First Team Meeting Agenda

There is a difference between working as a group and functioning as a team. Take a few minutes at your first meeting to go through this agenda. Set someone to take notes from the beginning.

Team Members: Caroline Causey, Sophie Scherer, Shreya Holikatti, Alex Creech

Introductions

These first questions should be answered by everyone. These are questions to individuals and may differ between teammates. Use this time to listen respectfully to your teammates (even if you're old buddies). Try not to assume you know the answers others might give.

1. Introductions
    a. State your name and major
    b. Optional: tell one crazy thing about yourself which the others might not know
        i. **Caroline** - Computer Science and International Studies with minor in Economics; fun fact: training to hike Mount Kilimanjaro
        ii. **Shreya** - Computer Science and Economics; fun fact: been to the Himalayas
        iii. **Alex** - Computer Science; fun fact: fallen off a horse twice, no broken bones!
        iv. **Sophie** - Computer Science and Finance; fun fact: gone rappelling down 2 waterfalls in Costa Rica
2. Individual Motivation
    a. What motivates each of you to put forth your greatest effort? (Grades, Competition, Approval, Completion)
        i. **Caroline -** While getting a good grade will encourage her to put forth her greatest effort, she is genuinely interested in understanding more about the data science field for her future Technology Consulting career. She will put forth her greatest effort in order to get the most out of this class, to learn from Dr. AM and guest lecturers, as well as to practice hands-on with real datasets. These are skills that can transfer over to her career, so she will make the most of this opportunity.
        ii. **Sophie -** Get a good grade (A or A+), Data Science will be applicable to trading strategies in quant trading internship next summer
        iii. **Shreya -** Grades matter, but also Data Science will be useful in career post-grad
        iv. **Alex -** Get a good grade, general career-preparedness, likes Data Science, want to add to resume
3. Individual goals for the project

a. What grade does each person want?
    i. **Caroline -** A or A+
    ii. **Sophie -** A or A+
    iii. **Shreya -** A or A+
    iv. **Alex -** A or A+
b. How much does learning something matter to each person? Is getting a good grade enough? Do you want a broad understanding beyond the scope of the project? Somewhere in between?
    i. **Caroline -** Getting a good grade matters, but understanding the material is her primary goal (wanting to go beyond the scope of the project). She wants to learn how these skills can apply to all industries/problems, talk to guest lecturers, and attempt extra credit when available.
    ii. **Sophie -** Gain deeper understanding within reasonable/limited additional commitment while still prioritizing the grade. A lot of extra time will not quite work with this semester's commitments.
    iii. **Shreya -** Broad understanding beyond the scope of the project as it applies to post-grad career
    iv. **Alex -** Gain a better understanding of data science, but prioritize the grade

4. Time willing to commit
    a. How much time are you willing to spend?
        i. **Caroline -** Maximum 6 hours outside of class
        ii. **Sophie -** Hesitate to say a specific hour per week. Very efficient person, so try to put in the minimal effort to get the maximum result (A quality). Maybe 3-4 hours outside of class.
        iii. **Shreya -** Somewhere in 5-6 hours outside of class if needed
        iv. **Alex -** Work somewhere between 5-6 hours outside of class, additional time if necessary
    b. If things don't go as planned, would you rather take a lower grade or work late into the night?
        i. **Caroline -** Would prefer to work later into the night to achieve a higher grade
        ii. **Sophie -** If it's a crunch week, would rather work later if needed in order to achieve the desired outcome, want good quality work
        iii. **Shreya** - Would prefer to work later in the night, then take the lower grade
        iv. **Alex** - Would prefer to work later in the night, then take the lower grade
5. Time restrictions
    a. Are there times you are unavailable to work on the project? Are there other demands on your time which might impact the project?
        i. **Caroline -** Willing/able to work weekends, Friday afternoons, generally flexible. Other commitments include 2 clubs, class (notable Senior Design Project)
        ii. **Sophie -** In 15-16 credit hours and some is Senior Design, on leadership for a few different clubs. Work should tail off at the end of the semester. Generally flexible in terms of meeting on weekends or evenings. Prefer to

delegate asynchronously.

iii. **Shreya -** Not super busy this semester, except working part-time in the mornings. Free most afternoons, can meet Fridays or weekends. Would prefer to get things done asynchronously as well.

iv. **Alex -** Classes, Senior Design, club meetings on some evenings. Prefers to delegate asynchronous work so people can work on their own times/schedules.

6. Strengths and Weaknesses
    a. What are your strengths? What are your weaknesses? How can each of you contribute best? (Be honest here.)
        i. **Caroline -** Strengths: Some background in data science from a few years ago, specifically experience in Python and data science algorithms. Good administratively, organization and communication. Weakness: Sometimes hesitant/uncertain when confronted with tasks she is unfamiliar with, especially new technologies.
        ii. **Sophie -** Decent background in Data Science (statistical programming courses), confident in research in high school (R, Python), used these methods in finance, did R statistical modelling in a finance application this past summer. Has subject matter expertise in finance, which is very data centered, so can bring in that insight if we do our project on this. Great with organization and documentation. Weakness: not fully understanding a technology and getting paralyzed by that. She has a lot on her plate and sometimes needs to shift priorities due to that (ex. Senior Design), but will always communicate that information
        iii. **Shreya -** Decent background in R and Python (past internships and courses), has subject matter knowledge from economics background on data analysis. Weakness: Going out and researching tech on her own, need confidence to use/apply it well
        iv. **Alex -** Some background in data science (DS club, courses). Wakeness: Struggle with being hesitant when confronted with stuff not similar with
7. Contact Preferences
    a. What are your first and second choices for getting in contact with each other? What are your expectations for response time?
        i. **Caroline -** First preference is text group message because she will see it the fastest. Second preference is email, and is also flexible using Slack or GroupMe. Expectations for response time are within 12-24 hours to hear some kind of acknowledgement or update from a team member.
        ii. **Sophie -** Text is easiest, and could use email as second preference (for more formal communication and communication with professor). Have issues with GroupMe and Slack on timeliness of notifications. With exceptions of circumstances, try to give some type of response in 24 hours. Expect members to explain context and when they will get to action items. If someone isn't responding, give a quick followup especially if it's urgent.
        iii. **Shreya -** Text will be easiest and best, then email for a second preference. She likes Slack better than GroupMe. Response time of 24 hours is reasonable as the maximum amount of time.
        iv. **Alex -** Text as first preference, then email. The response time of 24 hours

is reasonable, but I doubt that it would reach that point.

8. Concerns
    a. What is your greatest concern about group work? What are the best and worst experiences you've had with group work?
        i. **Caroline -** Greatest concern would be when the deadline is approaching and progress is insufficient. Best experience: SWE 326 group where everyone understood each others' strengths and weaknesses, facilitated learning opportunities. Worst experience: Team member drop off and not respond, other team members had to fill in for their work.
        ii. **Sophie -** Greatest concern is if external factors arise for one or many of us that puts pressure on how much time we have available. This can be other classes or commitments. Hope that people try to plan ahead as much as possible, so we are not cutting deadlines close. Give flexibility if we have a busy week. She had a great experience in 326 because everyone had aligned goals and communicated well. In terms of worst experience, her 216 group had team members dropping off or not doing work, and some who did provide work actually gave negative progress. They didn't communicate that they were lost, regressed work that had to be fixed by the rest of the team.
        iii. **Shreya -** Her greatest concern is if external factors arise from other classes, etc. that change how much time we have available. Best experience was the Senior Design group because everyone worked to their strengths and communicated well. Worst experience was the 216 group because a lot of people fell off and did nothing.
        iv. **Alex -** Don't have concerns about this group. General concern about group work is stuff not getting done on time. Cannot predict everyone's external factors. Best experience is from 326 when him and another team member were working well. They spent a lot of time making progress because they communicated well. Worst experience would be from 326 on frontend team and had to pick up the work from other team members.

Group Goals

Now, take the answers you gave as individuals above, and discuss group goals for the project. Finalize group goal(s) to which everyone can agree. Note: finishing the group goals does not finish the first meeting! It is important to continue to discuss how you will meet those goals. (Turn to page two.....)

1. Receive at minimum an A on the team project related grades, targeting an A+.
2. For tasks and associated deadlines, progress should be clearly documented and distributed to all team members. Team members should contribute high-quality work by team deadlines to ensure the team meets or exceeds course deadlines.
3. Clear and timely communication among team members. Update team members regularly on progress and/or obstacles to stay on schedule and avoid unnecessary delays that could have been avoided by reaching out for help.

Team Workings

Once these items have been discussed with every team member contributing and listening, the team should decide on the logistics for the project. As you answer these questions, keep these things in mind:

1. Documentation (Document everything, even for a small project!)
    a. Who will act as scribe?
        i. Scribe will be rotating every meeting
        ii. Order: Caroline, Sophie, Shreya, Alex
        iii. *Caroline is scribe for this meeting
    b. Where will these documents be kept?
        i. Team will have a shared Google Drive with a meeting agenda/minutes subfolder
    c. How will items be shared?
        i. Google Docs/Google Collab shared through our Google Drive folder (receive notifications through email)
    d. Github Repository Link
        i. https://github.com/causeyca21/CSC442Group
2. Scheduling and task planning
    a. How will the team communicate?
        i. Primarily through group messages for informal discussions/updates. Through email for formal updates or communication with the professor.
    b. Agree on a method and response time expectation
        i. Response time for any form of communication should be maximum 24 hours
3. Contingency plans
    a. How will you handle a change in team membership?
        i. Will have a team meeting to address restructuring of responsibilities
        ii. Share this document with the new team member for them to understand our goals and expectations
    b. How will you handle if a member needs to change their commitments?
        i. They should reach out to the team to explain their commitments and request a temporary restructure of commitments (communicate over group message) or request a larger, more long term restructure in which a team meeting will take place.
    c. What happens when a team member is going to be late or absent from a team meeting?
        i. If the team member expects to be late or absent, this should be communicated well in advance for the meeting to possibly be moved. If it is a sudden schedule change, then the team member should notify the

team through group message as soon as possible. The team will distribute minutes and action items to the team member.

d. What should a team member do if they become frustrated with another member? How will the team handle a member who wants to do nothing or who wants to do it all?
    i. Team expectations are to be kind to all members. If someone gets frustrated, they should pull aside the other member or message them to work it out. The rest of the team can get involved if necessary, potentially bringing in teaching staff. If someone is doing nothing, other team members should reach out and check-in. If someone wants to do it all, it is expected that all team members contribute in some manner to the project, so this should be restated if needed.
e. What happens when a team member hasn't met their commitment and the deadline is approaching?
    i. Team members can reach out and see if they need any help or have blockers. There should be team deadlines that are in advance of the official deadlines, so the other team members have time to step in and work on the commitment.
f. Were there other failures mentioned above that you need to make a contingency plan for?
    i. N/A

Project Logistics

Now that you've discussed the above, you can discuss the specific assigned project. (Too many teams skip the discussions above and only discuss the project; this leads to many misunderstandings which could have been avoided.)

1. What will be required in completing the project?
    a. Every team member needs to complete their individual parts on time before the team gathers to conduct team analysis and work on a team-based part of the project. Everyone should ask for help when needed. Every team member should contribute to taking meeting minutes, scheduling meetings, researching databases/datasets, researching domain knowledge, conducting high quality data analysis, and communicating well with the team.
2. Roles: who will do what?
    a. At this moment, we will set a general role to each team member based on interest/strengths. SInce we all have a broad interest however, we will rotate roles so everyone can get exposure to the phases of data science.
    b. As of right now, we will have a Team Leader (Caroline), Quality Control (Alex), Documentation Control (Shreya), and Researcher (Sophie)

Group Contract

Complete and sign a team contract. A sample is provided here Project Team Contract.

Scheduling

1. Schedule the next team meeting
    a. Next team meeting will be after class on January 28th from 9:45am-10:30 am in the EB II lobby

Action Items

Take a moment before you leave to review the action items for each team member. Include who is doing what, when, and how you will follow up. Make sure that someone is documenting action items in a way that everyone can view them.

Action Item	Team Member	Due Date	Follow-Up
Sign and submit team contract	All	1/27 11:59pm	Text in group message when complete
Research high quality databases	All	1/28 9:45am	Share links to databases on High Quality D… Caroline - done Alex - done Shreya - done
Research datasets in Finance	Sophie	1/30 9:45am	Create Google Doc in Drive to share links to datasets
Set up next meeting and agenda	Caroline	1/26 11:59pm	Share Google invite and attach agenda to all team members
Talk to Finance Professor about Insider Trading	Sophie	1/30 9:45am	Take notes of conversation and share in Google Doc with rest of team
Review instructions	All	1/28 9:45am	Text in group

and rubrics for Project Parts 1-5			message when complete Caroline - done Alex - done Shreya - done
Build out initial documentation (if applicable per rubric)	Shreya	1/28 9:45am	Share Google Doc in Google Drive with rest of team
Begin researching Python	All (Alex help lead)	1/30 9:45am	Communicate updates with team through group message Alex - shared resources