

MSc Supervisory Relationship

Implementation Guide for Faculty and Students

HEC Montréal

MSc Program Office

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Preamble

The purpose of this guide is to help MSc students and their supervisors manage the supervisory relationship that is central to completing a thesis or a supervised project. It aims to help develop and maintain a fruitful and harmonious relationship between the supervisor and the student by clarifying the roles and responsibilities of each and by suggesting tools to guide this collaboration. Therefore, this guide does not offer a prescriptive perspective, but rather suggests an approach that each party can adapt to their needs. Its aim is to provide advice rather than set standards and regulations.

The topic of this document is the **supervisory relationship**. Therefore, it does not address the content of theses or supervised projects or administrative procedures related to these works. For more information on these topics, students and faculty can refer to *MSc Thesis - Guidelines and Requirements* and *MSc Supervised Projects - Guidelines and Requirements*. Also, this guide does not address financing for tuition or for producing the work; readers can refer to the program's website for further information on this subject.

This guide is a joint initiative of the MSc Program Office, the Graduate Students' Association (AECS), and the Learning and Teaching Innovation Center (DAIP) of HEC Montréal. It is the result of a consultation with professors and students through group discussions and individual communications on preliminary versions. This document is inspired by several publications, in particular Prégent (2001)[1] and guides from Université Laval[2].

This guide is for students and supervisors. Only assistant professors, associate professors, full professors and invited professors are entitled to direct a thesis or a supervised project. Lecturers may also direct a supervised project. The term faculty is used to simplify the text.

Sections that are specifically for students or faculty are clearly marked by orange (for students) or blue (for faculty) text boxes.

[1] Prégent, R. (2001): *L'encadrement des travaux de mémoire et de thèse : conseils pédagogiques aux directeurs de recherche*, Montréal, Presses inter Polytechnique, 78 p.

[2] Faculté des études supérieures et postdoctorales (2012). *Guide de cheminement aux cycles supérieurs destiné aux étudiants à la maîtrise (avec mémoire)*, Quebec City, Université Laval, 20 p. [retrieved July 15, 2014] https://www.ift.ulaval.ca/fileadmin/ift/documents/PDF/Maitrise_et_doctorat/etudiants_maitrise.pdf
Faculté des études supérieures et postdoctorales (2012). *Guide de cheminement aux cycles supérieurs destiné aux directeurs de mémoire*, Quebec City, Université Laval, 17 p. [retrieved July 15, 2014] http://svn.bsp.ulaval.ca/modeles/FES-Gervais-Encadrement/pdf/directeur_maitrise.pdf.

1 Skills developed

The completion of a major work, such as a thesis or a supervised project, aims at developing several skills specific to the MSc program. More specifically, this major project allows students to show they have attained the following learning objectives and competencies:

- **Goal 1:** Acquire thorough knowledge in a field of specialization in management.
- **Goal 2:** Systematically conduct rigorous scientific research.
- **Goal 3:** Adopt ethical and professional behaviour when conducting research and doing business.
- **Goal 4:** Demonstrate critical thinking.
- **Goal 5:** Work independently to produce an essay**.**
- **Goal 6:** Communicate effectively.

2 Roles and responsibilities

Several people play an important role in supervising MSc studies, each having specific tasks and responsibilities.

2.1 Students

As the key player in their studies, students are responsible for their education and must play a major role in the supervisory relationship. Students must:

- be available to complete a thesis or a supervised project, which requires limiting time spent on other activities (work, personal responsibilities, etc.).
- focus the necessary attention on their major work and exercise due diligence in its completion.
- carefully choose a supervisor for their thesis or supervised project.
- carefully choose the topic for their thesis or supervised project, as they will need to work on the selected issue for an extended period of time.
- with their supervisor, decide on the terms and conditions of the supervision; for example, drawing up a collaboration agreement and updating it regularly (see section 3.4).
- submit their texts or other deliverables in compliance with the terms and conditions agreed upon with their supervisor, and within reasonable delays to allow time for reading and assessing the documents.
- report their progress to their supervisor at the stipulated frequency.
- inform their supervisor of any problems that may affect the progress of their work and ask for their help if required.

- be available for meetings during the course of their program and inform their supervisor of any prolonged absence.
- be open to their supervisor's advice and suggestions.
- acquaint themselves with and follow the policies and regulations of HEC Montréal.

➔ Students must pay particular attention to respecting the conditions applying to their thesis or supervised project, such as the deadline for submitting the supervised project or the thesis, or the completion of certain workshops of the thesis stream (ex. enrolling in the research workshop, registering their thesis topic and submitting a study plan, etc.).
➔ For example, students cannot begin their supervised project within an organization before registration, which implies having submitted the required forms (approval, confidentiality protocol, Research Ethics Board, etc.) and having paid their tuition. The fees offer to the student an essential protection in case of problems in the organization (for example, work accident).
➔ It is also the responsibility of the student to discuss with their director of all matters relative to ethics in the realization of their thesis or their supervised project and to verify if this activity requires an approbation from the Research Ethics Board. A decision tree is provided on this page to support the reflection. If the supervised project or thesis is part of one of the director's research projects that has already been approved, it is important to check with the Research Ethics Board to see if a separate declaration is necessary, because the nature of the project may require further validation. Student must take the appropriate steps, if necessary, before starting to collect data for the thesis or supervised project. Student are expected to conform to the ethical rules established by HEC Montréal, which the school respects in all its projects.

2.2 Thesis or Project Supervisor

The thesis or supervised project supervisor is responsible for guiding students in the completion of their major work and for assessing their results. The supervisor must:

- be sufficiently knowledgeable in the subject matter of the student's thesis or supervised project to supervise the work.
- have an interest in the topic of the student's thesis or supervised project.
- Ensure that the student is informed of the rules of ethics of HEC Montréal and that he/she intends to follow them in his/her project. The director must have a dialog with the student concerning all matters relating to ethics in the realization of the thesis or supervised project. He/her must verify whether or not this project needs an approbation from the REB and ensure the student takes the appropriate steps.
- be available to invest the required amount of time to supervise the student (according to the number of students supervised during that period, of courses assigned, or of ongoing research projects).

- Help the student to define and determine their subject to ensure that the supervised project or the thesis meets the objectives of the student, the requirements of the MSc program and the workload intended to complete this activity[3].
- decide on the terms and conditions of supervision, with the student, ideally by drawing up a collaboration agreement and updating it regularly (see section 3.4).
- hold regular meetings with students to assess the progress of their work.
- respond in a timely manner to students' calls or e-mails.
- inform students of any prolonged absence and plan terms and conditions of supervision during that period when applicable.
- set up an action plan with the student in case of problems with the progress of their work.
- read and correct the various versions of students' work in a timely manner and according to the agreement.
- assess the progress of the student's work.
- give the required attention to students' work and show diligence in supervising their work.
- offer constructive advice to students.
- be flexible and sensitive to personal aspects that may influence students' progress (for example, family situation, health, etc.).
- acquaint themselves with and follow the policies and regulations of HEC Montréal.

➔ Since one of the learning objectives of the MSc program is to develop autonomy in the production of a major work, supervisors must do their part while allowing students to take initiatives to communicate their progress, asking for meetings if they need counselling, etc. Supervisors should not be omnipresent, impose a topic for the thesis or project, systematically tell students what to do, or constantly watch over their work. Students must take matters into their own hands.

➔ Notwithstanding the previous paragraph, the supervisor must actively participate in defining the project for the major work before accepting it. This is particularly true for projects within organizations for which deliverables and terms must sometimes be negotiated by a representative. The supervisor is well positioned to assess the extent of the work to be done and to circumscribe it based on available resources, students' competencies, and MSc program requirements.

[3] Reminder: a supervised project counts for 9 credits, which implies 405 hours of work should be put into this activity, which usually takes place within one semester. The thesis is an activity of 24 credits, which implies 1080 hours of work, which usually takes place over two semesters.

➔ He also participates to the elaboration of a collaboration agreement, in the case of a supervised project, and of a study plan and its updates, in the case of a thesis. By validating these documents, the thesis director or project director helps to ensure that the student carries out the agreement and the plan, provided the student makes the required effort.

➔ The professor takes an educational role in the supervisory relationship. While remaining sensitive to personal issues that may influence students' progress, the supervisor cannot take on the role of a psychologist or of a financial or career advisor. Students who are facing a particular situation that is outside of the supervisory relationship, but that may affect the progress of their studies, must immediately contact Student Services to obtain the required assistance.

2.3 Academic Advisor of the Specialization

The specialization's academic advisor is responsible for guiding the student through the course of their MSc studies. They can advise students on the choice of a particular stream (thesis or supervised project) and help in selecting a supervisor. The specialization's academic advisors may:

- help students select the stream that is most appropriate based on their profile and goals.
- advise students on courses to take to gain the required skill set to complete a thesis or supervised project in their chosen field.
- inform students of the faculty members who are most likely to supervise them based on students' profiles and faculty members' expertise.
- promotes exchanges between faculty's members and students to present them with a diversity of topics for a thesis or supervised project.
- advise students on the choice of a supervisor.
- approve the description of the thesis or supervised project and the choice of a supervisor.
- inform students of main administrative rules[4] and the importance of respecting the structure of their specialization and deadlines for registering their thesis or supervised project topic, enrolling in the research workshop and submitting their study plan.

The specialization's academic advisors can also act as mediators in disputes between students and their supervisors (see section 4.2 below), but they cannot replace supervisors. In case of a disagreement between the advisor and the supervisor, the opinion of the latter will prevail.

[4] Or advise them to contact their counselling agents for more precise administrative questions.

2.4 MSc Program Director

The goal of the Program Director is to create conditions necessary to ensure that students succeed and that the program's learning objectives are reached. Therefore, the Program Director must:

- approve the choice of research supervisor, the description of the thesis or supervised project before they are completed and, in the case of a thesis, the proposed study plan.
- approves applications to write a thesis or supervised project report in a language other than that of the program. He or she also approves applications to write theses by articles.
- The Program Director also oversees the composition of the jury that will evaluate the thesis or supervised project submitted by the student.

Additionally, the Program Director can, if informed, help students who are having difficulties, refer them to appropriate resources at HEC Montréal, or even act as a mediator in case of a dispute between students and their supervisors. Students who are experiencing difficulties should not hesitate to immediately contact the MSc Program Director (see section 4.3 below).

3 Supervisory relationship: step by step

3.1 Student self-assessment

Before beginning their major work, students must make sure they are ready to take on their roles and responsibilities concerning it (see section 2.1). For this purpose, they should consider their availability, their personal abilities, and the progress of their project:

Self-assessment questions on availability

- Am I available full time to complete my thesis or supervised project?
- Do I have limited professional responsibilities?
- Do my personal responsibilities allow me to spend 40 hours per week on my thesis or supervised project?
- Do I have the financial means to survive without holding a full-time job?
- Do I have a professor who is ready to supervise my thesis or supervised project?
- Have I determined a realistic collaboration agreement with my supervisor?
- Am I available to meet with my supervisor in accordance with the agreed terms?
- Have I completed the required courses before starting my major work?
- Have I read the policies and regulations of HEC Montréal?

➔ As a student, if you answered "no" to one of the questions above, you should take some time to thoroughly assess your availability for your studies. Take the time to discuss this with your supervisor to ensure the time spent on your responsibilities allows you to adequately progress on your thesis or project. Student Services can also assist you in finding resources to finance your education. When applicable, you may need to postpone the completion of your major work. Program requirements cannot be reduced to accommodate limited availability, but the deadline for the major work can be modified.

Self-assessment questions on personal abilities

- Do I know why I am doing a thesis or a supervised project?
- Do I have the self-discipline necessary to give my thesis or supervised project due consideration?
- Am I able to refuse interesting offers that could impede the progress of my studies?
- Am I sufficiently autonomous to submit deliverables according to the terms agreed upon with my supervisor?
- Do I have the necessary skills for the activities in the collaboration agreement?
- Am I open to advice and suggestions?
- Is my mind free of any significant preoccupations that could impede the progress of my major work (e.g.: a personal or family situation, a physical or psychological health problem, an issue with distance from home or loved ones, a feeling of being isolated, etc.)?

➔ As a student, if you answered "no" to one of the questions above, you should take some time to thoroughly assess personal obstacles that could impede the progress of your studies. You can contact Student Services, which can provide you with a series of tools to help you succeed. You should also discuss this with your supervisor, who may suggest solutions to upgrade your skills (e.g.: writing or data analysis).

3.2 Choosing a Topic and a Supervisor

The most important decision students need to make during their MSc studies is choosing the topic for their thesis or supervised project. The best advice is to choose a topic one is passionate about. On average, students will work on this topic, full-time, between four and eight months[5]. So, it is essential to find it interesting from the start. Other criteria may be considered, such as students' competencies on the subject or its usefulness for their future goals (e.g.: their professional goals).

[5] Depending on whether it is a thesis or a supervised project.

The second most important decision is choosing a director. Students are responsible for finding a director who will be able to adequately supervise their thesis or project. To know who can act as a director, please see appendix 1.

The main selection criteria for choosing a director are:

- Expertize in the student's field of interest.
- Availability.
- compatibility in terms of goals, work methods, and expectations.

Students may use several approaches to identify a supervisor:

- contact the specialization's academic advisor to get information on the faculty members interested in the student's topic.
- consult the faculty's web pages on HEC Montréal's website.
- speak with fellow students and contact the student association that may refer them to other colleagues in their specialization.
- pitch their thesis or supervised project idea to faculty's members teaching in the MSc program and ask for their advice.
- register, if possible, for a course given by a person who can supervise work at the MSc level and that the student would like to have as a director for his thesis or supervised project.

When the student has found a potential director, who could supervise the thesis or supervised project, he should make an appointment to meet that person, present his research interests, and learn about the current projects of that person. This meeting will allow verifying the availability of that potential director and the good relationship with the student, to ensure of the best supervision relation.

➔ Do not hesitate to speak with several faculty members and give yourself time before choosing a supervisor; make sure to inform all of them of your final decision. Just speaking to a professor or a full-time lecturer about your thesis or supervised project does not constitute a commitment on your part to select that person; you have the right, and it is expected, to meet with several faculty's members before making your final decision.

Professors, full-time lecturers and postdoctorates are not obligated to supervise all students who contact them; they must ensure they have the necessary expertise and availability for this work. It is therefore possible that some may refuse to supervise students. If this occurs repeatedly, students should contact their specialization's academic advisor to assess their options. For example, the specialization's academic advisor could suggest that students contact a faculty member from another department. He could also suggest ideas to modify the original project, for a better fit with the expertise of persons able to supervise their work.

Students should also keep in mind that their chosen supervisor will be busy with multiple commitments. Students have the responsibility to respect their commitments and to inform their supervisor of any change that may affect their progress. They must also stay in regular contact with their supervisor; students should not expect a supervisor to always contact them to inquire about their progression. Student are encouraged to take initiatives to organize meetings with their supervisor to inform them of the progress of their work. Similarly, students should not expect a supervisor to be available to respond quickly and at any time to their requests, especially if students have themselves neglected to inform them of the progress of their project.

Joint supervision is a possibility to be considered if the research project requires expertise complementary to that of the supervisor. It should be initiated by the supervisor before the thesis or supervised project is started. The director would propose a colleague from his or her department or from another department or, exceptionally, from another university. This choice would be made according to the needs and expertise required to carry out the research project. When joint supervision, the student must ensure that the co-directors are informed of all exchanges to ensure proper coordination of the project.

A study plan or a collaboration agreement, clearly stating deadlines and deliverables, are valuable means of ensuring that the supervisor and student both understand their commitments. Updating this document also ensures a quality relationship throughout this supervisory process.

3.3 Deciding to Supervise a Student

The decision to supervise a student's thesis or project is an important one and involves a personal commitment on the part of the director. Faculty members are responsible for the selection of theses and projects they agree to supervise; thus, they may take some time to think before rendering their decision. The main decision criteria are:

- expertise in the student's field of interest.
- availability.
- compatibility in terms of goals, work methods, and expectations.

Even though directors adapt their supervisory style to the personality, needs, and motivation of students, they tend to have a preferred approach. Studies[6] have identified three approaches to supervise graduate students:

- the directive approach consists of giving students relatively specific guidelines and instructions.
- the collaborative approach, where professors or full-time lecturers guide students in a problem-solving process while ensuring they stay focused on the issue.

[6] Glickman, C. D., S. P. Gordon, & J. M. Ross-Gordon (2013). *SuperVision and Instructional Leadership: A Developmental Approach*, 9th ed. London, Pearson, 480 p.

- the non-directive approach requires that professors or full-time lecturers expose students to different experiences that will help them find their own solutions to problems that arise.

Directors should not hesitate to clearly indicate their preferred supervisory style. Obviously, as students progress, they may find it necessary to modify their approach to make sure they use the most appropriate combination that will allow students to progress.

Directors can also set conditions before agreeing to supervise a student. For example, they can insist a student take a specific course before beginning their project or that a student completes certain sections of a project before a specific deadline. However, these conditions cannot wrongfully limit the progress of a student's studies.

➔ As a thesis or supervised project supervisor, it is important that you clearly express your expectations and evaluation criteria before agreeing to supervise a student. If you have doubts about a project's feasibility or limits, these should also be mentioned at this time. This means that if students decide to work with you, they will do so transparently.

3.4 Collaboration Agreement

Once students have found a professor or a full-time lecturer willing to supervise them and both parties have agreed on the topic of the thesis or supervised project, it is recommended that they specify mutual expectations to ensure students and directors of the thesis and the supervised project are on the same page and to limit any ambiguity regarding each person's responsibilities from the start. Many of these elements are stated in the collaboration agreement but clarifying several additional points may contribute to the necessary discussion between the student and supervisor at the beginning of the supervisory process.

The subjects discussed concern:

- The content of the project:
  - The project's scope and breadth according to program requirements and students' ambitions (e.g.: wish to pursue doctoral studies, to work in a given field).
  - Expected contributions from the student.
  - Steps and deadlines.
  - Format of deliverables.
  - Relationship with the organization or the work environment where the project or thesis takes place.
  - Ethical terms related to research on human subjects (see the Research Ethics Board website).

- Terms of supervision:
  - Clarify mutual expectations.
  - Clarify each person's tasks and responsibilities.
  - Form and frequency of meetings and discussions.

- Expected availability and autonomy.
- Expected level of effort from the student.
- Terms in the event of a prolonged absence by either party.
- Terms if commitments are not upheld.
- Terms in the event of a disagreement or dispute.

- Resources available to the student:
  - Educational resources (e.g.: identifying the main literature on the chosen topic).
  - Material resources (e.g.: office space).
  - Informational and educational resources (e.g.: library, business communication training centre, software).
  - Financial resources (e.g.: scholarships from the university or granting agencies).

Depending on the situation, other precise elements can be specified when expectations are being set:

- Integration of the student in a research team or project.
- Specific terms for research that is funded or contractual.
- Specific terms relating to intellectual property.
- Participation in research seminars, conferences or conventions.
- Participation in publications.
- Financial support from the supervisor.

The expectations clarified in this way constitute a collaboration agreement, which is usually oral. For the thesis, deliverables, deadlines and the main terms are defined in writing in the proposed study plan. This plan needs to be periodically revised and, when necessary, adjusted for specific situations that may arise. To prepare the collaboration agreement or the study plan, and more generally to clarify mutual expectations, we have prepared appendices 2 and 3 to help students identify potential subjects to be discussed with the supervisor.

3.5 Completing a Thesis or Supervised Project

Once expectations have been clearly defined, students can begin their major work. To ensure that the work is done according to plan, directors of the thesis and supervised project and students must communicate effectively, optimize their meetings, and regularly assess work progress.

Effective Communication

A successful supervisory relationship greatly depends on effective communication, in person or remotely. Certain principles can promote clear and effective communication:

- planning regular meetings and respecting the schedule.

- avoiding having only remote communications (by phone, e-mail or video conference) and opting to alternate between meetings and electronic communication;
- preparing regular reports on work progress.
- preparing minutes from meetings (or phone conversations) to ensure proper understanding.
- not hesitating to question, restate or specify your thoughts.
- writing clear instructions (from supervisors to students) and questions (from students to supervisors).
- Favour direct communication between the student and the supervisor and only make a third person intervene if the communication between the two parties has failed to achieve its goal concerning the supervision relation.
- not leaving the other person without an answer and aiming to specify a later date to respond rather than leaving the other person waiting.
- considering cultural or linguistic differences when applicable.

Optimize your meetings

Carrying out a major work involves an important amount of work and a significant personal investment for students. It also requires a significant investment of time for directors of the thesis or the supervised project who have, additionally, multiple commitments. It is thus in both parties' best interest to optimize their meetings to make them productive. To this end, it is recommended that:

- a calendar of meetings is agreed upon, leaving room for ad hoc meetings when a situation calls for one.
- students take responsibility for confirming the scheduled meetings.
- parties are prepared by writing down questions and issues to discuss (see Appendix 2).
- documents to be read and commented on being submitted sufficiently ahead of time, by an agreed deadline.
- minutes of the meetings are prepared.

Regular assessments

One of the most important factors contributing to success when drafting a major work is receiving regular assessments on progress. These assessments should be sufficiently frequent to quickly target and correct any problem that may impede progress of the work. These assessments can be done during a regular meeting and make it possible to go beyond answering students' ad hoc questions. They make it possible to:

- ensure students' continued progress.

- openly discuss difficulties that were encountered.
- discuss perceived problems and collaboratively determine corrective measures if necessary.
- remind parties of mutual expectations.
- adjust the initial project, when necessary.

Additionally, at different predetermined steps, students submit texts to their supervisor (section plan, portions of chapters or entire chapters) for which they expect to receive detailed feedback within a timely manner. Various aspects of these assessments should be agreed upon beforehand:

- status of the submitted document: does the supervisor wish to receive drafts of the work plan, commented texts, relatively advanced versions, texts that are definitive before submission?
- format: does the supervisor wish to receive draft versions, versions that have been spell-checked, versions with the final layout?
- level of feedback: is it a quick review of a text that has been presented a few times, an in-depth correction that includes content and form, a specific assessment on certain elements of the text?
- speed of feedback: does the deadline give the supervisor sufficient time for the type of reading required to provide the level of feedback expected?

In many situations, students should expect to have to submit several versions. This kind of process is a good introduction to the profession of researcher. Corrections and questions are inherent to the process of writing a thesis or a supervised project. Students must support their viewpoints and approaches but above all must remain open to comments and requests from a more experienced scholar.

4 What to do when there is a Disagreement

Despite the care taken to develop a fruitful and harmonious relationship between the supervisor and the student, differences of opinion or misunderstandings during the completion of a major work may occur. It is crucial to intervene before a disagreement degenerates into a more serious conflict that could slow down, or even compromise, the completion of a major work.

There are several steps to this type of intervention.

4.1 Communication between a supervisor and a student

The first step to dealing with a disagreement is to discuss the source of the disagreement without delay. To avoid any misunderstanding, a face-to-face meeting is preferable. This meeting aims to:

- clearly determine the source of the disagreement.

- differentiate between facts and perceptions to avoid the latter being a source of misunderstanding.
- remind everyone of mutual commitments and expectations.
- adjust the collaboration agreement when applicable.
- arrive at an understanding for the work going forward.

The meeting can be organized by the supervisor or the student. However, since students are usually the ones that have the most to lose from a deterioration in the supervisory relationship, they should take the initiative if they feel the differences of opinion could harm the relationship.

➔ Before going forward with your process, you should tell your supervisor that you are uncomfortable with the misunderstanding, be it actual or perceived. This is not a pleasant process, but it demonstrates your motivation and commitment to complete your major work. You should not fear any possible negative repercussions (e.g.: bad grades) if you handle the matter professionally, that is by relying on objective facts and the collaboration agreement.

4.2 Appealing to the Academic Advisor

When faced with a conflict that is more serious or that persists despite communication between the supervisor and the student, it is possible to appeal to the academic advisor to request that he or she acts as a resource person. For example, the academic advisor can ensure that each party's expectations are reasonable in comparison to the usual standards found in the field of specialization. When applicable, the academic advisor can recommend that the supervisor and the student end their relationship and could guide the student in the selection of a new supervisor. If the academic advisor feels the situation is too delicate to act as a mediator, the student may be referred to the Program Director.

➔ Do not hesitate to contact your academic advisor for advice on how to manage a delicate situation. He or she may give you helpful advice that will shed more light on your supervisor’s point of view. Be assured that your consultation will remain confidential and the academic advisor will not act without your authorization. Your academic advisor can also refer you to the right people if it is judged that the situation requires it.

4.3 Appealing to the Program Director

When the situation has deteriorated to the point that bridges have been burned, the professor or student may appeal to the Program Director, who will act as a mediator to get the academic path back to normal. The Program Director's intervention is guided by the principle of student success, while respecting program requirements. The Program Director will review the basis of the conflict and attempt to settle the dispute. When applicable, the Program Director can advise parties to end their relationship and to take necessary measures for students to return to work on their project.

As a last resort, if students or supervisors are not satisfied after all these processes, they can contact the Ombudsman to get an external opinion on the situation.

Appendix 1: Supervision of thesis and supervised projects

A professor or a full-time lecturer can act as a research director for a thesis or a supervised project, as indicated in the chart below:

Title	Thesis	Supervised project
Lecturer	No	No
Full-time Lecturer	Co-supervisor	Yes
Adjunct professor	Co-supervisor[7]	Yes
Visiting professor	Co-supervisor	Yes
Guest professor with a career prospect	Yes	Yes
Assistant, associate or full professor of HEC Montréal	Yes	Yes
Assistant, associate or full professor at another university	Co-supervisor	Co-supervisor
Tenured researcher or Associate researcher	Co-supervisor	Co-supervisor
Postdoctoral Fellow[8]	Co-supervisor	Co-supervisor

[7] An adjunct professor can supervise a thesis only if he has a background in research (diploma and publications). He can, however, be a codirector of a thesis without restriction.

[8] Since the length of a postdoctoral fellows is limited, only the co-direction is accepted.

Appendix 2 - Items to discuss for a first meeting between a student and a potential director for a thesis or a supervised project

1. Presentation of the student

- ☐ Brief CV
- ☐ List of courses taken and transcript
- ☐ Plan of MSc courses to be taken (including preparatory or foundational courses)
- ☐ Expectations relative to the deadline to complete the thesis or supervised project
- ☐ Specific constraints that may affect the completion of the work or project (e.g.: work, family responsibilities)

2. Presentation of the potential director to supervise the thesis or supervised project

- ☐ Fields of expertise (courses taught, publications, theses or supervised projects)
- ☐ Ongoing research projects (with or without funding)
- ☐ Other current supervision of theses or supervised projects
- ☐ Availability for supervision

3. Discussion of the proposed thesis or supervised project

- ☐ Student's motivation for the subject
- ☐ Student's competency (e.g.: courses taken that are relevant to the topic)
- ☐ Match between the subject and the professor's (full-time lecturer) field of expertise or of interest
- ☐ Feasibility of the project (in light of the type of project and each person's constraints)
- ☐ Student's flexibility on the subject or work plan

4. Discussion of the work plan

- ☐ List steps to be taken
- ☐ Discussion of each person's responsibilities at each step (e.g.: finding a work environment)
- ☐ Discussion on the supervisor's requirements at each step
- ☐ Proposition of a preliminary work plan

5. Discussion of the terms of supervision

- ☐ Clarification of each person's tasks and responsibilities
- ☐ Agreement on the format and frequency of communications and meetings (e.g.: communication frequency, format, agenda)
- ☐ Clarification of expected availability of the professor (full-time lecturer) and the student, as well as expected autonomy of the student
- ☐ Specification of the student's expected level of effort
- ☐ Terms in the event of a prolonged absence by either party
- ☐ Terms in the event that commitments are not upheld
- ☐ Agreement on the student's integration into a research team or project

Appendix 3 - Items to cover in a collaboration agreement

1. Presentations

- ☐ Presentation of the student (CV, transcript, list of courses to be taken)
- ☐ Presentation of the supervisor (field of expertise)

2. Content of project

- ☐ Objectives of the project
- ☐ Scope of the project (e.g.: steps to be completed by the student, expected depth of analysis)
- ☐ Expected student productions (or deliverables)
- ☐ Project steps
- ☐ Preliminary agreement on deadlines
- ☐ Relationship with the organization or the work environment where the project or thesis takes place
- ☐ Ethical terms related to research on human subjects (e.g.: adding a project to an already approved research program)

3. Terms of supervision

- ☐ Clarification of each person's tasks and responsibilities
- ☐ Agreement on the format and frequency of communications and meetings (e.g.: communication frequency, format, agenda)
- ☐ Clarification of expected availability of the professor and autonomy of the student
- ☐ Specification of the student's expected level of effort
- ☐ Terms in the event of a prolonged absence by either party
- ☐ Terms in the event that commitments are not upheld
- ☐ Agreement on the student's integration into a research team or project

4. Resources available to the student

- ☐ Educational resources (e.g.: identifying the main literature on the chosen topic)
- ☐ Material resources (e.g.: office space)
- ☐ Informational resources (e.g.: library, business communication training centre, software)
- ☐ Financial resources (e.g.: scholarships from the university or granting agencies, salary negotiated with the organization)

5. Other items to discuss

- ☐ Specific terms for research that is funded or contractual
- ☐ Specific terms relating to intellectual property
- ☐ Participation in research seminars, conferences or conventions
- ☐ Participation in publications
- ☐ Financial support from the supervisor

The first version of this document was prepared by Professor Anne Bourhis in 2014. Thereafter, the document was amended by the MSc Program Director in 2017, 2020, 2021 and in 2026.