Advisory Takeover Guidelines

Overview: From Friday 3/27 until Tuesday 4/8 you will work on another project as part of a "takeover team". During this 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 4/8.

Part 1 - Audit

Prior to conducting your audit, you should receive all data (original and current), all relevant code used to arrive at the current data version, and all key results from the latest sprint. You should review these materials for completeness, legibility, organization, and accuracy (to the best of your knowledge). You should also ensure that the materials you were given are sufficient to recreate all of the major results presented in the team's most recent progress briefing.

Below is a checklist describing what your group should share with the takeover team:

- Data
  - Raw/unprepared data are provided
  - Current data (cleaned/prepared) are 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 (it is sufficient to rely upon posted briefing slides, but you may also share key results separately if the slides are incomplete)
  - Any additional key results you've achieved since your most recent 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 and Organization
  - 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?
  - 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?
- Section 3 - Accuracy and Efficiency
  - Were there any technical details that you felt were incorrectly implemented or not properly interpreted?

– Are there any places where you might suggest changes to improve the efficiency or technical accuracy of the project?

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 and present it on Tuesday 4/8.

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 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 (25 points in total)
  - Audit (15 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 (15 points)
  - This score is determined using the same criteria as regular progress briefing presentations.