FIT2001 – MADA Graduate Research Team System Case Study Detailed Information

NOTE: This case study is not an accurate reflection of the MADA Graduate Research Team system. It has been modified to suit the requirements of the Assignment.

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The MADA Graduate Research Team has been looking after PhD students for many years. Charli is the manager of the team and has provided the following information about the system s/he would like you to build for their team.

PRELIMINARY INFORMATION

The MADA Graduate Research Team look after all the PhD students in our Faculty. We currently have 78 PhD students. Our main goal is to support our PhD students so that they successfully complete their PhDs.

A PhD student is either full-time (up to 3 years) or a part-time (up to 6 years), and is allocated one or 2 supervisors to assist them during their PhD. Throughout this time, regular and thorough reviews of progress help keep candidates and supervisors on track. To assist with this review process formal progress meetings called milestones are compulsory for all PhD students. There are three milestones at set times during a student's PhD:

- Confirmation
- Progress Review (Mid Candidature Review)
- Final Review (Pre Submission Seminar)

These milestone meetings are with the PhD candidate, the supervisor and a panel of 3 expert academics. We currently have a manual system and a few different spreadsheets to manage this process. It is chaotic and very time consuming and it is very difficult to manage. At busy times milestone meetings are delayed and we often have no idea of where we are in the process. There are lots of issues with staff and candidates not being notified about the milestone meetings in a timely way, and the information required to check progress is all over the place – often in the email inbox of staff.

We want to be able to automate and streamline the process as much as possible so that the whole milestone meeting process from start to finish is very smooth, including when a candidate does not meet the requirements and we have to organise another milestone meeting. There are so many aspects – organising the meeting date, time, location and confirming availability of all attendees, selecting suitable panel members, making sure all the admin aspects of the meeting (catering, tech set up, etc.) are done, sending emails and reminders and managing cancellations to name just a few.

We want all the documentation and feedback associated with a milestone meeting to be in one spot online. Students should be able to upload all the required documentation for a milestone meeting, supervisors should be able to add any comments, and panel members should also be able to add comments and their final decision as to the meeting outcome. All the stakeholders should have access to the system for what they need to do with it. We also really want help with managing panel members suggestions from the supervisor and the student and the selection of suitable panel members.

We don't currently have any overall reporting or analysis of the progress of our PhD candidates across our Faculty, but we would really like this feature in future. It would also be interesting to see this progress breakdown by Supervisor, to see if there are issues with particular supervisors.

DETAILED INFORMATION

Further to the preliminary information provided and our interview, please find below detailed information to help you develop the system.

Manage PhD student information

We need to store data about the PhD students in the system, and thankfully this is going to be easy. We currently get all the data we require about the students from the Monash Callista system and Monash eSolutions (The Monash IT department) have agreed to upload the data we require into our system and keep it up-to-date with regular synching.
(NOTE: For the purposes of the assignment assume that this aspect of the system will be managed by Monash eSolutions, and that your system will have up-to-date read-only access to this data uploaded to the system)

The data we use from the Callista system about the students is as follows:
Student ID, Family name, First name, Email, Mailing address, PhD Topic, PhD Expertise code, Supervisor 1 Name, Supervisor 1 email, Supervisor 2 Name, Supervisor 2 email, PhD Start date, PhD End date, Milestone 1 date, Milestone 2 date, Miletone 3 date, PhD status – ongoing or terminated.

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Organise meeting

- ***Organise potential meeting dates***

The main purpose of the system is to help manage the meetings. To organise a milestone meeting, we would like the system to send an email (using a template we will provide) to the student and supervisor(s), 8 weeks before a milestone date, informing them that the student needs to organise the meeting. The meeting should ideally be organised in the week before or after the expected milestone date.

The student should liaise with their supervisor(s) and organise at least potential 3 suitable meeting times that suit both the supervisor(s) and themselves (Note – both supervisors do not have to be available for all 3 meetings, as long as one of them is available for each meeting that is fine). We request 3 meetings to give us a few options – only one of these dates will be chosen.

The student must enter these three meeting dates/times into the system, at least 6 weeks before the expected milestone date. If they have not entered this information into the system 6 weeks before the milestone date, the system should send a reminder email weekly to both the student and the supervisor(s), and keep doing this until 4 weeks before the milestone date. After that point, the Graduate Research Team Admin team should get an email alerting them to this issue, and they then handle it outside the system. It is extremely rare for a student not to organise their meetings on time.

- ***Supervisor – Confirm availability for meetings***

As part of organising the meeting, the supervisor(s) have to confirm that they can attend these meetings that the student has entered into the system. A confirmation request email should be sent to the supervisor(s) to confirm their availability for the meetings as soon as the student enters the meeting dates/time. The supervisor(s) must login to the system to confirm that they can attend these potential meeting dates for their student. The Supervisor should be sent a reminder every couple of days to do this task until 4 weeks before the milestone date. At this point, the Graduate Research Admin should get an email alerting them that the supervisor(s) have not confirmed, and they then handle it outside the system.

If the Supervisor(s) are not available for a particular date, the student has to enter another suitable date, that the supervisor has to confirm.

Select panel members

Panel members are selected from academic staff members at Monash. We currently get the data that we require about all staff from the Monash Staff system (see Academic Staff Spreadsheet). Again, Monash eSolutions have agreed to upload the data into our system and keep it up-to-date with regular synching. We refer to this list of academics as our 'Possible Panel Member List'

We keep the following data: Family name, First name, Staff ID, Staff email, Office phone number, Office room no. No. of milestone meetings completed and up to 5 Expertise codes.

(NOTE: For the purposes of the assignment assume that this aspect of the system will be managed by Monash eSolutions, and that your system will have up-to-date read-only access to this data uploaded to the system)

For a panel member to be selected for a milestone meeting, they have to meet 2 eligibility criteria:

- Their academic expertise code has to match the PhD student's expertise code
- They have to have done less than 12 milestone meetings per calendar year

- ***Supervisor recommends panel members***

The supervisor can put in recommendations for up to 3 panel members – these suggestions can only be eligible academics from the 'Possible Panel Member List'.

- ***Admin selects panel members***

If the student/supervisor does not recommend panel members or recommends less than 3 panel members, the Graduate Research team administrators select panel members from the 'Possible Panel Member List' so that we have a total of 3 panel members. It is important that we can see the no. of milestone meetings that academics have done so that we spread the workload across academics rather than keep allocating the same panel member to milestone meetings.

- ***Invite panel members***

Once we have 3 eligible panel members, we send them an email requesting their participation and get them to confirm their availability for all three possible meeting times. We ask that they respond in 3 days, and send daily reminders after that. They should respond in the system. We hope that at least one of the meeting times is chosen by all 3 members. Once all panel members respond, the system should send a notification to our Graduate Research team so that we can deal with any issues or finalise the meeting.

Finalise panel members

After admin have received a notification that all 3 panel members have responded, we check that:

- they are willing to participate
- there is at least one meeting time that they can all attend

If this is the case, this is our signal to finalise the meeting.

- ***Remove panel member***

If an invited panel member does not wish to participate or cannot attend any of the scheduled meetings, we remove them from the selected panel member list, and send them an email thanking them for their consideration. We do not need to keep a record of the removed panel members.

- ***Add new panel member***

If a panel member is removed from the selected list, we then select another eligible panel member and go through the 'select panel member' process again.

Finalise meeting

If we have a meeting time that all 3 panel members can attend, we finalise the meeting.

- ***Select location, start admin tasks***

As part of the finalise process a notification should be sent to our admin team to find a meeting location and start the admin processes - organising tech support at the start of the meeting, order catering, provide all required stationery. The system should have a checklist of these tasks so that they can tick them off, and get a reminder if their tasks are not done.

- ***Send final meeting invitation***

Once date, time and location are sorted, personalised emails should go to the student, supervisor(s), and panel members, informing them of their role in the meeting, and any tasks that they may have to do before or after the meeting. There should be a tick box system to register completion of tasks so that reminders can be sent to ensure that this happens. The meeting still proceeds even if the tasks are not done.

Conduct meeting

- ***Before the meeting***

Students provide documentation to be reviewed by their supervisor/s and panel members at least a week before the milestone meeting date to give the supervisors and panel members adequate time to review the information in advance of the meeting. See Appendix 1 for documentation requirements.

- ***After the meeting***

One of the *Panel members* (representing the panel and supervisor(s)) puts in detailed comments about the meeting and future expectations and the final result, which can be satisfactory progress or unsatisfactory progress. This feedback information is entered at the end of the meeting. The student receives a notification about this feedback and result and can see it in the system.

- ***Manage unsatisfactory progress***

If a student fails to meet the requirements of a milestone meeting, a second meeting is set up of that same milestone in the following 8 weeks. An email is sent to the student as soon as a fail is recorded to set up a meeting and the same meeting process is followed.

Cancel meeting

A student must attend the milestone meetings, even if they do not believe they are ready, as the meeting will help resolve the problems.

If any of the meeting attendees is unable to attend the meeting, the meeting is cancelled and the whole process starts again.

Reporting

We have decided to leave the reporting and analysis part of the system for the next stage, as we really want to focus on getting the main part of the system up and running.

System access

Monash eSolutions will enable the use of Monash Okta and access control so that specific roles (i.e. Admin, Supervisor, PhD student, Panel member) will have relevant access to the system for what they need to do.

Appendix 1 – Student checklist of items required for each milestone meeting.

Milestone 1: Confirmation

Due: before 12 months candidature equivalent full-time (EFT) enrolment

Requirements:

1. 20 minute oral presentation at the meeting, on your research to date

Upload the following 1 week before the meeting:

2. 1000-word summary report of your research
3. Draft Exegesis chapter

Milestone 2: Progress Review (Mid Candidature Review)

Due: before 24 months candidature EFT

Requirements:

1. 20 minute oral presentation at the meeting, on your progress since Confirmation milestone meeting

Upload the following 1 week before the meeting:

2. 1000-word summary report of your research
3. Draft Exegesis chapter

Milestone 3: Final Review (Pre Submission Seminar)

Due: before 36 months candidature EFT

Requirements:

1. 20 minute oral presentation at the meeting, on your progress since Progress Review milestone meeting

Upload the following 1 week before the meeting:

2. 1000-word summary report of your research
3. Draft Exegesis chapter
4. Draft Examination Exhibition plan