Team Charter

Prepared by: Montana Data Consultants

Document Versioning Chart			
Version Number	Submit to	Date Submitted	Description
V1	MT-PMI Mentor or Team	1/31/24	Draft of team charter created during group meeting.
V2	Moodle for grading	1/31/24	Draft of team charter submitted to Moodle.
V3	Team for review & Moodle for revision grading		
V4	Team Members for Signatures		

Team Goals

Montana Data Consultants will create a minimum viable product for Morton Analytics to use in their pitch decks during venture capital fundraising. The goals of the product are as follows:

- Understand emerging trends of chronic disease using a public data set
- Create a data pipeline and utilize various data visualization tools to make the data more manageable.
- Create a map that can see any chronic disease indicator on any date
- Create time series plots to see trends for any chronic disease indicated over time
- Demonstrate proof of concept in a performant tool, such as a dashboard or report, that is easy to read

Team Members

Quinn Sybert, Lead Content Writer and Systems Analyst

Quinn is a management information system senior at the University of Montana. He has previous work experience interning for KPMG as a Digital Assurance Consultant. This experience taught him how to communicate, collaborate, and problem-solve in a professional environment. During the internship, he reviewed client's control systems in place for their IT systems to ensure they were following industry standards and delivered status reports. Quinn also has relevant coursework project experience. In the course BMIS 372, System Design and Analysis, He served as a project manager and oversaw his group's progress in building a website for a Missoula non-profit, Zero-to-Five. Additionally, Quinn worked on a team in a course BMIS 372, Information Infrastructures, where his team presented a Salesforce business solution and his group was selected by a panel of Advanced Technology Group employees (c-suite officers, senior managers, and associates) as top group performance out of 18 groups for best performance.

Quinn will have two roles in this project: systems analyst and co-content writer. As the systems analyst, he will define and document functional and technical requirements for the project, identify problems or bugs in software/analysis, brainstorm solutions, testing, compile a list of all the system requirements, define the scope, track the progress of implementing system requirements. As a co-content he will take notes at all meetings, with and without the client, collaborate with team members to document methods and processes used in each role and evaluate progress towards completion of the project, consolidating and updating the various components of the workbook.

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Ashley Hardin, Project Manager & Co-Data Analyst

Ashley is a Senior at the University of Montana and is getting a B.S. in Management Information Systems with a Minor in Mathematics and a Certificate in Big Data Analytics. Ashley has spent the

last two years working as an Assistant Project Manager for an organization at the University of Montana. Along with that, Ashley also has experience working as an Implementation Consultant Intern with FAST Enterprises where she conducted enterprises level querying and data managing. This experience and skill set will be valuable in managing the Montana Data Consultants in delivering the final product as well as, analyzing the dataset to deliver meaningful insights. After Ashley graduates in May 2024, she will be moving to Denver to work as a Data Analytics Consultant with FAST Enterprises.

Ashley has two roles: Project Manager and Co-Data Analyst. She holds the responsibility overseeing the team and communication with the client. She also holds the responsibility of keeping the Montana Data Consultants on track and within the scope of the project. With this role, she will also be turning in any assignments that are due. Her role as the Co-Data Analyst includes supporting the Data Analyst in any way needed to complete the deliverable including analyzing the provided data, identifying patterns and trends related to chronic diseases as well as developing statistical models and algorithms to extract meaningful insights from the data.

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Rebecca Bryan, Lead Visualization & Team Support Specialist

Rebecca is currently pursuing an M.S. in Data Science at the University of Montana. She graduated from UM with a B.A. in Mathematics in Spring of 2023. Through her education, she has learned various methods for data cleaning, manipulation, analysis, and visualization, and has gained experience in a variety of software including Excel, Python, and other data visualization tools. Rebecca is currently a Data Science intern with Manhattan Strategy Group, working on their Charter and Magnet Schools Grant Management Project. She has developed skills in data manipulation, analysis, and visualization, graphic design, and written and oral communication. She is committed to learning and developing new skills while maintaining excellent observational, communication and critical thinking skills.

Rebecca will have two roles in this project. First, she will be acting as Lead Visualization Specialist. She will utilize various data visualization tools, including Python, Excel, and Canva, to create clear and attractive visual representations of data trends. She plans to learn Tableau for mapping purposes. She will also be acting as Team Support Specialist. Her variety of skills and experience give her the means to provide support in any role within the team, should any team member need assistance in completing a task. She will continuously check in with her teammates regarding their progress and well-being and will locate additional resources should they be needed.

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Zach Szklarz, Lead Researcher & Co-Writer

A native of Portland, Oregon, Zach is in his last semester studying Management Information Systems and Chinese at the University of Montana. His primary interests are in the cybersecurity realm, including data security and privacy, physical access controls, and social engineering prevention. He spent summer 2023 working at Moss Adams in Portland as an IT Audit intern and will start full time there in July. Additionally, he has been selected as a finalist for a Fulbright Scholarship to get an M.A. in Political Economy at National Tsing Hua University in Taiwan. Career wise, Zach is interested in working in information security strategy and hopes to transition to a more cybersecurity-oriented consulting role before moving into industry.

Zach's research duties will include researching topics relevant to the project and dataset, identifying and researching the various chronic disease indicators and conditions, identifying and document the context and nuance behind the data, and communicating with the team to ensure everyone understands the what and why of the data. Outside of research, Zach will assist in taking notes during meetings and be one of the team members responsible for documentation and writing.

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Jackson Nakae: Lead Data Analyst, CO- Visualization Specialist

Jackson has an undergraduate degree in Mathematics from Montana State University, and is currently pursuing his master in Data Science at the University of Montana. In his studies he has completed multiple advanced data science, statistics, and computer science courses, These include Advanced Data Analytics, Advanced Data Analytics Theory, Numerical Methods, and Simulation Modeling. The summer of 2023 he received an ORISE fellowship to work for the US forest service, helping to develop a stream permanence model for western OR called FlowPER.

As the Lead Data Analyst Jackson will be responsible for analyzing the provided data, identifying patterns and trends related to chronic diseases as well as developing statistical models and algorithms to extract meaningful insights from the data. As the Co-Visualization Specialist Jackson will be responsible for creating visually appealing and informative representations of the data as well as designing dashboards, reports, and interactive visualizations.

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Team Rules

Team rules are crucial for establishing a structured framework that promotes collaboration, communication, and efficient project management. Clear and agreed-upon rules contribute to a positive team culture, minimize misunderstandings, and enhance overall productivity. They set

expectations, boundaries, and a shared understanding of how the team will operate, fostering a harmonious working environment.

1. Communication: Regular and open communication is key. Team members are expected to respond promptly to messages and actively participate in discussions.

2. Meeting Attendance: All team members are required to attend scheduled meetings. In case of unavoidable absences, advance notice should be provided.

3. Task Accountability: Each team member is accountable for completing assigned tasks within agreed timelines. Delays should be communicated in advance.

4. Respect: Mutual respect is fundamental. Team members must value diverse opinions, treat each other with courtesy, and create an inclusive environment.

5. Confidentiality: Respect the confidentiality of team discussions and project-related information. Do not disclose sensitive details without team consent.

Meeting Time & Tracking Time

Montana Data Consultants will meet for a minimum of one hour a week and a maximum of two hours per week. Weekly meetings will be determined by the amount of time needed for the current agenda, and additional meetings can be scheduled if necessary. These team meetings will take place weekly on Wednesday from 3:00pm - 4:00pm in Griz Central and Friday from 1:00pm - 2:00pm in the Mathematics Building. Montana Data Consultants members will use the software "Clockify" to log any and all time dedicated to each component that goes into the completion of the project.

Team Values, Ethics, and Expectations

Team values, ethics, and expectations form the ethical foundation of our collaboration. They guide behavior, promote integrity, and create a shared sense of purpose. Aligning with the Project Management Institute (PMI) Code of Ethics ensures a commitment to professionalism, responsibility, and fairness in our project endeavors.

Our team is committed to upholding the highest standards of professionalism, integrity, and responsibility throughout the project. Adhering to the PMI Code of Ethics, we prioritize honesty, fairness, and transparency in our actions.

- Professionalism in all interactions and deliverables
- Integrity in handling project information and client relations
- Responsibility for individual tasks and project outcomes

- Fairness and impartiality in decision-making processes

Team Decision Making Process

Decisions will be made collaboratively through a consensus-building approach. The process involves:

1. Discussion: Thorough discussion of the decision at hand, allowing all team members to express their perspectives. Maintain respectful language and temperament when interacting with team members.

2. Consensus Building: Strive for consensus by addressing concerns and finding common ground and compromising when necessary. Encourage open dialogue until agreement is reached.

3. Majority Vote: In cases where consensus or compromise is unattainable, a majority vote will determine the decision. This ensures progress while considering the majority's perspective.

Conflict Resolution Plan

A conflict resolution plan is essential to manage and resolve conflicts efficiently, maintaining a positive team dynamic. It establishes a structured approach to address issues, ensuring that conflicts are resolved promptly and constructively.

Conflict Resolution Plan:
1. Informal Discussion: Team members involved in a conflict initiate an informal discussion to understand each other's perspectives.

2. Mediation: If the conflict persists, a designated team member (mediator) facilitates a discussion to help reach a resolution.

3. Escalation to Project Manager: If mediation is ineffective, the conflict is escalated to the project manager, who will meditate and make a final decision. If further escalation is needed, the whole team will approach Shawn to help identify an effective solution.

4. Documentation: Throughout the process, all steps and resolutions are documented for future reference and continuous improvement.

Execution and Acknowledgement

The team members hereby indicate by their signatures below that they have read and agree with the specifications of this charter.

Quinn Sybert

Ashley Hardin

Rebecca Bryan

Jackson Nakae

Zachary Szklarz