

APPLICATION FORM

PART ONE: CONTACT INFORMATION

Name: Stephanie Locke
Pronouns: She/her

[Redacted]

LinkedIn profile link if available: <https://linkedin.com/in/stephanielocke>

Years of experience with Microsoft data platform technologies: 13

PART TWO: PROFESSIONAL BACKGROUND

1. Describe your employer's business:
Nightingale HQ is a company focussed on helping the enterprise market adopt artificial intelligence (AI) successfully.
Locke Data Ltd is a consultancy that helps business establish data science and advanced analytics practices.
2. Describe your primary job responsibilities:
I am a Director and CEO of both companies. As CEO, my role is to develop the business, our overall strategy, and the team to deliver it. Nightingale HQ is a startup so I fulfil both a business role (investor meetings, business development, forecasting etc) and act as technical lead (both in data & AI and in software engineering) while we scale our revenue generation and subsequently our team.
3. Do you or your company have any known relevant financial relationships with any current companies represented on the PASS Board of Directors? Current companies are outlined on pages 4 of the Application Guidance Document. If yes, details may be requested.
 Yes
 No
Microsoft is a customer of Locke Data Ltd. There are no ongoing contractual obligations between either of my companies and Microsoft.

PART THREE: STATEMENT OF INTENTIONS

4. How can PASS better serve the Microsoft data platform community?

PASS delivers benefit to the Microsoft data platform community in some core ways:

- A premier conference that brings together professionals from around the world to learn
- Supports both in-person and virtual user groups in managing their activities
- Provides technical and financial support for globally distributed local conferences
- (New) A content / learning platform

Unfortunately, the premier conference, the in-person user groups, and the local conferences have been hugely disrupted by the pandemic. This “black swan” event means that the generator of >90% of revenue is no longer viable for the next couple of years, at the least. Similarly, how communities engage is undergoing change and a move to the digital space meaning local conferences and user groups will need to change.

Fundamentally, PASS will struggle to continue delivering benefit to the community because it is currently structured in a way that works for the pre-pandemic way of doing things. It is at risk of spending the cash reserves and potentially going bankrupt.

To better serve the Microsoft data platform community, PASS needs to restructure towards a digital-first, low-overheads model to be able to continue delivering its core value proposition: education and networking for data professionals.

To this end, I think PASS should be exploring the following:

- Moving to a virtual events first model for core revenue generation and doing two things to support that: engage a qualified specialist agency, and consult the community on their lessons learnt running virtual events this past 6 months (whilst it's the big revenue generator at ~\$7.6m, the total conference expenditure is ~\$4m)
- Ensuring continuity of community operations (user groups, local conferences, etc) through either open sourcing the IP or moving to use third party / OSS alternatives that require lower maintenance and infrastructure costs (total IT expenditure is budgeted at >\$800k)
- Opening PASS as a learning and innovation sandbox for the Microsoft data platform community. Through many activities like hackathons, the community can deliver substantive efficiencies to reduce the cost of managing PASS (~\$3m is spent on day to day management of various aspects of PASS). This reflects into the community through sharing knowledge, increasing learning & volunteering opportunities, and generating new open source solutions
- Increasing communications with the community to build up a bank of ideas that can be scoped out, prioritised, and implemented via a volunteer body to help generate new community benefits

PART FOUR: LEADERSHIP AND MANAGEMENT

5. Please describe your management and leadership background.

Leadership

Particularly as part of the startup Nightingale HQ, I have been developing the strategy and company culture to build a high-growth organisation. I work with my co-founder to engage different stakeholders, potential customers, and employees to develop a product offering that is commercially viable.

Leading the company through the pandemic has meant needing to do things like enact short-term furloughs to support cashflow, identifying and acquiring other revenue sources, and more – the crises has taught me how to approach a substantive disruptor to business operations and work with staff to come out stronger for it. We have ended up not just retaining our staff but growing the headcount, generating revenue, and engaging with new partners. My leadership during this time has focussed very much on building consensus, ensuring the wellbeing of my team, and balancing short term needs with long term goals.

Management

I've run a successful small consulting company since the beginning of 2017 and created an ambitious startup in 2019. During these times, as well as business leadership, I've also been a manager of up to 8 people at any one time. Prior to becoming an entrepreneur, I managed small teams inside two organisations and before that was responsible for mentoring as a senior team member.

6. List any professional Boards on which you have served.

I have not served as a non-executive director before

7. Please describe your background/experience in dealing with organizational finances, including the size of the organization and budgets involved.

At Nightingale HQ, we're building a high-growth business and actively seeking investment of more than \$400k. To this end, as well as day to day short term budgets I'm adept at building budgets to cover the next three to five years to take us to more than \$20m annual revenue.

My background in finance organisations and teams, has left me comfortable with concepts like depreciation, cost of acquisition, and EBITDA. My data science background helps me develop cashflow simulations. My work building a Software as a Service company has given me a grounding in the unit economics to help with the development of the online learning SaaS product.

PART FIVE: VOLUNTEER EXPERIENCE

8. Please outline your volunteer history with PASS. Include the following information:
- Committees on which you have served
 - Projects you worked on and the PASS organization has benefited
 - PASS community participation within your region that outlines your contribution, the location, reach, and goals

I have run a user group in Cardiff, UK for more than a decade. A significant portion of that time, the group was also a PASS Chapter. This group now has nearly 1k members and has evolved into a broader Azure community with an emphasis on the Microsoft data platform. As well as being a local user group leader, I have volunteered at, spoken at, and sponsored many SQL Saturdays.

Over the years, I've engaged with regional mentors and Board members to provide feedback on PASS initiatives. Work with SQL WIT groups etc has helped grow new speakers from underrepresented groups. Past events organised like SQL Relay worked to promote PASS in the UK to grow local membership, attendance at UK SQL Saturdays, and PASS Summit attendance.

PART SIX: ACTIVITIES

9. What have you done in the past 24 months to prepare to serve on the PASS Board?
- Over the past few years, I've followed PASS Board outcomes closely via the minutes and financials.
10. Tell us about your involvement and accomplishments within any other volunteer organizations.
- In appreciation of the impact of SQL Saturdays has for the local data platform community, I set up satRdays, an open source data science conference brand that has had more 40 conferences around the world. I aimed to set this up in a sustainable and open way that fosters diversity. All discussions take place on the public Slack space, all development and hosting of the website etc uses open source solutions, and we have integrations with different software to enable local organisers to use relevant platforms. <https://knowledgebase.satrdays.org/newevents/>
11. What key learnings have you taken away from your volunteer experiences?
- Building an effective team/body of volunteers who can perform key activities is vital for delivering the goals of the organisation. Thinking out the right structure to support strategy, execution, and growth of the members is vital. I've also learnt that this is a collaborative exercise that can be arrived at through a consensus model with the community. Whilst I make recommendations, ultimately, the input of everyone greatly improves the outcome.
12. Have you read the current PASS Bylaws?

Yes

No

13. Have you read the PASS Board meeting minutes from past year?

Yes

No

PART SEVEN: ACKNOWLEDGEMENTS

14. Please provide links to any relevant public social media accounts.

<https://twitter.com/theStephLocke>

<https://uk.linkedin.com/in/stephanielocke>

PART EIGHT - REFERENCES AND BACKGROUND CHECK

You are required to include statements of support from individuals who endorse your candidacy.

You **must** provide three references illustrating the range of your network and how it relates to leadership experience. This can include references from other Boards you are currently sitting on or have sat on in the past. At least one reference must be from a PASS volunteer. References from current PASS members are valued above other references.

Reference Information	Reference Type
<p>Name: Joey D'Antoni</p> <p>[Redacted]</p> <p>Statement of Support:</p> <p>I've known Steph since her early days in the community, and she's been a leader from the start despite being one of the younger MVPs in the community. Steph initiated the idea, secured funding, and built out the organising team for SatRDays, an international for community event for R users. In addition to her community efforts, Steph is also the founder of a successful consultancy, where we have had the opportunity to work together on a number of projects, and I can strongly recommend her work and breadth of knowledge.</p>	<input checked="" type="checkbox"/> Volunteer <input type="checkbox"/> General <input type="checkbox"/> Personal <input checked="" type="checkbox"/> Work
<p>Name: Rie (Irish) Merritt</p> <p>[Redacted]</p> <p>Statement of Support:</p> <p>I make only one recommendation for a PASS Board of Directors candidate in any given election cycle. This year, I couldn't be more pleased to offer that support to Steph Locke. She has everything you could want in a BoD member. A global profile with a reputation for being professional, measured and detail oriented. Steadfast and armed with surety, but willing to listen, learn and adjust when presented with new information. She's a successful businessperson, earning CEO of the Year in Wales last year. I've known her for several years in different capacities, including as a Woman in Tech, a speaker, an MVP, an organizer & a mentor. She always has a straight head, for numbers, for people and for reading the room. Not one to sugar</p>	<input checked="" type="checkbox"/> Volunteer <input type="checkbox"/> General <input type="checkbox"/> Personal <input type="checkbox"/> Work

<p>coat things when you need the truth is a skill set that would serve PASS well as we move forward in an uncertain world. PASS and data platform community would be lucky to have her representing us. I trust the Nomination Committee will agree with me on how her strengths will be a benefit.</p> <p>Thanks for your consideration</p>	
<p>Name: Ruth Kearney</p> <p>[Redacted]</p> <p>Statement of Support:</p> <p>As well as being an effective communicator to our many stakeholders, Steph leads the company by example. Community work, mentoring and sponsoring underrepresented minorities, and being a patient teacher are all things the individuals inside the company are inspired by.</p> <p>We've worked together for more than 2 years, the last year has been in business together. Steph is a strong leader and her business skills around product development and finance have helped build an organisation set to scale rapidly.</p>	<p><input type="checkbox"/> Volunteer</p> <p><input type="checkbox"/> General</p> <p><input type="checkbox"/> Personal</p> <p><input checked="" type="checkbox"/> Work</p>

Background Check/Time and Travel Commitments

15. I agree to the estimated time and travel commitments required for this office, as outlined on Page 2 of the Application Guidance Document: Yes___.

16. I have my employer’s support regarding the time and travel commitments required for this office as outlined on Page 2 of the Application Guidance Document: Yes_____.

You may be asked to provide a background check.

PART NINE – SIGNATURE

17. "I, Stephanie Locke, hereby certify, on this date, 5th October 2020, that all information I have provided or will provide in this document is true, and I agree to abide by all the terms and conditions of the PASS election process.

I agree to be considered a candidate for the position of Director-at-Large for PASS. I understand that my email address may be made available to select PASS bloggers - screened and approved by PASS - during the campaigning period for the purpose of blogger interviews with candidates. I am aware that the term for which I am applying begins January 1, 2021 and ends December 31, 2022. If elected, I agree to fulfil the duties and obligations of the elected position to the best of my ability." *(Please answer yes or no to all of the above):* yes.

By adding your name to this contract, you signify that you understand and agree to all the terms of the above as written. This acts as your transcribed signature.