Machine Learning Algorithms/Models for Asset Management
UVA DS6011 Capstone Project with Conlan Scientific

We believe this agreement to be a living document that can, and should, be updated at any time if any team member finds there to be a better solution for the processes outlined below. If updated, we will all review and sign the new agreement and save a second version to our GitHub repo.

1. STAKEHOLDERS. (a) Chris Conlan, capstone sponsor and CEO of Conlan Scientific

(b) We also consider the team members—Alex Cathcart, Ellen You, Jamie Oh—stakeholders as well. Since the project's purpose is almost solely educational, and the goal and scope will be set by us, we are the primarily beneficiaries of the outcomes and success of this project.

2. MEETING PURPOSE AND GOALS.

(a) Friday meetings [Chris and Jeremy present] (30 mins)
      (i) Treat as a scrum—what we've completed since we last met, what we plan to do before our next meeting, any blockers we may have. (5 mins)
      (ii) Note new learnings or findings. (5 mins)
      (iii) Discuss any change in scope, whether we are still on schedule, or review revisions to the project plan if applicable. (2 mins)
      (iv) Show code and ask for feedback. (18 mins)

(b) Wednesday meetings [Only Alex, Ellen, and Jamie] (30 mins to 1hr as needed)
      (i) Treat as sprint planning for the following week.
      (ii) Review readings, analyze learnings. (10 mins)
      (iii) Plan agenda for Friday's meeting. (10 mins)
      (iv) Review Kanban board, highlight any cards in a blocked stage or that still need to be completed from previous week. (10 mins)
      (v) Optional live coding session. (30 mins)

3. MEETING PROCEDURES.

(a) Meetings are run with respect to everyone's time and to get the most out of having Chris in the room with us.
(b) Our expectations for the interactions are that they will run smoothly and professionally due to our Wednesday planning and a streamlined agenda. We want Chris to be able to critique our methods and pivot our direction if we are incorrect. We also want to be informed on any inefficiencies and how we can make our work better. To do this, we believe we need to get code in front of him and prepare discrete questions for feedback. Open ended questions will not serve us well here.
(c) If there is not one correct solution, whoever works on that task first from the Kanban board can choose their preferred method.
(d) Our process for changing this contract is stated at the top of the page.

4. TEAM ROLES AND RESPONSIBILITIES.

(a) One team member should act as the MC for Friday's meeting.

    (i) Use timer to keep time and stay on track with agenda items.

    (ii) Keep to 30 mins unless planned ahead of time. In this case check with the group at the beginning of the meeting that no one has a hard stop at 30 mins.

    (iii) This person should also be prepared to share their screen and therefore prepare their own method of presenting the status updates clearly and have notebooks ready to run.

(b) Another team member should keep the minutes document at Friday's meeting.

    (i) This person is responsible for taking notes throughout the meeting, particularly of Chris' feedback.

    (ii) This person should upload the minutes to the team GitHub promptly following the meeting.

(c) The third team member should be the owner of the Kanban board From Wednesday to Wednesday of that week and prepare/ask the specific questions we have for Chris during the code critique on Friday.

    (i) During/immediately following the Wednesday meeting, this person should share the Kandan board on their screen, create cards for the next week and move/alter/close out cards from the past week.

    (ii) This teammate should be intimately familiar with each block of code from that week, regardless of who wrote it.

    (iii) The questions to Chris should be compiled during/following the Wednesday meeting and shared with the team for accuracy by at least 10am Friday morning.

(d) Team members are responsible for completing the tasks they claim during the Wednesday planning meeting.

    (i) This should be flexible. We understand that sickness, vacations, moves, holidays, homework, work stress, and other unforeseen life events can affect the productivity/bandwidth of any given week.

    (ii) Each team member will communicate open and often on how they're doing with their workload and if they need help.

(e) We will keep the team members incentivized to perform the roles well by rotating roles each week. Our hope is to create an environment where we learn from each other's wins and then make improvements in our own performance. It will also help each of us to personally feel the difficulties created by a role not done well.

5. SIGNATORIES. Alex Cathcart, adc6fs; Ellen Yu, eyy8k; Jamie Oh, hso6b

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Alex Cathcart

Signature: *Alexandra Cathcart*

Date: 9/19/2021

Ellen Yu

Signature: *Ellen Yu*

Date: 9/19/21

Jamie Oh

Signature: *Jamie Oh*

Date: 9/18/21