

<b>Procedure#</b>	<b>Title:</b> Market Research and Data Science Standard Operating Procedure	<b>Date Prepared:</b>
<b>Revision#</b>	Number and Policy Title (if applicable):	
<b>Effective Date:</b> MM/DD/YYYY	<b>Revised By :</b>	<b>Date Reviewed:</b> MM/DD/YYYY
<b>Reviewed By :</b>	<b>Approved By :</b>	<b>Date Approved :</b> MM/DD/YYYY

## Market Research and Data Science

### Division's Mission/Vision:

#### Mission:

To provide accurate data analytics and market research reporting for SGSF's stakeholders and program events.

#### Vision:

To share consistent weekly, monthly, and annual data reports with stakeholders to inform and power and cause disruptions to the current data trends for rewriting the narrative for underserved women and girls in STEM.

#### Goals:

- Increase the accuracy of extremely valuable foundational data.
  - o Review with the team the surveys we will deliver to our population to collect all needed information and reduce the number of missing values to 0
    - 3 weeks before every program and event.
- To improve efficiency, to help SGSF in fast-track decision-making.
  - o Enable easier data access by offering a consolidated space to store our data
    - Every time we have new data or report

- Improve our data analysis skills to provide insights that help the team make better decisions.
  - By learning “Tableau”, a new visualization tool, practicing our skills on real-world datasets,
  - Analyzing data confidently and effectively and regularly presenting our findings to the SGSF team
    - over the next four months
  
- Incorporate machine learning models into our data analytics
  - to help SGSF gain far more accurate and powerful capabilities for forecasting demand
    - in the next 2 months
  
- To expand the SGSF team and increase its productivity,
  - Bring and retain new data analyst trainees in the team and train them
    - within two months.
  
- Work smarter, not harder.
  - manage our time
  - Schedule regular data check-ins with the team,
  - set deadlines
  - take regular breaks.
  - be more productive with our time to achieve more without burning out.
    - Over the two months ahead

## Purpose

Data is the foundation of SGSF's strategic business decisions that align with its goals, objectives, and initiatives. Consequently, it is important that the Market Research and Data Science division at SGSF generates a good working plan for managing its data workflow and communicating that plan with new personnel working with SUPERGirls SHINE Foundation (SGSF) to ensure that the data remain intact and accessible. The scope of this Standard Operating Procedure is to create a cohesive and specific plan that facilitates data collection, analysis, processing, and sharing. Please always refer to the most up-to-date document to ensure you are following current procedures. If you would like assistance in receiving more clarification, please contact your Team Lead.

### **SECTION 1: RESPONSIBILITIES**

### **SECTION 2: DATA PROJECT PROCESSING**

### **SECTION 3: MONTHLY DATA REPORTING**

### **SECTION 4: WEEKLY DATA REPORTING**

### **SECTION 5: WEEKLY DATA REPORTING**

### **SECTION 6: EVENTS DATA REPORTING**

## Responsibilities

### **Executive director**

- Address to the Market Research and Data Science team lead the need for a specific project/process.

### **Market Research and Data Science team lead**

- Receive a request for collecting or analyzing data and share it with the Market Research and Data Science team.
- Assign tasks to the team members and lead project execution.

### **Market Research and Data Science team members**

- Perform data collection, analysis, processing, and sharing.

## Data Project Processing

Step	Action	Responsibility
1.	Send a request for a specific data project	Executive director
2.	Receive the request for a specific data project	Market Research and Data Science team lead
3.	The team leader schedules a team meeting with the <b>Market Research and Data Science team</b> members to explain the project and discuss the following steps	Market Research and Data Science team lead
4.	<b>Data collection</b>  Depending on the project: <ul style="list-style-type: none"> <li>○ What type of data is needed? where to get the data from?               <ul style="list-style-type: none"> <li>▪ If Existing Data:                   <ul style="list-style-type: none"> <li>▪ Go to SGSF Jotforms /</li> <li>▪ Go to the Data Storage in teams (RAW Data, CLEAN Data folders)</li> <li>▪ Ask the executive director if any previous data is available in old resources.</li> </ul> </li> <li>▪ New data is needed:                   <ul style="list-style-type: none"> <li>▪ Search on the Internet</li> <li>▪ Generate a Jotform and share                       <ul style="list-style-type: none"> <li>• In future events</li> <li>• On SGSF social media platforms</li> <li>• Via email</li> </ul> </li> </ul> </li> </ul> </li> </ul>	Market Research and Data Science team lead and members
5.	<b>Data Storage</b>  After collecting the data: <ul style="list-style-type: none"> <li>- Primary data should be</li> <li>- Recorded in teams under the Market Research division folder named RAW Data</li> <li>- Follow this particular file naming convention               <ul style="list-style-type: none"> <li>○ Subject Name_ Date of collection (YYYYMMDD)</li> </ul> </li> <li>- Save a copy of this primary data on your desktop</li> <li>- Always edit copies of primary data, and never the primary data</li> <li>- Edited data should be uploaded to teams, in the Market Research division folder, under CLEAN Data folder</li> </ul>	Market Research and Data Science team <b>Leader and Members</b>

	<ul style="list-style-type: none"> <li>- Any files generated before the project is completed should be stored in the Market Research division under “ UNDERGOING Projects “ folder to ensure its availability in case the file is lost on team members’ desktops</li> <li>- Final projects datasets, and reports should be stored in the Market Research division folder in Teams, under FINAL Projects/ Project Name_ (YYYYMMDD)</li> <li>- Data storage should be always supervised to make sure it follows the above criteria.</li> </ul>	Market Research and Data Science team <b>Lead</b>
<b>6. Data Cleaning</b>	<p>After collecting or retrieving the data from the storage</p> <ul style="list-style-type: none"> <li>- Check and impute missing values</li> <li>- Check for outliers and deal with them</li> <li>- Store the clean data in data storage in the Market Research division folder, under the CLEAN Data folder</li> <li>- Cleaned data should be supervised and approved before any further analysis</li> </ul>	Market Research and Data Science team <b>Members</b>  Market Research and Data Science team <b>Lead</b>
<b>7. Run an Exploratory Data Analysis (EDA)</b>	<p>Run an exploratory data analysis using R Studio to</p> <ul style="list-style-type: none"> <li>- Ensure that there is information available to allow for the type of analysis requested so the research is feasible.</li> <li>- The results of the EDA may indicate that the analysis is not feasible; discuss with the executive director possible changes to the analysis</li> <li>- Prepare the draft data analysis plan.</li> <li>- Save a copy of the R markdown file in the Market Research division folder in Teams, under the UNDERGOING Projects folder to ensure its availability in case the file is lost from your desktop</li> </ul>	Market Research and Data Science team <b>Members and Lead</b>  <b>Team lead</b>  Market Research and Data Science team <b>Members and Lead</b>
<b>8. Develop Data Analysis Plan</b>		Market Research and Data Science team <b>Members and Lead</b>

<b>9.</b>	Prepare the draft analysis report	Market Research and Data Science team <b>Members and Lead</b>
<b>10</b>	Circulate draft analysis report to the executive director. This stage involves final proofreading and content comments.	Market Research and Data Science team <b>Members and Lead</b>
<b>11</b>	Changes to the draft report proposed?  - If yes, go to step 7  - If no, store the report in the Market Research division folder in Teams, under FINAL Projects/ Project Name_ (YYYYMMDD)	Market Research and Data Science team <b>Members and Lead</b>

## Weekly Data Reporting

<b>Weekly Report</b>	<b>Procedure</b>	<b>Due Date</b>	<b>Responsibility</b>
<b>Weekly research or data project</b>	- Use the Weekly/Monthly/Yearly report template in the index to report.	<b>Every Monday</b>	Market Research and Data Science team <b>Members and Lead</b>

## Monthly Data Reporting

<b>Monthly Report</b>	<b>Procedure</b>	<b>Due Date</b>	<b>Responsibility</b>
ion Program Partner Reporting	<b>Data Preparation</b> <ul style="list-style-type: none"> <li>- Total # of Events</li> <li>- Total # of Guests</li> <li>- Counts for: <ul style="list-style-type: none"> <li>○ Gender <ul style="list-style-type: none"> <li>▪ Male</li> <li>▪ Female</li> <li>▪ I prefer not to answer</li> </ul> </li> <li>○ Race/Ethnicity <ul style="list-style-type: none"> <li>▪ Black / African American</li> <li>▪ White / Caucasian</li> <li>▪ Asian</li> <li>▪ American Indian or Alaska Native</li> <li>▪ Hispanic / Latino / Spanish Origin</li> <li>▪ Native Hawaiian or Other Pacific Islander</li> <li>▪ Two or more</li> </ul> </li> </ul> </li> </ul>	10 <sup>th</sup> of each month	Market Research and Data Science team <b>Lead</b>

	<ul style="list-style-type: none"> <li>▪ I prefer not to answer</li> </ul> <ul style="list-style-type: none"> <li>- Upcoming Events: <ul style="list-style-type: none"> <li>○ What public events are scheduled for next month at the Ion (date, time, title)</li> </ul> </li> <li>- Positive Press <ul style="list-style-type: none"> <li>○ Positive press (please include links) for SGSF organization or related startups in the SGSF cohort</li> </ul> </li> </ul> <p>Open the report link below and Complete the template in the index  <a href="https://hs-sites.com">Program Partner Reporting (hs-sites.com)</a></p>		
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<b>Mentees Monthly updates Reporting</b>	<ul style="list-style-type: none"> <li>- Use the Weekly/Monthly/Yearly report template in the index.</li> <li>- Report should include: <ul style="list-style-type: none"> <li>○ Mentor-Mentee relationship rating monthly variation</li> <li>○ SUPERGirls' interest in monthly variation</li> </ul> </li> <li>- Follow steps 4 to 11 of the Data Project Processing to report.</li> </ul>	<b>The 1<sup>st</sup> of each month</b>	Market Research and Data Science team <b>Lead and Members</b>
<b>Mentors Monthly updates Reporting</b>	<ul style="list-style-type: none"> <li>- Use the Weekly/Monthly/Yearly report template in the index</li> <li>- Report should include: <ul style="list-style-type: none"> <li>○ Mentor-Mentee relationship rating monthly variation</li> <li>○ Mentorship growing impact on mentor rating in monthly variation</li> <li>○ Outside opportunities offered to mentees by mentors</li> <li>○ Gaps we need to fill</li> </ul> </li> <li>- Follow steps 4 to 11 of the Data Project Processing to report.</li> </ul>	<b>The 1<sup>st</sup> of each month</b>	Market Research and Data Science team <b>Lead and Members</b>



## Events Data Reporting

Report	Procedure	Due Date	Responsibility
<b>Events Reporting</b>	<ul style="list-style-type: none"> <li>- Include it as a topic in the weekly Monday report using the Weekly/Monthly/Yearly report template in the index.</li> <li>- The report must include:               <ul style="list-style-type: none"> <li>○ A bar graph showing in (%) the distribution of roles in the event (SUPERGirls, Mentors, Volunteers...)</li> <li>○ The number of attended girls members</li> <li>○ Any not member guest in the middle-high-collegiate range</li> <li>○ What other attendees attended</li> <li>○ What industries do attendees work at?</li> <li>○</li> </ul> </li> </ul>	<b>Monday after each event</b>	Market Research and Data Science team <b>Members and Lead</b>

## Index: Weekly/Monthly/Yearly report



Division Report  
Date

Prepared By:

SUPERGirls SHINE Foundation

### **SGSF's Mission/Vision:**

Mission:

Vision:

### **Division's Mission/Vision:**

Mission:

Vision:

### **Goals:**

- 1
- 2
- 3

### **Report Topics:**

- Topic 1
- Topic 2
- Topic 3

### **Summary:**

Paragraph format

### **Topic 1**

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### **Topic/Conclusions/Findings:**

- Topic/Conclusions/Findings:
- Topic/Conclusions/Findings:
- Topic/Conclusions/Findings:

### **Topic Recommendations/Room for improvement:**

- Topic Recommendations/Room for improvement:
- Topic Recommendations/Room for improvement:
- Topic Recommendations/Room for improvement:



Division Report  
Date

Prepared By:

SUPERGirls SHINE Foundation

**Action Items with due dates:**

- Action item
- Action item
- Action item

**Topic 2**

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**Topic/Conclusions/Findings:**

- Topic/Conclusions/Findings:
- Topic/Conclusions/Findings:
- Topic/Conclusions/Findings:

**Topic Recommendations/Room for improvement:**

- Topic Recommendations/Room for improvement:
- Topic Recommendations/Room for improvement:
- Topic Recommendations/Room for improvement:

**Action Items with due dates:**

- Action item
- Action item
- Action item

**Topic 3**

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**Topic/Conclusions/Findings:**

- Topic/Conclusions/Findings:
- Topic/Conclusions/Findings:
- Topic/Conclusions/Findings:

**Topic Recommendations/Room for improvement:**

- Topic Recommendations/Room for improvement:
- Topic Recommendations/Room for improvement:



Division Report

Date

Prepared By:

SUPERGirls SHINE Foundation

- Topic Recommendations/Room for improvement:

**Action Items with due dates:**

- Action item
- Action item
- Action item

**Conclusion:**

Paragraph format

**Next Steps: (within 14-30 days)**

- 1
- 2
- 3

## Index: ion Program Partner Report

Name of Organization\*

Please Select

Name of Person Compiling this Report\*

Email of Person Compiling this Report\*

Reporting Start Date

Reporting End Date

Total # of Events\*

# of public events held at the Ion during the reporting period

Total # of Guests\*

Estimated total # of guests visiting the Ion during the reporting period (this included group meetings and/or events hosted by your organization)

Demographics of Guests

To better understand how guests are segmented by demographics - please [click the following link](#) to download the excel template to report (1) gender (2) race/ethnic distribution of guests.

Please provide the counts guests who identified as the following:

Gender

☐ Male

☐ Female

☐ I prefer not to answer

Race/Ethnicity

☐ Black / African American

☐ White / Caucasian

☐ Asian

☐ American Indian or Alaska Native

☐ Hispanic / Latino / Spanish Origin

☐ Native Hawaiian or Other Pacific Islander

☐ Two or more

☐ I prefer not to answer

Upload Demographics\*

Please [download](#) template - you will see three tabs (Instructions, Action Required - Events, Action Required - Cohort).

1. If your organization **DOES NOT have** an accelerator/incubator please only complete: Action Required - Events.  
2. If your organization **DOES have** an accelerator/incubator and is actively running a cohort please complete **BOTH**: Action Required - Events & Action Required - Cohort.

Completing Demographic Reporting: Items that require your input are highlighted in yellow (column C)

Choose Files

 | No file chosen

Upcoming Events\*

What public events are scheduled for next month at the Ion (date, time, title)

I.e., 09/01, 9:00 AM, Venture Houston

Positive Press\*

Positive press (please include links) for your organization or related startups in your cohort

☐ I am reporting on behalf of Urban Capital Network

Does your organization host an accelerator or incubator for startups?\*

☐ Yes

☐ No

Is your accelerator or incubator actively running a cohort?\*

☐ Yes

☐ No