Advisory Takeover Guidelines

Overview: From Thursday 4/6 until Tuesday 4/18 you will work on another project. During the takeover period, your new team will complete two tasks: auditing the current state of the project, and making progress towards one of the project's goals. You will prepare a memo summarizing your work, and you will deliver a brief presentation to the class on Tuesday 4/18.

Part 1 - Audit

Prior to conducting your audit, you should receive all data (original and current), code, and results from the team whose project you are taking over. You should review these materials for completeness, legibility, and organization. You should also ensure that the materials you were given are sufficient to recreate the results presented in the team's most recent progress briefing.

Below is a checklist that everyone involved in the takeover should review at the onset of the takeover period:

- Data
    - Raw/unprepared data is provided
    - Current data (cleaned/prepared) is provided
    - Documentation and/or supporting materials are provided (if applicable)
- Code
    - All code needed to process the raw/unprepared data into the cleaned/prepared data is provided, including documentation/comments.
    - All code needed to recreate the results of the most recent progress briefing is provided. Code used in earlier briefings may also be provided, but is not necessary.
- Results
    - All visualizations, tables, and other results from the most recent progress briefing are available (either posted to the proper p-web discussion board or privately shared)
    - Additional results are provided if substantial progress has been made since that most recent progress briefing

When conducting the audit you should include sections pertaining to the following in your memo:

- Section 1 - Completeness
    - Were all of the items in the checklist above made available?
    - Were you able to recreate the current data set(s) using the provided code?
    - Were you able to recreate all of the most recent results using the provided code?
- Section 2 - Legibility
    - How easily could you follow and understand the provided code?
    - Are there any places where you believe more documentation would be helpful?
    - If a team in another semester were given the project description and its current materials, how well would they understand the current status of the project?
- Section 3 - Organization
    - Were the files you received organized in an appropriate manner? Or were there too many (or too few) distinct files?
    - Are there any ways in which you would choose to organize the project's data, code, and results differently?

Part 2 - Goal Pursuit

After conducting your audit, your group should select a single goal and make progress towards it. This decision should be coordinated with the original team to ensure the selected goal's viability and utility. The selected goal should be clearly stated, measurable, and achievable. You will be expected to document your progress towards the chosen goal.

Part 3 - Memo and Presentation

Your memo should be a written report containing the results of your audit and the work you performed in pursuit of the goal you selected in Part 2. There are no formatting or length requirements, but all required information pertaining to the audit and the goal progress should be clearly identifiable and you should include evidence of your assertions whenever possible. For example, you might support claims made in your audit using screenshots, code excerpts, and quotes; and you might include your own graphs, tables, code excerpts, and other output in your section on goal pursuit.

Your presentation should resemble an abbreviated version of a regular progress briefing. That is, it should begin by stating your goals and current business understanding. It should document your progress using visualizations, tables, diagrams and other results. It should be technically accurate, containing descriptions and explorations of the methods/models you used. And it should conclude with a reflection on the impact of your work and where the project might go next.

Scoring Details

- Memo (30 points in total)
  - Audit (20 points)
    * This score is based upon completeness (ie: did you address the 3 sections described above?), depth (ie: is your assessment thoughtful, detailed, and supported by evidence?), and professionalism (ie: is the writing clear, fluent, and free from errors?).
  - Progress report (10 points)
    * This score is based upon clarity (ie: did you clearly state your goal and provide tangible results pertaining to it?), quality (ie: was your work technically correct, efficient, and productive?), and professionalism (ie: is the writing clear, fluent, and free from errors?).
- Presentation (10 points)
  - This score is determined using the same criteria as regular progress briefing presentations. No score will be given to the goal scoring component that is part of regular progress briefings.