Carpentries Users Guide Documentation

Authors

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The Carpentries teaches foundational coding, and data science skills to researchers worldwide. Software Carpentry, Data Carpentry, and Library Carpentry workshops are based on our lessons. Workshop hosts, Instructors, and learners must be prepared to follow our Code of Conduct.

CODE OF CONDUCT

1.1 The Carpentries Code of Conduct

1.1.1 Code of Conduct (Summary View)

Below is a summary of The Carpentries Code of Conduct. Continue reading for a *more detailed description of the CoC*.

For more information please review our:

- Incident Response Guidelines
- Incident Reporting Guidelines
- Incident Response Procedure
- Termed Suspension Guidelines

We are dedicated to providing a welcoming and supportive environment for all people, regardless of background or identity. By participating in this community, participants accept to abide by The Carpentries' Code of Conduct and accept the procedures by which any Code of Conduct incidents are resolved. Any form of behaviour to exclude, intimidate, or cause discomfort is a violation of the Code of Conduct. In order to foster a positive and professional learning environment we encourage the following kinds of behaviours in all platforms and events:

- Use welcoming and inclusive language
- Be respectful of different viewpoints and experiences
- Gracefully accept constructive criticism
- Focus on what is best for the community
- Show courtesy and respect towards other community members

If you believe someone is violating the Code of Conduct, we ask that you report it to The Carpentries Code of Conduct Committee completing this form, who will take the appropriate action to address the situation.

1.1.2 Code of Conduct (Detailed View)

Part 1. Introduction

The Carpentries is a community-led project. We value the involvement of everyone in the community. We are committed to creating a friendly and respectful place for learning, teaching and contributing. All participants in our events and communications are expected to show respect and courtesy to others.

To make clear what is expected, everyone participating in The Carpentries activities is required to conform to the Code of Conduct. This Code of Conduct applies to all spaces managed by The Carpentries including, but not limited to, workshops, email lists, and online forums such as GitHub, Slack and Twitter. Workshop hosts are expected to assist with the enforcement of the Code of Conduct.

The Carpentries Code of Conduct Committee is responsible for enforcing the Code of Conduct. It can be contacted by emailing coc@carpentries.org. All reports will be reviewed by the Code of Conduct Committee and will be kept confidential.

Part 2. The Carpentries Code of Conduct

The Carpentries is dedicated to providing a welcoming and supportive environment for all people, regardless of background or identity. As such, we do not tolerate behaviour that is disrespectful to our teachers or learners or that excludes, intimidates, or causes discomfort to others. We do not tolerate discrimination or harassment based on characteristics that include, but are not limited to, gender identity and expression, sexual orientation, disability, physical appearance, body size, citizenship, nationality, ethnic or social origin, pregnancy, familial status, veteran status, genetic information, religion or belief (or lack thereof), membership of a national minority, property, age, education, socio-economic status, technical choices, and experience level.

Everyone who participates in Carpentries activities is required to conform to this Code of Conduct. It applies to all spaces managed by The Carpentries including, but not limited to, workshops, email lists, and online forums such as GitHub, Slack and Twitter. Workshop hosts are expected to assist with the enforcement of the Code of Conduct. By participating, participants indicate their acceptance of the procedures by which The Carpentries resolves any Code of Conduct incidents, which may include storage and processing of their personal information.

Part 2.1 Expected behaviour

All participants in our events and communications are expected to show respect and courtesy to others. All interactions should be professional regardless of platform: either online or in-person. In order to foster a positive and professional learning environment we encourage the following kinds of behaviours in all Carpentries events and platforms:

- Use welcoming and inclusive language
- Be respectful of different viewpoints and experiences
- Gracefully accept constructive criticism
- Focus on what is best for the community
- Show courtesy and respect towards other community members

Note: See the four social rules for further recommendations.

Part 2.2 Unacceptable behaviour

Examples of unacceptable behaviour by participants at any Carpentries event/platform include:

- written or verbal comments which have the effect of excluding people on the basis of membership of any specific group
- causing someone to fear for their safety, such as through stalking, following, or intimidation
- violent threats or language directed against another person
- the display of sexual or violent images

- unwelcome sexual attention

- nonconsensual or unwelcome physical contact

- sustained disruption of talks, events or communications

- insults or put downs

- sexist, racist, homophobic, transphobic, ableist, or exclusionary jokes

- excessive swearing

- incitement to violence, suicide, or self-harm

- continuing to initiate interaction (including photography or recording) with someone after being asked to stop

- publication of private communication without consent

Part 2.3 Consequences of Unacceptable behaviour

Participants who are asked to stop any inappropriate behaviour are expected to comply immediately. This applies to any Carpentries events and platforms, either online or in-person. If a participant engages in behaviour that violates this code of conduct, the organisers may warn the offender, ask them to leave the event or platform (without refund), or engage The Carpentries Code of Conduct Committee to investigate the Code of Conduct violation and impose appropriate sanctions.

1.1.3 Update Logs

- 2020-09-23 The CoCc Governance document was added to the handbook. This document is approved by the members of the Code of Conduct committee, the executive director, Kari L. Jordan and executive committee. Contributors: drafted by Karin Lagesen, Malvika Sharan and Karen Word (2019) and extensively reviewed and updated by the committee members of the Code of Conduct committee: Karin Lagesen, Malvika Sharan, Karen Word, Samatha Ahern, Ivo Arrey, Benjamin Schwessinger, François Michonneau and Konrad Förstner (2019-2020).

- 2019-07-17 The CoCc membership agreement document was added to the handbook. This document is approved by the members of the Code of Conduct committee, the executive director, Tracy Teal and trainers community. Contributors: drafted by Malvika Sharan (January 2019) and intesively reviewed and updated by the committee members Malvika Sharan, Karin Lagesen, Kari L. Jordan, Samantha Ahern, and Simon Waldman (February-April 2019).

- 2019-02-28 Added appeal process, procedure for following up with a reportee, terminology, CoC incident response procedure, termed supsension checklist, and expanded clauses for conflicts of interest. Contributors: Ethan White, Kari L. Jordan, Karin Lagesen, Malvika Sharan, Samantha Ahern, and Simon Waldman.

- 2018-09-11 Code of Conduct revised to provide straightforward examples of both beneficial and unwanted behaviour. Also includes changes regarding evaluating intent. Contributors: Ethan White, Kari L. Jordan, Karin Lagesen, Malvika Sharan, Samantha Ahern, and Simon Waldman.

- 2018-09-11 Reporting guidelines revised to include alternate contact points. Contributors: Ethan White, Kari L. Jordan, Karin Lagesen, Malvika Sharan, Samantha Ahern, and Simon Waldman.

- 2016-11-21 Code of Conduct, Reporting Guidelines and Enforcement Manual released. Documents were adapted from guidelines written by the Django Project, which was itself based on the Ada Initiative template and the PyCon 2013 Procedure for Handling Harassment Incidents. Contributors: Adam Obeng, Aleksandra Pawlik, Bill Mills, Carol Willing, Erin Becker, Hilmar Lapp, Kara Woo, Karin Lagesen, Pauline Barmby, Sheila Miguez, Simon Waldman, Tracy Teal.

1.1.4 About this Document

This document is adapted from guidelines written by the Django Project, which was itself based on the Ada Initiative template and the PyCon 2013 Procedure for Handling Harassment Incidents. Contributors to the the initial document are Adam Obeng, Aleksandra Pawlik, Bill Mills, Carol Willing, Erin Becker, Hilmar Lapp, Kara Woo, Karin Lagesen, Pauline Barmby, Sheila Miguez, Simon Waldman, and Tracy Teal. Additional language was added by Otter Tech from the PyCon U.S. 2018 Code of Conduct (licensed CC BY 3.0) In 2018, the Code of Conduct was revised to add a summary, straightforward examples of both beneficial and unwanted behaviors, and evaluating intent. Reporting guidelines were also revised to include alternate contact points and a reporting form with the procedure was added. In 2019, an appeal process, the procedure for following up with a reportee, terminology, CoC incident response procedure, termed suspension checklist, expanded clauses for conflicts of interest, and committee membership agreement were included. Contributors of these revised documents are Ethan White, Kari L. Jordan, Karin Lagesen, Malvika Sharan, Samantha Ahern, and Simon Waldman.

1.2 Code of Conduct Incident Response Guidelines

Information on how to report a Code of Conduct (CoC) incident is outlined in our Code of Conduct Incident Reporting Guidelines.

The checklists below outline the steps any community member (workshop host, instructor, helper, etc.) can take during a potential Code of Conduct incident **before** reporting it to the Code of Conduct Committee. You may encounter challenging situations and have limited experience or training to feel comfortable enforcing the CoC. These guidelines are meant to help guide you through the process of supporting other community members and yourself during an incident.

All Carpentries community members should feel empowered to enforce the Code of Conduct.

Ideally, we would all be able to defuse an incident. In practice, we have varying comfort with situations depending on our current experience and the environment. Below are ways that you can be supportive and steps that you can take during or after an incident.

If you can, move from being a bystander to being a Code of Conduct first responder. If you see something inappropriate happening, speak up. If you don't feel comfortable intervening, but feel someone should, please submit a report in person to a workshop host or instructor or via the Code of Conduct incident report form to the Code of Conduct committee.

1.2.1 Immediate Response

The initial response to an incident is very important and will set the tone for The Carpentries community. Depending on the severity and/or details of the incident, an immediate response may be required. If an incident involves physical danger or involves a threat to anyone's safety (e.g. threats of violence), any member of the community may – and should – act immediately to protect safety. This can include contacting emergency or crisis resources.

1.2.2 Ongoing Incidents

If an incident is ongoing, whether in-person or online, any community member (workshop host, instructor, helper) may act immediately and employ any of the tools available to the community member to pacify the situation. In situations where an individual community member acts immediately, they must inform the workshop host as soon as possible and report their actions to the Code of Conduct Committee for review within 24 hours of the incident. Should there be a need for an immediate response, please see the *Immediate Response Checklist*.

1.2.3 Checklists for Responding to an Incident

Immediate Response Checklist

- Assess whether you need a first-responder (law enforcement, etc.) to immediately respond to the incident. If so, ask the reporter to stay with you and dial the appropriate emergency response number.

- If there is any general threat to participants and/or the safety of anyone attending a Carpentries event, contact the emergency response number established.

- If individuals are physically safe, contact law enforcement or security only at the reporter's request.

- Follow any local guidelines for handling incidents, including if you have a legal reporting role.

In-Person Event Checklist (Carpentries Workshops, CarpentryCon, CarpentryConnect, Carpentries Instructor Training)

- Ensure participants are safe.

- If not, refer to the *Immediate Response Checklist*.

- Listen to the reporter and write down as many details as possible.

- Ask the reporter to report the incident via the Code of Conduct Incident Report Form. If they would rather you complete the report, complete the report with their assistance.

- Inform the workshop host that there was an incident and that a report was submitted via the incident report form. If the incident involves the workshop host, report the incident directly to the Code of Conduct committee via the incident report form.

Online Events and Communications Channels Checklist (Teaching Demonstrations, Community Discussions, Carpentries Instructor Training, Slack Channels, TopicBox)

- Inform the event host/meeting facilitator that there was an issue and send a report via the incident report form.

- If the incident involves the event host/meeting facilitator, please complete the incident report form and rest assured that confidentiality and your experience in our community is our first priority.

If a community member has violated the CoC via an online event, the CoC committee can enact a short-term Termed Suspension, and the reportee's privileges to all Carpentries communication channels could be suspended until the Code of Conduct Committee has concluded their investigation of the reported incident.

Individuals reported often get upset, defensive, or deny the report. Allow them to give any additional details about the incident. However, remember:

- It does not matter if they did not intend to hurt anyone; their behaviour still impacted participants negatively.

- It is not your job to reassure or forgive them.

- Do not allow the reported person to make an apology to the reporter or impacted person. Often an apology centers the reported person's feelings and not the person who was impacted. You may accept their apology and offer to pass it on, but you're not required to if you think it would negatively impact the reporter.

1.3 Code of Conduct Incident Reporting Guidelines

1.3.1 Reporting a Potential Code of Conduct Incident

If you are attending a Carpentries workshop, in-person event, or participating in one of our online events or communication channels and believe someone is in physical danger, please ask your workshop host, instructor(s), or another community member to contact the appropriate emergency responders (police, crisis hotline, etc.). Prior to a Carpentries workshop or in-person event, event organisers should determine emergency contact numbers and local procedures.

If you believe someone violated the Code of Conduct during a Carpentries event or in a Carpentries online space, we ask that you report it. If you are not sure if the incident happened in a Carpentries governed space, we ask that you still report the incident. You are encouraged to submit your report by completing the Code of Conduct Incident Report Form. The form may be completed anonymously, or you may include your contact information.

Submit a Code of Conduct Incident Report

The Code of Conduct Committee takes all incident reports seriously and will review all reports according to our Enforcement Guidelines. A report guarantees review, but not necessarily that an action will be taken.

1.3.2 Alternative Contact Points

If you would prefer other ways to contact us, an email to coc@carpentries.org will be seen by all of the Code of Conduct committee. If you are uncomfortable reporting to the Code of Conduct committee, incidents can also be reported to Cam Macdonell, the designated ombudsman for The Carpentries, at confidential@carpentries.org.

The Carpentries Executive Director (Kari L. Jordan) can also be contacted by telephone at +1-407-476-6131 or email at kariljordan@carpentries.org.

1.3.3 Confidentiality

You are welcome to report an incident anonymously. If you would like someone to follow-up with you about the progress of your incident report however, you would need to provide contact information.

All reports will be kept confidential with details shared only with the Code of Conduct committee members. In the case that a CoC committee member is involved in a report, the member will be asked to recuse themselves from ongoing conversations, and they will not have access to reports after the enforcement decision has been made. Resolution action may also include removal of that member from the CoC committee.

In rare cases, the CoC committee may suspend a community member. In such cases, the Executive Council and Carpentries Core Team will be informed in order to prevent future harm to the community, and The Carpentries Core Team Immediate Response Checklist will be employed.

Some incidents happen in one-on-one interactions, and though details are anonymised, the reported person may be able to guess who made the report. If you have concerns about retaliation or your personal safety, please note those concerns in your report. You are still encouraged to report the incident so that we can support you while keeping our community members safe. In some cases, we can compile several anonymised reports into a pattern of behaviour, and take action on that pattern.

The Code of Conduct committee may determine that a public statement should be made about the incident and/or the action taken. If that is the case, the identities of all reporters and reportees will remain confidential unless those individuals instruct the CoC committee otherwise.

1.3.4 Report Data

Reports can be filed anonymously with minimal details. If you do not feel you can provide details, we would still like to be aware that an incident occurred. Our ability to act is impacted by the amount of information you can provide, however.

Information about an incident may be communicated to relevant Carpentries personnel in cases where a community member is suspended from engaging in The Carpentries community. In those cases, the Termed Suspension Checklist will be employed.

1.3.5 Following Up with Reporter(s)

Once a report is filed through the Code of Conduct Incident Report Form or other communication channels, the Code of Conduct committee will handle the review and follow up according to the procedures in the Enforcement Guidelines.

1.4 Code of Conduct Incident Response Procedure and Enforcement Guidelines

This document outlines the Incident Response Procedure and Enforcement Guidelines followed by The Carpentries Code of Conduct Committee (CoCc) once an incident report is received through the incident report form or other channels. These guidelines are used when the CoCc reviews and resolves incidents to ensure consistency, transparency, and fairness. The Carpentries has access to legal support through our fiscal sponsor, Community Initiatives, should there be a need.

The CoC committee will attempt to ensure your safety and help with any immediate needs, particularly at in-person events. The incident reporter(s) will receive an email from the Code of Conduct committee acknowledging receipt of an incident report within 24 hours of the form submission, and we aim for the same response time through other channels.

If there is an ongoing incident or a threat to physical safety, the committee's immediate priority will be to protect everyone involved. This means we may delay an "official" response until we believe that the situation has ended and that everyone is physically safe.

The committee will make all efforts to meet within two business days to review the incident and determine next steps. Once the committee has a complete account of the events, they will make a decision as to how to respond. Examples of possible incident responses are outlined in The Carpentries Enforcement Guidelines. The committee will respond within one week to the original reporter with either a resolution or an explanation of why the situation is not yet resolved.

Once the committee has determined its resolution, the original reporter will be contacted to let them know what action (if any) will be taken. The committee will take into account feedback from the reporter on the appropriateness of its response but may decide not to act on that feedback.

Finally, the Chair of the Code of Conduct Committee and Executive Council Liaison will write up a transparency report for incidents reported through the incident report form or other channels. Names of the reporter and any persons involved in the incident will not be included unless the resolution results in a termed suspension. The Executive Council may choose to make a public report of the incident while maintaining anonymity of those involved.

1.4.1 Terminology

- **Reporter**: Person reporting an incident.

- **Reportee**: Person being reported.

- **Incident Response Group (IRG)**: Group of people who work on a specific incident. There will be a minimum of three people from the CoC committee on each IRG.

- **Incident Response Lead (IRL)**: Person on the CoC committee heading the IRG. This person is appointed on a per-incident basis by the IRG.

1.4.2 Incident Response Procedure for The Carpentries Code of Conduct Committee

The following is a summary of the steps the Code of Conduct Committee takes when responding to an incident reported via the incident report form. More detailed information is also provided below the summary.

- If there is a need for an immediate response (physical danger, disruption in a workshop, ongoing online conversation) communicated through any channel, the CoCc can activate the Termed Suspension Checklist.

- For non-immediate responses submitted via the incident report form, an auto-generated email is sent to the Code of Conduct committee that a report has been received.

- An auto-response is sent to the reporter acknowledging that the incident report was received via the secure form.

- The first person on the Code of Conduct committee to see the report reviews it and provides an initial response to the reporter within 24 hours of the report being submitted or immediately, if safety is an issue.

- This response will include a timeline of what to expect as the Code of Conduct committee works to provide a resolution.

- The first person on the Code of Conduct committee to see the report completes an incident data collection form to share with the CoC Committee.

- A minimum of three members of the Code of Conduct Committee (the Incident Response Group (IRG)) meet to discuss the incident. The incident report document is shared with the IRG prior to this meeting.

- An Incident Response Lead (IRL) is appointed by the IRG.

- The IRG determines if the incident occurred in a Carpentries space and is therefore appropriate to review.

- The IRG reviews all of the information included in the incident report and determines whether more information is needed. If so, that information is requested from the reporter.

- The IRL contacts the reportee(s) to set up a meeting, if necessary. At least two IRG members should be present at the meeting with the reportee(s).

- An optional meeting with the reporter takes place to obtain more information. At least two members of the IRG should be present at the meeting.

- After further collection and review of information, if needed, the IRG determines a resolution. Possible *resolutions* are located in this documentation and include, but are not limited to, a private reprimand, public reprimand, and termed suspension.

- The IRL updates the reporter and solicits feedback on the resolution. Feedback may or may not be used to update the resolution.

- The IRL updates the reportee(s).

- The Core Team Liaison determines whether the Termed Suspension Checklist should be employed or other actions taken.

- Essential personnel are notified to implement any actions. Report details remain confidential.

- Decisions and outcomes are logged on the private Code of Conduct Committee GitHub repository.

- The Chair of the Code of Conduct Committee and Executive Council Liaison write up a transparency report.

1.4.3 Report Acknowledgement

When a report is received, any one of the Code of Conduct committee members will reply to the reporter to confirm receipt. This reply will be sent within 24 hours of the incident being reported, and the CoCc will strive to respond much more quickly than that.

For details about what the incident report should contain, see the Incident Reporting Guidelines. If a report does not contain enough information, the committee will attempt to obtain all relevant information to resolve the incident. The committee is empowered to act on the behalf of The Carpentries in contacting any individuals involved, unless this is not requested by the reporter. **Protecting the safety of the reporter is the priority in any incident report or review.** The committee is also empowered to act if any of its members become aware of ongoing behaviour that, taken as a whole over a long time period, is inappropriate.

1.4.4 Incident Response Assessment

Upon receiving a report of an incident, at least three members of the CoCc will form the Incident Response Group (IRG). The IRG will meet to:

- Assign an Incident Response Lead (IRL).

- Review report documentation to determine the content and context of the incident.

- Consult documentation of past incidents for patterns of behaviour (if available and applicable).

- Discuss appropriate resolutions to the incident.

- Determine the follow up actions for the reportee, reporter and anyone else named in the report who may have been impacted.

The deliberations of the incident response assessment will be stored in the Code of Conduct Committee's private GitHub repository.

The committee will aim to have a resolution agreed upon within one week of receipt of the incident response form. In the event that a resolution cannot be determined in that time, the IRL will respond to the reporter(s) with an update and projected timeline for resolution.

1.4.5 Following up with the Reportee

When following up with the reportee, the CoCc representatives will:

- Explain that an incident was reported that involves the reportee.

- In this explanation, the focus will be on the impact of their behaviour, not their intent.

- Reiterate the Code of Conduct and that their behaviour was deemed inappropriate.

- Provide concrete examples of how they can improve their behaviour.

- Give them the opportunity to state their view of the incident.

- Remind them of the consequences of their behaviour, or future consequences if the behaviour is repeated.

- Explain the possible resolutions that may be enforced should the CoCc determine there is a breach.

1.4.6 Resolutions

The committee must agree on a resolution by the majority of all members investigating the incident in question. If the committee cannot reach a majority decision and deadlocks for over one week, they will turn the matter over to the Executive Council for resolution.

What follows are examples of possible resolutions to an incident report. This list is not comprehensive, and The Carpentries Code of Conduct Committee reserves the right to take any action it deems necessary to resolve an incident. Possible resolutions to an incident include:

- Nothing, if the Code of Conduct committee determined there was no breach in the Code of Conduct.

- A private verbal reprimand from the committee to the individual(s) involved.

- This conversation may happen in person, over video conference call, or by phone.

- The IRL will write a short report of the conversation to be shared with the reportee for verification purposes and then shared with the CoCc and maintained on record in the private GitHub repository.

- A private emailed reprimand from the committee to the individual(s) involved.

- The IRL will deliver a reprimand to the individual(s) over email, cc'ing the Code of Conduct Committee.

- Requiring that the reportee avoid any interaction with, and physical proximity to, another person for the remainder of The Carpentries event.

- Refusal of alcoholic beverage purchases by the reportee at Carpentries events.

- Ending a talk that violates the Code of Conduct early.

- Not publishing the video or slides of a talk that violated the Code of Conduct.

- Not allowing a speaker who violated the Code of Conduct to give (further) talks at Carpentries workshops or events now or in the future.

- Requiring that the reportee not volunteer for future Carpentries events either indefinitely or for a certain time period determined by the CoCc.

- Requiring that the reportee refund any travel grant funding they received.

- Requiring that the reportee immediately leave an event and not return.

- Immediately ending any volunteer responsibilities and privileges the reportee holds.

- A public announcement of an incident, ideally in the same venue that the violation occurred (i.e. on the listserv for a listserv violation; GitHub for a GitHub violation, etc.).

- The CoCc may choose to publish this message elsewhere for posterity.

- An imposed suspension (i.e. asking someone to "take a week off" from a listserv or The Carpentries' GitHub repos).

- The IRL will communicate this suspension to the reportee. They will be asked to take this suspension voluntarily, but if they do not agree, then a temporary ban may be imposed to enforce this suspension.

- A permanent or temporary ban from some or all Carpentries spaces (listservs, GitHub, in-person events including workshops, etc).

- The CoC committee will maintain records of all such bans so that they may be reviewed in the future, extended to new Carpentries communication forums, or otherwise maintained.

- Assistance to the complainant with a report to other bodies, for example, institutional offices or appropriate law enforcement agencies.

Once a resolution is agreed upon, but before it is enacted, the IRL will contact the reporter and any other affected parties to explain the proposed resolution. The IRL will ask if this resolution is acceptable and must note feedback for the record. However, the CoC committee is not required to act on this feedback.

1.4.7 Appeal Process

Any individual(s) involved in a Code of Conduct report handled by CoC committee (CoCc) has the right to appeal a decision made by the committee. An appeal can be made directly to the CoCc (email: coc@carpentries.org) or to the ombudsperson (email: confidential@carpentries.org) by sending an email with subject line **Code of Conduct Incident Appeal**.

The email should include documentation related to the incident to support the appeal. The said documentation may include, but does not have to be limited to:

- Information from the reportee justifying reasoning for the appeal.

- Letters of support from community members.

- Statements from other individuals involved in the incident to support the appeal.

Appeals can be requested up to 30 days after a resolution has been determined.

1.4.8 Accountability

The CoC committee will submit a report to The Carpentries Executive Council and The Carpentries Executive Director in the event of an ongoing resolution, such as a termed suspension or ban.

The CoC committee will never publicly discuss the details of an incident; any public statements will be made by The Carpentries Executive Council.

At the end of every quarter, the Executive Council will publish an aggregated count of the incidents the Code of Conduct Committee reviewed, indicating how many reports it received, how many incidents it investigated independently, how many times it acted unilaterally, and, for each of these, under which part of the Code of Conduct the incident was classified.

1.4.9 Conflicts of Interest

In the event of any conflict of interest (a committee member, their family member, or someone with whom the committee member has a close academic or employment relationship is involved in a complaint), the committee member must immediately notify the other members and recuse themselves if necessary.

In the case that a CoCc member is involved in a report, the member will be asked to recuse themselves from ongoing conversations, and they will not have access to reports after the enforcement decision has been made. Resolution action may also include removal of that member from the Code of Conduct committee.

1.5 Code of Conduct Termed Suspension Guidelines

1.5.1 The Carpentries Termed Suspension Checklist

As a part of their enforcement options, The Carpentries Code of Conduct (CoC) committee can place a community member in Termed Suspension, where the community member is removed from all Carpentries engagement for a period of time.

The goal of a Termed Suspension is to 1) limit a person's participation in virtual and in-person Carpentries spaces for a set time to create a safe space for the community, and 2) to give time and opportunity for the individual to review their response to the incident and demonstrate immediate, ongoing, and demonstrable changes as evaluated by the CoC committee before possible reinstatement.

In most cases, a Termed Suspension will only be enacted after an incident has been reviewed by the CoC committee and a resolution is reached. However, in severe situations, in particular where there is active harassment, the CoC committee may enact an immediate short-term Termed Suspension while an incident is under review.

If there is a decision for a Termed Suspension, the following checklist is followed by the appropriate personnel to enact the Termed Suspension. In accordance with CoC confidentiality guidelines, only essential personnel will be involved in implementation of these actions.

1.5.2 Online Communication and Communities

Revoke access from the following communication channels and communities:

- Email lists on TopicBox
- Email lists on Google Groups including but not limited to:
    - Library Carpentry Governance Group
    - Library Carpentry Maintainer Onboarding
    - Code of Conduct Committee
    - Carpentries Mentoring Groups
- Twitter:
    - @datacarpentry
    - @swcarpentry
    - @libcarpentry
    - @thecarpentries
- Blogs
    - Data Carpentry
    - Software Carpentry
    - Library Carpentry
    - The Carpentries
- GitHub (including but not limited to carpentries, datacarpentry, swcarpentry, librarycarpentry, data-lessons, carpentrieslab)
- Gitter - Library Carpentry Lobby
- Slack

- Facebook

- LinkedIn Carpentries and LinkedIn Instructors

Additionally, the community member will not be allowed to attend community discussions.

1.5.3 Teaching Workshops

The suspended member will, for the duration of their suspension:

- Be asked not to sign up for workshops on the Instructor Spreadsheet.

- Not be able to participate as a helper at any workshops.

- Be removed from Eventbrite login access.

- Not be allowed to plan self-organised workshops.

- Not be allowed to request or host centrally coordinated workshops.

- Not be listed as an instructor on the "Instructors" webpage.

- Be removed from the instructors email list.

1.5.4 Organising Workshops

If the suspended member is a Regional Coordinator or serves in another role whereby they organise workshops for The Carpentries, for the duration of their suspension they will not have access to:

- LastPass

- AMY

- Regional Email

- Asana

- HelpScout

- Zoom

- Regional Coordinators Slack Channel

- Regional Coordinators Email List

1.5.5 Instructor Training

The suspended member will, for the duration of their suspension, be removed from the "Our Trainers" web page. Additionally, the suspended member will not be allowed to:

- Teach Instructor Training or lead teaching demonstration sessions. The Deputy Director of Instructor Training (DDIT) will check the teaching demo Etherpad to ensure that the suspended member is not signed up to lead teaching demonstrations and will find a replacement Trainer as needed.

- Join Trainer meetings. The DDIT will check the meeting Etherpad, and if the suspended member is signed up to attend, will email them if needed to confirm they will not be in attendance.

- Post pull requests (PRs), issues, or comments to the Instructor Training GitHub repository. Write or administrative access to repositories will be removed for the duration of the suspension.

- Post to the Trainers Slack channel or mailing lists. The suspended member will be removed from these lists for the duration of their suspension.

> • Participate in review of applications for open instructor training or Trainer training. Participate as a learner in instructor training.

1.5.6 Trainer Training

The suspended member will not be allowed to participate in Trainer Training (if they are currently enrolled) and will not be accepted for Trainer Training (if they apply during the suspension period). Additionally, they will not be allowed to shadow a current Carpentries Trainer. They may apply or reapply for future rounds of Trainer Training.

1.5.7 Member Organisation and Local Activities

The suspended member shall not be involved in officially branded Carpentries workshops or activities at the member or local site for the duration of the suspension. We expect the suspended member to assert that they will be able to carry out this suspension accordingly and to notify the CoC committee if this suspension will interfere with their expected employment duties.

If the suspension does affect employment duties or the suspended member is the key contact for a member site, the member will work with The Carpentries Executive Director to determine a course of action.

1.5.8 Lesson Development and Maintenance

The suspended member will not be allowed to post PRs, issues, or comments to any repository in the carpentries, including but not limited to datacarpentry, swcarpentry, library carpentry, data-lessons, and carpentrieslab organisations. Administrative or write privileges to repositories in these organisations will be removed for the duration of the suspension.

If the suspended member is a Maintainer, their name will be removed from the lessons page and they will not appear on the Maintainers page for the duration of their suspension.

1.5.9 Executive Council

If the suspended member is a member of the Executive Council, they will not participate in Executive Council responsibilities and will be removed from the Executive Council repositories and list of Executive Council members on the website for the duration of their suspension. The Executive Council will review the CoC incident to determine if a suspension will affect their long term position on the Executive Council.

1.5.10 Committees, Task Forces, and Other Interactions

Involvement in all committees, communities, and task forces (African Task Force, Carpentries en LatinoAmérica, etc.) will be suspended.

1.5.11 Other Interactions

- The suspended members ability to sign in to AMY to manage their own profile or other tasks will be revoked for the duration of their suspension.

1.6 Membership Agreement for the Code of Conduct (CoC) Committee

This document describes the responsibilities that the members of the Code of Conduct committee (CoCc) must agree to meet in order to fulfill the requirements of their roles on the committee.

> *The committee is what turns a code of conduct from a written document into meaningful action.* Valerie Aurora, FrameShift Consulting

1.6.1 Core Membership Agreement:

The main purpose of the CoCc is to: establish, maintain and uphold the Code of Conduct; educate members of the community of policies and behaviors that can help create a more inclusive and welcoming environment; and protect all members from harm in community spaces.

In order to uphold the CoC, the CoCc members will:

- support the objectives and mission of The Carpentries by abiding by its CoC and other policies and procedures.
- learn about the Code of Conduct and reporting guidelines, and as CoC advocates, bring awareness of it into any Community spaces that they are part of.
- understand and be comfortable to act on CoC related reports as per the enforcement guidelines put in place for the relevant community spaces.
- actively help develop and maintain existing and new documents to facilitate the work of the CoCc.
- avoid *conflicts of interest* [1] when processing CoC related reports. Failure to declare a conflict of interest may be considered a breach of the CoC.
- maintain the confidentiality of any reported incidents, the identity of persons involved and discussions that take place within the committee.
- not make any comments about any matters that they have been informed of as part of their duties as a CoCc member unless authorized to do so.
- hold themselves accountable for their responsibilities as trustees and understand that they are expected to follow through on their commitments.
- respect and promote diversity, equity, and inclusion in the community and act in the best interests of the Carpentries community impartially, putting aside any individual affiliations such as organizations or other Carpentries committees, and personal biases.

1.6.2 Further Roles and Responsibilities:

In addition to the core membership agreement, CoCc members will be required to:

- support the committee chair and the designated Core Team liaison in collective decision making. In order to do so, they will prepare fully for meetings, which will include reading reports and related documents carefully, querying anything they do not understand, thinking through issues before meetings and completing any tasks assigned to them.

- attend in the order of 75% of all *CoCc Business meetings* [2]. In these meetings, CoCc members will actively engage in discussion, voting and contributing in a constructive way, listening carefully, challenging sensitively and avoiding conflict.

- promptly respond to emails, or, if they realize they will be out of touch for a while, inform the committee chair.

- participate in any training that is organized to support the work of the committee, and to responsibly use any technical solutions that the CoCc is asked to use in order to maintain the security and privacy of personal information conveyed to the committee.

[1] Note on *Conflicts of Interest*:

A conflict of interest is a situation where a member of the CoCc could be perceived to not act in the interest of the Carpentries and the members of the community. Such situations can, for instance, occur when the members have close ties with one of the parties in a CoC incident (e.g. family relationships, close friendships, business ties, or even personal considerations). Such conflicts of interest may make it difficult to fulfill their duties impartially.

If any member of the committee happens to face a conflict of interest while handling a case, they are expected to:

- inform the chair of the CoCc and/or the full committee of the conflict of interest,

- not be involved in the case, and if required, temporarily leave their position as a CoCc member to avoid any bias.

[2] Note on the *CoCc Meetings*:

The committee conducts two types of meetings:

- **Business meetings**: these are meetings where we discuss the status of current documents, issues brought to us by the community and other CoC related matters.

- **Incident report related meetings**: in these meetings those that have volunteered to decide the course of action for a reported incident meet and discuss the situation. To decide on an issue, a minimum of 3 members must participate, thus not all members need to participate in every case.

Onboarding of new committee members:

New committee members will be included in committee discussions only after they have fulfilled the onboarding requirements specified by the CoCc and The Carpentries Executive Council.

Leaving the Committee:

- If a CoCc member wishes to leave the committee at any time, they will inform the Committee chair in advance (giving enough notice to hand-over their responsibility) in writing, stating their reasons for leaving.

- Breach of any part of the CoC by any CoCc member may result in a fair procedure being put in motion that may result in them being asked to resign from the CoCc. Should this happen they will be given the opportunity to be heard. In the event they are asked to resign from the committee, they will accept the majority decision of the committee in this matter and resign at the earliest opportunity.

1.6.3 Relevant information:

- CoC committee: https://carpentries.org/coc-ctte

- CoC Handbook Documentation

1.6.4 References:

- This document is largely based on "The Code of Good Governance, DIY Committee Guide, 2016" http://www.diycommitteeguide.org/download/example-code-of-conduct-volunteer-now

- How to Respond to Code of Conduct Reports, Valerie Aurora and Mary Gardiner, 2018

1.7 Code of Conduct Committee Governance

1.7.1 Membership

Any voting member of the Carpentries community, as defined in The Carpentries bylaws, may express their interest to volunteer to sit on the Code of Conduct Committee (CoCc) (the Committee). The Committee will onboard its members on a yearly basis through open calls and from available volunteers. The Executive Council (EC) will be notified about any new members. New members will undergo an application and onboarding process before they are officially seated on the Committee.

1.7.2 Onboarding and training

The onboarding process is determined by the Committee, and the EC will be notified about this process. New members are not immediately seated on the Committee, and thus not included in issue resolution, until after onboarding is completed.

The current onboarding process involves reading assignments in The Carpentries Code of Conduct documents and selected chapters from How to respond to Code of Conduct Reports (by Valerie Aurora, based on a short guide written by Mary Gardiner). Additionally, incident response training will be organised for the new and existing members to ensure they can confidently serve on the committee.

1.7.3 Administration

The Committee consists of a minimum of five members; approximately 10 is recommended. The Committee, in addition, has a liaison from the Carpentries Core Team and a liaison from the EC. The liaisons have the responsibility of informing the CoCc of anything that is relevant from their respective groups. They are also responsible for conveying issues and updates to their respective groups from the CoCc that are relevant for them while respecting the confidentiality requirements of the Committee.

The Committee has two chairs - a Governance Chair and an Incident Response Chair. These individuals are responsible for guiding the Committee's work.

1.7.4 Voting

The CoCc participates in two types of voting - votes about incidents and those not about incidents (e.g. business, policy, administrative matters).

Non-incident voting

For non-incident related matters, the Committee passes votes with a simple majority of the non-liaison members, with the Governance Chair breaking any ties. The Carpentries Core Team and Executive Council liaisons do not vote on motions, but are welcome to provide feedback and insight.Quorum in meetings is more than 50% of the non-liaison CoCc members.

Incident voting

For incident related matters, the liaisons to the CoCc will abstain from voting, unless their vote is needed to ensure that an incident or other need can be responded to in a timely manner according to the Incident Response Guidelines. The Incidence Response Lead of the Incident Response group will make this decision and indicate that a liaison vote will be necessary to resolve the incident.

Should the Executive Council liaison participate in a CoCc vote, and that resolution is appealed before the Executive Council, the liaison member will abstain from that appeal vote.

1.7.5 Terms of office

The expected term of office for each Committee member is one to three years, however, members may remain longer if continuity of the Committee is a concern. During their time on the Committee, members may temporarily withdraw from Committee work for up to 3 months provided they inform the Governance Chair in writing. If the members are unavailable for longer than 3 months, they will be asked to take a leave from the Committee. They may volunteer to rejoin when they are available again following the onboarding procedure described earlier in the document. This will allow us to maintain privacy for the reports that will be handled in their absence and create an opportunity for new members to join the Committee.

The Chairs are expected to sit for approximately one year. New Chairs are selected from among those who have been on the Committee for at least one year. One of the available members can volunteer to be elected to take on the role of a Chair.

1.7.6 Main duties of the position holders

All members of the CoCc must read, understand and abide by the membership agreement. In addition to the roles and responsibilities outlined in the membership agreement (e.g. engaging in GitHub issues and reviewing transparency reports), committee officers have the duties outlined below.

Chairs' roles

- The CoCc utilises two Chair positions, Governance Chair and Incident Response Chair, who share leadership and operational responsibilities. Both the Chairs will share the following responsibilities:
- Keep an overview of the ongoing work in the Committee
- Draft and review new policies with other members of the Committee
- Assign Committee related tasks to the Committee members fairly
- Help and support other members in using tools and approaches effective for the Committee's work
- Plan training scheduled for Committee members and other stakeholders of CoC enforcement on a yearly basis
- Communicate CoCc activities on via the Carpentries communications channels

Specific roles of the Governance Chair

- Schedule and chair business meetings quarterly
- Collect agenda points from Committee members for the business meetings
- Write, update, and maintain the business meeting minutes for the committee
- Co-edit and co-release transparency reports in collaboration with the EC liaison and Committee members
- Identify gaps in the current Code of Conduct, specifically governance, and raise them to the Committee

Specific roles of Incident Response Chair

- Monitor channels where the CoCc receives incident reports
- Organise incident response meetings for any new CoC incident report, and establish the Incident Response Group
- Support the Incident Response Group in documenting the incident -handling process, and in coordination with the Governance Chair, assist the Incident Response Group in communicating with the reporter and reportee
- Identify gaps in the current Code of Conduct, specifically in the incident reporting and incident-handling aspects, and raise them to the Committee

Core Team Liaison

- Represent the CoCc in any relevant communication with the Core Team

- Relay information to the Core Team members when required

- Intervene in any communication or potential incident in Carpentries online spaces that may lead to a CoC incident

- Notify and request a review from the Carpentries Executive Director regarding any public communication from the CoCc, when needed

EC Liaison

- Represent the CoCc in any relevant communication with the EC

- Relay information to the EC members when required

- Co-edit and co-release transparency reports with the Incident Response Chair

- Notify, and request a review if needed, from EC regarding any public communication from CoC committee

Incident Response Group's roles and responsibilities

- An Incident Response Group of a minimum of 3 people are convened for any reported incident

- An Incident Response Lead is selected in the Incident Response Group to ensure accountability of the report handling

- The Core Team liaison will create a collaborative document for each case and share with the Incident Response Group

- A note-taker will ensure that the notes are maintained for the Incident Response Group and shared with the Code of Conduct committee

- A time-keeper will notify the Incident Response Group of the various deadlines

Below are general resources of use to various segments of The Carpentries community.

ASSESSMENT

2.1 Learner Assessment

Assessment plays a key role in ensuring the success, longevity, and evolution of The Carpentries workshops. The primary goal of our assessment efforts is to evaluate the impact we are having teaching data skills throughout our global community. Our assessment efforts are meant to guide the development, implementation, and instruction of our workshops. We are committed to providing directed feedback to our community regarding our assessment targets and using information collected from assessment to improve how we teach data skills and build learning communities.

Our assessment tools will cover content knowledge, self-efficacy, and metacognitive strategies. Additionally, evaluation will occur at the end of each workshop and 6 months after a workshop with data releases published bi-annually, and an annual review of our impact will be published on our website. Source code, data, and additional information are also available in this GitHub repository.

We are committed to supporting our learners, accommodating their differences, and encouraging them to grow individually and become part of our community of practice. We also encourage them to understand, reflect upon, and monitor their own learning.

We assess our learners by measuring changes in their attitudes, motivation, and self-efficacy. Our pre-workshop survey includes questions about learners' attitudes about the content covered in their workshop, and their objectives (i.e. what they hope to learn).

We also ask questions to measure learners' mindset (growth vs. fixed). Our objective is to measure their confidence in their ability to learn, not necessarily execute specific tasks.

Additionally, we measure learners' perception of skill growth and whether or not they plan to recommend our workshops to colleagues.

Our pre- and post-workshop surveys can be previewed below.

2.1.1 Pre-workshop survey

2.1.2 Post-workshop survey

2.2 Programmatic Assessment

In May 2018, we began regularly publishing programmatic assessment reports. These reports provide overviews of our workshop and instructor activities. More information including published reports can be found on our website.

2.3 Assessment Network

2.3.1 About

The Assessment Network was established in October 2016 as a space for those working on assessment within the open source/research computing space to collaborate and share resources.

2.3.2 What We Do

The Assessment Network meets quarterly to discuss best-practices and projects around assessing outcomes in scientific computing. For past meeting information, check out the minutes in the Assessment Network repo.

2.3.3 Get Involved

To join the Assessment Network, email Kari Jordan at kariljordan@carpentries.org.

COMMUNICATIONS

3.1 TOOLS

3.1.1 Etherpads

General Usage

The Carpentries offers the use of our Etherpads as collaborative note taking tool during workshops, training events, and other Carpentries related events.

A new Etherpad can be created by appending a descriptive name to the url `https://pad.carpentries.org/`, such as `https://pad.carpentries.org/committeename`.

Pads are synchronised as you type, so that everyone viewing this page sees the same text. This allows everyone to collaborate seamlessly on documents.

Use of this service is restricted to members of The Carpentries community; this is not for general purpose use (for that, try Etherpad.wikimedia.org).

Users are expected to follow our code of conduct. All content is publicly available under the Creative Commons Attribution License.

A list of all commonly used Etherpads can be found on our pad of pads. This list is manually created and typically only includes pads of interest to the general community. It will not include pads specific to single events or groups.

Troubleshooting

While Etherpads are generally reliable, you may find an Etherpad not loading as expected. In this case, you can try appending `/export/html` to an Etherpad's url. For example, if `https://pad.carpentries.org/committeename` is not loading, it may be possible to recover its text by going to `https://pad.carpentries.org/committeename/export/html`. This text content can then be copied and pasted to a new Etherpad. Note this will not preserve the Etherpad's history. The chat will often still be active in the broken Etherpad, so it is recommended that you link to the new Etherpad in the broken Etherpad's chat.

If other Etherpad issues arise, please contact us at team@carpentries.org and a team member will help you troubleshoot.

3.1.2 Newsletter

Our newsletter, *Carpentry Clippings*, appears every two weeks.

Newsletter Content

- *Highlights from The Carpentries Community Calendar*: Includes items from The Carpentries calendar, such as upcoming events.
- *Community News*: A place to report on all kinds of things - events, workshop or conference reports, awards, lesson releases, new reports ...
- *Committee and Task Force Activity*: Includes announcements directly from task force and committee chairs and summaries from meeting notes.
- *What you may have missed on the blog and mailing lists*: Includes highlights of key conversations on the *Discuss* email list, other lists or things on the blog that need further highlighting.
- *Tweet of the Week*: One noteworthy tweet is chosen and a screen captured image is included.
- *Optional: Papers & manuscripts for and from the community*: Includes announcements that were made on the *Discuss* email list, Twitter, or other media.
- *Optional: Offcuts*: Includes other unusual news that may be of interest.
- *Optional: Joinery*: Includes other ways to get involved in The Carpentries community and ways The Carpentries community is involved in other conferences, etc.
- *Optional: Toolshed (Posts from our Past)*: A place to highlight handy posts from the blog or discussion list archives that might still be relevant to postings to lists and other issues.
- *Community Job postings*: Includes information that has come through on the *Discuss* email list, Twitter, and other media.
- *Other places to connect*: This section is standardised for all newsletter issues.

Submitting Newsletter Content

Carpentries Core Team manage newsletter content through this private Asana project. Submissions from community members are welcome by emailing newsletter@carpentries.org.

Publishing the Newsletter

This information is intended for Core Team or community members who have taken on the responsibility of publishing the newsletter.

Each newsletter is a campaign on MailChimp.

To create a new newsletter, log in to MailChimp and click on *Campaigns*. Make a copy of the latest newsletter and rename the copy to reflect the current date (e.g. `Carpentry Clippings, 27 March, 2018.`).

Check the *To* field is correctly set as going to *x* number of newsletter subscribers.

Check the *From* field is correctly set as coming from *The Carpentries*.

Make sure the date in the *Subject* line is changed to the new newsletter date.

Select *Edit design* to add newsletter content. When the newsletter opens, click the pencil icon in the newsletter on the left to open the newsletter for editing. (Editing is all done within the right pane; the left pane renders the public view as you edit.)

Remove the old content and paste in the new, leaving the headings so that the formatting for them is not disturbed.

Be sure to update the date at the top of the email as well.

Highlight each paragraph and click *Clear styles* if anything you are copying in appears in bold when you do not want it to.

Add images by clicking on the *Image* icon in the edit window. All images must be no more than 550px wide to render properly. These can be resized within MailChimp by working with the image styling and location.

Go to *Preview and Test* to preview the newsletter before sending it out. This includes a desktop and mobile version preview. Send a test email to yourself to preview it in your email client.

Save and Close and schedule the newsletter to be sent. This should be set for Wednesday at 9 am Eastern time. **Be sure it is set for *AM*, not *PM*.** A confirmation message saying **"Rock On! Your campaign has been scheduled"** will be displayed, and a link to a published view of the newsletter will be displayed. Paste this link into the Core Team channel so Core Team have a chance to review the newsletter before it goes out.

The newsletter will now be locked. If any changes need to be made after the newsletter has been scheduled, you will need to *pause* the campaign, make changes, and restart the campaign.

After a campaign has been paused and then restarted, it is important to double check that the date and time for sending out the newsletter is still correctly set as this will often default to the current time, rather than the original scheduled time.

As soon as the newsletter has been sent out, move it to the **Carpentry Clippings** folder. This adds it to the searchable online archive findable through our website. To move it, check the box next to the newsletter and select the Carpentry Clippings folder when the `Move to` option appears.

Tips and Tricks

The Mailchimp editor is not entirely user-friendly. Formatting changes may appear in the edit window but not in the preview document. The easiest workaround for this is to:

1. Copy and paste text in the Mailchimp editor.

2. Select all text in the Mailchimp editor and click *Clear Styles*.

3. Select all text and set font to Arial 12 point.

4. Select the title ("Carpentries Clippings, ") and set font to 18 pt bold.

5. Select each subheading one by one (*Highlights from The Carpentries Community Calendar*, *Community News*, etc.) and set font to 16 pt bold.

6. Select each item heading one by one and set font to 14 point regular.

Mailchimp customer service chat is hard to find on their website but quite responsive to requests for help.

3.1.3 Slack and Mailing Lists

There are many ways in which you can join our conversations:

- The Discuss email list, which community members are welcome to join and post to.

- Our other email lists are a combination of regional and topic-specific lists.

- Our Slack channel, which community members are welcome to join. Click on "Channels" in the left panel to view all existing channels.

Below are descriptions of selected channels found on TopicBox (as discussed in this blog post):

- **Instructor Trainers** - A list/group for topics related to the community of Trainers that prepare new instructors in teaching Data, Software and Library Carpentries lessons.

- **Discuss** - A list/group for general discussion of Carpentry teaching practices and community activities and concerns.

- **Discussion Hosts** - The community of instructors that hosts community discussion sessions.

- **Instructors** - An admininistrator approved list/group where opportunities for badged instructors to teach are announced.

- **Maintainers** - A list/group for topics related to the maintenance of Carpentry lessons.

local-* - A set of city / region-specific lists/groups discussing The Carpentries in our local and regional communities

Region-specific lists/groups

- **Australia and New Zealand**

- **Africa**

- **Germany**

- **Latino America**

- **Nordic**

- **United Kingdom**

City-specific lists/groups

- **Bay Area**

- **Colorado**

- **Davis, California**

- **Heidelberg**

- **Seattle**

- **Southwestern United States**

- **Southeastern United States**

- **Vancouver, Canada**

- **Washington, DC**

3.1.4 Zoom Rooms

The Carpentries offers three Zoom rooms for public community events. Zoom rooms are available for The Carpentries events such as instructor trainings, discussion sessions, teaching demos, and committee meetings. The following information assumes you are using the most recent version of the Zoom client.

General Room Usage and Links

Rooms are generally used as follows. However, any room can be used for other purposes if it is available.

- Room 1: Instructor Training
- Room 2: Community events (teaching demos, discussion sessions, committee meetings, etc.)
- Room 3: Other events as needed

Events are scheduled for each room by The Carpentries Core Team. Each event will have a URL in the format `https://carpentries.zoom.us/my/**room_name**`.

For Instructor Training events, this link will be shared with the Trainers and trainees for that event. For Community Discussion sessions and Teaching Demos, the link will be on the relevant Etherpad and in that event's description on our Community Calendar. As required by Zoom, all rooms have a password. The password is available to all participants via the event's etherpad, the calendar listing, or shared directly by the event host or organizer.

Information for event hosts

Please read below if you are teaching an Instructor Training workshop or hosting a Teaching Demo or Community Discussion.

Gaining Host Access

If you are teaching an Instructor Training workshop, about a week before the event, you will receive an email with host credentials and other logistical information.

If you are hosting a Community Discussion or Teaching Demo, you should have signed up to do so via Calendly. Two days before the event, you will receive an automated email from Calendly that includes the host key for the event.

Enter the room and select "Participants."

Near the bottom of the Participants view is a button to Claim Host Access. This will open up a pop up window where you will be able to enter in the Host Key you were given. You will now have host access. It is not possible to claim host access in this way if a logged on host is already present. The logged on host can transfer host access to another participant.

Claim Host

Creating a Waiting Room

Once you have entered and claimed host access, it is recommended that you create a waiting room. This enables you to explicitly let people in, rather than allowing anyone to simply come in. It helps prevent "zoombombing," or entry of unwelcome guests.

Click on "Security" in the bottom panel. At this point, you can lock the room entirely. This is not recommended, as someone who accidentally gets bumped off the call or other latecomers will not be able to re-join. Select "Enable Waiting Room."
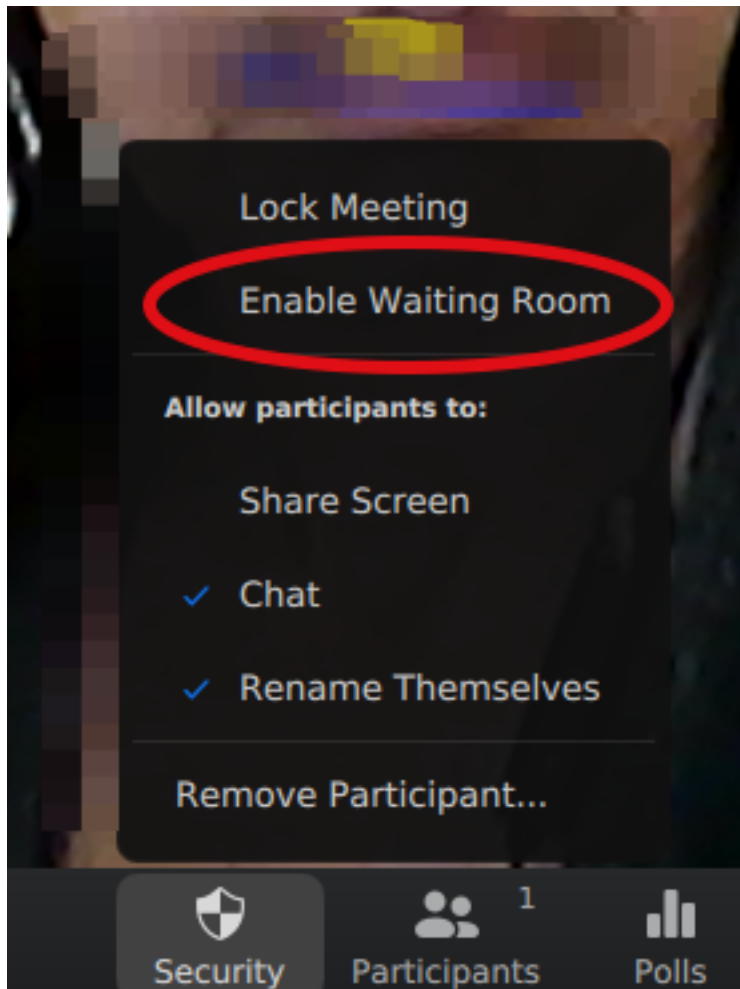
 Enable waiting room

This will give you (as host) a notification every time someone tries to enter the room. You can admit them individually or as a group.
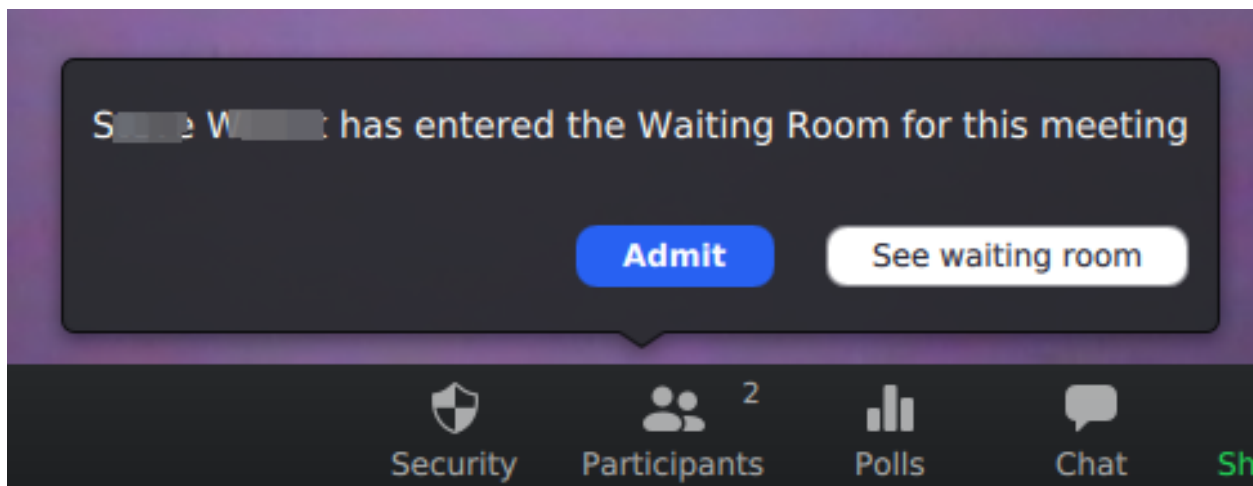
 Admit people from waiting room

You can also message the waiting room (as a whole; not individuals) before admitting them. If a name does not look familiar or valid to you, you may be worried about letting them in. In this case, you can consider messaging them to ask them to verify themselves another way, like asking them to leave a message in the Etherpad chat.

Message people in waiting room
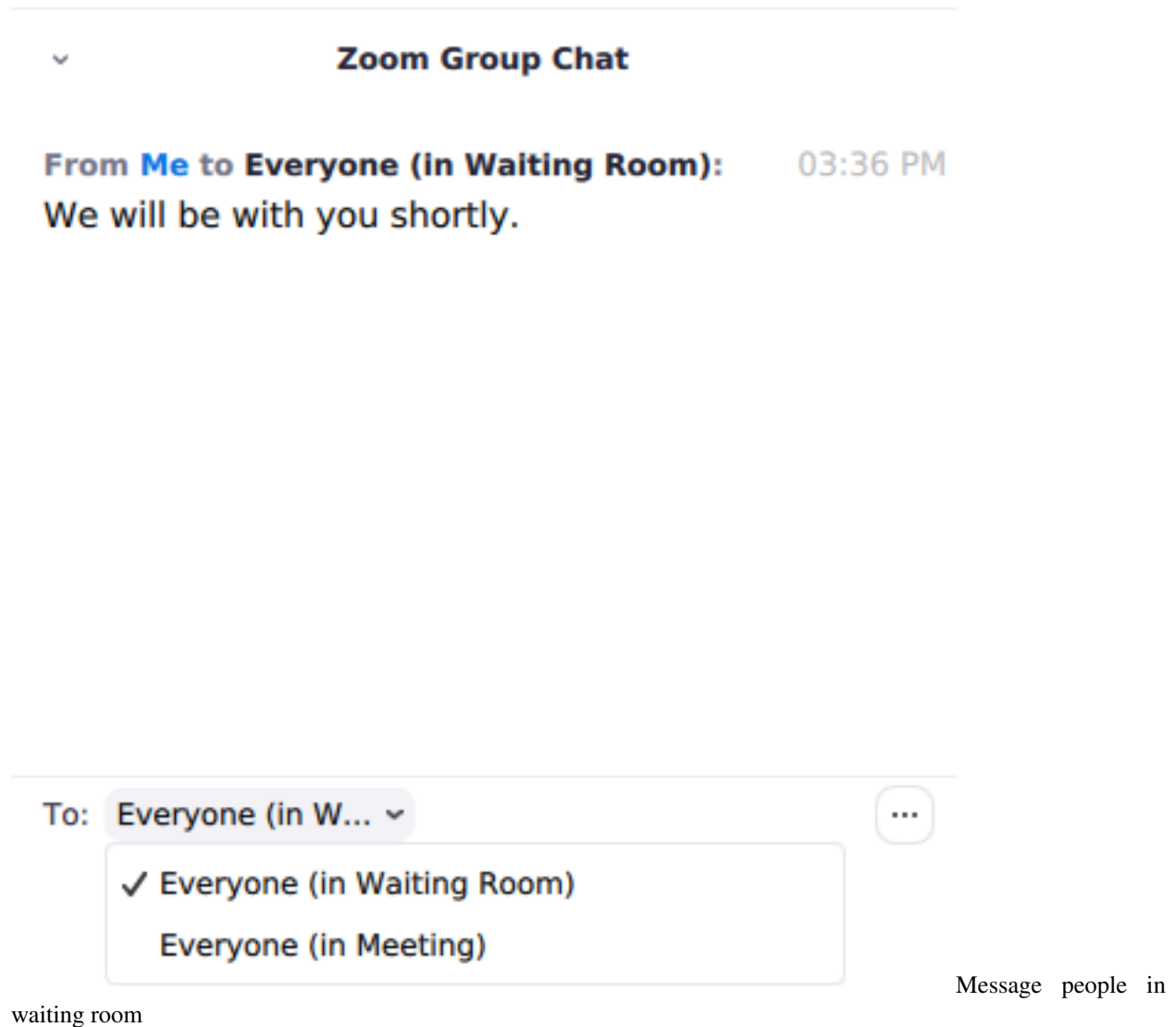
Transferring host privileges or assigning a co-host

A meeting can have only one Host, but can also have a co-host.

A host may transfer host privileges or assign a co-host. In making someone else a host, the new host will have full host privileges. The original host loses all host priviliges, but can reclaim host access by clicking on "Reclaim Host." The co-host has most, but not all, of the privileges of the host. Click on "More" next to the participant's name to get the option transfer host privileges or to make them a co-host.

Having a co-host is useful in managing participants entering the room and controlling background noise by muting people as needed.

Make another participant the host

A co-host can:

- Admit people from the waiting room
- Mute/unmute people

A co-host can not:

- Create breakout rooms

- Move independently between breakout rooms

Turning participants' audio and video on or off

As host, you will be able to mute and unmute participants. This can either be done selectively or for the room as a whole. By default, participants can unmute themselves. The host can also choose not to allow participants to unmute themselves.

As a host, you will be able to turn off video for participants. The participant will not be able to turn their video back on themselves. The host must request that the participant turn video back on.

A participant can choose to keep their own video off. The host can not turn a participant's video on directly, but can request them to turn their video on.

Creating Breakout Rooms

Breakout rooms can be created automatically or manually. Only the host (not the co-host) has the ability to create "Breakout rooms". The button for this is on the lower left. Breakout rooms can be created manually or automatically.

- Manually create rooms: You can manually assign people to the number of rooms of your choice. This is useful if you know you want to have certain people together, or if you want to have rooms of varying sizes. It is recommended that you add in 1-2 empty rooms to make it easier to change rooms during the session. Zoom will not allow you to create more rooms during the breakout session.

- Automatically create rooms: Zoom will automatically divide your participants in a given number of rooms. For example, if you have 25 participants and choose 4 rooms, Zoom will randomly assign them to 4 rooms of 6-7 people each.

- The host can manually end breakout rooms by clicking on the button in the breakout rooms window. All breakout rooms will then get a 60-second warning and automatically be returned to the main room. Closing breakouts can not be scheduled in advance. Participants can return to the main room early if they choose.

- The host can move between breakout rooms and can send messages to all rooms simultaneously. The co-host can not move between rooms; they must be moved by the host.

- People in the breakout rooms will see a button to ask the host for help. The host will get a notification to join that room. Participants can not communicate across breakout rooms.

Yes/no questions and other real-time feedback

The host can ask yes/no questions for participants to respond to. Participants can also offer feedback to note things are moving too fast or too slow; raise their hand; or ask for a break. These responses show up in the participants list and are visible to everyone.

The host can lower someone's hand. For other responses, the host can clear all responses, but can not clear individual responses.
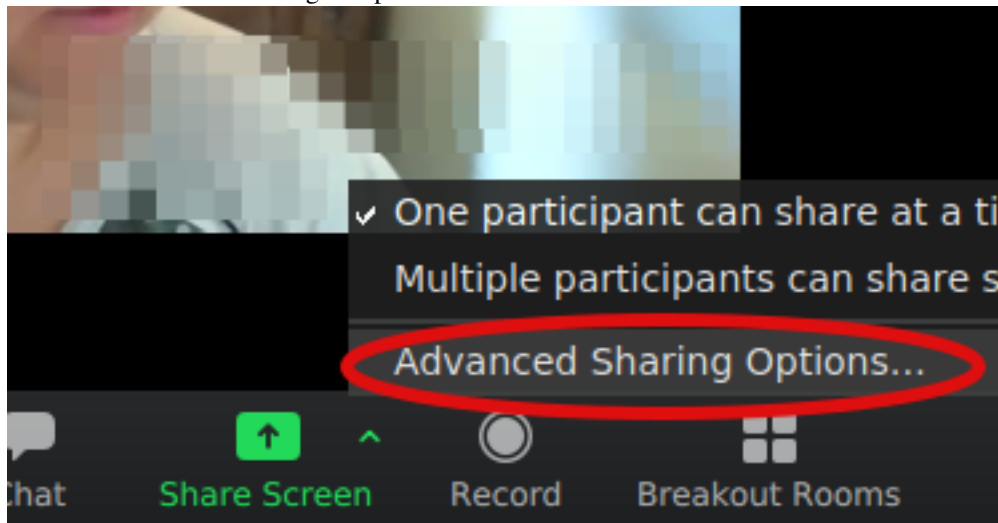
Screen sharing

The host can decide whether any participant can share their screen, or limit this access to host only. Screen sharing access can not be granted or denied to specific participants only. Screen sharing can be granted one of two ways:
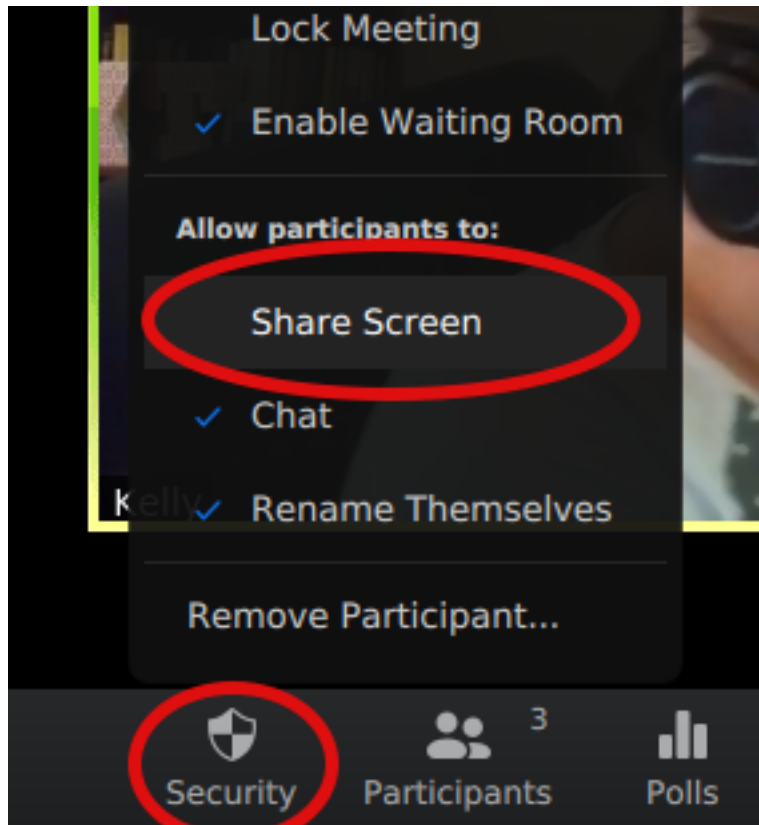
The "Security" button on the bottom panel. Host Security Settings

The "Advanced Sharing Options" on the "Share Screen" button on the bottom panel.

Advanced Sharing Options

The person screen sharing will have options to share their whole desktop or only a given window. Multiple windows can not be selected for screen sharing.

If you would like to include your computer's audio feed when screensharing, please be sure to select the "Share Computer Sound" setting. This can be useful, for example, when sharing a video clip.

Share audio with screenshare
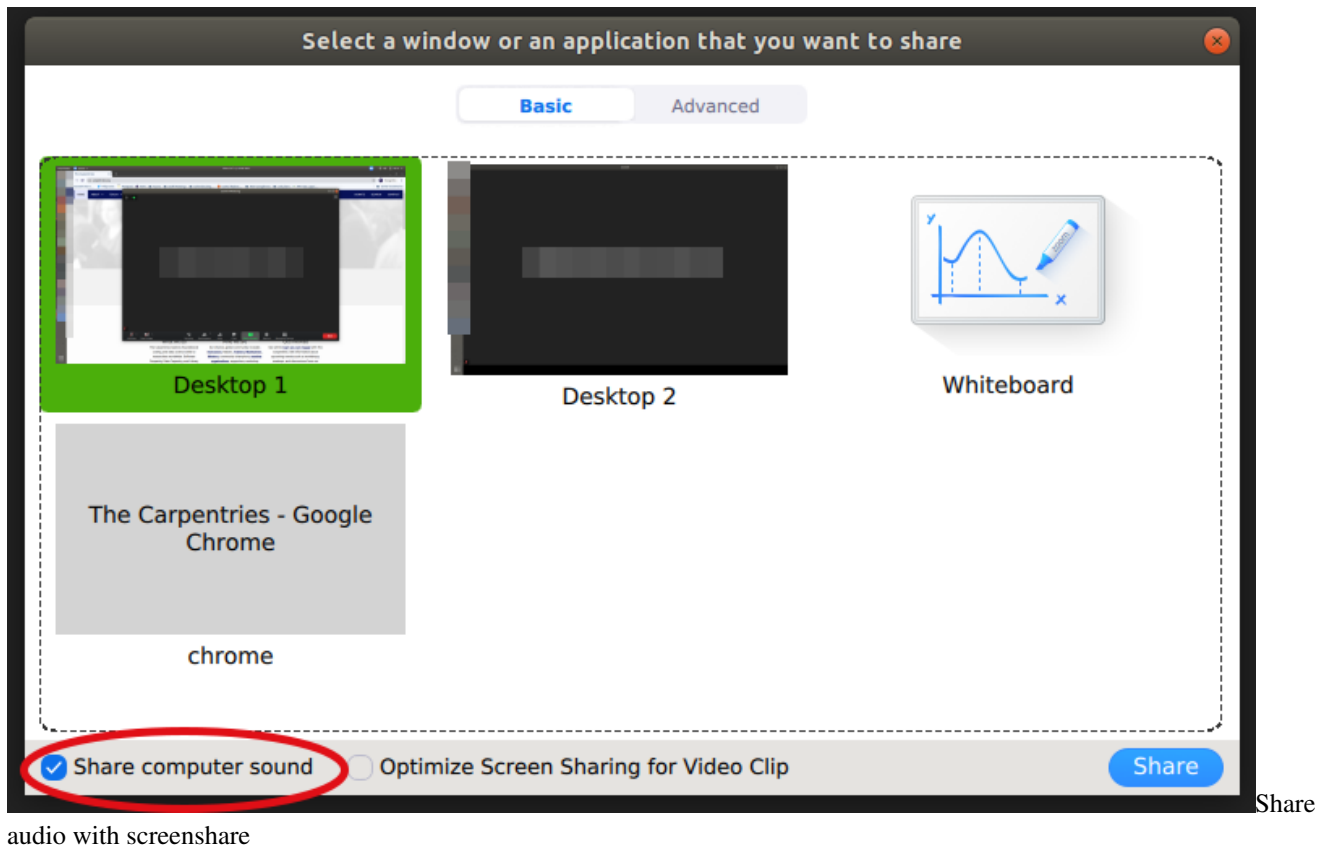
Zoom chat

Zoom chat allows participants to send messages to the whole group or to a select individual. Group chats are not an option.

A participant can only see the chat since they most recently joined. If a participant leaves and re-enters, they will not see old chats. Also, Zoom chat is not consistently preserved across breakout rooms. The original main room chat may not be available when participants return from a breakout room.

Emojis are not recommended as they are not consistently available and do not render consistently across platforms.

Ending a call

When the room host clicks "End Meeting" a dialogue box appears with three options: "Cancel", "Leave Meeting" and "End Meeting for All". Be careful not to end the meeting if you are leaving the room while the event is still active.

If the host leaves while participants are still in the room, the host will be asked to designate a new host before they can leave.

General Tips

- "Gallery view" in the upper right toggles the display to show more participants videos.

- If a trainee is using Linux and gets the error message "Can not start share, wayland has not been supported yet, please use x11 instead", have them log out of Zoom and log back in. On the login screen there is a gear with a dropdown menu there, choose the option with x11.

For Administrators: Scheduling Zoom Rooms

Zoom Room 1 is scheduled by The Carpentries Core Team for online instructor training events. Zoom Room 2 is for Community Discussions and Instructor Training Demos. These events are scheduled by Discussion Hosts and Trainers using Calendly. Attendees can sign up to attend these events on the relevant Etherpads.

- Community Discussions:
    - Calendly for Hosts
    - Etherpad for Attendees
- Teaching Demos:
    - Calendly for Hosts
    - Etherpad for Attendees

If you would like to schedule a Zoom Room for another event, please contact us at team@carpentries.org.

Viewing Zoom Room Availability

Zoom room calendar views are public - anyone can view whether a room is available. Only Carpentries Core Team can actually book a room. If a room is available, please contact a Core Team member or team@carpentries.org if you would like to make a room reservation.

Room availability can be viewed below.

- Red: Room 1
- Orange: Room 2
- Green: Room 3

Adding an Event to the Community Calendar

Note while anyone can view room availability, only Carpentries Core Team members may book events or reserve a Zoom room.

To add an event to the Community Calendar and book a Zoom Room for it:

- Give the event a meaningful title ("Demos" is not as good as "Instructor Training Teaching Demos")

- List the time zone in UTC - not your local time zone. Events set in local time zones do not always correctly adjust for daylight savings time.

- Add a description, including a link to the relevant Etherpad or other document.
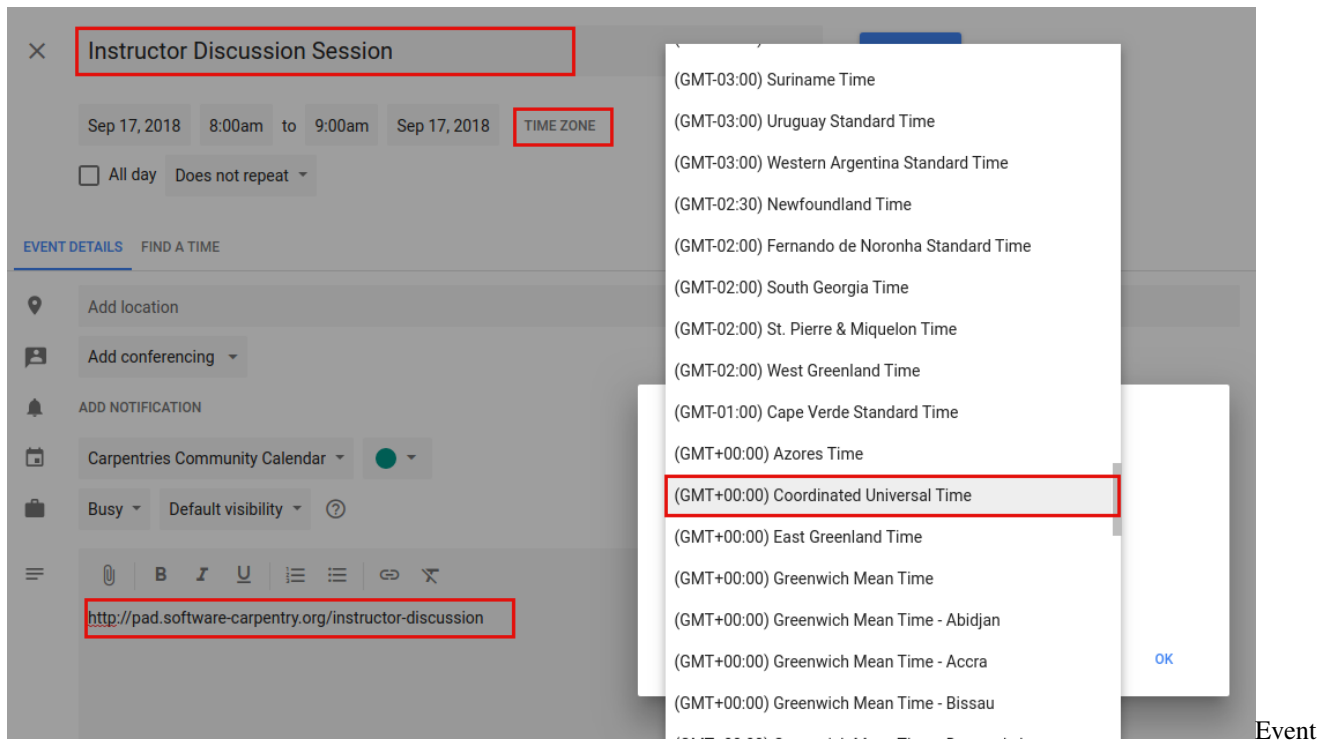
Event Setup

- Select a room.
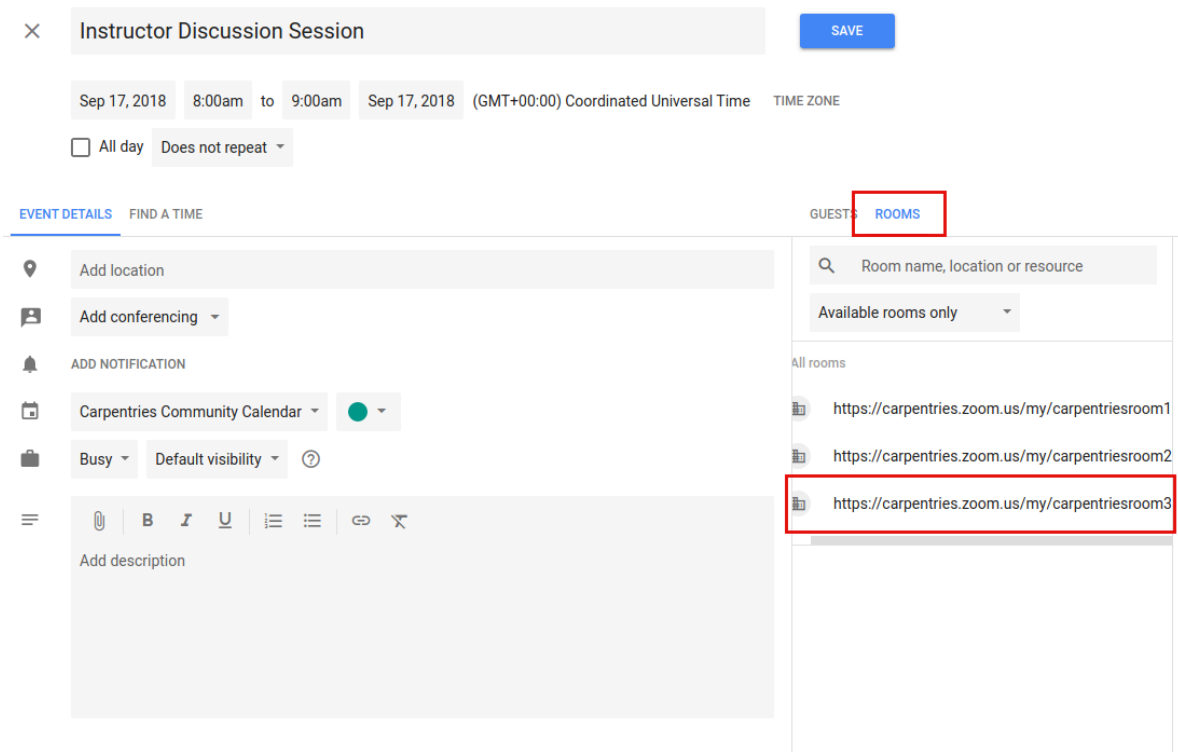
View Rooms

  - Each available room will be listed. If you are scheduling a recurring event, any future conflict will prevent a given room from being listed as available.

- Multiple rooms can be selected for a single event.

- Click on a room to select it. The Zoom link will now appear in the location.

Reserved
Room

- If you select a room and immediately remove it, it may not appear as available again until you close out the edit event screen and enter it again.

- Save the event.

- The event will now show up on The Carpentries Community Calendar and the Zoom Rooms Calendar.

Be sure to complete the above steps in order (i.e., do not select a room before setting the exact date and time).

Creating a Zoom Room Option on Google Calendars

This will only need to be done once for each new room. This is already done for Zoom Rooms 1, 2, and 3. If additional Zoom rooms are added, they will need to be set up here. This must be done by someone with admin access to The Carpentries' Google console.

Go to the Google admin console. Click on "Buildings and Resources" and then click "Edit Resources" under "Resource Management."

You will see all existing buildings and rooms listed. This feature is meant for physical buildings; we are using it for virtual videoconferencing rooms. One "building" is set up, called "Zoom Rooms" that contains three resources – Zoom Room 1, Zoom Room 2, and Zoom Room 3.

To add a new "room" in this "building" - click on the yellow plus sign next to "Resources." Fill out the following information:

- Category: (no category set)

- Type: *leave blank*

- Building: Undefined

- Floor: Undefined

- Floor section: *leave blank*

- Resource name: Link to the Zoom Room

- Capacity: 100 (standard for all Zoom rooms)

- Features: *leave blank*

- User visible description: Note what this room is used for.

When done, click "ADD RESOURCE" and this new room should be on your list of rooms. This room will now be available for scheduling events as described above.

3.2 RESOURCES

3.2.1 The Carpentries Style Guide

This guide aims to provide a standard reference point when questions arise about style for The Carpentries - how we would prefer people to reference us, how best to render dates and times for a global community, when to use what capitalisation, and other questions of style.

We will adhere to a similar style on our website and in other material we make widely available such as blog posts. Lesson contributors and maintainers should aspire to adhere to this style, but may prioritise making material available over style considerations. To ensure that the style guide is as widely applicable as possible, UK English spellings and usage will be used in favour of American spelling.

The guide is a work in progress and additions are welcome. This version, compiled by Belinda Weaver, is a first draft.

Please note, as outlined in section C: The Carpentries, while sounding plural, is a singular entity. Therefore, when referring to The Carpentries, verbs should also be singular, *e.g.,* 'The Carpentries is . . . '. The full and correct title for the merged organisation is The Carpentries. However, terminology such as 'A Carpentries workshop . . . ' is acceptable.

A

abbreviations and acronyms

Generally use all capitals for initialisms, *e.g.,* NSF, CEO, BIDS. When writing about an organisation or event within text, provide the acronym in brackets on first use, and use the acronym to refer to the organisation or event from then on. For example, 'She was the chair of the National Science Foundation (NSF) . . . The NSF . . . '

If an organisation is mentioned only once within a piece of text, say, in a blog post, it is not necessary to provide its acronym. Do not use acronyms without spelling these out first as country-specific acronym may be unfamiliar to members of our community.

accents

Use on non-English words when known. People's names, in whatever language, should also be given appropriate accents where known, *e.g.,* 'Arsène Lupin was a jewel thief who never got to Bogotá or Angoulême.'

adverbs

Hyphens are not needed after adverbs ending in *-ly*, *e.g.* a hotly argued topic, a constantly evolving career, a recently published program, etc. Hyphens are needed with short and common adverbs, *e.g.,* ever-faithful follower, ill-written script, much-quoted speech.

alphabetisation

The lesson programs within The Carpentries, when listed together, should be listed in alphabetical order: Data Carpentry, Library Carpentry, and Software Carpentry

ampersand

In text and blog posts, use the ampersand in organisations' names when the organisation does so, *e.g.,* P&O, AT&T.

apostrophes

Indicates either a missing letter or letters (can't, we'd, hadn't) or a possessive (Siobhan's script). The correct use of the apostrophe is important, as a misplacement or omission can alter a sentence's meaning. Apostrophes are not needed in dates. Preferred form is 1990s, not 1990's; the 70s, not the 70's.

B

bullet points

Should ideally include a full stop after each one if it is not just a list of terms, i.e:

- This is the first bullet point that covers a range of ideas.
- This is the second that also ranges quite widely.
- And this is the third and these are just examples.

But

- Instructors
- Trainers
- Mentors

C

capital letters and capitalisation

titles Render these with initial capitals, *e.g.,* President Abraham Lincoln, Facebook's CEO, Pope John Paul II, the Secretary-General Ban-Ki Moon.

government departments initial capitals, *e.g.,* Department of Industry, Department of Health. Use lower case when not referring to a department by its proper name, *e.g.,* 'Senator Carr first led the Department of Industry. The department is now led by . . . '

government agencies, public bodies, quangos Render these with initial capitals, *e.g.,* District Attorney's Office, Human Rights Commission, the University of Florida. Use lower case when not referring to an organisation by its proper name, *e.g.,* 'She worked for the National Society of Coders. The society was founded . . . '

lesson titles and episode names Lesson titles and episodes within lessons should be rendered in Title case, i.e. all major words capitalised, *e.g.,* Introduction to Data; Project Organisation and Management for Genomics.

names of institutions Render these with initial capitals, *e.g.,* Gordon and Betty Moore Foundation, Smithsonian Institute, the United Nations, the European Union.

roles Roles within The Carpentries are always capitalised. Therefore we use Instructor, Supportive Instructor, Trainer, Maintainer, Mentor, and Curriculum Advisor. Helper and host are not capitalised as these are not official roles.

Carpentries

The Carpentries, while sounding plural, is a singular entity. Therefore, when referring to The Carpentries, verbs should also be singular, *e.g.,* 'The Carpentries is . . . '. The full and correct title for the merged organisation is The Carpentries. However, terminology such as 'A Carpentries workshop . . . ' is acceptable.

commas

Use commas to separate clauses in long sentences. 'If the judges truly reflected on their decisions regarding the non-award of prizes in 2010, they would not find it hard to see why people objected to their choices.'

Commas can be used definitively. For example, in this sentence: 'The developer, Sue Miller, is a keen coder,' the use of commas indicates that there is only one developer.

Where no such definition is needed, *e.g.,* 'PyCon speaker Mary Clough won the award,' no commas are needed since there are many speakers at PyCon, not just one.

A comma is also crucial to avoid ambiguity in examples such as this: 'The report criticises the judges who have been accused of favouritism.' A comma after 'judges' would have made it clear that all judges have been accused of favouritism. Without the comma, the sentence implies that only some judges have been criticised.

See also Oxford comma.

company names

Company names are always singular, *e.g.,* 'Twitter is . . . ', 'Amazon Web Services is . . . '

D

dates

Our style is 21 July, 2011 (day month year).

Other renderings: 'In the 21st century' but '21st-century science'.

Use figures for decades, *e.g.,* the 1990s, the radical 60s, etc. Do not add an apostrophe to decades, i.e. 1990s, not 1990's; the 70s, not the 70's.

See also times. *See also* seasons.

diacritical marks

If possible, use the correct diacritical marks on people's names in any language, *e.g.,* Sven-Göran Eriksson (Swedish), Béla Bartók (Hungarian), Phng Nguyn (Vietnamese).

E

e.g.

include full stops, and always follow with a comma, whether you are using the abbreviated form, *e.g.,* or the written-out version, for example.

etc.

Include final full stop.

F

figures

Always spell out in writing the numbers from one to nine. Use numerals for numbers 10 to 999,999, and thereafter go back to writing numbers out in full, *e.g.,* one million readers, eight billion people, but when the first number is above nine, you can go back to figures for that first part, *e.g.,* 20 million lines. Spell out ordinals from the first to the ninth, e.g., third, fifth, and thereafter use 10th, 31st, etc.

fractions

Render as two-thirds, three-quarters, etc., but two and a half needs no hyphens. *See also* figures.

full-stops

The first character after a full-stop should be capitalised and have one space before it, rather than two.

G

given name

This term to be used in preference to the terms 'first name', 'forename', and 'Christian name', which might offend non-Christians. Use given name the first time someone is mentioned, but not subsequently, *e.g.,* 'Mary Brown came late to programming . . . Brown later went on to develop several well-known programs.'

Avoid using initials rather than a name, unless that is how a person is best known, *e.g.,* J. K. Galbraith.

H

honourifics and titles

Honourifics which denote occupations, *e.g.,* Doctor, Professor, can initially be used within text or in blog posts. Drop honourifics and first names after the first mention and use surname only from then on, *e.g.,* 'Professor Gillian Kramer teaches . . . Kramer has spent a lot of time. . . '

Honourifics such as FRCS should not include full stops.

I

i.e.

include full stops, does not precede a comma in British English

inclusivity

Use inclusive language. This includes word choice that recognises the complexity of the subject matter and respects the diversity of all members of the community. Use globally accessible references, either with a more common name or a more verbose description.

Things to avoid: diminishing or dismissive language (just, simply, obviously, etc), local colloquialisms

initials

Separate initials in names from each other with spaces and full stops, *e.g.,* J. K. Galbraith.

-isation

not –ization, *e.g.,* organisation, characterisation.

-ise

not -ize at end of word, *e.g.*, characterise, sympathise, organise. One exception is capsize.

italics

Words and phrases in languages other than English, and scientific names, *e.g.*, *Macropus rufus*, *Bufo marinus*.

N

names

Do not use the terms Christian name, first name, or forename. Instead use given name or personal name. We will defer to people's chosen spelling, choice of given name, punctuation, capitalisation, and name order (when known or obtainable). *See also* non-English names.

non-english names

The French (or French origin) de, d', des, la, les or le and the Dutch van are normally lowercase when the name is fully written out, *e.g.,* Marianne d'Alpuget, Erik van der Walden, but capitalised when written without forenames, *e.g.,* D'Alpuget, Van der Walden.

non-English words and phrases

Italicise these and provide accents where applicable, *e.g., bête noire*. In the case of frequently used non-English terms in accepted English usage, *e.g.,* avant garde, vis a vis, vice versa, you do not need to italicise.

numbers

Always spell out in writing the numbers from one to nine. Use numerals for numbers 10 to 999,999, and thereafter go back to writing numbers out in full, *e.g.,* one million readers, eight billion people, but when the first number is above nine, you can go back to figures for that first part, *e.g.,* 20 million lines. Spell out ordinals from the first to the ninth, *e.g.,* third, fifth, and thereafter use 10th, 31st, etc.

When starting a sentence with any number, the number should be written out as words, *e.g.,* 'Twenty-five people attended the workshop.' 'Nineteen-ninety-five was not a leap year.'

---

numbered lists

Like bullet points,should ideally include a full stop after each one if it is not just a list of terms, i.e:

1. This is the first numbered item that covers a range of ideas.

2. This is the second that also ranges quite widely.

3. And this is the third and these are just examples.

But

1. Instructors

2. Trainers

3. Mentors

O

Oxford comma

A comma before the final 'and' in lists. Straightforward lists (he wrote books, short stories and poetry) do not need the extra comma, but sometimes it can help the reader to know which bits go together, e.g., 'she wrote in these genres – horror, mystery, cloak and dagger, and fantasy', and sometimes it is essential for clarity and meaning, e.g.,

I spoke to my sisters, Olga Petrova, and Susanne De Vries (means I spoke to my sisters AND to Olga Petrova and Susanne De Vries)

I spoke to my sisters, Olga Petrova and Susanne De Vries (this wrongly implies that Olga Petrova and Susanne De Vries are the sisters in question.)

Carpentries style is to prefer the Oxford comma unless necessary.

P

per cent

Please spell this out in text, *e.g.,* not as %, and write as two words, not one.

periods

See full stops.

Q

quotation marks

Use single quotes at the start and end of a quoted section, with double quotes for quoted words within that section. Place full stops and commas inside the quotes for a complete quoted sentence; otherwise the full stop comes outside, *e.g.,*

'Anna said: "Your style guide needs updating," and I said: "I agree."' 'Anna said updating the guide was "a difficult and time-consuming task".'

For parentheses inside direct quotes, use square brackets, *e.g.,* The judges said, 'We very much liked the work of Goran [Kovacs] from Croatia'.

quotations

Colons, rather than commas, should be used to introduce quotations from speeches or writings that run longer than a single sentence, *e.g.,* Brown said: 'Winning the Nobel Prize was a highlight. It will change my life. I can't believe my luck.'

To introduce phrases or single sentence quotations, a comma is preferable, *e.g.,* Brown said, 'Winning the Nobel Prize was a highlight.'

R

roles

Roles within The Carpentries are always capitalised. Therefore we use Instructor, Supportive Instructor, Trainer, Maintainer, Mentor, and Curriculum Advisor. Helper and host are not capitalised as these are not official roles.

S

scientific names

Render these in italics, with the first name, which denotes genus, having an initial capital, with the second, which denotes species, written in lower case, *e.g., Aedes aegypti* (yellow fever mosquito), *Crocodylus porosus* (Saltwater crocodile), *Macropus rufus* (Red kangaroo).

seasons

Avoid using seasons when discussing or announcing events, as seasons vary from hemisphere to hemisphere. What is Fall in the USA is spring in Australia. Use a month range instead, *e.g.,* January to March, or use halves or quarters, *e.g.,* 'This happened in the first quarter of 2018', 'This is planned for the second half of the year.' *See also* dates.

---

singular or plural?

Corporate entities take the singular: *e.g.,* 'The NSF has announced … ' In subsequent references, use a singular pronoun: 'It will cover the Olympics.' The Carpentries is always singular.

square brackets

In text, square brackets are used for interpolated words in quotations, *e.g.,* Olav Jonsson said, 'Matthew [Brown] went to CapeTown to address a conference.'

T

times

Times should be rendered in UTC in a 24-hour format, *e.g.,* 12:00 UTC, 17:30 UTC, 09:00 UTC. Do not use local zones, *e.g.,* PDT, AEST. If you want to make times meaningful for people in a range of time zones, use the Event Time Announcer (using your UTC time and date as the basis to create the event) to create a linkable time that will render locally for each person who uses it, *e.g.,* 20 August, 2018 22:00 UTC: https://www.timeanddate.com/worldclock/fixedtime.html?msg=Carpentries+Mentoring+Committee+Meeting+2&iso=20180820T22&p

3.2.2 Brand Identity

Carpentries Colours

The following is a list of hexcodes for colours used in The Carpentries materials.

Carpentries Fonts

The font used in the headers on the https://carpentries.org website is Lato. The font used in the body of the https://carpentries.org website is Roboto.

3.2.3 Carpentries Commons

The Carpentries Commons GitHub repository is a place for open sharing of reusable material, such as text for grants, wording for job or tenure applications, slide decks for conferences, workshop descriptions, promotional copy, and so on.

Carpentries Core Team will have write access to add, edit and upload material here. Other members of our community will need to fork the repository and submit pull requests.

3.2.4 Logos

The names "The Carpentries", "Software Carpentry", "Library Carpentry", and "Data Carpentry", and their associated logos are all trademarked.

You do not require approval to use these trademarks in some cases. Stating accurately that a workshop is a Carpentries workshop, or that a workshop is based on Carpentries material, is always allowed. It is acceptable to use the trademark in acknowledging or crediting The Carpentries in journal articles, conference presentations and keynotes, grant applications, and the like. In those cases, you may use the term "The Carpentries" or the *unaltered logos* to indicate this, without our prior approval.

If you have any doubts about your intended use of the trademarks, please write to us at team@carpentries.org and one of our team members will advise.

Links to Logo Files

- The Carpentries
- Data Carpentry
- Library Carpentry
- Software Carpentry

Virtual Backgrounds

Virtual backgrounds featuring the logos of The Carpentries lesson programs are available for download and use in the Carpentries Commons GitHub repository.

3.2.5 Presentations

It is great for community members to give presentations on The Carpentries! Include your work with The Carpentries in a presentation, or you are more than welcome to give talks or discuss the organisation in general.

There are some general Google slide decks as well as ones more tailored to particular topics or events. The General slide deck is CC0, so you are welcome to use it how you wish. Please just keep attributions on individual figures or photos if they are there.

Other slide decks are CC-BY.

Please use the following template when you are presenting on a topic related to The Carpentries. The template can be modified and adapted as necessary. However, please ensure that you are adhering to the general visual identity including colors, blocks, and fonts. Carpentries Presentation Template

General Carpentries slide deck CC0

Google drive with slide decks

List of past Data Carpentry presentations on Zotero including abstracts and links to slide decks.

Updates to slide decks or contributing your slide decks is encouraged and welcomed too!

3.2.6 The Carpentries Communications Strategy

Introduction

Purpose of this document

The purpose of this document is to provide a strategy for communications around projects and initiatives that The Carpentries team and community undertake.

Target audience for this document

This document was originally written for the core Carpentries team, and has now been made available to our community. It is designed as a resource to be referenced regularly, rather than as literature to be studied once and archived after.

Background

About us

The Carpentries is a volunteer-driven organisation committed to training and fostering an active, inclusive and diverse community that promotes and models the importance of software and data in research and libraries. Our community includes learners, instructors, maintainers, trainers, mentors, workshop organisers, paid employees and champions.

The Carpentries Mission

The Carpentries builds global capacity in essential data and computational skills for conducting efficient, open, and reproducible research. We train and foster an active, inclusive, diverse community of learners and instructors that promotes and models the importance of software and data in research. We collaboratively develop openly-available lessons and deliver these lessons using evidence-based teaching practices. We focus on people conducting and supporting research.

Our approach to attaining this objective is threefold:

- scaling evidence-based teaching,
- creating inclusive environments, and
- building communities of practice based on open principles.

Communications Objectives

To support the mission of The Carpentries effectively, our communications should:

- Create awareness about our work: Our communications should articulate the purpose and value proposition of The Carpentries to facilitate uptake of our core offerings (i.e. workshops, trainings, and organisation memberships) among key audiences.

- Encourage participation and collaboration: Our communications should emphasise our collaboration-driven ethos and point to the myriad of ways contributions and participation are encouraged in various Carpentries' projects.

- Empower our community: Our communications should amplify the voices and articulate the value of community members the world over, to foster a deep sense of belonging and ownership.

- Edify our community: Our communications should strive to enlighten our community on pertinent issues by passing along information and discussing relevant trends on data, software, inclusive teaching, accessibility, etc

Meeting our Communications Objectives

In order to meet The Carpentries' communications objectives, we have to carefully consider:

- *Language and tone of our communications*
- *The Carpentries Brand*
- *The Carpentries Audiences*
- *The Carpentries Communications Platforms*
- *Inclusivity in our Communications*

a. Language and Tone of our Communications

The Carpentries has a collaboration-driven ethos. In our communications, this should translate to inclusive messaging in diverse formats over different channels and as much as possible, using contextualised language, with the ultimate goal of enabling participation.

Because we cater to a distributed community, both geographically and disciplinarily, we continue to employ multiple communication models at The Carpentries, namely:

- interactive (i.e. via Slack, email, TopicBox, Twitter),
- transactional (i.e. via Zoom calls, workshops, instructor training, GitHub),
- linear/broadcast (i.e. via Twitter, our Newsletter and Facebook).

The language we adapt in our communications should embody our "***people first, access for all and openness***" values as an organisation.

Depending on the subject and context (i.e. audience) of our communications, the tone we use should be an amalgamation of several attributes, some of which are listed in the table below. The Carpentries badge spells out where on the scale the tone of our communications should fall at any given time.

Tone scale for our communications at The Carpentries						
Formal						Casual
Serious						Comical
Disengaged						Relatable
Laid-back						Energetic
Dictatorial						Liberal

Communications
Tone Scale

The Carpentries messaging is primarily relayed via the following formats:

- Text: We value accessibility and ensuring community members have access options to our content and programs. Therefore, we offer transcription of any recorded community discussions in addition to providing slide decks from those discussions.

- Audio: Community Discussions that are recorded using Zoom include audio. To ensure content is accessible to as many community members as possible, audio recordings will be added to The Carpentries account on a podcast platform.

- Video: As often as possible we record onboardings and other community events for dissemination to the community via The Carpentries YouTube Channel. To ensure content is accessible to as many community members as possible, we require videos to be uploaded including closed captioning in the language the discussion was recorded in.

b. The Carpentries Brand

The names "The Carpentries", "Software Carpentry", "Library Carpentry", and "Data Carpentry", and their associated logos are all trademarked, and may only be used with permission. Our current logo use policy includes guidelines on the use of trademarks and details about who to contact for questions about using and/or modifying our logo.

Formal communications should include "The Carpentries" as a proper noun. When describing lesson programs, they should be written as "Library Carpentry", "Data Carpentry", and "Software Carpentry". Although more elaborate guidelines for community use are pending, members should be encouraged to use the same guidelines above, and official, unmodified versions of our logo to express their involvement with The Carpentries in presentations and talks.

c. The Carpentries Audiences

Through different projects and initiatives at The Carpentries, we primarily engage with:

- Researchers and scientists
- Technologists - developers at all levels, data scientists, analysts etc.
- Librarians
- Academics

A broader analysis of our target audiences, and specific high-level messaging for each one, will live in The Carpentries audience mapping document [currently WIP]. Useful resource: See Democrati.se's guide to audience mapping.

d. The Carpentries Communications Platforms

Facebook

The Carpentries community members hail from 46 countries. Statistically [1,2], people in nations outside of the United States and Europe primarily use mobile web/applications to engage. Facebook is therefore a great way for them to receive communication and announcements.

We are currently working on bolstering our following on Facebook, and increasing the number of linear communications we send out on the platform.

LinkedIn

LinkedIn is primarily used for making professional connections, networking, and job opportunities. It is a good place for us to list Carpentries team members, and cross-post relevant organisation announcements, particularly targeted at potential member organisations. We have an instructors group and an organisation page.

GitHub

GitHub is a software development platform that The Carpentries employs to host our lessons, communicate about projects, publish our website, and collaborate openly with the community. Each lesson program within The Carpentries has several lessons that are maintained by a group of volunteers we call Maintainers. Issues and pull requests are welcome from community members on all of our lessons, and our Instructor Training curriculum.

In proposing changes to policy, committee structure, and other functions of The Carpentries, The Carpentries uses GitHub issues to collate feedback. Comments remain open for a period of time, and once feedback is collected and incorporated, we close the issue.

As many of our projects involve community members, we recommend the use of GitHub project boards to collaborate openly about projects with the community. One example of a project is the Code of Conduct Guidelines Project.

Subdomains

To allow easy access to key pages on our website, we recommend using our Carpentries GitHub organisation as follows:

- Move our blog content to a new, stand-alone repository, and
  - set up a subdomain, blog.carpentries.org to make it easier to access our blog
  - aggregate historical blog content from Software, Data and Library carpentry into it (by scripting rather than by scraping)

- Revive and use our Presentations repository to collate presentation slides about The Carpentries put together by the community and available under a CC-BY license

    - this will also need a dedicated subdomain, for example, presentations.carpentries.org

Gitter

Gitter is mainly used by the Library Carpentry community for sprints. The #libraries Slack channel is now primarily promoted as the preferred everyday communication platform for the Libraries community.

There is also an inactive Data Carpentry Gitter https://gitter.im/data-carpentry/Lobby and Software Carpentry https://gitter.im/swcarpentry/public.

Google Groups

Many of The Carpentries Google Groups are now lists on TopicBox.

Slack

The Carpentries Slack is used to receive immediate feedback from community members. Channels are driven by community members (e.g. initiatives) and Core Team (e.g. project related). Due to the primarily community driven approach to Slack, some channels fall idle while others remain active. A comprehensive approach to weeding channels that are idle for greater than one year will be taken. The approach will be communicated to the community and feedback will be solicited on the channels to be weeded before they are delisted.

Welcome channel

There's a range of meaningful ways to onboard new members to our Slack community that we are open to exploring in Q1 2021 and beyond, key among them:

- The welcome bot, such as the one Maneesha Sane integrated into Slack in February 2019, which would prompt newcomers to introduce themselves and plug into the community. This option is the least tasking for The Carpentries team, but also the most impersonal.

- Personalised messages by one of the team, such as what Erin Becker did in January and February 2019 to help newcomers feel like they belong. This is the most tasking, but by far, the best engagement practice.

    - We suggest taking this path, and adding it as a task for the forthcoming communications committee (3 times a week) and the Carpentries communications team (twice a week).

    - A sample welcome message would be a variation of the one below: *Hello [person] and welcome to The Carpentries Slack channel. Please read our Code of Conduct [link] and feel free to browse our Slack channels, join any that you like and contribute freely. Welcome!*

We will also pin this message to the top of the Welcome channel. *Welcome new members. Please read our Code of Conduct https://docs.carpentries.org/topic_folders/policies/index_coc.html*

TopicBox

Topicbox is used for announcements and richer discussions which, while possible, would be too crowded and unsuited for Slack. It is also a preferred communication channel for members seeking to limit the number of channels they follow.

Since The Carpentries team has been thinking about regional or local TopicBox lists as a way to enrich community interactions by region, the Communications team will develop a strategy to adding and weeding out idle lists and get feedback from the community before delisting.

Discuss is where The Carpentries community comes to amplify their own opportunities, suggestions, and observations. The popularity of discuss is somewhat due to its ease of use as a general all purpose communications channel. Instead of dividing the channel into separate channels such as jobs, announcements, events, etc., we will inform the community to use tags such as [Job], [Announcement], [Event], etc. in the subject of their posts. These instructions/reminders will be:

- primarily included in the Topicbox "About" section, or

- where necessary, sent via email reminder to the community every 3 to 6 months. We will scan Discuss for themes for the past 6-12 months to determine if there are additional tags to include.

Twitter

Due to historical timelines, Software Carpentry has the highest number of Twitter followers. Data Carpentry, The Carpentries and Library Carpentry accounts have comparatively lower follower counts. Our current Twitter strategy is:

- to primarily use The Carpentries account, and run an open campaign to encourage Software Carpentry, Library Carpentry, and Data Carpentry followers to follow our central account.

- creating 5 - 10 versions of a given message and scheduling them over a 4-8 week timeframe i.e. no more than three tweets on a given subject on any week, prioritising each post for one of the 10 major time zones: Los Angeles (PT) 9am, Denver (MT) 12pm, Chicago (CT) 12pm, New York (ET) 12pm, Paris (CET) 4pm, Cape Town/Helsinki (EET) 8pm, Sydney (AET) 10pm, Hong Kong (HKT) 8am, Tokyo (JPT) 12pm, Shanghai (CT) 9pm.

- to improve engagement by

  - embedding images and videos to tweets where possible, and providing alternative text for these audio-visuals as described here.

  - reacting to stories from the community by retweeting, liking mentions, and flagging threads for response by specific team members as much as possible, rather than by using the organisation account. Chris Erdmann made a good point about implementing this tactic so as a way to coming across as relatable to our community. This would mean flagging specific tweets for response by the Memberships team, Workshops Administration team, Infrastructure team, Leadership team, etc from team member's personal accounts.

  - celebrating Carpentries wins by congratulating new Instructors, contributors to our repositories and other community initiatives like the newsletter, etc

  - running several campaigns on our socials in any given week i.e.

    * come to event tweet 1

    * apply for job tweet 1

    * subscribe to YT tweet 1

    * read post by Mark tweet 1

        ∗ come to event tweet 2

        ∗ give us feedback on issue x tweet 1

        ∗ see resource by ally organisation tweet 1

Website and Blog

The Carpentries blog posts allow community and Core Team members to share announcements with the broader community. Major mechanisms for sharing include the website, Twitter, the newsletter, and Slack. As with lessons, the Creative Commons Attribution (CC-BY) license will be extended to all website content, including blog posts.

Recommendations:

- Employ schema to improve direct traffic to Carpentries blog posts, lessons, workshops, and events.

- Narrative blog posts from people guided by questions

- Additionally, we will use Discuss,Slack, Twitter and GitHub conversations as the basis for setting up a community-led communications committee in the second quarter of 2021. Their primary mandate will be:

  – To identify pertinent issues / conversational trends that resonate with several people

  – To help community members draft, edit and publish blog posts to the main Carpentries blog

To onboard this communications committee, we need:

  – A communications starter kit for The Carpentries. This will be a one-pager that links to relevant resources - photos to use, logo repository, our Code of Conduct, blog and blog repo links, etc

    ∗ A checklist to guide the communications committee in identifying relevant topics in community conversations, soliciting posts and guiding the blog post drafting process

    ∗ A list of tasks that are in the communications committee's scope of work i.e.

        · Implementing meaningful ways to onboard new members to our Slack community that we are open to exploring from Q1 2021

YouTube

YouTube is used primarily to share community discussion and event videos. To reach 100+ subscribers, which will allow The Carpentries to have a custom URL i.e. youtu.be/carpentries, search and discovery of the channel can be improved through the use of engaging keywords, (like data science), and video content/covers. We will continue to point the community to the channel via social media channels like Twitter.

Newsletter

Our current Carpentry Clippings strategy is efficient; members of the Community Development Team work together to solicit and organise contributions - making sure Core Team members submit updates, and then writing, formatting, and publishing content from them. Some content curation is also involved i.e. for "Tweet of the Week" and "Toolshed (Posts from our Past)" sections. Going forward we will actively deliberate on what we are sharing via the newsletter and why and determine a strategy for improving our open and click rates, which currently stand at 30-40% and 3-6% respectively.

Zotero and FigShare

We don't communicate in these places, but they are places where our publications and presentations can be found. We will have a strategy for what content we put in these locations and the metadata to include so that our community can find these resources more easily.

e. Inclusivity in our Communications

All of our communications will include welcoming and inclusive language per the expected behaviours outlined in The Carpentries Code of Conduct (CoC).

A note about our CoC

The Carpentries is dedicated to providing a welcoming and supportive environment for all people, regardless of background or identity. This is true for both our in-person events, virtual events, and all internal and external communications. Everyone who participates in The Carpentries activities is required to conform to the Code of Conduct.

Localisation efforts at The Carpentries

The Carpentries is intent on creating inclusive spaces in which communities from diverse backgrounds can thrive. Contextualising the resources The Carpentries creates is a big part of this. The Community Development team sees it as a positive step toward community growth and sustainability at hyper-local levels that is worth exploring in different ways from April 2019 onwards

Several of our lessons have been translated through the tireless efforts of our community members. A framework to guide community groups interested in translating our lessons into other languages will be prioritised in Q2 2021.

Message broadcast and communication discussion timings

Our communications plan will include a strategy to broadcast messages via Twitter and multiple other communication means at different times such that our global community is able to engage in discussion threads at times that are convenient for them. Additionally, we strive to offer community discussions during multiple times to fully engage our community members who live all over the world. We invite community members to pose discussion times that are suitable for their locality by completing the call for community discussion facilitators form. For sub-community events (e.g. teaching demonstrations), we provide a platform for community members to schedule their own events and provide Zoom room access for them.

Community Cookbook targeting local The Carpentries communities

The Carpentries Community Cookbook was developed to collect 'recipes', or practical tips to aid in creating strong local communities. Contributions to this cookbook are welcome through GitHub issues.

3.2.7 The Carpentries Communications Strategy Implementation Plan

Introduction

Purpose of this document

The purpose of this document is to outline a clear uptake and implementation plan for the communications strategy so The Carpentries project owners and community members can adopt it for use effectively.

Target audience for this document

This document was originally written for the core Carpentries team, and has now been made available to our community. It is designed as a resource to be referenced regularly, rather than as literature to be studied once and archived after.

Our unique value as The Carpentries is that we have evolved over the last twenty years as a community-led organisation, spanning multiple cultural and disciplinary contexts, and working towards a unified goal - that of equipping researchers and librarians with foundational computational and data science skills.

Propelled by a lean core team that exemplifies holacractic practices and oversees the activities of thousands of people around the world, it is important for us to take on an innovative and proactive approach in all communication at The Carpentries because:

- our community is geographically distributed and rendezvouses primarily on the internet where most of our exchanges - deliberations, collaborations, strategising and empowering- happen.

- our community is a mashup of many stand-alone communities - learners, instructors, trainers, council members, committee members, et al. and with so many moving parts, communicating helps us all to stay on course and focused on our collective goal as a community-led organisation.

- clarity, transparency and timeliness are essential in giving individual members a deep-seated sense of ownership and belonging, as well as in growing and sustaining The Carpentries.

Project-Centric Communications

For every project, a complete communications plan will be the sum total of four components:

- *A communications briefing*

- *Audience mapping*

- *Outreach plan*

- *Evaluation*

Communications Briefing

The role of the Community Development team is to help align all of The Carpentries' communications with our strategy, and empower our community by communicating effectively. To help The Carpentries' Communications team review your project communications adequately, each project team will schedule an hour-long communications brainstorm session at the onset of their project to talk about Project particulars highlighted in orange. Highlighted in green are existing project details you will need to have before the Communications brainstorm meeting in order for us to collaboratively develop a wholesome communications plan.

Project details
Context
Project Glossary:
Project goals
The role of communications in meeting these goals
Audience(s) the project is targeting
Content the project needs to create for target audience(s)
Platforms / Channels where the target audience(s) can be reached
Member and Partner organisations that have a significant influence over audiences we want to reach
Key messages and Calls to action for target audience(s) to help attain project goals
Responsibility assignment matrix to carry out the project communications plan
Responsible: Accountable: Supportive: Consulted: Informed:
How are you going to do it?

```
What will success look like?
    a.  In general, for the entire project


    b.  From a communications perspective


        Metrics - how many clicks, responses, views, shares are you hoping for?


        Impact - what changes do you hope to propagate

        1.  short-term


        2.  long-term


Project Sign-off:


Project Retrospective?
    a.  In general, for the entire project


    b.  From a communications perspective


        Metrics - projected vs actuals?


        Unique comms perspectives obtained while working on the project


```

Audience Mapping

The audience of our communications activities is broadly comprised of researchers, scientists, librarians, and developers. However, given that transparency is a core tenet of The Carpentries, we have a broader audience comprised of partners, funders, and broader communities in academia, data science, and software that access and keep abreast with aspects of The Carpentries activities as and when we share them.

Using guides provided by Democrati.se, the Community Development team will work with different project teams to brainstorm on specific audiences our communications and outreach efforts should target for different projects. These audiences will then be added to our Carpentries audience mapping document which is currently a work in progress.

We recommend scheduling time to carry out this hour-long brainstorming exercise with our team at least once in your project lifecycle, and preferably in the early stages.

Outreach Plan

The Carpentries' Asana Project Template currently holds an outreach plan checklist for every project to use. Ahead of any project-related announcement, remember to draft tweet-long messages to aid our Twitter and 1:1 outreach efforts, as well as long-form messages for TopicBox, Slack and our Newsletter.

We will also start attaching multimedia to key messages where possible, and welcome your suggestions on which ones would be best suited. Where none is provided, we will use tools like Adobe Spark to generate images or short videos for use. In some cases, we will employ use of The Carpentries badge and logo.

Evaluation

The Carpentries values a culture of assessment and data-driven decision making. As such, this communications plan will be consistently evaluated and revised.

Intent vs. Outcomes

Projects lead by our team will include intended outcomes (what does success look like?) and actual outcomes. We realise that sometimes intended outcomes will not match actual outcomes due to feedback from the community or discrepancies in data collected during a project. Each project should include an evaluation plan that expresses the intent of the project, project outcomes, and data to support outcomes. Projects should include clear, consistent messages.

Projected vs. Actual Metrics

Projects should include specific metrics for engagement and interactions. Though the overall success of the project may not be determined by the expected vs. actual metrics, it is important to include goals for metrics when evaluating projects. Sample metrics include, but are not limited to:

- Social Media Impressions (Likes, Follows, Shares, Retweets)
- Number of New Sign-Ups for Community Discussions
- Number of Pull Requests and/or Issues on GitHub
- Number of Attendees at Community Discussions
- Number of Repository Forks
- Growth in Number of Workshops
- Number of Comments on Blog Posts

Feedback

The strategy around our messaging and communications will be reviewed consistently, and customised based on our target audiences. As this strategy is a dynamic document, it will be revised quarterly based on feedback from the Carpentries team and community.

Based on responses, questions, and engagement statistics on various platforms, we will particularly pay attention to the outcome of our messaging, i.e.

- did we communicate impartially, with clarity, in a timely manner?
- was our language inclusive, and our tone inviting?
- did we cover all time zones adequately?
- did our communication efforts break through our community silos?
  - Did we encounter new contributions and interactions?
  - What new things did we try (video? podcast?)? Did it result in new memberships, training sign-ups? etc.

Organisation-Wide Communications

The Carpentries Community Development team sees engagement with other relevant communities on the web and in shared physical spaces as an important avenue for amplification of the work and initiatives of The Carpentries team and community. To ensure we are adequately represented in these offline and online spaces, the Community Development team is continually considering the following

- *Website Search Engine Optimisation* (SEO)
- *Conferences and events*
- *Cross-community partnerships*
- *Amplification of Carpentries Community Initiatives*

Website Search Engine Optimisation

To improve traffic to The Carpentries websites, a number of developer tools can be used to test the current optimisation levels of the websites. The following services provide recommendations regarding what can be improved:

- https://web.dev
- https://sitechecker.pro
- https://www.seotesteronline.com/

In addition, Google provides guidance to developers to enhance their web presence (including advice on structured data) and a keyword planner to assist with keyword generation:

- https://developers.google.com/search/
- https://ads.google.com/home/tools/keyword-planner/

The services above also address accessibility, but WAVE is also a tool that can be used for testing accessibility of the websites:

http://wave.webaim.org/

All Carpentries websites will be tested using these tools to compile website reports with action items to improve and fix them. The Infrastructure/Technology team will be consulted to develop a comprehensive plan to address the items listed in the reports.

Conferences and Events

Going forward, we would like to proactively promote Carpentries' existing resources and initiatives by tapping into events, key calendar days and opportunities afforded to us by others in relevant spaces. We will do this by:

- Keeping a rolling calendar of relevant events and conferences that our team should consider submitting session proposals to. The entire team is invited to add events to the calendar, keeping in mind that:

  - The Carpentries is a non-profit organisation and as such, we aim to keep our overhead costs at a minimum as much as possible. Conferences and events that offer to cover travel and associated costs for speakers and attendees are a big plus for The Carpentries.

  - The Carpentries is a strong advocate for fair and inclusive community practices and as such, we will endeavour to be a part of conferences and events that have meaningful Codes of Conduct, and that steer away from tokenising underrepresented groups for clout i.e. by promoting manels and sneaking in one woman as a speaker, for example.

- – We are also keen on /looking for opportunities for non-profit organisations to have 'booths' at meetings to share information about The Carpentries and for these booths to serve as a meetup space for our community at these events.

- Observing dates-of-note relevant to The Carpentries activities and community such as the International Open Data Day, International Science Day, AdaLoveLace day, International day of Women in STEM, 100daysofCode, FOSS February, Hacktober, etc., and aligning our communications efforts with the goals of those specific dates.

- When Carpentries members are participating in organising, speaking at or attending meetings, we will promote their involvement, as ways for them to connect with other communities present at the meeting, and demonstrate participation and engagement in the ecosystem.

Cross-Community collaborations

The Carpentries has good working relationships with a number of organisations. We will continue to foster these relationships and others, but with the goal of developing The Carpentries' brand as a critical open research service that is a critical part of the evolving research lifecycle. We will explore creating graphics that show/promote The Carpentries services in an ecosystem of services/tools. The goal is that The Carpentries is seen via presentations and other materials similar to this example. We will seek opportunities to strategically share this graphic with the aim of others sharing it and potential partners coming across it in open research/scholarly meetings.

Amplification of Carpentries Community Initiatives

The Carpentries Community Development team is also keen on crafting our platform to create room to amplify the work of Carpentries community members and empower them to present and advocate for The Carpentries, i.e.

- when opportunities arise to represent and advocate for The Carpentries, if better suited for community members more than the core team, we will share these in timely fashion on Discuss and Slack to see if specific members are interested in taking part. As a rule of thumb,

  - – if we are looking for someone to substitute a core member on The Carpentries team at an event, it is important to reach out to specific people who we can trust to deliver.

  - – where the call for applications is more general i.e. SciPy 2019 talks for specific tracks, or opportunities to speak at BioDiversity Next, then it is important to share these opportunities with our entire community

- by asking The Carpentries community in different ways, we hope to understand what resources community members need from The Carpentries, to be prepared. Developing these resources will be the responsibility of the Community Development team which will liaise with community members to create and add them to our community Handbook, and The Carpentries presentations repository.

- we will develop a mechanism to enable Carpentries community members and friends of The Carpentries (like ROpenSci, SciPy, Jupyter community members) to submit their announcements, stories, etc. i.e.

  - – possibly adapt Library Carpentry's version of the blog post request form and create a dynamic Google Form that changes based on what the submitter would like to do, i.e. blog post about their community building, announcement on the Discuss list, tweets about a recent event, etc.

  - – link to this form regularly in our communications on different platforms, as well as in our community Handbook, etc.

Communications Roles and Responsibilities

Communication is a shared responsibility. As our larger Carpentries community continues to grow, sub-communities and local communities are continuing to develop. It is imperative that our communications plan include not only what we will communicate, but how we will communicate, and who is responsible for communicating project/program goals and outcomes.

Who is responsible for communicating projects/programs/goals to the community?

Each Carpentries team member either leads or is a member of a project. Team members also serve as liaisons to various sub-committees, sub-communities, and task forces. As such, it is the responsibility of team leaders to either communicate the project/program goals, or to designate a team member as the 'communications lead' for that project/program.

What should our Executive Council be communicating and when?

Formal statements regarding The Carpentries' policies and finances will only be released by the' Executive Director or Executive Council Chair. The Executive Council is also responsible for communicating transparency reports and will also communicate on all other subjects as mandated by their role in their period of tenure. The Secretary of the Executive Council, also regularly publishes meeting minutes. Succinct updates from the Executive Council will continually be added to Carpentry Clippings fortnightly, as appropriate.

What should our Executive Director be communicating and when?

Open Letters The Executive Director is responsible for communicating the strategic direction and vision of the organisation, and periodically, writing open letters to the community to inspire, challenge and engage with the community. These open letters will continue to be published in The Carpentries Conversations repository on GitHub.

[idea] The communication team's vision for this initiative is that it evolves into *a Letters from The Carpentries Team* series, where we can all share tidbits from our respective desks i.e. on community building, communications, developing curricula, setting up community infrastructure, workshops administration, et al.

Once we've published at least five letters, we can set up a dedicated page on our website for these letters. Given that they are in a standalone repository, we suggest setting up a conversations.carpentries.org subdomain when the time comes.

Matters arising

The Executive Director also communicates as needed to address issues of concern, articulate The Carpentries official stand on pertinent trends, challenges and opportunities, and lends her voice and platform to initiatives and occurrences in ecosystems that interface with ours at The Carpentries.

Succinct updates from the Executive Director can also be appended to the Updates from Leadership section of Carpentry Clippings fortnightly, as appropriate.

3.2.8 Fundraising Resources

Introduction

The following resources were created in October and November of 2020 to aid parties within The Carpentries in asking for donations during the 2020 Fall/End of Year Appeals. With modification, they can be used in other donation appeals or serve as a guide for future assets in Carpentries Fundraising.

Donation Request Letter - Individual

Email Subject Line: A Call to Action: Help The Carpentries Meet Our Fundraising Goal

Dear [potential donor's name]

My name is [your name], and I am the [position or role] with The Carpentries. Our mission is to build global capacity in essential data and computational skills, and to help train and foster an active, inclusive, diverse community of learners and instructors that promotes and models the importance of software and data in research.

This year has been a challenging one for us all. We understand the impact the global Coronavirus pandemic has on our community, and communities around the world as we shift to virtual instruction. We believe the importance of digital skills is undeniable; educators and organisations are collaborating to support effective instructional strategies, and with your help, The Carpentries is primed to thrive in this environment. Despite the unprecedented impact of the Coronavirus pandemic, our instructors have run even more self-organised workshops this year than we anticipated, teaching our established digital skills curricula globally, but our work is never finished and we want to do so much more.

The Carpentries supports more than 1,700 highly skilled instructors in communities in 61 countries across the world. We have experience training educators, researchers, librarians, and technologists. We are working to scale our instructor training and curriculum development programs to respond to the shift in the nature of education around the world. **Now more than ever we need you to champion our mission**. You can help us teach data skills to the communities that need them most by donating any amount you feel comfortable with.

Our goal is to raise $30,000 in individual contributions by December 31, 2020. Will you help us get there?

Donating even a small amount can make a big difference - we value all contributions. Your donation will allow The Carpentries to expand into new geographies and new disciplines, and will help bring workshops to individuals who might otherwise have barriers to participation.

If you are interested in supporting The Carpentries' mission of teaching data skills globally, please visit our campaign page and donate any amount you are comfortable with. Thank you so much!

Sincerely, [Your name] [Your role within The Carpentries]

Donation Request Letter - Organisation

Hello [potential donor's name]

I am writing to thank you for [previous interaction or partnership]. By partnering with us on [previous interaction] The Carpentries was able to [positive result or impact]. As we move into the fourth quarter of the year, I want to make you aware of another opportunity for [their organisation] to partner with The Carpentries.

This year has been a challenging one for us all, and we understand the impact this crisis has had on The Carpentries community, and other communities around the world. As the world shifts to virtual instruction, we believe the importance of digital skills is undeniable; educators and organisations are collaborating to support effective instructional strategies, and with your help, The Carpentries is primed to thrive in this environment. Despite the unprecedented impact of the Coronavirus pandemic, our instructors have run even more self-organised workshops this year than we anticipated, teaching our established digital skills curricula, but our work is never finished and we want to do so much more.

The Carpentries supports more than 1,700 highly skilled instructors in communities in 61 countries across the world. We have experience training educators, researchers, librarians, and technologists. We are working to scale our instructor training and curriculum development programs to respond to the shift in the nature of education around the world. Now more than ever we need organisations like [ ] to champion our mission. With your help, we can teach data skills to the communities that need them most. We invite [organisation] to donate any amount you feel comfortable with.

Our goal is to raise $100,000 by December 31, 2020. Will you help us get there?

Your organisation's donation will allow The Carpentries to expand into new geographies and new disciplines, and will help bring workshops to individuals who might otherwise have barriers to participation.

If you are interested in partnering with us with a donation or have any questions, please reply directly to this email. I am also available to discuss our fundraising goal via phone or Zoom call.

Thank you so much!

Sincerely, [Your name] [Your role within The Carpentries]

Short Calls to Action/Tweet Length Messages

- A Call To Action: Support The Carpentries Read Executive Director, @DrKariLJordan's letter to The Carpentries Community and consider donating to The Carpentries to help us reach our 2020 fundraising goal! https://carpentries.org/blog/2020/11/a-call-to-action-donate-to-the-carpentries/

- "The Carpentries supports more than 1,700 highly skilled instructors in communities in 61 countries... Now more than ever we need you to champion our mission." - Dr. Kari L. Jordan Help us teach data skills to the communities that need them most https://carpentries.wedid.it/campaigns/8261

- Thank you to everyone who has donated so far to help The Carpentries achieve our mission! With your help we are on track to reach our goal. Please consider donating to help us achieve our 2020 fundraising goal https://carpentries.wedid.it/campaigns/8261

Videos

Appeal Video from The Executive Director - Long Form

Appeal Video from The Executive Director - Short Form

The Carpentries | Our Goal (Shorter appeal video with community)

Appeal Images

Fundraising Letter Pull Quote

> As I write this letter, we are approaching 200 workshops taught globally this year, despite unprecedented circumstances. For that, **I thank you**
> - Dr. Kari L. Jordan

Fundraising Video Title Card

A CALL TO ACTION TO HELP SUPPORT THE CARPENTRIES

By Executive Director, Dr. Kari L. Jordan

3.3 HOW-TO GUIDES

3.3.1 Adhering to The Carpentries Style Guide

In contributing to The Carpentries website, handbook and other resources, remember to refer to The Carpentries Style Guide and format your contributions accordingly.

For example, headings should use title casing, and tools like the Title Case Converter serve as a definitive guide to formatting for Title Casing, complete with reasons for or against capitalising certain words.

Another meaningful example is spellings. Because The Carpentries is a global community-led organisation, content standardisation is important. Our Style Guide currently recommends the use of British English in all our resources across the board. More about this in the language section of our Style Guide.

3.3.2 Formatting Hyperlinks

Hyperlinks on the websites for The Carpentries and its lesson programs should be formatted using Jekyll's link formatting syntax. This includes:

- using `{% link %}` for pages. For example, `[Become a member organisation]({% link pages/membership.md %})`

- using `{% post %}` for blog posts. For example `[blog post]({% post _posts/2021/05/ 2021-05-01-blogging-from-the-future.md %})`

- not using relative paths

- not including `https://carpentries.org/` (or the respective website) in the URLs. The `baseurl` should be defined in the website's `_config` file.

- using `{{ urlimg }}` for images. For example, `<img src="{{ site.urlimg }}/blog/2021/05/ future.png">`. The `urlimg` should be defined in the website's `_config` file.

- using `{{ filesurl }}` for files. For example, `[Read the report]({{ site.filesurl }}/ docs/2021/05/future.pdf)`

How can you help?

As you read through the resources we make available on the Data Carpentry, Library Carpentry, Software Carpentry and The Carpentries websites as well as this Handbook and other resources, you can go to the appropriate repository and either:

- open an issue and report instances of these anomalies (low time requirement), or

- submit a Pull Request with edits that help standardise spellings, headings, etc (Moderate time requirement).

We are also keen on continued resource provenance, so please report any broken links as and when you come by them. Internet Archive's Way Back Machine is a powerful tool to help you view resources in broken links, and potentially find alternative/updated links to the same resources.

3.3.3 Collaborative Blog Post Writing

The Carpentries welcomes blog posts from our community members including workshop host sites, instructors, learners, and more. Are you interested in publishing a post on The Carpentries blog?

Sharing blog post ideas

- Join The Carpentries Slack and share your blog post idea in the #blog-post-ideas channel to start discussion and invite other community members to collaborate with you (preferred)
- Email community[at]carpentries[dot]org with your idea and one of the team will facilitate amplification of the idea in the community so others can reach out and collaborate with you (option)

Sharing ready-to-publish drafts

Our blog content is formatted in Markdown, and rendered as html thanks to Jekyll. You can submit your blog post draft in one of three ways

- Email your blog post draft to community[at]carpentries[dot]org, or submit it through this form and one of the team will follow up with you to get it published. (low time requirement)

If you wish to submit a blog post about your favourite tool or workflow, you can submit the post through this form and we will post it on the blog for you.

- Create a CodiMD file, convert your post to Markdown [see Markdown cheatsheet], add a YAML header to the top of your Markdown file, open an issue in The Carpentries blog GitHub repository with new post appended to the issue title. One of the team will help get it published. (moderate-time requirement)
- Convert your post to Markdown [see Markdown cheatsheet], add a YAML header to the top of your Markdown file, and submit a Pull Request to The Carpentries blog GitHub repository (more tasking).

Read below and find out how to contribute a blog post to

- *The Carpentries blog*
- *Data Carpentry blog*
- *Library Carpentry blog*
- *Software Carpentry blog*

How to Contribute a Blog Post to The Carpentries blog

1. If you wish to contribute a blog post, please work in https://github.com/carpentries/carpentries.org, which can be viewed at https://carpentries.org/blog/.

2. Posts go in the `_posts` folder.

3. Posts need to be created in Markdown and named according to this convention:

   `YYYY-MM-DD-filename.md`

   e.g.

   `2018-04-29-book-review-teaching.md`

4. In order to render correctly, posts need to have a header block, which should be created like this example, e.g.

```
---
layout: page
authors: ["Tracy Teal", "Belinda Weaver"]
teaser: "New website for access to all things Carpentries"
title: "Launching The Carpentries Website"
date: 2018-04-25
time: "09:00:00"
tags: ["Website", "Communications"]
---
```

Separate the header block from the post text by inserting a new line.

5. All fields should be filled in. If there is more than one author, separate the author names like this: `["Name 1", "Name 2"]`.

6. Images should be uploaded to the `images` folder. Images should be linked using Markdown, and paths to the image should be relative.

   Example:

```
![Image Description]({{ site.filesurl }}/images/myimage.jpg)
```

   A web link should be used for images hosted elsewhere. Please be sure you have rights to use this image before including it.

   Example:

```
![Image Description](https://web_address/pathway_to_full_image_filename)
```

   If you are not sure how to add images in Markdown format, look at an existing post with a locally hosted image and copy the formatting from there.

7. Once you have previewed your file, commit the Markdown file to your fork and start a Pull Request. We automatically run tests using TravisCI on your Pull Requests. Please review your pull request a few minutes after you have submitted it to make sure those tests have passed. These tests look for valid YAML headers and make sure that the post will build properly. Once tests have passed, Carpentries Core Team will review and merge your Pull Request or reach out to you with more questions.

How to Contribute a Blog Post to Data Carpentry

1. If you wish to contribute a blog post, please work in https://github.com/datacarpentry/datacarpentry.github.io, which can be viewed at http://www.datacarpentry.org/blog/.

2. Posts go in the `_posts` folder.

3. Posts need to be created in Markdown and named according to this convention:

   YYYY-MM-DD-filename.md

   e.g.

   2017-07-10-assess_report.md

4. In order to render correctly, posts need to have a header block, which should be created like this example, e.g.

```
---
layout: post
subheadline: "Lessons"
title: Data Carpentry Genomics and Asssessment Hackathon
```

(continues on next page)

```
teaser: "Announcing a Data Carpentry Genomics and Assessment Hackathon"
header:
   image_fullwidth: "light-blue-wood-texture.jpg"
categories:
   - blog
comments: true
show_meta: true
authors: ["Tracy Teal", "Belinda Weaver"]
---
```

Separate the header block from the post text by inserting a new line.

5. `Subheadline` is an optional field, as is `teaser`, but the other fields should be filled in. If there is more than one author, separate the author names like this: `["Name 1", "Name 2"]`.

6. Images should be uploaded to the `images` folder. Images should be linked using Markdown, and paths to the image should be relative.

   Example:

```
![Image Description]({{ site.filesurl }}/images/myimage.jpg)
```

   A web link should be used for images hosted elsewhere. Please be sure you have rights to use this image before including it.

   Example:

```
![Image Description](https://web_address/pathway_to_full_image_filename)
```

   If you are not sure how to add images in Markdown format, look at an existing post with a locally hosted image and copy the formatting from there.

7. Once you have previewed your file, commit the Markdown file to your fork and start a Pull Request. We automatically run tests using TravisCI on your Pull Requests. Please review your pull request a few minutes after you have submitted it to make sure those tests have passed. These tests look for valid YAML headers and make sure that the post will build properly. Once tests have passed, Carpentries Core Team will review and merge your Pull Request or reach out to you with more questions.

How to Contribute a Blog Post to Library Carpentry

1. If you wish to contribute a blog post, please work in https://github.com/LibraryCarpentry/librarycarpentry.github.io, which can be viewed at https://librarycarpentry.org.

2. Posts go in the `_posts` folder.

3. Posts need to be created in Markdown and named according to this convention:

   `YYYY-MM-DD-filename.md`

   e.g.

   `2018-09-12-data-in-the-desert.md`

4. In order to render correctly, posts need to have a header block, which should be created like this example, e.g.

```
---
layout: page
authors: ["Tracy Teal", "Belinda Weaver"]
```

```
title: "Data in the desert"
teaser: "Library Carpentry workshop at the University of Arizona"
date: 2018-09-12
tags: ["University of Arizona", "Library Carpentry", "The Carpentries", "Workshop
↪"]
category: ["blog"]
---
```

Separate the header block from the post text by inserting a new line.

5. All fields should be filled in. If there is more than one author, separate the author names like this: `["Name 1", "Name 2"]`.

6. Images should be uploaded to the `images` folder. Images should be linked using Markdown, and paths to the image should be relative.

Example:

```
![Image Description]({{ site.filesurl }}/images/myimage.jpg)
```

A web link should be used for images hosted elsewhere. Please be sure you have rights to use this image before including it.

Example:

```
![Image Description](https://web_address/pathway_to_full_image_filename)
```

If you are not sure how to add images in Markdown format, look at an existing post with a locally hosted image and copy the formatting from there.

7. Once you have previewed your file, commit the Markdown file to your fork and start a Pull Request. We automatically run tests using TravisCI on your Pull Requests. Please review your pull request a few minutes after you have submitted it to make sure those tests have passed. These tests look for valid YAML headers and make sure that the post will build properly. Once tests have passed, Carpentries Core Team will review and merge your Pull Request or reach out to you with more questions.

Alternative Ways to Post

If you are new to GitHub and want to submit a blog post without using this workflow, you can submit it through this form and we will post it to the blog for you.

How to Contribute a Blog Post to Software Carpentry

1. If you wish to contribute a blog post, please work in https://github.com/swcarpentry/website, which can be viewed at https://software-carpentry.org/blog.

2. Posts go in the `_posts` folder, which is divided up first by year, e.g. `2017`, and then by month, e.g. `07`. Be sure to start creating your file in the correct folder.

3. Posts need to be created in Markdown and named according to this convention:

`YYYY-MM-DD-filename.md`

e.g.

`2017-07-10-assess_report.md`

4. In order to render correctly, posts need to have a header block, which should be created like this example, e.g.

```
---
layout: post
subheadline: "Assessment"
title: "Analysis of Software Carpentry Workshop Impact"
date: 2017-07-10
time: "08:00:00"
authors: ["Tracy Teal", "Belinda Weaver"]
category: ["surveys", "workshops", "impact", "assessment"]
---
```

Separate the header block from the post proper by a new line.

5. Subheadline is an optional field, as is time, but the other fields should be filled in. If there is more than one author, separate the author names like this: ["Name 1", "Name 2"]. Separate any categories the same way.

6. Images should be uploaded to the appropriate year in the files/<year>/<month> folder. Images should be linked using Markdown, and paths to the image should be relative.

Example:

```
![Image Description]({{ site.filesurl }}/2017/07/myimage.jpg)
```

A web link should be used for images hosted elsewhere. Please be sure you have rights to use this image before including it.

Example:

```
![Image Description](https://web_address/pathway_to_full_image_filename)
```

If you are not sure how to add images in Markdown format, look at an existing post with a locally hosted image or one with a web link and copy the formatting from there.

7. Once you have previewed your file, commit the Markdown file to your fork and start a Pull Request. We automatically run tests using TravisCI on your Pull Requests. Please review your pull request a few minutes after you have submitted it to make sure those tests have passed. These tests look for valid YAML headers and make sure that the post will build properly.

Troubleshooting

The most likely reason posts fail to build is because of 'rogue' characters in the YAML header. Rogue characters generally occur because material has been pasted in directly from programs like Word or Google documents. The most common rogue characters that cause issues are smart quotes (curly quote marks as opposed to plain ones), but others might be em or en dashes, mathematical or other symbols, or other characters that cannot be rendered in plain text by typing on a keyboard. Replace smart quotes with plain quote marks and smart em or en dashes with plain hyphens to avert any problems.

3.3.4 Selecting Tags for your Carpentries Blog

We recently decided to clean up the tags we use on The Carpentries blog so as to help everyone in our community to find posts they are interested in more easily. Below is a set of categories to help you determine which tags to include in your posts for The Carpentries blog. Remember, less is more with tags - one would be optimal, but a maximum of three would suffice, should there be a need for it.

If in doubt over what tags to attach to your post, email community[at]carpentries[dot]org and we will help you pick one.

By Region

In case the post you intend to publish reports on activities carried out by The Carpentries in a specific region, or holds an invitation target at a geographical subset of our community, please add a region tag, such as Africa, Latin America, Australasia.

By Carpentry

Since the Data Carpentry and Software Carpentry merger, and the inclusion of Library Carpentry as a lesson program of The Carpentries, we have realised the need to share relevant posts from each of the three sources with The Carpentries community. As such, cross-posted posts on The Carpentries blog will be tagged Library Carpentry, Data Carpentry or Software Carpentry to indicate their original source.

Carpentries Tagathon

For posts in the Data Carpentry, Library Carpentry and Software Carpentry blog, there is no need to add Carpentry-specific tags as all posts in the respective blogs are already specific to each Carpentry.

By Thematic Focus

Our core team at The Carpentries works on projects that have specific themes attached to them i.e. Assessment, Equity and Inclusion. Additionally, as a community-led organisation, we often incorporate pertinent discussions into our ongoing work and communicate regularly about those i.e. Accessibility and Roadmaps for achieving specific goals.

By Community Activity

The Carpentries has many different activities aimed at bringing our community members together for learning, sharing, discussions, collaboration online and in-person. Remember to tag posts by the appropriate community activity i.e. Workshops, Events (Conferences not organised by the Carpentries, Hackathons, Meetups, Research Bazaars, Hacky Hours, etc), Discussion Sessions, Feedback, Translations etc

By Carpentries-centric Initiatives

The Carpentries team, with the support and oversight of various committees and task forces, carries out initiatives such as the Membership program, the Lessons Program, community-wide Communications, the Regional Coordinators program, our Instructor Development program, Curriculum and Code of Conduct. In communicating about these, strive to use eponymous tags.

By Resource Genre

The Carpentries blog is home to many types of resources i.e. Skillshare posts on how to use different tools and achieve specific tasks in various programming languages or platforms, reports on community-wide progress, or governance by the Executive Council, Book Reviews by different members of the community, etc

3.3.5 Sharing Relevant Announcements

The Carpentries have a number of mechanisms for pushing out news. These include:

- Our newsletter, *Carpentry Clippings*, which appears every two weeks.
- Our Facebook page, which community members are welcome to follow and comment on.
- Twitter feeds for The Carpentries, Software Carpentry, Data Carpentry, and Library Carpentry.

If you would like us to post an event, a job vacancy or a new publication of interest to the community in our newsletter, on Twitter, or on Facebook, email team@carpentries.org with *For Newsletter*, *For Twitter*, or *For Facebook* as the subject line.

3.3.6 Sharing Job Postings and other Community Opportunities

The Carpentries has three main mechanisms by which to share job postings and other community opportunities: One is within our newsletter, Carpentries Clippings the second is our #jobs channel on Slack and the third is the opportunities mailing list on Topicbox.

Criteria for Posting

In order to ensure that postings for opportunities featured on Carpentries channels are applicable and of relevance to our community, The Carpentries Core Team has a list of criteria that a posting must meet in order to be shared. If the posting does not meet the criteria, then the post will be removed or modified after discussion with the poster. However, we reserve the right to remove a posting without notice, in particular, if we believe that the opportunity has been submitted automatically (i.e., by a bot).

This criteria was developed over 2020 by The Carpentries Core Team in order to ensure we are adequately screening opportunities.

Here are the criteria we consider when deciding whether to feature a job posting:

- **Organisational Alignment with The Carpentries**

    - Does the organisation which is hiring have similar goals to The Carpentries?

    - Do our goals directly support each other?

- **Carpentries Code of Conduct**

    - Does the organisation abide by our Code of Conduct and/or have their own published Code of Conduct that has the same priorities as The Carpentries'

    - Note: If The Carpentries publishes a posting from an organisation and is then made aware by our community of incompatibility with our Code of Conduct, we will remove the posting

- **Quality of The Posting**

    - Does the posting bear relevance to our community?

    - Are the skills and experiences sought by the posting organisation compatible with the skills our community has or seeks to gain?

    - Does the posting mention The Carpentries by name?

- **Prior Knowledge/work with the Posting Organisation**

    - Often, The Carpentries posts job opportunities from affiliate or member organisations.

    - If we have prior interactions and knowledge of the organisation, this is a strong indicator of a valuable opportunity post that our community will appreciate.

Note: These criteria are not strictly quantitative and rely on the judgment of the core team.

Sharing Postings on Carpentries Clippings

Carpentries Clippings is a biweekly newsletter to members of our community featuring community news, program updates of note, and opportunities relevant to the wider Carpentries community.

In order to share a job posting that we will feature in Carpentries Clippings, please follow the Sharing Relevant Announcements guide.

Sharing Job Postings and other Community Opportunities on Slack

Once you have read the criteria above and joined the #jobs channel on The Carpentries Slack, you can share relevant announcements to the group. Please include the following information when posting:

- Job Title

- Organisation

- Location (if applicable)

- Posting/Application Deadline

- Link for more information and to apply

Note: Please do not request that applicants or those interested in the opportunity contact you by DM.

If a post does not contain the above or does not meet the criteria outlined earlier, then a member of The Carpentries Core Team will reach out to you via Slack DM to address the concerns and suggest modifications.

In cases where this process is not able to be carried out effectively (such as if the posting is by a spam bot), the Core Team will remove the posting, and with repeated instances of this, will potentially remove the account from the #jobs channel.

Sharing Job Postings and other Community Opportunities on the "opportunities" Mailing List on Topicbox

Posting opportunities to the "opportunities" mailing list requires one to be a member of the group.

To join the group, navigate to the mailing list and click "Join The Conversation" and enter the required information. Once you are a member of the group, please include the following information when sharing a posting.

- In the title field please include the opportunity title and organisation

- In the body of the message, include other relevant information about the opportunity including deadlines, links to apply and learn more, location (if applicable)

Once you have submitted the posting, moderators of the mailing list will approve the posting or reach out to you if the posting does not meet the criteria to address the concerns and suggest modifications.

FOR INSTRUCTORS

This material is for current and aspiring Carpentries Instructors. Find material here on becoming an Instructor, how you can develop as an Instructor, and what networking opportunities our community offers.

Thank You to Instructors!

We are very grateful to our community of Instructors! From those who teach once or twice a year to those who organise entire programs, from those who have just gotten involved to those who have deeply embedded themselves as mentors, discussion hosts, committee and Task Force members, and instructor Trainers: EVERY Instructor helps make The Carpentries what we are. Thank you!!

4.1 For Current Carpentries Instructors

4.1.1 Professional Development for Instructors

As part of welcoming and orienting new Instructors to our community, and enriching and building skills and community among continuing Instructors, we have a number of ways to support you.

4.1.2 Mentoring and Development

The Instructor Development Committee (formerly known as the Mentoring Subcommittee) manages the mentoring program, which supports Instructors as they progress through training, teaching, curriculum development, and other community-related activities.

4.1.3 Community Discussions

These hour-long sessions are organised by the Instructor Development Committee and serve a number of purposes. Trainee Instructors use them as part of their checkout process. There they can raise questions about teaching workshops and other matters and get advice from more experienced Instructors. All sessions are run by volunteers. Instructors preparing to teach can attend to ask questions, get tips, and find useful examples or analogies they can use. Instructors who have recently taught can attend to debrief about what went well, and what might have gone better, so they can plan for next time. Sessions are coordinated through this Etherpad.

4.1.4 Mentoring Groups

Mentoring is a professional development opportunity that The Carpentries offers our growing Instructor pool to help community members learn and grow. Whether you are a new Instructor preparing to teach your first workshop, a seasoned Instructor hoping to run workshops in a new community, or an Instructor excited about getting involved with lesson development and maintenance, mentoring groups will help you gain the confidence, technical skills, and teaching skills you need to reach your goal. Mentoring groups run in specified rounds at regular intervals. See the Mentoring Groups section for more information.

4.1.5 Carpentries Champions

If you are interested in building a local community, then consider joining the Carpentries Champions. Champions calls are run quarterly and you can hear from more experienced community members about what strategies you can try to build grassroots communities. There is already a Carpentries Community Cookbook, with 'recipes' you can adapt for your local needs. There is a Champions mailing list, and you can also join the `#champions` channel on Slack.
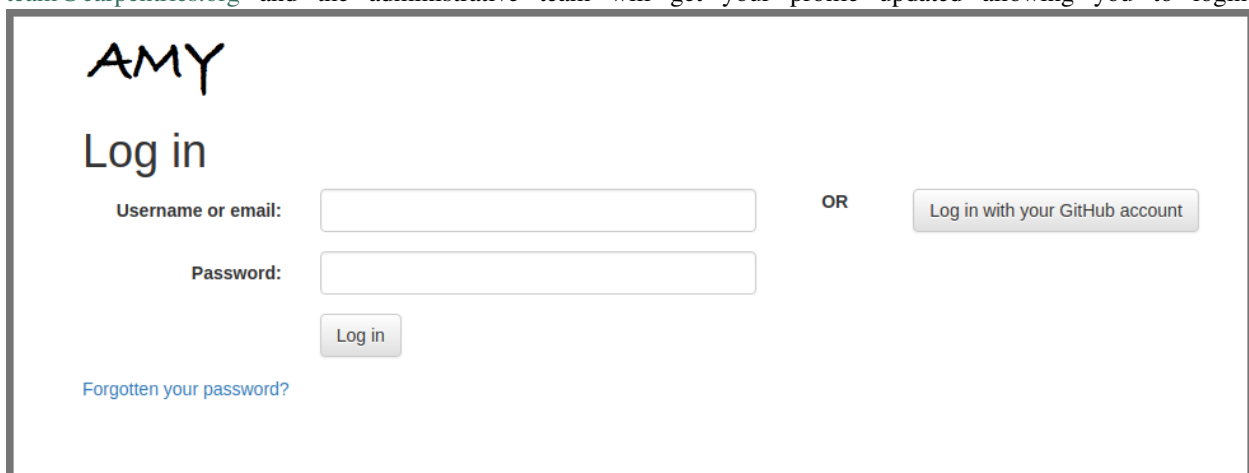
4.1.6 Meetups page

If you are attending a conference or event and would like to network with other Carpentries community members, please add the details of the event and your own details to our meetups Etherpad.

4.1.7 Accessing and Updating Your Instructor Profile

We maintain a record of information for each of our instructors in our AMY database system. We use instructor profiles to help us identify instructors for workshops and to keep track of when and where you teach workshops. We also ask for social profile information as well as your ORCID and personal website. All of this information will be published on the instructor page of our website if you consent. Being included on our website is strictly opt-in. You must login to your instructor profile and check the box "consent to publish profile" or your instructor information **will not** be included in our listing.

To view and update your AMY profile you can login to AMY using your GitHub account. If you are unable to login to AMY, please submit your GitHub username to team@carpentries.org and the administrative team will get your profile updated allowing you to login.

AMY Database tool login window, allowing login with username/password or GitHub account

If you have taught, hosted, or helped at workshops that aren't listed in your profile, please send a brief message, including a link to the workshop website(s) to team@carpentries.org.

4.1.8 Teaching

Setting Up a Workshop

Please see our Teaching and Hosting section for instructions on setting up and running workshops. This includes links to our checklists and describes the surveys we use to assess learners' and Instructors' experiences. Also check out our Workshop Administration section

Setting Up a Workshop Website

For instructions on setting up a website for a workshop, please see the workshop template home page.

4.1.9 Other Ways to Contribute

There are many other ways you can contribute to The Carpentries beyond teaching workshops. These include helping keep lessons updated by becoming a maintainer; coordinating Carpentries-based workshops, helping grow the Instructor pool by becoming a Trainer; contributing to email lists like Discuss or topic- or region-specific lists; serving on committees such as Instructor Development; serving on Task Forces such as CarpentryCon; helping translate our lessons into other languages; running a mentoring group; hosting discussion sessions - the list goes on. If you would like to contribute to the development of our lessons, a good place to start is our Help Wanted page, where you can find issues from our repositories that are in need of attention. You can find a number of contacts for specific areas of work on our Get Involved page. Please email us if you would like to help but are not sure who to approach.

4.2 Become a Carpentries Instructor

We are always glad to welcome new Instructors to our community!

A Carpentries Instructor is a person who has completed our two-day Instructor training course workshop, and has performed the required follow-up tasks to complete the checkout process to become a certified (or 'badged') Instructor. Our Instructor training has the following overall goals:

- Introduce participants to *evidence-based teaching practices*.
- Teach participants how to *create a positive environment* for learners at workshops.
- Provide opportunities for participants to *practise and build teaching skills*.
- Help participants become integrated into *The Carpentries community*.
- Prepare participants to use these skills in teaching *Carpentries workshops*.

4.2.1 Who Are the Instructors?

Our Instructor community includes researchers, librarians, data scientists, and many others from a wide range of backgrounds, disciplines, career stages, and countries. Many of our Instructors are people who have attended a Carpentries workshop, and who have been inspired to go on and train as Instructors to share the skills they learned and now use in their work.

4.2.2 What Knowledge is Needed?

Some would-be Instructors worry about how knowledgeable one has to be about the material we teach in order to become an Instructor. While our Instructors have experience in one or more of our content areas, such as shell, git, SQL, Python, R, OpenRefine or spreadsheet software, some are relatively new to the skills.

Some people might be surprised to hear that feeling like a content 'expert' is not a necessary qualification to becoming an Instructor! We encourage newer learners to become Instructors. This is because:

a) often the best people to teach a novice level curriculum are *not* experts, but rather people who have recently been novices themselves (we will discuss why this is so in the training!) b) teaching is actually an excellent way to become more familiar with the material.

And because Carpentries Instructors never teach alone, you will always have help around if you get stuck!

Many Instructors add to the number of lessons they feel comfortable teaching only gradually. Not knowing the material well should not hold you back from applying to become an Instructor. However, if you do want to apply, it would be useful to have attended a Carpentries workshop either as a learner or helper and have some familiarity with at least one of the topics. That way, you will know more about what being an Instructor involves, and you can assess whether the workshop style and teaching method are for you. Having already participated in a workshop will be a plus on our scoring rubric if you decide to apply.

4.2.3 Motivation for People to Train as Instructors

People train as Instructors for many reasons:

1. *To make their own lives better.* By teaching their peers how to build and share better software, our Instructors are indirectly helping to create things that they themselves can use.

2. *To build a reputation.* Teaching a workshop is a great way for people to introduce themselves to places they would eventually like to work, and a great way to make contact with potential collaborators.

3. *To get practice teaching.* We are training more Instructors every year, and giving them opportunities to teach, which is useful for people with academic careers in mind.

4. *To help get people of diverse backgrounds into the pipeline.* Some of our Instructors are involved in part because they want computational science to include people from a broader range of backgrounds.

5. *Teaching forces you to learn new things, or learn old things in more detail than you already know.* See this paper: Graduate Students' Teaching Experiences Improve Their Methodological Research Skills".

6. *To make the world a better place.*

7. *To acquire useful skills for careers.* Instructors can expect to develop this skill set. You can re-use and re-purpose this wording for use in grant and job applications and for your CV.

8. *To join a community* of people who care about inclusive teaching of computational skills.

9. *Because it is fun.* It really is !

Read more about Instructor motivations in Dr. Beth Duckles's report, *Value of Software Carpentry to Instructors*.

4.2.4 Steps to Becoming an Instructor

Anyone who supports the aims of The Carpentries is welcome to apply for Instructor training. However, we are not able to guarantee training to all applicants. Member organizations get first priority for Instructor Training seats. For individuals interested in becoming certified Instructors outside the scope of membership, applications may be submitted for review through our Open Instructor Training program.

Open Instructor Training applications are reviewed and scored periodically, with expected wait times of 1-3 months from submission. When space is available in upcoming events, we invite Open applicants in order of scoring to register. Multiple applicants from a single institution will generally not be admitted at the same time. Acceptance to Open Instructor Training does not expire, and registration codes may be used for any online training event between 1 month and 1 week prior to its start date.

How do we score applicants? See our scoring rubric. Applications below a threshold score may be declined. Howewver, we welcome enthusiastic instructors to correspond and re-apply.

To request training as an Instructor, please fill out this form.

Occasionally, open training events offered to the general public may be announced in our mailing list, newsletter, *Carpentry Clippings*, or through our Twitter feed. For all other events, seats are reserved for trainees affiliated with member institutions or admitted individually through our Open Instructor Training program.

GOVERNANCE

5.1 The Carpentries Bylaws

[The Executive Council welcomes community feedback on these bylaws. See our contact information.]

5.1.1 1. Purpose

Vision: The Carpentries vision is to be the leading inclusive community teaching data and coding skills.

Mission: The Carpentries builds global capacity in essential data and computational skills for conducting efficient, open, and reproducible research. We train and foster an active, inclusive, diverse community of learners and instructors that promotes and models the importance of software and data in research. We collaboratively develop openly-available lessons and deliver these lessons using evidence-based teaching practices. We focus on people conducting and supporting research.

5.1.2 2. Lesson Programs

Overview

Lesson Programs are collections of lessons which comprise one or more Carpentries workshops and the leadership guiding their development and implementation. The following requirements outline the general expectations associated with Lesson Programs; additional detail can be found in the Lesson Program Policy.

Eligibility for Lesson Program Acceptance

The Executive Council is responsible for assessing a prospective Lesson Program for acceptance into The Carpentries, which requires a majority vote. The Executive Director in coordination with relevant core team and Executive Council members will be responsible for: developing and implementing policies related to Lesson Program incubation and assessing the ability of the Core Team and community to meet obligations associated with new Lesson Programs.

Roles and Responsibilities of Lesson Programs

A Lesson Program within The Carpentries should possess the following characteristics:

- Intention and purpose for lessons that align with The Carpentries mission and vision

- Goals and objectives for lessons and/or workshops that are distinct from other Lesson Programs

- Service to a particular audience of learners and instructors

- Evidence of community member commitment to Lesson Program governance (see below), lesson maintenance, and curriculum development

Governance of Lesson Programs

Each Lesson Program will have a Curriculum Advisory Committee to serve as community governance organisation and act as a point of contact with The Carpentries Executive Council and Core Team. The Curriculum Advisory Committee will provide the Executive Council with an annual report of Lesson Program operations.

Resignation and Termination of Lesson Programs

In the event that either the Lesson Program or The Carpentries is not fulfilling its obligations under the Lesson Program Policy, or the mission and vision of The Carpentries and the Lesson Program no longer align, the relationship between the Lesson Program and The Carpentries can be terminated. The Executive Council may decide to retire the Lesson Program through a majority vote, or the Curriculum Advisory Committee can choose to discontinue the Lesson Program's association with The Carpentries. In either case, notice must be given to the other organisation to arrange for separation of responsibilities and resources.

5.1.3 3. Organisational Membership

Member Organisations have committed to supporting the maintenance and growth of The Carpentries community according to the specific details outlined in each institution's Membership Agreement. In general, Member Organisations financially support The Carpentries in exchange for priority access to instructor training and guidance in building training capacity at their organisation.

5.1.4 4. Individual Voting Membership

The Carpentries community includes many opportunities for involvement representing variable levels of commitment. All individuals participating in community activities are required to conform to the Code of Conduct. Individuals may choose to commit to serving in one or more formal roles in the community, such as Instructor, Trainer, or Maintainer, as defined by The Carpentries Handbook.

Eligibility, Rights, and Termination for Voting Members

In a yearly timeframe associated with the dates of the election, starting December 1st, individuals who satisfy at least one of the following conditions are eligible for Voting Membership:

1. Every individual who has completed Instructor or Trainer certification in the past year

2. Every individual who has completed their Instructor or Trainer certification in the last two years and has taught at least one official workshop of The Carpentries

3. Every individual who is a certified Instructor or Trainer and has taught at least two official workshops of The Carpentries in the past two years

4. Any individual who has contributed to The Carpentries through participation on a Committee or Task Force, serving as a mentor or maintainer, or otherwise making a significant contribution to any Lesson Program or The Carpentries organisation in the past year, as and thus is considered active in the community

The Executive Director is not eligible for Voting Membership.

All individuals who satisfy conditions 1-3 above are automatically tracked and will receive Voting Membership. Contributing community members who satisfy condition 4 are indicated by having a badge in AMY, The Carpentries' internal database. Community members that do not have a badge in AMY, but feel they have contributed sufficiently, can contact The Carpentries Core Team (team@carpentries.org) within a reasonable timeframe prior to release of ballots, as dictated by the Election Policy, to request their voting privileges updated. Community members can log in to AMY to check their records and voting-eligible status. For more help with accessing and updating your AMY profile, please see Accessing and Updating Your Instructor Profile.

Any individual who no longer wishes to be affiliated with The Carpentries or included as a Voting Member must inform The Carpentries Core Team for removal from membership lists. Voting Membership may be terminated by a majority vote of the Executive Council for individuals who are recommended for termination by the Code of Conduct Committee or Executive Director for non-compliance with The Carpentries policies or violation of the core values of The Carpentries.

5.1.5 5. Executive Council

General Powers

As the highest leadership body of the organisation, the Executive Council is responsible for:

- determining the mission, vision and purposes of the organisation
- write, maintain and update the bylaws
- selecting the Executive Director and evaluating their performance
- strategic and organisational planning
- ensuring strong fiduciary oversight and financial management
- identifying revenue streams and resource development
- approving and monitoring The Carpentries programs and services
- enhancing The Carpentries public image
- assessing its own performance as the governing body of The Carpentries

Responsibilities of Executive Council Members

Each Member of the Executive Council is responsible for:

- knowing the organisation's mission, vision, policies, programs, and needs
- reading and understanding the organisation's financial statements
- serving as active advocates and ambassadors for the organisation necessary for The Carpentries to advance its mission
- leveraging connections, networks, and resources to develop collective action to fully achieve The Carpentries' mission
- helping identify personal connections that can benefit the organisation's fundraising and reputational standing, and can influence public policy

- preparing for, attending, and conscientiously participating in Executive Council meetings

Number, Tenure, Requirements, and Qualifications

The Executive Council will be composed of nine Members, each serving a two-year term. Member terms will begin on February 1st following the election, except when filling between-election vacancies (see below). Five Members of the Executive Council will be elected by the Executive Council (hereafter referred to as "Council-elected Members"). The other four Members will be elected by the Membership of the organisation ("Community-elected Members"). Executive Council members will not serve for more than three consecutive 2 year terms, followed by at least a one year hiatus before serving any new term(s). No employer may have more than two elected or appointed representatives on the Executive Council, and Carpentries Core Team are not eligible to serve as Executive Council Members. The Executive Council has the final say in determining whether people are working for the same employer. If more than two people who are working for the same employer are elected, they must step down one by one to be replaced by other nominees in order of the number of votes received.

Regular Meetings and Quorum

The Executive Council must meet at least ten times per year, either in person or online. Quorum for meetings of the Executive Council is five Members, including at least one Council-elected and one Community-elected Member. The Executive Council may use an asynchronous public online voting mechanism for motions to be approved inbetween regular meetings.

Compensation

Members of the Executive Council shall not receive compensation from the Organisation for their service, with the exception of administrative support, travel, and accommodation costs related to their duties on the Executive Council.

Confidentiality

Members of the Executive Council will sometimes discuss or be made aware of information or activities that may be sensitive to share publicly (e.g. salary information). Executive Council Members are expected to treat such information confidentially and to disclose such information to those outside the Executive Council only when the Executive Council has agreed that such dissemination is appropriate.

Removal

If a Member of the Executive Council consistently fails to meet the obligations outlined above, they may be removed by a vote of three-quarters of the other Members of the Executive Council. A vote to remove a Member must be announced in writing (in the meeting agenda) to the entire Executive Council at least ten days in advance to vote on the removal. A vacated Executive Council seat will be filled following the Between-election vacancies procedure outlined in the Nominations and Elections section.

5.1.6 6. Nominations and Elections

Overview

Four to five of the nine Members of the Executive Council will be elected each year, either by the community (Community-elected) or by the Executive Council (Council-elected). A general timeline for elections will occur annually as follows:

- Mid August: The Executive Council identifies an Executive Council member as point of contact for the election. The person should not be an Executive Council member who is standing for re-election

- Early September: Executive Council announces election, soliciting self-nominations for Community-elected Members and recommendations for Council-elected Members, and identifying areas of expertise desired by the Council

- Late October: Self-nominations and recommendations close and the Executive Council hosts Community Calls to discuss the election and introduce candidates for Community-elected Members

- Early November: Voting Members vote for Community-elected Members

- Mid-November: Executive Council elects Council-elected Members and announces the Executive Council Members for the following year

- February 1: Responsibility for governance is transferred to the new Executive Council

Community-elected Members

Two Community-elected Members will be elected each year by the Voting Members of The Carpentries. Any Voting Member of The Carpentries may stand for election by announcing their candidacy as dictated by the Election Policy; Carpentries Core Team may not stand for election. If there are fewer than two candidates for the election, the current Community-elected Members whose seats are up for election will decide amongst them who will remain in office.

Elections will take place once every calendar year and no later than 30 days before the new Executive Council becomes active (February 1). Each Voting Member may vote for as many candidates as there are Community-elected Member seats to be filled. The candidates who receive the highest number of votes will be elected into the Executive Council.

Council-elected Members

Two or three of the Council-elected Members will be elected each year. The Executive Council must consider at least one more candidate than the number of Council-elected Member seats to be filled. Anyone may recommend candidates for Council-elected positions.

Executive Council selects, by anonymous vote, the Council-elected Members from among the recommended candidates. Appointed Members will abstain from voting when they themselves are recommended for reappointment. Each Executive Council Member may vote for as many individuals as there are Council-elected Member seats to be filled. The individuals with the highest number of votes will be appointed. This vote will not take place until after the voting results for Community-elected Members are known and no later than December 15th.

Between-election Vacancies

If an Executive Council seat of a Community-elected Member becomes vacant after the beginning of the year but before the first of October, the Executive Council will strive to fill the seat with one of the non-elected nominees from the previous year's election, in the order of the number of votes they received. If this effort fails, the Executive Council may appoint a Voting Member to fill the seat.

If an Executive Council seat of a Council-elected Member becomes vacant after the beginning of the year but before the first of October, the Executive Council will strive to fill the seat with another eligible Voting Member.

In both of these cases, the vacancy will be filled by the new Executive Council Member for the remainder of the original term only.

5.1.7 7. Officers

Responsibilities of each officer of the Executive Council are as follows:

Chair

- Oversee regularly scheduled Executive Council meetings and call special meetings as necessary
- Work in partnership with the Executive Director to make sure that resolutions are carried out and issues addressed by the Executive Council as needed
- Prepare the agenda for Executive Council meetings
- Oversee the search for a new Executive Director (when applicable)
- Coordinate the Executive Director's annual performance evaluation
- The board chair shall serve for renewable one-year terms. They shall serve not more than five consecutive years.

Vice-Chair

- Understand the responsibilities of the Executive Council Chair and be able to perform these duties in the chair's absence
- Participate in leadership of the Executive Council by chairing special Committees and carrying out assignments as requested by the Chair
- Ensure the circulation of agendas, minutes, and other communications to the Executive Council
- Ensure that any Executive Council members who have been given tasks know what it is they have been asked to do
- Check that action has been taken following decisions at previous meetings
- Receive all communication from community to Executive Council and relay as necessary

Secretary

- Ensure that someone is assigned to and takes minutes during all official EC meetings

- Revise minutes for publication

- Report decisions, policy, and action items in formal minutes published publicly (when applicable)

Treasurer

- Assist the Executive Director in preparing financial reports for both the Executive Council and community at large

- Assist the Executive Director in preparing the annual budget and presenting the budget to the Executive Council for approval

- Answer Executive Council Members' questions about the budget and finances

Election of Officers

All officers must be members of the Executive Council. Officers will be selected via majority voting of the Executive Council at the first regular meeting of the Executive Council's term.

Removal of Officers

If an officer steps down, is removed from the Executive Council, or is otherwise unable to meet their obligations as determined by the Chair and/or Vice Chair, a new officer will be elected from the remaining Executive Council Members.

A detailed description of the Responsibilities of Executive Council members and officers is described elsewhere.

5.1.8 8. Committees and Task Forces

Committees

Committees are organised by the Executive Council to carry out specific tasks as delegated on an ongoing basis. Formation, Operations and terminations of Committees are regulated in the Committee Policy. Both Committees and Task Forces are overseen by Core Team, although the Executive Council may request quarterly reports on each group's activities.

Task Forces

Task Forces are organised by the Executive Council to carry out specific tasks on a short-term basis (e.g., a year or less). Formation, Operations and terminations of Task Forces are regulated in the Task Force Policy.

CarpentryCon Task Force

CarpentryCon is the key community-building and networking event in The Carpentries' calendar of activities. This event brings together newer and more experienced community members to share knowledge, to network, to develop new skills, and to develop strategies for building strong local communities. Location and frequency of the meeting is determined by the CarpentryCon Task Force.

5.1.9 9. Core Team

Executive Director

The Executive Director acts as the Chief Executive Officer of The Carpentries in accordance with its vision and mission as overseen by the Executive Council. The Executive Director provides oversight and overall management, planning, vision and leadership for all aspects of The Carpentries including programs, finances, resource development, human resources, member services, communications, and Executive Council development. The Executive Director assumes a leadership role in partnering with collaborating organisations, businesses, universities, foundations, government agencies, other nonprofits and supporters. The Executive Director works with the Executive Council to establish vision, policies, strategic focus, priorities, and general scope of programs. The Carpentries will deliver, and communicates on progress towards these goals via an annual report.

The Executive Council is responsible for advertising, conducting interviews and setting the salary level for the position of Executive Director. A majority vote of the Executive Council is required to hire or remove the Executive Director from their position.

5.1.10 10. Amendments

Bylaws

Any changes to these bylaws require a majority vote of the Executive Council. The Executive Council must re-approve these rules or an amended version every two years.

Update log:

- Approved 2018-11-01 by the Executive Council
- Amended 2020-09-25 and 2020-10-22 by the Executive Council

5.2 The Carpentries Commitee Policy

5.2.1 Context

Committees are an integral part of The Carpentries community. This policy will ensure sustainability, reduce burnout, and establish clear lines of communication and appropriate transparency for all Carpentries committees.

5.2.2 Committee operations

To ensure sustainability, accountability and effective communication for our committees, we propose the following guidelines. Each committee should:

Meetings

- Hold regular meetings, at least 4 per year

- Post meetings on the community calendar. Note that meetings do not necessarily need to be public. For example, for the Code of Conduct Committee, only business meetings are public, not incident meetings

- Host at least one community discussion per year

Roles

- Appoint a committee chair, and optionally a co-chair, with a description of their responsibilities

- Identify term limits and succession plan for chair/co-chair

- Provide a "roles and responsibilities" document for the committee

- Identify processes for onboarding new members

- Identify a process for offboarding members

- Include a process for recruiting and selecting new members

- Appoint a Core Team member liaison

Communication

- Post meeting notes or minutes in a consistent location. Minutes should be public, but can be private if the work of the committee requires it

- Utilise The Carpentries communication pathways

- Send written updates to the Executive Council every 6 months

5.2.3 Public Documentation

Each committee shall have a public page with the following information:

- Committee Name

- A short description of what the committee does

- Contact information for the committee

- Link to roles and responsibilities

- Link to committee materials: (e.g. the committee's GitHub repo, and/or section of the handbook)

- Information for when meetings are held

- Link to public meeting notes (current and past)

- Names of current members including their roles

- Name of the Core Team Liaison

- Past committee members including their roles
- Information for how to join the committee

The committee chair is responsible for updating this information at least yearly.

5.2.4 Internal Documentation

The committee should also have an documentation for the committee members that includes:

- Onboarding information
- Offboarding information
- How the chair and other roles are selected
- Information on recruiting or selecting committee members: e.g. language, rubric

5.2.5 Committee Formation

Committees are formed by creating the public documentation described above and submitting it for approval to the Executive Council. Upon approval, the committee is listed at the Carpentries Website with a link to this public documentation.

5.2.6 Committee termination

The Executive Council may terminate a Committee at any time.

5.2.7 Committee Actions Requiring Executive Council Approval

The committee will not undertake any of the following actions without obtaining approval of the Executive Council:

- Creation of a supplementary Code of Conduct
- Creation and/or release of position statements
- Host branded events
- Create and/or use a logo
- Launch their own fundraising campaign

Note that the above list is not exhaustive. Committees should consult with the Executive Council if there is any question about whether or not what they are doing requires approval.

Update log:

Approved 2020-07-06 by the Executive Council

5.3 The Carpentries Executive Council

5.3.1 About the Executive Council

The Carpentries Executive Council is the highest leadership body of The Carpentries. It is responsible for strategic and organisational planning, selecting the Executive Director and evaluating their performance, financial oversight, identifying revenue streams and resource development, approving and monitoring The Carpentries programs and services, and enhancing The Carpentries public image. Members of the Council also serve as advocates and ambassadors for the organisation, leveraging their networks to benefit the organization's reputation and fundraising. The Executive Council executes these responsibilities through a combination of monthly Executive Council meetings and regular correspondence and collaboration via email and online platforms.

The governance of The Carpentries by the Executive Council is outlined in the Bylaws.

In addition to publicly posting meeting minutes, the Executive Council reports on its activities periodically in Carpentry Clippings (the organizational newsletter) as well as through blog posts. The council also prepares Yearly Summaries of its activities.

5.3.2 Contacting the Executive Council

If you have a question or concern for the Executive Council, there are three ways for communicating with Executive Council Members:

1. **File an issue in this repository.** This is appropriate if you would like to solicit additional community feedback on a topic of general interest to the community.

2. **Send us an email.** This is appropriate for communicating directly with the Executive Council but not the rest of our community.

3. **Submit this form.** This is preferable if you would like confidential communication with the Executive Council, or if you would like to remain anonymous.

5.3.3 The Carpentries Executive Council Documentation

The information below describes all procedures, routines and resources relevant for the Executive Council. This information is added here as onboarding information for new Executive Council members, as well as to provide transparency for the community.

NOTE that a number of links lead to pages for which access is restricted to Executive Council members. We wish to be as transparent as we can, but sometimes we need to choose to withhold information from others.

Responsibilities of all Executive Council Members

The Carpentries Bylaws describe the formal responsibilities of the Executive Council from an organisational level. This text describes the current implementation of the tasks described in the bylaws and represents flexible guidelines that may be adapted as the Executive Council deems necessary. In addition to documenting Executive Council standard operating procedures, it is also intended to clarify Executive Council function for the broader community and help potential members understand the commitment to serve on the Executive Council.

In practice, each Executive Council member is responsible for the following general tasks:

- Supporting the Mission and Vision of The Carpentries
- Exemplifying the Code of Conduct
- Ensuring The Carpentries' adherence to legal agreements and standards

- Offering their expertise to help ensure the health and success of the organization

- Actively participating in discussions about strategic and financial decisions

- Providing feedback and voting on formal motions within one week of their posting

- Attending (in person or by phone/web-based) at least 75% of the meetings held each year

- Dedicating at least three volunteer hours per week toward Carpentries activities (including meeting attendance)

The specific commitments expected of Executive Council members include monthly meetings (1-1.5 hours, online) and a once-yearly face-to-face meeting (expenses covered by The Carpentries). Minutes for these meetings are published to a GitHub repository after approval by Executive Council members. We may periodically schedule additional virtual meetings to address particular topics. Officers and Executive Council liaisons to Committees or Task Forces may have additional commitments for meetings. Asynchronous commitments involve suggesting agenda items for meetings, responding to email requests for opinions, and formal voting on resolutions (as issues in this repository), and work resulting from being on a task force or committee representing the Executive Council.

5.3.4 Officers

Executive Council officers are selected at the first regular meeting following election and appointment of new members and serve one year terms. Officer positions include:

- Chair

- Vice Chair

- Secretary

- Treasurer

General tasks for each officer position are described in the bylaws. More detailed descriptions can be found on the page describing the Executive Council officers responsibilities.

5.3.5 Communication

We use two mailing lists:

- executive-council@carpentries.org: this is an internal list, and includes Executive Council and Executive Director; this list can only receive messages from list members

- carpentries-executive-council@carpentries.org: recipients are Executive Council Chair and Vice Chair; anyone can send to this, allowing the community to communicate directly with the Executive Council (but not the rest of our community)

5.3.6 Meetings

The Executive Council generally meets once monthly (we are required to hold at least 10 meetings a year, either in person or online). Smaller groups of Executive Council members may hold additional meetings when needed.

- Publicly available meeting minutes

- See the Agendas and minutes folder* in the Executive Council Google Drive. We use a single document for meeting agendas/minutes for the entire year (meetings from February - January)

- Our Meeting conduct document* describes how we prepare for and conduct regular meetings, see the Google Doc in the above-mentioned folder (folder Agendas_Minutes –> Meeting conduct.gdoc)

- Scheduling is done through our Google calendar*

- Executive Council members are invited to attend the Core Team meetings whenever they desire

5.3.7 Finances and Fiscal Sponsor

See the Finance folder* in the Executive Council Google Drive.

The Carpentries Fiscal Sponsor

The Carpentries is fiscally sponsored by Community Initiatives, a registered 501c3 based in Oakland, CA. Here are some relevant resources:

- What is fiscal sponsorship?
- Who are CI's other fiscally sponsored projects (FSPs)?

See also the Community Initiative's bylaws and the Carpentries' fiscal sponsor agreement in the Fiscal Sponsor folder* on the Executive Council Google Drive (folder EC_processes –> folder Fiscal_Sponsor).

5.3.8 GitHub

We maintain multiple repositories with variable permissions (some public, some restricted to Executive Council and/or various Core Team members).

Under https://github.com/carpentries

This is a GitHub organisation 'owned' by The Carpentries Core Team. Executive council members have access, as well as members of the Core Team and some community members

https://github.com/carpentries/executive-council-info

- *public* repository
- used to publish information intended for the community, such as our monthly meeting minutes
- also used for voting on our our motions (our decisions)

https://github.com/carpentries/executive-council*

- *private* repository
- used for discussions between Executive Council and Executive Director that require broader direct feedback from the Core Team
- issues for approval of meeting minutes are posted here

Under https://github.com/carpentries-ec

This is a GitHub organisation 'owned' by the Executive Council, used for information or documents that *only* Executive Council members should have access to. Optionally, the Executive Director can be given access by inviting them as collaborator.

https://github.com/carpentries-ec/conversations_ec_ed*

- *private* repository. Executive council members have access, as well as the Executive Director (but not the Core Team)
- used to

- discuss issues between Executive Council and Executive Director outside of the Executive Council monthly meetings

- storing relevant information that needs to be private to the world, and necessary or OK for the Executive Director to have access to

https://github.com/carpentries-ec/minutes-private*

- *private* repository, *only Executive Council* (not Executive Director or the Core Team) have access

- used for

  - those parts of the minutes that only Executive Council should have access to

  - voting on motions that should only be visible to Executive Council. Examples of such discussions and motions:

    * hiring of a new Executive Director

    * salary discussions/decisions

https://github.com/carpentries-ec/financeviz*

- *private* repository, Executive Council, Executive Director and the Core Team have access

- used for visualisations and plots for communicating The Carpentries finances

5.3.9 Google Drive

We use a private Google Drive folder called Carpentries_Executive_Council*, see its README for orientation to contents.

5.3.10 Yearly Timeline

Additional annual tasks:

- in-person (face-to-face) meeting

- reassessing the strategic plan

- annual financial report

Additional recurring tasks:

- every second year, starting 2020: revision or reapproval of the bylaws

January

- Review previous year's minutes, ensuring all are approved and posted

- Onboarding meeting for incoming Executive Council members with current Chair and/or Vice Chair and Executive Director

- Overlap meeting of outgoing/incoming members

- Logistics of offboarding outgoing members

- Logistics of onboarding new members

- Solicit nominations for Executive Council officers

- Suggest annual goals for new Executive Council

- Assess availability of incoming Executive Council Members for in-person meeting
- Review Q4 financial report
- Publish Q4 Code of Conduct Transparency Report

February

- New Executive Council officially takes over
- Reassess meeting procedures, including methods for setting the agenda and taking minutes
- Select new officers
- Select Executive Council liason to Code of Conduct Committee
- Finalise annual goals for Executive Council

March

- Review and discussion of strategic plan activities
- Review draft financial report for community (the draft may first be available early April)

April

- Review Q1 financial report
- Publish Q1 Code of Conduct Transparency Report

May

June

- Review and discussion of strategic plan activities

July

- Review Q2 financial report
- Publish Q2 Code of Conduct Transparency Report

August

September

- Assign individuals to reassess bylaws (required in even-numbered years, due in November)
- Review and discussion of strategic plan activities

October

- Assess desired skills for incoming Executive Council members
- Announce opening of self-nomination for Executive Council
- Solicit nominees for community awards
- Review Q3 financial report
- Publish Q3 Code of Conduct Transparency Report

November

- Executive Director evaluation
- Solicit nominations for appointed members
- Nominations for Executive Council elections close (at start of first community call)
- Community call for Executive Council nominees
- Vote on reassessed bylaws

December

- Announce community award winners
- First full week (Monday-Friday) in December: elections open
- Selection of appointed members
- Ratifying community-elected positions and council-elected positions (private GitHub repo)
- Ratifying the new Executive Council members (public GitHub repro)
- Announcement of the new Executive Council
- Start organising dates for face-to-face meeting in first half of year
- Review and discussion of strategic plan activities

5.3.11 Elections

Details about how Executive Council Members are elected and their terms of service are available in the bylaws. Elections are currently administered by an Executive Council Member (who is not up for re-election) via ElectionBuddy.

A checklist for the Executive Council election process is available as a Google Doc* in the Executive Council Google Drive (folder Election –> EC Election Process.gdoc)

An overview of whose council member's seats are up for (re-)election can be found in a Google Sheet* (folder Elections –> Year-of-term for executive council members.gsheet).

5.3.12 Transitions between Executive Councils

The transfer of responsibilities to the incoming Executive Council includes

- *onboarding new members to Executive Council processes*

- *updating access to resources*

- *selecting members to serve in specific roles*

A checklist for the transition process can be found as a Google Doc* (folder EC_processes –> Onboarding_offboarding members, ED.gdoc).

Onboarding new Executive Council members

New (incoming) members (both Community-elected and Council-elected) are announced in late December/early January. The official term of office for incoming Executive Council members is February 1. We ask that incoming members attend the final regularly scheduled meeting of the current Executive Council in January, prior to taking office, to learn how meetings operate, and to prepare for formal transfer of responsibility.

The outgoing Chair and/or Vice Chair should meet with the incoming Executive Council members and Executive Director in January to discuss the following key points:

- The general workflow of the Executive Council

    - monthly meetings

    - as-needed special meetings and yearly in-person meeting

    - asynchronous communications

- Where different types of information are stored

- Responsibilities and expectations for all Executive Council members

Access to resources

Executive Council members have access to the following resources:

- Google Drive folder Carpentries_Executive_Council

- GitHub organisations, teams, and repositories

    - Organisation: carpentries

        * Team: carpentries/executive-council

        * Repo: executive-council-info (public, this repository)

    - Repo: private (Executive Council + the Core Team)

        * Team: carpentries-ec/ec

        * Repo: Executive Council + Executive Director

        * Repo: Executive Council only

- Mailing list (listserv)

    - executive-council@carpentries.org

- Executive Council Google Calendar

Incoming Executive Council members should be granted access to these resources in January. Outgoing members' access to these resources should be removed in February.

Additionally, The Carpentries' website that includes the Executive Council Members/Officers should be updated.

Transfer of member responsibilities

The following Executive Council roles should be assigned at the February meeting (these require formal voting by Executive Council members):

- Officer positions:

    - Chair

    - Vice Chair

    - Secretary

    - Treasurer

- Committee representatives (these may continue from previous terms as applicable):

    - 2 x 2 Committee representatives

    - CoC representative

    - Representatives to Community Initiatives (CI)

*Access to this information is restricted to Executive Council members.

5.4 The Carpentries Executive Council Officer Positions

General tasks for each officer position are described in the bylaws. This document describes their tasks in more detail.

- *Chair*
- *Vice Chair*
- *Secretary*
- *Treasurer*

5.4.1 Chair

The Chair's primary role is to organise and facilitate the activities of the Council. General tasks are described in the bylaws.

The Chair's responsibilities are to:

- Organise official meetings, including regularly occurring monthly meetings and additional special meetings as necessary.

    - Set meeting times and make sure these are properly adjusted with respect to daylight savings (which does not change for all members at the same time)

    - Send out reminder email 7-10 days before each monthly meeting (more details in the monthly minutes document)

    - Plan dates, location, and agenda for the annual in-person meeting with input from the rest of the EC

- Set the agenda and ensure that it is circulated in a timely fashion to allow EC members to prepare for the meeting.

- – Review submissions to the agenda form and add these to the agenda for the meeting

  – Invite non-members to the EC meeting as needed for specific discussions, such as staff, Community Initiatives (CI) representatives

- Ensure meetings are led fairly and transparently.

  – Make sure the Secretary is posting minutes for approval, voted on by EC members, and published in the public repository all in a timely fashion.

  – Make sure that motions are voted on in a timely fashion (send out a notice when they are ready for voting and reminders as necessary to the group or individuals).

- Facilitate the formation of necessary Committees and appointments of EC liaisons.

  – Make sure that committees and task forces report back to the EC on their work at monthly meetings, either verbally or in non-verbal updates.

- Act as the primary liaison between the Executive Director and the Executive Council.

  – This typically involves a monthly meeting with the Executive Director (ED) to discuss current issues and possible agenda items for the next monthly meeting and is typically two weeks offset from the monthly Executive Council (EC) meeting.

- Coordinate the Executive Director's annual performance evaluation (November)

- Oversee the search for a new Executive Director when necessary.

- Ensure that EC members are aware of their duties and responsibilities.

- The EC member who holds the position of Chair has ideally served on the EC for at least one year prior to accepting the office and is willing to remain accessible to the Chair who accepts the position following their departure from office.

- The following additional tasks also fall to the Chair:

  – Make sure Code of Conduct Transparency Reports are completed in a timely fashion and published in the public repository.

  – Close GitHub issues in the EC repositories as needed

  – Onboard new members (with the Vice Chair)

  – Generally track goals of the EC to ensure that the EC is focusing on the right tasks and that tasks are completed in a timely fashion.

5.4.2 Vice Chair

The Vice-Chair's primary roles are to perform the tasks of the Chair in the event of their absence and to ensure communication of Executive Council activities to the Carpentries community. General tasks are described in the bylaws.

The Vice Chair's responsibilities are to:

- Understand the responsibilities of the Executive Council Chair and be able to perform these duties in the chair's absence

- Ensure the circulation of agendas, minutes, and other communications to the Executive Council

- Ensure that any Executive Council members who have been given tasks know what it is they have been asked to do

- Check that action has been taken following decisions at previous meetings

- Serve as the primary liaison for communication between the community and the Executive Council. Primary tasks include reporting from EC meetings for the newsletter, as well as monitoring GitHub issues and private email.

More specifically, the Vice Chair should:

- Monitor activities of the EC:

  - Ensure all obligations of members of the Executive Council are being fulfilled, particularly those of the Chair

  - Track all items in the yearly EC timeline

  - Check that the meeting minutes are approved (via GitHub vote in a private repo) and published (in the public EC repo) within two weeks of the meeting occurring

  - Watch issues/PRs in all GitHub repositories and taking appropriate action as necessary: adding to agendas, noting in nonverbal updates for meetings, etc.

- Elections: so far the Vice Chair has been point of contact for the elections. The complete process is documented in a Google Doc* (Folder Elections –> EC Election Process.gdoc). At the very least, the Vice Chair should ensure each part of the election process is delegated to someone.

- Communications

  - Send newsletter updates to the appropriate Carpentries core team member to be published. The newsletter is published every other Wednesday, and updates should be sent the prior Friday. These updates are important to help the community know what the Executive Council does and to encourage feedback and communication about our activities

  - Monitor communication from the community. As described elsewhere, community members may use a Google Form, an email address or GitHub issues to communicate with the EC

5.4.3 Secretary

The Secretary maintains records for the Executive Council that are not related to either finances or the Core Team. General tasks are described in the bylaws.

The Secretary's responsibilities are to:

- Ensure that someone is assigned to and takes minutes during all official Executive Council meetings

- Revise minutes of regularly occurring meetings to report decisions, policy, and passage of formal motions prior to circulation among the Executive Council for approval.

- Publish meeting minutes and policy decisions

  - publicly for the community, as described in the Meeting conduct document* (folder Agendas_Minutes –> Meeting conduct.gdoc) under the section "Preparing the minutes for release"

  - or, if necessary, in secure locations only accessible to the Executive Council or Executive Council/Executive Director.

5.4.4 Treasurer

The Treasurer organizes and maintains financial records for Executive Council oversight of The Carpentries operations. General tasks are described in the bylaws.

The Treasurer's responsibilities are to:

- Assist the Executive Director in preparing financial reports for both the Executive Council and the community at large

- Assist the Executive Director in preparing the annual budget and presenting the budget to the Executive Council for approval

- Ensure that an up-to-date report on the status of accounts can be given at each Council meeting.

- Maintain open lines of communication with the Executive Director and the fiscal sponsor.

Practical information for the Treasurer role can be found in a Google Doc* (folder Finance –> Treasurer: practical information.gdoc).

*Access to this information is restricted to Executive Council members.

5.5 Lesson Programs

The Carpentries supports and maintains Lesson Programs. Lesson Programs are collections of lessons comprising one or more Carpentries workshops, serving distinct goals and audience, and the leadership guiding their development and implementation.

From The Carpentries Bylaws:*A Lesson Program within The Carpentries possesses the following characteristics:

- Intention and purpose for lessons that align with The Carpentries mission and vision

- Goals and objectives for lessons and/or workshops that are distinct from other Lesson Programs

- Service to a particular audience of learners and instructors

- Evidence of community member commitment to Lesson Program governance (see below), lesson maintenance, and curriculum development*

Adoption as an official The Carpentries Lesson Program is the last step of Lesson Program incubation as outlined in the *Lesson Program Incubation Roadmap*

This Policy outlines the Roles and Responsibilities of the Lesson Programs and The Carpentries.

5.5.1 Lesson Program Policy

Roles and Responsibilities of Lesson Programs

- The Lesson Program maintains a Lesson Program Committee of a minimum of 3 members to serve as community governance body and act as a point of contact with The Carpentries Executive Council and Core Team.

- The Lesson Program Committee provides the Executive Council with an annual report of Lesson Program operations based on a template provided by The Carpentries.

- The Lesson Program follows all general policies as outlined by The Carpentries, including, but not limited to, the Code of Conduct.

- The Lesson Program workshops are conducted and administered as outlined in The Carpentries handbook, including tracking activities and using at least one certified instructor per workshop.

- Assessment of Lesson Program workshops and activities are conducted through, and in coordination with, The Carpentries assessment efforts.

- Lesson Program workshops follow The Carpentries instructor training procedures and guidelines as outlined in the instructor training curriculum.

- The Lesson Program has at least one articulated, established core curriculum for a workshop and guidelines on what is required for it to be called a Lesson Program workshop.

- The Lesson Program maintains documentation with information about its goals, workshops and curriculum.

- The Lesson Program coordinates with The Carpentries to release and publish lessons with permanent identifiers on a regular basis.

- The Lesson Program develops all content collaboratively and openly with a Carpentries approved open license.

- The Lesson Program maintains and develops lessons in accordance with Carpentries guidelines as outlined in The Carpentries Curriculum Development Handbook.

- The Lesson Program uses Carpentries templates and curricular guidelines for workshops and lessons.

- The Lesson Program has a workshop fee structure and Member Organisation engagement plan consistent with The Carpentries.

- The Lesson Program promotes its curriculum so that workshops are taught regularly.

- The Lesson Program will follow the procedures and guidelines of The Carpentries administrative and financial management structure.

Roles and Responsibilities of The Carpentries

- The Carpentries Core Team and affiliates will coordinate Lesson Program workshops in accordance with standard workshop coordination practices as outlined in The Carpentries Handbook.

- The Carpentries will enable the Lesson Programs to make use of all The Carpentries infrastructure, including workshop coordination tools and database.

- The Carpentries will provide the Lesson Programs access to all lesson and workshop templates. The Carpentries will include representatives from the Lesson Program on task forces or committees tasked with updating and maintaining these templates.

- The Carpentries will support development opportunities for the Lesson Program, including grants, donations and other revenue opportunities. Funds brought in for Lesson Program activities will go to support that work.

- The Carpentries will include Lesson Programs in the regular lesson release and publication cycle, coordinating between the Lesson Program maintainers and The Carpentries Core Team and affiliates.

- The Carpentries will include the Lesson Programs in assessment efforts, including survey development and data analysis.

- The Carpentries will ensure the instructor training program addresses the training needs of the Lesson Program, incorporating examples and exercises targeted towards the communities served by the Lesson Program.

- The Carpentries will prepare Trainers to work with trainees from the Lesson Program.

- The Carpentries Instructor Training recruitment and retention strategies will include building communities of Instructors in domains and communities served by the Lesson Program.

- The Carpentries will include the Lesson Program in all community efforts, including but not limited to the activities of the Instructor Development committee, Mentorship program and BugBBQs.

- The Carpentries programmatic and assessment reports will include Lesson Program activities. The Lesson Program will also have access to data specific to its activities.

- The Carpentries Organisational Membership program will include The Lesson Program.

- The Carpentries will provide an annual financial report to the Lesson Program Committee, including an assessment of the financial stability and sustainability of The Carpentries.

- The Carpentries general revenue through Memberships, workshop coordination fees and general grants or donations, will support the ongoing work of the Lesson Program - running workshops, diversity and inclusion efforts, instructor training, lesson maintenance and community engagement.

- The Carpentries maintains and documents an administrative and financial management structure that supports the Lesson Program.

5.5.2 Lesson Program Incubation Roadmap

The Roadmap describes the three phases of a Carpentries Lesson Program: Pre-incubation, Incubation as a Lesson Project, and Adoption as a Lesson Program. Advancement from one phase to the next requires a proposal and approval process involving both Core Team and the Executive Council. Approval of a new Lesson Program requires substantial investment from both the applicants and The Carpentries. In the case of the previous applicant for Lesson Program (Library Carpentry), the process was aided by a grant supporting a full-time Core Team member, and took about a year (though the community existed for several years prior). Details for each phase are described below.

Phase 1: Pre-incubation

Pre-incubation is the initial phase of development of a lesson program during which a group of individuals come together to develop a new curriculum or Lesson Project to teach a specific set of skills to a targeted audience of learners. Groups that are developing Lesson Projects often come together organically for discussions regarding audience, need, learning objectives, and content. This phase is often quite long, possibly years.

Not all Lesson Projects will achieve the level of development or community commitment necessary for consideration for Incubation as a Lesson Program. Some groups may not consider this a goal and may prefer to consider the development of lessons within the Carpentries Labs or Carpentries Incubator programs as an alternative to becoming a full-fledged Lesson Program, as the latter requires significantly more overhead and commitment from their community. If the Lesson Project intends for their work to eventually lead to an application for Incubation as a Lesson Program, they should keep in mind that the goals and objectives of their lesson and/or workshops should be different from those of existing Lesson Programs and should have a distinct audience. If this is not the case, they may want to consider whether it is more appropriate to include the new lessons as options within the curriculum of an existing Lesson Program.

Outside funding or other external support may be required for the Lesson Project to develop their materials and community to the point where they would qualify for Incubation as a Lesson Program and to allow them to complete the steps required during the Incubation phase in order to gain full approval as a Carpentries Lesson Program.

During the Pre-incubation phase, activities by the Lesson Project will likely include most of the following:

- Development of a community interested in developing and teaching the lessons

- Identification of a distinct audience that will be served by the lessons/workshops. If they intend to eventually apply for application as a Lesson Program, the target audience should not currently be served by another Carpentries Lesson Program.

- Statement of the goals of the Lesson Project, similar to a mission or vision statement

- Definition of the scope of the lessons

- Completion of draft versions of lesson content, including learning objectives

- Early test runs of the lesson material at workshops with actual learners

- Results from Carpentries short-term surveys if appropriate and possible

Application and Approval for Incubation Phase

As the Lesson Project develops and undertakes the activities listed above in the Pre-incubation Phase, it may consider applying for Incubation as an official Carpentries Lesson Program. Application for Incubation requires the submission of a report from the Lesson Project that must include:

- Description of the community that is working on the Lesson Project

- Description of domain knowledge required for instructors to teach the material, so that we can determine to what extent our existing instructor pool may possess these skills and be able to teach these workshops

- Description of the community that the Lesson Project serves with their workshops

- Goals of the Lesson Project

- List of the lessons developed or under development and what a two-day workshop would include, along with access to the materials for Carpentries review

- Information about when and where at least some of the materials have been taught, even if as smaller modules and not yet a full-fledged 2-day workshop

- Assessment information from the teaching events regarding number of attendees and learner feedback about the workshop(s), either using The Carpentries standard surveys or custom survey questions

- How the Lesson Project feels that becoming an official Carpentries Lesson Program will benefit the Lesson Project, The Carpentries, and the broader learning community.

The Carpentries Executive Council will then review these materials to determine whether the Lesson Project has met the core criteria for Incubation:

- Intention and purpose for lessons that align with The Carpentries mission, vision, and values

- Goals and objectives for lessons and/or workshops that are distinct from other Lesson Programs

- Service to a particular audience of learners and instructors

- Evidence of community member commitment to Lesson Program governance, lesson maintenance, and curriculum development.

The Executive Council will decide on one of the options below:

- Approve the application and recommend the Lesson Project for the Incubation phase

- Recommend revisions to the application or work that needs to be undertaken before the application can be approved or before it can be resubmitted for consideration, whichever the Executive Council specifies.

- Reject the application for Incubation, providing reason(s) for rejection if appropriate.

Phase 2: Incubation

Once approved for Incubation, the Lesson Project must accomplish specific requirements within a defined time frame to be agreed upon between the Lesson Project and The Carpentries. The Carpentries will also have specific responsibilities toward the Lesson Project during this time.

During the Incubation phase, the Lesson Project will complete the following tasks:

- Establish a culturally and linguistically diverse Lesson Program Committee (LPC) of at least three people to serve as a governance body and point of contact with The Carpentries.

- The LPC should meet at least quarterly to oversee Lesson Project activities.

- The LPC should create a document describing this group's roles and responsibilities.

- The LPC must demonstrate experience having discussions and making decisions by providing The Carpentries with access to open versions of meeting minutes.

- The LPC must agree for the Lesson Project to be included in Organisational Membership agreements.

- Agree to abide by The Carpentries Code of Conduct (CoC)

- Assign at least three maintainers to maintain each of the lessons

- Create an onboarding document and process for existing Carpentries instructors so that they can determine whether or not they should consider teaching these lessons

- Create a plan to recruit additional instructors for the program

- Agree to have at least one trained instructor for each workshop

- Run pilot workshops

- Collect and analyse post-workshop feedback

- Complete and refine core curriculum, incorporating relevant workshop feedback

- Assign one or two leads for workshop coordination and communications work

- Agree to The Carpentries workshop fee structure

During the Incubation phase, The Carpentries will:

- Provide the Lesson Project with access to our database system (currently AMY) for workshop tracking

- Allow the use of our survey infrastructure (currently Typeform)

- Post information on The Carpentries website regarding the Incubation of the Lesson Project as well as through other communication channels and at instructor training workshops

- Provide a Carpentries team member to meet with the Lesson Project for feedback or advice on a regular basis, with the frequency to be determined mutually by the Lesson Project and The Carpentries.

Application and Approval for Official Lesson Program Adoption

At the end of the agreed upon Incubation time period, or prior to that if the Lesson Project feels it has completed all the listed tasks, the Lesson Project's status will be reviewed by the Executive Council. The Lesson Project should submit a request to The Carpentries documenting how it meets the criteria listed above. The Carpentries Executive Council will review this application and evaluate whether the criteria have been met.

The Executive Council will decide on one of the options below:

- Approve the application and adopt the Lesson Project as an official Carpentries Lesson Program

- Recommend revisions to the application or work that needs to be undertaken before the application can be approved, or before it can be resubmitted for consideration, whichever the Executive Council specifies.

- Reject the application for Incubation, providing reasons for rejection if appropriate.

Phase 3: Adoption

Once The Executive Council has approved Adoption, the new Lesson Program will be listed as such on The Carpentries website and will be included as part of the standard workshop offerings. The Lesson Program should be committed at this point to maintaining their lesson materials and their community and to working with The Carpentries on long-term sustainability and the fulfillment of its roles and responsibilities in accordance with the Lesson Program Policy.

Once adopted, The Carpentries will update operations and documentation across the organization to reflect the addition of the new Lesson Program. The Carpentries will also fulfill its roles and responsibilities in accordance with the *Lesson Program Policy*.

Update log:

- Approved 2018-11-01 by the Executive Council
- Updated 2019-12-29 to include Lesson Program Incubation Roadmap

5.6 The Carpentries Task Force Policy

5.6.1 Context

The Carpentries uses Task Forces to explore ideas and make updates in policy, procedures and guidelines. Task forces bring together a small group of people focused on a particular topic for a set period of time. Task forces are proposed by the community, Lesson Programs, Carpentries Core Team and Executive Council, and are approved by the Executive Council.

5.6.2 Task Force Operations

To ensure sustainability, accountability and effective communication for all task forces, we propose the following guidelines.

Meetings

Each task force shall:

- hold regular meetings, to be determined by the Task Force Chair
- post meetings on the community calendar. Note that meetings do not need to be public

Requirements

Each task force requires:

- a Task Force Charter that outlines the context, objectives and deliverables of the Task Force
- a set timeline for the start and completion of the Task Force deliverables
- an associated public facing GitHub project for information about the Task Force during its work, to be located in the Carpentries Task Forces GitHub repository
- appointment of a Task Force chair
- a "roles and responsibilities" document for the Task Force
- a process for recruiting and selecting task force members
- appointment of a Core Team liaison who serves as a point of contact and can attend Task Force meetings when deemed necessary

Communication

Each task force shall:

- post meeting notes or minutes in the corresponding task force folder in the task forces GitHub repository. Minutes should be public, but can be private if the work of the task force requires it
- utilise The Carpentries communication pathways
- produce a Task Force report to be shared with the Executive Council upon completion of the deliverables as outlined in the Task Force Charter

5.6.3 Public Documentation

Each task force shall have a folder in the Carpentries Task Forces GitHub repository with the following information:

- Task Force Charter
- Meeting notes or minutes
- Task Force report The task force chair is responsible for updating this information as necessary.

5.6.4 Internal Documentation

The task force should have internal documentation for the task force members that includes:

- Onboarding information
- Offboarding information
- How the chair and other roles are selected
- Information on recruiting or selecting task force members: e.g. language, rubric

Whenever possible, this internal documentation should be made available to the community.

Task Force Formation

The current mechanism for creation of a Task Force is for the Executive Council or Core Team to identify needs for information gathering or updates in current policies, guidelines or products, and collaboratively draft a Charter with relevant members of the community. Members of the community interested in proposing or leading a Task Force should get in touch with the Executive Council at carpentries-executive-council@carpentries.org. The Task Force comes into effect upon approval of the Task Force Charter by the Executive Council.

Task Force Termination

The Executive Council may terminate a Task Force at any time.

Task Force Actions Requiring Executive Council Approval

The task force will not undertake any of the following actions without obtaining approval of the Executive Council:

- Creation of a supplementary Code of Conduct
- Creation and/or release of position statements
- Host branded events
- Create and/or use a logo
- Launch its own fundraising campaign

Note that the above list is not exhaustive. Task forces should consult with the Executive Council if there is any question about whether or not what they are doing requires approval.

Update Log:

Approved 2020-09-23 by the Executive Council

INSTRUCTOR DEVELOPMENT

6.1 Instructor Development Committee

6.1.1 Instructor Development Committee Roles

Co-Chairs

Responsibilities

The Co-Chairs of the Instructor Development Committee are responsible for:

1. Scheduling monthly committee meetings.

    - Meetings held monthly, twice in one day with each co-chair hosting one meeting to accommodate time zones.

2. Working with fellow co-chair to plan and share the monthly meeting agenda in advance (i.e. 1 or 2 weeks ahead of time).

3. Leading one of the monthly committee meetings (or delegate when absent).

4. Delegating tasks that come up each month.

    - This can be done through a co-chairs meeting after monthly committee meeting.

5. Following up with other committee members regarding their duties/concerns.

6. Gathering feedback from community and other committee members about desired instructor development efforts and/or outcomes.

7. Adding/modifying new committee roles as necessary.

8. Evaluating committee roles on a yearly basis.

Time Commitment

- 1-2 hours/week
- 1 year term beginning 1-May

Requirements

- Certified Carpentries Instructor

Secretary

Responsibilities

The Secretary of the Instructor Development Committee is responsible for:

1. Recording notes and attendance at IDC Leadership Meetings and IDC Meetings.

2. Adding notes to the Instructor Development GitHub Repository after each meeting

3. Emailing a summary of notes to the instructor-development list on TopicBox.

4. Updating IDC Etherpad with meeting connection information and details

5. Monitoring the Instructor Development Topicbox for ideas/issues to bring back to the committee.

Time Commitment

- 1-2 hours/week
- 1 year term beginning 1-May

Requirements

- Certified Carpentries Instructor

Communications Chair

Responsibilities

The Communications Chair of the Instructor Development Committee is responsible for:

1. Adding IDC Meetings to The Carpentries Community Calendar

2. Actively recruiting participants to join IDC meetings and projects by sending out communications via Slack, Topicbox, Twitter (with the help of The Carpentries Communications Lead, Omar Khan) and The Carpentries Blog.

3. Creating communications around IDC projects or other initiatives.

Time Commitment

- 1-2 hours/week
- 1 year term beginning 1-May

Requirements

- Certified Carpentries Instructor

Mentoring Chair

Responsibilities

The Mentoring Chair of the Instructor Development Committee is responsible for:

1. Using the Mentoring Groups Workflow to recruit mentors/mentees and managing The Carpentries Mentoring Groups.

2. Reporting back to IDC Leadership and Carpentries Core Team Liaison about Mentoring Group metrics and any concerns or revisions to the mentoring groups.

3. Maintaining The Carpentries Mentors' Etherpad and Mentoring Groups' Etherpad

4. Updating the Mentoring Groups section of the handbook as necessary.

5. Managing the #mentoring channel in The Carpentries Slack.

6. Coordinating with the *Communications Chair* on communications campaigns around mentoring.

Time Commitment

- 1-2 hours/week
- 1 year term beginning 1-May

Requirements

- Certified Carpentries Instructor

Discussion Session Coordinator

Responsibilities

The primary responsibilities of the Discussion Session Coordinator are:

- Organising Themed Discussion Sessions and #CarpentriesConversations that come in on the Call for Community Discussion Facilitators form

- Inviting instructors to attend pre and post-workshop discussions

- Recruiting discussion hosts

- Maintaining the discussion hosts mailing list

- Maintaining the community discussions Etherpad with upcoming dates

- Adding Community Discussions to the Community Calendar

- Checking in with hosts the week of their discussion sessions

Time Commitment

- 1-2 hours a week

- 1 year term beginning 1-May

Requirements

- Certified Carpentries Instructor

Special Projects Chair

Responsibilities

The Special Projects Chair of the Instructor Development Committee is responsible for:

1. Facilitating the formation of task forces/committees as appropriate to accomplish desired project outcomes.

2. Supporting any of the other Chairs/Leaders in their roles as needed.

Time Commitment

- 1-2 hours/week

- 1 year term beginning 1-May

Requirements

- Certified Carpentries Instructor

6.2 Community Discussions

The Instructor Development Committee leads and organises Community Discussions, sets up mentoring cycles, leads special projects aimed at improving instructor resources in The Carpentries and advocates for activities and initiatives that promote professional development, equity and inclusivity for Carpentries instructors. This document describes how community discussions are organised and conducted. Checklists for the Hosts and Discussion Session Coordinator are *here*.

The Carpentries Community Discussions are designed for everyone in The Carpentries community interested in learning, educating and advocating for teaching foundational coding and data science skills globally. Discussion topics range anywhere from teaching workshops and developing curricula to building local communities and assessing the impact of our workshops globally. There are three types of Community Discussions:

1. **Pre- and Post-Workshop Discussions** These discussions are designed for those getting ready to teach or having recently taught to come discuss their workshop with the community.

2. **Themed Discussion Sessions** These discussions are centered around a particular topic ranging anywhere from teaching your first workshop to community building strategies.

3. **Carpentries Conversations** These Conversations are hosted by one of our Committees or Task Forces to provide the community with the opportunity to learn about and discuss new developments and programs in our organisation. Our committees and task forces include:

   - Carpentries en Latinoamérica

   - CarpentryCon Task Force

   - Code of Conduct Committee

   - Instructor Development Committee

   - Lesson Infrastructure Committee

   - The Carpentries Executive Council

Read more about the history of Community Discussions on The Carpentries website.

6.2.1 Terminology

- **Community Discussion**: an online meeting where instructors share experiences from teaching and obtain information while preparing to teach.

- **Discussion Session Host**: member of The Carpentries community who facilitates a community discussion.

- **Discussion Session Coordinator**: a volunteer from the Instructor Development Committee whose responsibilities include updating the scheduling Etherpad and emailing invitations to instructors. For more information about this role, see the role description.

6.2.2 Motivation

1. The Carpentries is a community-led project and the community needs opportunity to interact.

2. The Carpentries believes in jugyokenkyu, or "lesson study", and evidence-based education so instructors need opportunity to share experiences.

3. The Carpentries is continuing to increase the number of instructors and develop new lessons. New instructors would like to hear from experienced teachers who have recently taught to help prepare for upcoming workshops.

6.2.3 Who Can Host?

Hosting community discussions is a great way to meet more people in The Carpentries community, to get to know the organisation better, to learn from the experiences of others and to share your own knowledge and experience with an even greater number of people.

Any instructor with experience of organising/teaching workshops and a good knowledge of The Carpentries as an organisation is welcome to host a discussion session. Sessions are coordinated by the Instructor Development Committee and hosts are encouraged to join the meetings of this committee. Committee meetings include an update on community discussions and an opportunity to discuss the format, to ask questions about hosting a session, and to get to know other hosts. To receive messages relating to discussion sessions and hosting, make sure that you are subscribed to the discussion hosts mailing list.

A great way to get into hosting these sessions is to first attend as an observer or co-host. An experienced host will be happy to talk you through it, and may return the favour when you host for the first time, so that you do not have to "fly solo" in your first session.

Discussion Host Onboarding

Interested in becoming a session host? Not sure how or what would be required of you? No problem! Follow these steps:

1. Complete this form to start the onboarding process.

2. Work through the following section of the Carpentries Handbook. Watch this Discussion Host Onboarding video and then the accompanying slides, presented by our Executive Director, Dr Kari L. Jordan.

3. To co-host a Community Discussion session, you can sign-up here as notetaker.

4. Have any other questions? - reach out to the Discussion Host Slack channel or TopicBox channels.

6.2.4 Signing up to Host or co-Host a Community Discussion

The Carpentries uses Calendly to manage scheduling of Community Discussion sessions. This allows hosts to schedule discussion sessions at times that are best for them, rather than requiring them to choose from a predefined schedule. Four times a year, Discussion Hosts will be asked to slot in their availability.

Calendly Demo

Once Discussion Hosts have scheduled themselves in for a Community Discussion session via Calendly, The Carpentries Core Team will ensure that these events appear on the Etherpad and on the Community Calendar.

This system aims to build Community Discussion schedules around the Host availability. The community of Discussion Session Hosts should represent a good cross-section of the general Carpentries community, and should offer the broader community a better option of sessions to attend.

People interested in being Co-hosts can review the calendar once it is published, and sign up on the Etherpad to co-host an event of their choice.

Event Cancellations

We recognise that even after scheduling their own events, Discussion Hosts may have conflicts and may need to cancel a scheduled event. If this happens, the Host should contact community@carpentries.org as soon as possible so a Core Team member can ensure another Host is able to cover this event.

6.2.5 Host Expectations

- Primary role is to facilitate the community discussion using the agenda at the bottom of the Etherpad.

- While it's the co-hosts main responsibility to take notes, please take notes in the Etherpad when the co-host/notetaker is speaking.

- Maintaining focus on the main goal of the session, which is to share ideas, support each other, and keep instructors excited about teaching.

- Ensuring instructors teaching in the near future have urgent questions or concerns addressed.

- Collecting feedback from instructors who have recently taught.

- Engaging newly trained instructors and evaluating their participation using a subset of questions described in the checkout procedure.

- Encouraging attendees to create issues or pull requests to correct problems.

- Complete the host questionnaire at the end of the community discussion.

6.2.6 Co-Host Expectations

- Primary role is to assist with note-taking while the Host leads the discussion

- Take accurate notes of discussion on the Etherpad

- At the beginning of the call, introduce yourself as the co-host/notetaker

- Co-hosts/notetakers do not have to be the very active in the conversation

- If a co-host/notetaker does want to chime in, it is welcome!

- **NOTE:** if the session is mostly instructor checkouts, it is highly recommended that you, as the co-host, contribute to the discussion with your experience helping out with workshops.

6.2.7 Checklists - Community Discussions

Community discussions are organised and conducted through this Etherpad.

Discussion Session Coordinator

Before the Discussion Session

The Instructor Development Committee is responsible for organising the community discussions so that

- each month has at least eight discussion sessions, and

- each session has at least one host (preferably two) to conduct the discussion.

This is done periodically using Calendly. The Discussion Session Coordinator is responsible for scheduling the events and ensuring instructors who are about to teach and who have recently taught are being invited.

Scheduled events are listed on this Etherpad.

Host and Co-Host

Leading the Discussion Session

Meetings will be hosted on a Zoom videoconference, linked via the community discussions Etherpad.

Each session must have at least one host (although two hosts are preferred). Any experienced instructor is welcome to host, but hosts are encouraged to join the Instructor Development Committee.

- Sign on as close to the start time as you can.

- Confirm that your fellow host is present (if there is one) and who will be leading/taking notes

- (Optional) If a group is very large and you have a co-host, you can split the group in two, using the Breakout Rooms feature in Zoom.

- Copy the agenda from the bottom of the Etherpad to the space under your time slot

- Lead the discussion

  - We recommend following the main points of the agenda, but feel free to let discussion go where people want. Not all the questions need to be answered by everyone.

  - You should not feel like *you* have to answer all the questions as the host - draw on the other discussion participants to answer each other's questions.

- – If someone is attending as part of their training checkout, prompt them to ask a question.

- – Try to leave enough time at the end for the final agenda item.

The agenda should be similar to the following:

- Welcome, introductions, and reminder of Code of Conduct (5-10 minutes depending on number of participants)

  - – Code of Conduct Link: https://docs.carpentries.org/topic_folders/policies/code-of-conduct.html

- Host introduction

- Co-host/notetaker introduction

- Attendee introductions

  - – Name, affiliation/position, purpose for attending

- Report from previous workshops (10-25 minutes: 2-3 minutes per workshop plus about 5-10 minutes for questions)

  - – Share some significant accomplishments and obstacles.

  - – Any changes or additions to lesson material?

- Preparing for upcoming workshops (10 minutes)

  - – Specific questions about teaching and/or lessons?

  - – How are instructors sharing roles/responsibilities? Is there a designated "lead instructor" or will you act as co-instructors?

- Discussion Questions Use Zoom Breakout Rooms for large groups (15 minutes)

  - – Hosts: Choose 1-3 of these questions, or add your own.

  - – What additional resources would be useful to you in teaching or preparing for a workshop?

  - – Do you find the instructor notes helpful? How do you use them? How could they be more useful?

  - – What are you most excited about for teaching with The Carpentries?

- Preparing for instructor training checkout (2 minutes)

  - – Questions about checkout procedure, lessons, or workshop organisation?

  - – Have you asked a question here yet?

- Closing (Main Room) (3 minutes)

  - – Reports from breakout rooms

  - – Q&A

  - – Reminders to discussion session participants

  - – Export the Etherpad (button at top right) if you would like to save notes from our session. Notes will be removed (but available in the archives) soon after the discussion ends!

  - – For small typos in lessons, submit pull request to appropriate lesson

(A copy of this agenda is kept at the bottom of the instructor discussion Etherpad.)

Based on discussion among the Instructor Development Committee, temporary questions may be added to the agenda for a month of sessions, in order to collect data on specific issues.

- Take notes

If there are more than 5 workshops represented by attendees, the discussion session should be split into two groups, to make sure everyone has enough time to share. When dividing attendees into two groups, try to balance the number of people who are de-briefing, who are there for pre-workshop help, and who are instructor trainees. If there are exactly 5 workshops represented, it is at the discretion of the host whether to split the group.

After the Discussion Session

- Archive the Etherpad by clicking on the star in the top right corner.
- Fill out the host questionnaire
    - Note: Please copy the list of attendees (including all attendees but removing no-shows) and paste it into question 7 of the questionnaire.
    - This questionnaire will automatically send an email to the Instructor Development Committee Co-Chairs and to checkout@carpentries.org.
- Clear the information from your session (date/time, attendees, notes) from the Etherpad.
- (Optional) write a blog post about interesting points that came up in discussion.

6.2.8 Discussion Session FAQ

The content below comes from this blog post.

What if I am hosting a discussion and there are no pre/post workshop debriefs?

You could start by introducing the session and what it should be about. You could also give some feedback on your own experience in previous workshops and/or upcoming workshops that you are a part of.

What if I do not know the answer to someone's questions and no one in the room does either?

It is totally fine if you do not know all the answers. In such a situation you are welcome to refer the question to someone within The Carpentries community that will have the answer. If not, you could always send your question to community@carpentries.org.

What if the host/co-host has a poor internet connection and is unable to communicate? What if Zoom fails to work (e.g. your internet connection fails?)

It is very important to test your internet connection beforehand and to make sure that you as a host are able to communicate. The host is the session leader and should have a stable connection. If, however, when you test your connection you find that you do not have a good connection, reach out to the community to see if someone could take over as host for that session. Do this by sending a message to discussion-hosts on TopicBox.

What if a group from a single site has connectivity issues?

You could ask them to try and reconnect. However if they continue to have issues and cannot participate in the session, please ask them to reschedule.

What if no one shows up?

If no one shows up simply wait for a few minutes, send out reminder emails to the signed up participants, and then fill in the post discussion questionnaire and indicate that no one showed up for your session.

What if someone talks too much?

Limit the amount of time that you give participants to ask and answer questions. You could ask for feedback from someone who has not spoken yet as well.

What if there is no co-host/note taker and the session is fully booked?

As a host you are more than welcome to take a few notes, however there is no need to take down every single thing that is said. Note down important points, making sure to add links to useful information. Also encourage the participants to contribute to the notes on the Community Discussions Etherpad.

What if someone joins in late?

Depending on how late the person joins, you could simply welcome them and ask them to introduce themselves to the rest of the participants. If you have time, you can ask the individual to stay on the call for a few minutes after it is finished to summarise what they missed, and answer any questions they may have.

What if someone does not have a headset and can't control their background noise?

As a host you will have the privileges to mute other participants, or you could simply ask the person directly to mute their microphone. Read more about how to use host features in Zoom.

What if I forget to complete the host questionnaire?

The participants will not have updated profiles for the checkout sessions and it will take a lot of administration to solve this challenge. Please remember to fill in the form directly after hosting your session.

What if someone breaks the Code of Conduct? What if someone had a report of misconduct?

In the case that this happens The Carpentries has a set of guidelines that can be followed.

What if one person doesn't contribute to the conversation?

Always try and encourage participation. This can be done by asking them a question or asking them their thoughts on a specific topic of conversation. There is also a point in the agenda that allows you as the host to talk to participants and ask them each for a specific question that they need answering.

What if someone asks me to join the instructor checkout session and it is already full?

Participants can email the host and ask if it would be ok with them if they joined the session although it is already fully booked.

What if someone is loud/obnoxious and/or talks down to other people?

It is very important to remind everyone of the Code of Conduct as The Carpentries observes it in every community discussion. This will be a clear violation of this and you could ask the person to leave.

What if I am having trouble understanding one of the attendees?

You could ask the participant to type their questions in the Community Discussions Etherpad for you to read and respond to them, which will also make note taking much easier. Consider asking them to speak up if the microphone is too soft.

6.2.9 Email Templates

Call for Instructors (to Instructor Development Committee)

Subject: Sign-up to Host [QUARTER-YEAR] Community Discussion Sessions

Hello,

Sign-up for host for Community Discussion sessions for [QUARTER-YEAR] is open now!

Please take a look at our Calendly link [insert link here] and put yourself down for a slot or two that best suits your schedule. We want to accommodate your schedules as much as possible! We ask that you sign up by [insert date here], so that we can publish the calendar the following week. If you know you would like to host something in [QUARTER-YEAR] but are not sure of your availability yet, please let me know so we can follow up with you.

We hope to see you soon!

Cheers,

[Your name].

6.3 Community Discussions Workflow

This workflow was established for the Instructor Development Committee Discussion Session Coordinator to organise The Carpentries Community Discussions. Between January 2020 and September 2020, this workflow will be managed by Angelique van Rensburg from Carpentries Core Team.

6.3.1 Scheduling Community Discussions

- Review responses from the Call for Community Discussions Facilitators form.

  - The Call for Community Discussions Facilitators form includes an integration which, when a form response is received, an e-mail is sent to The Carpentries Discussion Session Coordinator who should then open the attachment and review its contents.

- Add potential Community Discussions to the Etherpad.

- If the Community Discussions Facilitator proposed a day/time for the community discussion they will be hosting, add that day/time to the Etherpad as TBD in this format:

```
Themed Discussion Sessions/#CarpentriesConversation
DAY OF WEEK, MONTH DAY TIME
TIME UTC
Click here for your time zone:
Topic:
Description
Host (name & email):
Host questionnaire to be completed at the end of call: https://goo.gl/forms/
↪iXkMQABmO6HROfCy1
Co-host/notetaker (name & email):
Attending (Name/Affiliation/Twitter):
  Sharing an upcoming or past workshop? Please add the link to your workshop website␣
↪along with your name.
  Attending as part of the instructor checkout requirement? Please add your e-mail␣
↪address and checkout along with your name.
    1.
    2.
    3.
Attendee questionnaire to be completed at the end of call: https://goo.gl/forms/
↪uCeESfUUWsX5dpPu2
```

- Add potential Community Discussion to the community calendar

  - If the Community Discussions Facilitator proposed a day/time for the community discussion, add that day/time to the community calendar in UTC and assign the Zoom Room carpentries room 2 for the call. If they did not provide a time, include that question in your e-mail to them.

- Add potential Community Discussion to the Community Discussions Page on the website

  - Submit a PR to update the Community Discussions page on The Carpentries website

  - The appropriate GitHub repository to submit your Pull Request to is here. Add the new community discussion in the upcoming discussions section.

- Contact potential Community Discussions Facilitator

  - Send a version of the following templated e-mail to the individual who completed the form. Once the e-mail has been sent, highlight the row in the spreadsheet yellow indicating that you have contacted the individuals.

- Communications Tasks

  - Inform The Carpentries Core Team Liaisons about the Community Discussion by emailing `community@carpentries.org`.

  - Draft tweets for Community Discussion

  - Make a copy of this template and draft tweets to spread the word about the Community Discussion.

> * Send the tweet template to the Communications Manager by emailing `okhan@carpentries.org`.

- Request Blog Post to Promote Community Discussion

    - Remind facilitator to write a blog post to get the word out about the community discussion. Here is a handy blog post drafting guide to help them get started

6.3.2 Scheduling Pre- and Post-Workshop Community Discussions

1. Coordinate with Infrastructure Team (Maneesha Sane) regarding quarterly sign-ups. This process has been semi-automated with the use of Calendly.

2. After signups have closed the Community Discussions Coordinator and Infrastructure Team discuss distributions of time slots identified by Discussions Hosts (during sign-up) per week and time zone. This will result in either extending signups (if more are needed), or cancel duplicate/sessions not needed.

3. Once finalised the Infrastructure Team publishes the time slots to the Etherpad.

4. In coordination with IDC's Communications Coordinator, the Community Development Team will coordinate weekly Tweets and schedule messages to go out in Carpentries Clippings, our fortnightly newsletter, regarding upcoming Community Discussion sessions.

5. The final version of the Carpentries Community Calendar is populated from Calendly by the Infrastructure Team.

6. If any additional sessions are added/sessions are changed at a later stage, this is done manually.

7. The Community Discussions Coordinator checks the Etherpad weekly to view signups (perhaps too few) for sessions as well as if any changes have been made and might impact the Carpentries Community Calendar.

8. The Community Discussions Coordinator will periodically write blog posts, update mailing lists and provide information via Slack regarding various Community Discussion matters (i.e. quarterly signups, upcoming themed discussions etc) and will have as much support from the Community Development Team as needed throughout this process.

6.3.3 Preparing to Host a Carpentries Community Discussion

- [Optional] Identify a Community Discussion Moderator

    - Identify someone to moderator the Community Discussion. This individual will:

    - Introduce the facilitator

    - Remind participants that we are following The Carpentries Code of Conduct

    - Request permission from attendees to record the session.

    - Take notes during the discussion

    - Moderate Q&A

    - Facilitate breakout rooms

    - Serve as timekeeper

    - Thank attendees for participating

    - Remind attendees to complete the questionnaire

    - Ensure we recognise those attending the discussion for checkout and facilitate Q&A for checkout participants.

- Share Zoom Room Credentials & Practice Breakout Rooms

    - Contact the Community Development Team on `community@carpentries.org` in case you need alternative Zoom Room Credentials shared.

- [Optional] Review The Carpentries Community Discussions Host Onboarding slide deck

6.3.4 Community Discussion Wrap-Up

- Add Community Discussions Slide Deck to Google Drive

    - Add the slide deck to either the Themed Discussion Session folder or the #CarpentriesConversation folder on Google Drive.

- Upload Community Discussion Recording to YouTube

    - Contact the Community Development Team on `community@carpentries.org` to have the recording of the Community Discussion uploaded to The Carpentries YouTube Channel.

- Add Community Discussion to the Past Calls section of the Community Discussions page on The Carpentries website.

- Send thank you notes to the Community Discussion Facilitator & Moderator using this template email as a starting point if need be.

- Review Discussion Questionnaire Results

    - Request access to the results of the Community Discussion Questionnaire. Review the results and share your notes with the rest of the Instructor Development Committee Leadership Team.

- Review the Community Discussion blog post and ask Community Development Team to merge by emailing `community@carpentries.org` or tagging `@kmomar` in the PR.

    - If the discussion host wrote a blog post, review the blog post and the results of the questionnaire. Add/edit blog post content and be sure to include any responses from the survey that are valuable/interesting before requesting the Communications Lead to merge.

6.4 Mentoring Groups

Mentoring is a professional development opportunity that The Carpentries offers our growing instructor pool to help community members learn and grow.

Mentoring Groups support instructors in a variety of ways. Whether you are a new instructor preparing to teach your first workshop, a seasoned instructor hoping to launch workshops in a new community, or an instructor excited about getting involved with lesson development and maintenance, mentoring groups will help you gain the confidence, technical skills, and teaching skills you need to reach your goal.

Mentors guide small groups of no more than five mentees toward a particular outcome. Outcomes might be anything from teaching a specific lesson (i.e. Version Control with Git) to making a meaningful contribution to one of our lessons.

6.4.1 Mentoring Groups Outline

Groups are encouraged to set SMART goals to be achieved. The following are sample mentoring group outlines. Groups are free to decide how to spend their time.

Sample Mentoring Group Outline: Lesson Maintenance

- Introductions, review The Carpentries community culture, and communication channels.

- Review and discussion lesson objectives.

- Meeting with Lesson Maintainers to discuss challenges and opportunities.

- Review, discuss, and comment on lesson issues. Identify a representative to attend the mid-way touch base.

- Review, discuss, and comment on lesson pull requests.

- Discuss current challenge questions. Write new challenge questions to be added to the pool of challenge questions.

- Submit new challenge questions as pull requests. Draft one slide for the mentoring group showcase.

- Finish slide for mentoring group showcase. Attend mentoring group showcase.

Sample Mentoring Group Outline: Teaching Workshops

- Introductions, review The Carpentries community culture, and communication channels.

- Review and discuss instructor notes.

- "Tag-team" teaching each module of the lesson. Provide feedback to group members.

- First mock quarter/half day workshop with group members. Identify a representative to attend the mid-way touch base.

- Second mock quarter/half day workshop with group members. Draft one slide for the mentoring group showcase.

- Finish slide for mentoring group showcase. Attend mentoring group showcase.

Sample Mentoring Group Outline: Organising Workshops

- Introductions, review The Carpentries community culture, and communication channels.

- Introduce existing workshop resources. Identify challenges for organisers.

- Walkthrough of workshop set up using checklists. Discuss workshop planning tools, e.g. Eventbrite, spreadsheets.

- Identify potential issues and how to resolve them, e.g. 'no shows', CoC violations, refunds. Identify sources of help.

- Draft one slide for the mentoring group showcase. Identify a representative to attend the mid-way touch base.

- Identify resource gaps, e.g. issues that are not covered by existing checklists and procedures.

- Finish slide for mentoring group showcase. Attend mentoring group showcase.

Sample Mentoring Group Outline: Community Building

- Introductions, review The Carpentries community culture, and communication channels.

- Discuss desired local outcome. Discuss existing community, if any. Identify stakeholders and potential supporters.

- Discuss community building methods used elsewhere (e.g. ResBaz, Hacky Hours, MeetUps, communities of practice).

- Discuss the use of communication tools such as Slack and Gitter channels.

- Identify a representative to attend the mid-way touch base.

- Draft one slide for the mentoring group showcase. Identify a representative to attend the mid-group touch base.

- Draft a plan for a local community building event that includes a marketing strategy.

- Review plans collectively. Identify gaps or further resources needed.

- Finish slide for mentoring group showcase. Attend mentoring group showcase.

6.4.2 Mentoring Groups Highlights

Participants can choose the type of mentoring group they would like to belong to:

- Lesson Maintenance
  - Contributing to current lesson development
  - Contributing to lesson maintenance
- Teaching Workshops
  - Developing confidence and skill in teaching
  - Preparing to teach a specific lesson (i.e. Python)
- Organising Workshops
  - Logistics of organising a workshop (e.g. marketing, registration)
  - Logistics of running a workshop (e.g. recruiting instructors, distributing tasks)
- Community Building
  - Strategies to build local communities
  - Tried-and-true events that help foster local communities

An additional highlight includes the opportunity to participate in in-person mentoring groups.

During the final week of the mentoring groups, we will host a virtual mentoring groups showcase. During this event, the community can hear about the projects on which the mentoring groups worked.

Lastly, both mentors and mentees will receive a certificate!

6.4.3 Mentor Agreement

I agree to follow the Code of Conduct in all communications and interactions with The Carpentries community and to promptly report any violations of the CoC that I become aware of.

When interacting with my mentoring group, I agree to

- communicate The Carpentries community values to mentees and model that behaviour myself in how I mentor,

- provide a welcoming and supporting environment for mentees,

- avoid dismissive language, question my expert blind spot, and model error-making as a vital part of the mentoring process.

I understand that it is important to keep in touch with The Carpentries community so that my mentorship will reflect current practices. I agree to:

- stay active in one or more Carpentries communication channels,

- keep up-to-date with changes to the lesson(s) I teach, and

- provide feedback to the Mentoring Subcommittee and Carpentries Core Team to help continue improving our mentoring groups.

6.4.4 Mentor Onboarding

- Mentor Onboarding Recording

6.4.5 Mentoring Groups Recruitment Strategy

- **Recruitment**

  - Mentoring groups are open to any individual who has completed Carpentries instructor training.

  - Community members who have taught fewer than two workshops (or no workshops at all yet) are invited as mentees.

  - Certified Carpentries instructors who have taught three or more workshops are invited to lead mentoring groups.

- **Activities & Timing**

  - Mentoring groups run for between eight and 12 weeks.

  - Kari Jordan will hold a mentoring groups 'touch base with mentors' halfway through the 8-12 week period.

  - Mentors and mentees will be asked to complete a short survey halfway through the 8-12 week period.

  - The 8-12 week period will end with a virtual showcase.

  - Mentors and mentees will be asked to complete a second short survey at the end of the mentoring group period.

- **Exposure**

  - A mentoring page will be added to The Carpentries' website with information on how to join a mentoring group.

  - Members will be added to groups, and new groups will be formed, on a rolling basis as needed, at the discretion of Kari Jordan.

  - The Mentoring Subcommittee will be instrumental in getting the word out about mentoring groups.

6.4.6 Mentoring Groups: Guidelines for Certificates

Mentors

- Attend a mentoring onboarding session.
- Attend regular meetings with your mentees.
- Attend the virtual showcase.
- Attend the power check-in.
- Complete the post-program survey.

Mentees

- Attend at least two mentoring meetings.
- Attend the virtual showcase.
- Complete the post-program survey.

6.4.7 Mentoring Groups Roles

Mentees

Responsibilities

- Communicate with your Mentor about your goals and needs.
- Attend scheduled meetings and participate actively or let your Mentor know you won't be attending.
- Be respectful of other Mentees and Mentors. Provide a safe space for questions and mistakes.

Requirements

Be either a newly certified Carpentries instructor or be in the process of completing certification. Generally Mentees will have taught one or no workshops, but may have been helpers before.

To Participate

To join the mentoring program as a mentee, complete this form.

Mentors

Responsibilities

- Decide on a meeting schedule with your Mentees.
  - You can use a Carpentries Zoom room for your meetings - please reach out to team@carpentries.org for more information about scheduling a room. Details and links for meetings can be kept in a Carpentries Etherpad.
- Personalise meetings based on Mentee's needs and desires.

- Respond promptly to emails from your Mentees.

- Follow up with Mentees who miss meetings.

- Be respectful of Mentees. Provide a safe space for questions and mistakes.

- Report Mentee attendance and progress to mentoring coordinator.

Time commitment

~4 hours/month for 3-5 months (or longer if accepting new Mentees). This breaks down to about 2 hours prep, 1 hour meeting and 1 hour answering emails per month. Variable depending on meeting frequency and prep time.

Requirements

Certified instructors who have taught at least 2 workshops.

To Volunteer

To join a mentoring group as a mentor, complete this form.

Mentoring Coordinator

Responsibilities

- Recruit mentors and mentees for the Mentoring Program.

- Pair Mentors and Mentees based on responses to Google form surveys.

- Send email introductions for each mentoring team.

- Follow up with each mentoring team on a monthly basis and ask if there is anything you can do to help.

- Keep track of program completion rates to assess success.

- Get feedback from Mentors and Mentees about program.

6.4.8 Mentoring Groups Virtual Showcase

The Carpentries' community is invited to participate in a Virtual Showcase of our mentoring groups' projects. These will be scheduled at the end of each mentoring group term.

- **What to expect:** Each group will present one slide outlining something they learned or completed with their mentoring group. We will also answer questions from the community and discuss the benefits of mentoring.

- **Why attend:** Be inspired by the projects of **your** global community members! Be empowered to start a new project, contribute to a lesson, or prepare to teach a lesson. Explore the benefits of mentoring and being a part of a global community.

Sign-Up

Please visit this Etherpad to view notes from past meetings or sign up for upcoming meetings.

Contact

For information regarding The Carpentries Mentoring Groups, e-mail Marco Chiapello. To join the next Instructor Development Committee meeting, sign up via this Etherpad.

6.5 Mentoring Groups Workflow

This workflow was set up to guide the Instructor Development Committee Mentoring Chair in running The Carpentries Mentoring Groups.

6.5.1 Preparing to Run Mentoring Groups

- Meet with the Instructor Development Committee to set the dates of the Mentoring Groups
- Add Mentoring Group dates to README on GitHub. Instructions
- Update deadlines in the Mentor and Mentee Application forms
    - The Carpentries Mentor Application form
    - The Carpentries Mentee Application form

6.5.2 Recruiting Mentors and Mentees

- Schedule a Mentoring Groups Info Session
    - Add the dates for the info session to the community calendar.
- Use this templated presentation as a guide
- Add mentoring group applications to Carpentries Clippings, our community newsletter
- Write blog post to recruit mentors and mentees for Carpentries Mentoring Groups
    - Sample Post 1
    - Sample Post 2
- Inform Carpentries Member Organisations that Mentor/Mentee applications are open
    - Contact The Carpentries Director of Membership and request that a version of this template e-mail be sent to Member Organisations
- Inform Trainers that Mentoring Applications are open
    - Contact The Carpentries Deputy Director of Instructor Training and request that a version of this template e-mail be sent to Trainers.
- Schedule tweets for Carpentries Mentoring Groups recruitment
    - Make a copy of this tweets template
    - Draft tweets to be shared on The Carpentries Twitter account using the template. Include the dates you'd like the tweets to be scheduled.

  – E-mail the tweets to the Communications Lead on `okhan@carpentries.org`.

6.5.3 Setting Up Mentoring Groups

- E-mail mentors with mentee assignments
- Use the results of the mentor and mentee applications to match one mentor with 4-5 mentees.
- Add mentor/mentee assignments to the Mentoring Groups Etherpad.
- Add mentor and mentee contact information to this spreadsheet to generate certificates at the end of the program.
- Host Mentor Onboarding
  - Schedule mentor onboarding in two different timezones.
  - Add the mentor onboarding to the community calendar
  - Add onboarding information to this Etherpad
  - Prepare for the onboarding using this information from the Handbook
  - Be sure to communicate to mentors who will get certificates.

6.5.4 Mid-Program Tasks

- Send Mentoring Groups the Mid-Program Survey
  - Use the following e-mail template to collect feedback from mentors and mentees half way into the program.
- Review Mentoring Group Mid-Program Survey Results and address issues as needed.

6.5.5 Wrapping Up Mentoring Groups

- Schedule Mentoring Groups Virtual Showcase
  - Add the dates for the Virtual Showcase to the community calendar.
- E-mail the mentoring groups with instructions for completing their slide for the Virtual Showcase
- See past virtual showcase presentations in this folder
- Create certificate for mentors and mentees
- Send Mentoring Groups the Post-Program Survey
  - Use the following e-mail template to collect feedback from mentors and mentees at the end of the program
- Review Mentoring Groups Post-Program Survey Results and add highlights to the wrap-up blog post.
- Write wrap-up blog post for mentoring groups
- Add a summary statement on Mentoring Groups wrap-up to Carpentries Clippings, our community newsletter

INSTRUCTOR TRAINING

7.1 For Trainers

7.1.1 Instructor Trainers

Instructor Trainers ('Trainers') are certified to teach at all authorized Carpentries Instructor Training workshops, on-boarding new Instructors who may in turn become certified to teach Data Carpentry, Library Carpentry, and Software Carpentry workshops. Trainers also play a role in the Instructor 'checkout' process, evaluating trainees' teaching demonstrations. The Trainer community plays a leading role in The Carpentries, maintaining our flagship Instructor Training Curriculum, contributing to relevant policies, and bringing instructional practices to bear in leadership roles across our local and global communities.

Trainers benefit from being part of a global community of pedagogically trained professionals with a shared interest in promoting robust teaching practices and propagating data skills worldwide. Trainers continually build on their own pedagogical and communication skills through co-instruction and monthly community discussions about Instructor training. Trainers have opportunities to influence what we teach, through curriculum maintenance, and to steer the progress of this community, through leadership roles. Trainers often play leadership roles in their home communities, mentoring local Instructors, and modeling best practices.

Trainer Agreement

Version 2.0.0 - Approved 2020-07-22

I agree to follow the Code of Conduct (CoC) in all communications and interactions with The Carpentries community and to promptly report any violations of the CoC that I become aware of.

I understand that the secondary learning outcomes of workshops are as important as their stated goals. I will:

- Communicate The Carpentries community values to trainees and model that behaviour myself in how I teach

- Provide a welcoming and supporting environment for trainees

- Model our focus on active, participatory learning in Instructor Training

- Connect the principles used in The Carpentries workshops with other teaching contexts

I understand that it is important to keep up to date and in touch with the Trainer community so that my teaching will reflect current practices and curriculum. To be an active Trainer, I agree to:

- Engage in a minimum of 48 units of service to the Instructor Trainer community per calendar year. This service may include:

  - Teaching authorized Carpentries Instructor Training workshops, following The Carpentries Instructor Training Curriculum (16 units each; minimum 1 per calendar year)

  - Hosting Carpentries teaching demonstrations (1 unit each; recommended 4 per calendar year)

- Teaching additional Instructor Training-related content (e.g. 'bonus modules'; 1 unit per instructional hour)

- Attending Trainer meetings (1 unit each)

- Serving The Carpentries community in an elected, appointed, or designated leadership role (variable, as approved by Trainers leadership on a per-case basis, with 1 unit approximately equivalent to 1 hour commitment)

I understand that any Trainer commitments specified in a Membership Agreement or Memorandum of Understanding (MOU) add to my responsibilities and do not count towards these 48 units unless otherwise stated. Commitments specified in the Membership Agreement or MOU may include, but are not limited to, teaching local Instructor Training events. The Carpentries is working towards making these agreements and MOUs available to Trainers upon request; I understand that I may initiate a request at any time by contacting team@carpentries.org.

I understand that any scholarship-based training events that I may request on behalf of a community that I wish to serve may not count towards these 48 units. These expectations will be communicated on a per-case basis in the context of scholarship approval.

I understand that Instructor Training workshops are considered "workshops" with respect to The Carpentries requirements for maintenance of individual voting membership. It is not necessary to teach Data Carpentry, Library Carpentry, or Software Carpentry technical workshops to maintain active status as a Trainer.

Additional responsibilities that do not count towards the 48 units of service include:

- Reading minutes/notes from Trainer meetings when I am not able to attend

- Reading emails sent to the Trainer listserv (Topicbox). I will keep my email address on Topicbox up to date to ensure that I receive all communications in a timely manner. Update requests may be sent to team@carpentries.org.

- Keeping up-to-date with the instructor training curriculum and related conversations on GitHub

- Providing feedback to other Trainers and Carpentries Core Team about workshops and teaching demonstrations to help continue developing our offerings

I understand that The Carpentries Core Team needs an accurate understanding of Trainer availability in order to plan Instructor Training events. If at any point I am no longer able to serve as an active Trainer, I will let The Carpentries Core Team know by emailing team@carpentries.org. I understand that only active Trainers are eligible to teach Carpentries Instructor Training workshops and vote in Trainer community elections, but that I will be able to re-activate my Trainer status at any time by making arrangements with the Core Team for re-onboarding per the guidelines in The Carpentries Handbook.

The Carpentries is a fiscally sponsored project of Community Initiatives, a registered 501(c)3 non-profit organisation based in California, USA.

Trainer Alumni Status

Active Trainers may elect to become inactive by requesting Trainer Alumni status at any time by contacting team@carpentries.org.

Trainer Alumni will not be permitted to:

- teach Carpentries Instructor Training workshops

- host teaching demonstrations

- vote in Trainer community electionsExceptions may be made at the discretion of The Carpentries Core Team. To request permission to teach or host a demo, contact team@carpentries.org.

Trainer Alumni may select to:

- continue to receive Topicbox Instructor Training emails & participate in conversations

- continue to participate in the Slack private Trainers channel

- receive an annual newsletter during agreement renewal with community updates and details on how to return to Active status.

A Trainer who wishes to return to Active status will have a different path depending on the amount of time they've been inactive:

- < 3 months no requirements - contact team@carpentries.org to request reinstatement

- 3-12 months: meet with Director of Instructor Training to catch up on latest news & discuss plans for re-activating

- 12 months: review Trainer Training curriculum, observe part of an Instructor Training workshop, and meet with Director of Instructor Training to catch up and discuss plans, including re-introduction to the Trainer community via meetings or other arrangements.

7.1.2 Trainers Guide

Trainer Meetings

The Trainers group meets regularly. Our meetings include three sections: 1) Discussion, where we share experiences and get advice about running instructor training events, 2) Announcements, and 3) Topic of the Month, which may include curriculum updates, active conversations occurring on GitHub or other Trainer channels, guest presentations, etc. Upcoming meetings are listed on our Etherpad and on the Community Calendar. If you are not a Trainer, but are interested in joining a meeting, please contact Erin Becker (ebecker@carpentries.org). Minutes for these meetings are available.

Signing up to Teach an Instructor Training Event

1. The Program Manager will send an email to the Trainers list asking all Trainers to fill in their calendar for the upcoming time period. Trainers should sign up for as many days as they are available and hold those dates in their calendar until the schedule is confirmed.

2. The Program Manager will confirm events with individual Trainers, at which point they are free to release all other dates on their calendar.

3. The Program Manager will invite member sites to register for upcoming events. Accepted trainees from the open application process will be invited to register one month before each event.

Note that in order to provide the best experience for our trainees, in rare instances events may be canceled due to low enrolment. If this happens, trainees and Trainers will be notified two weeks before the event. Trainees will have the opportunity to sign up for a future event.

A calendar for upcoming instructor training events is here.

Trainer Checklists

Running an Instructor Training Event (General)

Please see the Instructor Notes section of the Instructor Training Curriculum for guidelines on preparing to teach an Instructor Training Event.

Running a Teaching Demonstration

If you would like to watch an example teaching demo, there is a recording of one here. Trainer-suggested scripts and other tips and tricks for hosting these sessions are included in the Instructor Notes section of the Instructor Training Curriculum.

Before the demo

- Sign up to lead demos.

- Get acquainted with using Zoom for videoconferencing.

- a day or two before the demo, send a reminder email using the email template. This often leads to people letting you know they cannot make it, or clarifications regarding what to prepare for (episode versus lesson)

- For each trainee, pick a suitable starting point in the lesson that they have chosen. Suggested lessons are available in the Instructor Training Curriculum (under *Extras*). Do not have them start in the middle of an episode. Note that some lessons (e.g., the Software Carpentry R lesson using inflammation data) have supplementary episodes. Do not pick from those.

During the Demo

- Go to the Zoom room. The link is in the Etherpad.

- Once everyone is in the call (audio and video working), remind them of the Code of Conduct, explain the procedure for the demo session, and remind them that trainees have to be able to teach from any episode from their chosen lesson. Ask whether anyone has only prepared for 5 minutes from one episode instead of the entire lesson, and if so, suggest strongly they reschedule. It can help to remind them that this is not a high stakes test but a friendly opportunity for feedback.

- Ask those not presenting to mute their microphone, and ask them to give feedback using the same positive-vs-negative and content-vs-presentation rubric used in training. For a full session (5 trainees), they should add feedback to the Etherpad. If you have fewer people, you may choose to have them jot down comments and deliver them verbally as time allows.

- Give the assignment to the first trainee, then give them a bit of time to set up the demo (they may have to import some packages, load some data, move to a certain folder etc).

- Ask them to share their screen using the "Share Screen" lower menu in Zoom.

- Once they are ready, give them a 3-2-1 countdown to start.

- Use a countdown timer which makes a noise once their 5 minutes are up (e.g., your phone), or just say "bong" really loudly at the end of their time.

- After the five minute timer, allow them to finish their sentence and tell them time's up.

- Use a rubric to help you take notes.

- After the trainee is finished, first ask how they themselves thought it went. If you have time, other trainees can give verbal feedback, or you can summarise what is in the Etherpad. Then, give focused, constructive feedback based on your notes and the comments of others. You might choose one or two things to particularly emphasise to help focus trainees' efforts as they proceed to teach a workshop. It is also sometimes necessary to take time to (gently) disagree with feedback from another trainee.

- Do NOT tell a trainee whether they passed immediately after their demo.

- Repeat for the other trainees.

- At the end of the season, ask for general questions.

- If all of your trainees passed, you can tell the group at the end of the demo session. If anyone did not pass, tell everyone you will send them each an email to let them know if they passed.

- more tips can be found in the instructor notes of the instructor training website.

During the Demo (Troubleshooting)

- Refer to the Zoom guide to help troubleshoot connection issues.

- If a trainee is teaching a Python lesson and their Jupyter notebook doesn't start, direct them to http://jupyter.org/try.

After the Demo

- Fill out this form to notify The Carpentires who passed and who did not pass.

- Clear Etherpad of data from your session.

- Send each trainee an email letting them know they passed or did not pass the teaching demo. If needed, let them know the reason they did not pass and asking them to retry.

Starting Points for Demos

This table has moved. Suggested lessons are available in the Instructor Training Curriculum (under *Extras*).

7.1.3 Becoming a Trainer

The Trainers group periodically accepts new members via application. New Trainers undergo an eight-week training program outlined below and agree to the Trainer Agreement.

Trainers Training Program

This outline represents the time commitment required for being an instructor Trainer with The Carpentries. Please read through and check to see that you are able to commit to the responsibilities outlined below.

Instructor Trainers agree to abide by the Code of Conduct in all communications and interactions with The Carpentries community.

- Trainees who are not previously certified Instructors will be asked to concurrently pursue Instructor certification

- Read How Learning Works by Susan Ambrose and discuss in book club format with Trainers-in-training. Preliminary reading schedule.

    - Time commitment: 1 hour per week for 10 weeks meetings; can miss one meeting; ~10 hours reading

- Join Trainer meetings

    - Time commitment: 1 hour per month; review minutes for missed meetings

- Shadow a teaching demonstration session (previously certified Instructors)

    - Time commitment: 1 hour one time

- Shadow at least half a day of an online instructor training event (previously certified Instructors)

- – Time commitment: 4 hours one time
- • Agree to fulfill the duties outlined in the Trainer Agreement for a period of 1 year.

Total time commitment for previously certified Instructors to become certified Instructor Trainers: ~30 hours over 3 month period, including reading and prep time

Trainers Training Reading Schedule

For the most recent Trainer Training schedule and discussion questions, see the Trainer Training Curriculum

Reviewing New Trainer Applications

1. Director of Instructor Training and Carpentries Core Team will decide on goals for Trainer recruitment.

2. Trainer Application will be modified to reflect these goals.

3. Open application period will be announced via Carpentries platforms including Twitter, Facebook, the Discuss email list, and blogs. Ask relevant community members to promote within their networks as well. Personal invitations can be sent with this email template.

4. Ensure communication emphasises overall goals.

5. Ask 2-3 existing Trainers to help review applications in line with defined goals. There is no rubric for this. Reviewers should leave notes supporting their rankings.

6. Consolidate rankings, adding discretionary points for gaps in representation by characteristics like gender, race, geography, and experience.

7. Notify accepted applicants using this email template.

8. Schedule Book Club meetings across time zones.

9. Inform the Communications Lead so he/she can promote this.

10. Update the Trainer training Etherpad.

11. Update the Reading Guides as needed.

12. Take attendance at all Book Club meetings. At most one absence is allowed.

13. After Book Club is over, remind Trainers to complete follow up tasks.

14. Send out Trainer certificates.

15. Inform the Communications Lead so he/she can promote the new cohort.

7.1.4 Email templates

Reminder to Trainers signed up for teaching demos

Hi!

You're signed up to host a Carpentries teaching demo within the next two weeks!

Please double check your time/date link on the etherpad and confirm this one-hour time slot in your calendar.

If you know in advance that you will have a conflict and are unable to host your demo, please email the Trainers list request a replacement. In most cases Core Team will fill in as needed if a replacement isn't found.

If you have a last-minute conflict, please use Slack as well as email to request a replacement. You may use "@here" to get the attention of all online group members as well as tagging Karen Word and Erin Becker in your request on Slack. If you are unable to get help in time, please contact your trainees to cancel or reschedule.

Instructions for hosting demos are here. Please get in touch with questions, and enjoy your demo session!

Best,

[Name]

Teaching demos without hosts

Subject: Need hosts for upcoming teaching demos

Dear Trainers,

We are missing a Trainer to lead a session on [time and date UTC] [time and date link]. If you are available to cover this session, please add your name to the etherpad. Also, please reply to this thread so that others know this event is covered.

Thank you![Name]

Teaching demo cancelled - trainees

Subject: Teaching demo cancelled - please reschedule

Dear checkout participant,

Thank you for signing up to do your teaching demonstration at [time in UTC from Etherpad] [time and date link]. Unfortunately, we need to cancel this session due to [reason (optional)]. There are still spots open in upcoming sessions on the Etherpad, and I hope you will be able to find one that suits your schedule.

I know it is hard to make time for these sessions, and I apologise for any inconvenience this has caused. I look forward to having you as a part of our Instructor community.

Sincerely,[Name]

Meeting notes available

Subject: Trainer meetings notes

Hi all,

Thank you to all who attended our meetings this week. For those who weren't able to attend, please read through the meeting notes to stay informed about important issues affecting the Trainer community. If you have any questions or would like to contine a conversation started at this meeting, please send a message to the Trainers list.

Best,[Name]

7.1.5 Email Templates (Trainers)

This section contains email templates for English and Spanish activities.

Templates in English

Email after Training Event

Subject: Thanks for attending Carpentries Instructor Training!

Hi everyone,

Thank you for participating in The Carpentries Instructor training workshop. We really enjoyed having you involved and getting to know you a bit. You are now well on your way towards becoming a certified Carpentries instructor. In order to finish your certification, please finish these tasks (https://carpentries.github.io/instructor-training/checkout/) by the 90-day deadline. If you have any questions about the checkout process, please contact checkout@carpentries.org.

Looking forward to having you as a Carpentries Instructor!

Best,

[name]

Reminder Teaching Demo

Subject: The Carpentries teaching demonstration

Hi,

According to https://pad.carpentries.org/teaching-demos you have signed up to give an online teaching demo on [date] at [time] (See this link for your local time: [timeanddate.com link]). I will be the Instructor Trainer running the session.

I wanted to make it very clear that I may give you any segment of the lesson you prepared to teach, so you must be ready to teach any part of your chosen lesson. Some people prepare to teach 5 minutes from a particular section and nothing else, and these often have to reschedule as they seldom are assigned the section they have prepared for. A lesson corresponds to a single line in the lesson tables (https://software-carpentry.org/lessons/ , http://www.datacarpentry.org/lessons/ , and https://librarycarpentry.org/lessons/) and a single repository on GitHub. Some lessons have supplementary modules, but you do not need to be prepared to teach the supplementary modules for your teaching demonstration.

For example, if you have chosen The Unix Shell, I may assign you any episode listed at http://swcarpentry.github.io/shell-novice/.

Please visit the Etherpad a little while before the demo starts, I will post a link there to another Etherpad we will be using for this demo.

See you at the demo session,

[sender name]

Trainee Invited to Repeat Teaching Demo

Note to Trainers: Even with a template, these emails can be hard to compose and send! When in doubt, don't hesitate to reach out to the Trainer community and/or Core Team for support in deciding, customizing, or responding to questions about these messages.

Subject: Carpentries instructor training: Teaching Demo

Hi [trainee name],

Thank you for doing a teaching demonstration. While you demonstrated good [something they did well, e.g. command of the subject material], I am inviting you to return for one more try at the teaching demo. The primary reason is because [reason]. [Explanation of what you would like to see instead, and why it is central to Carpentries teaching practices.]

This was a difficult determination to make – we are excited about having you as a Carpentries instructor and we want to have you on board! I know it is hard to make time for these sessions, and I hope you will find the opportunity for additional practice and feedback to be worthwhile.

I have contacted our checkout Core Team to indicate that this session should be repeated. If you are close to the end of your checkout period, you can email checkout@carpentries.org to request an extension if you need one.

Please get in touch with questions!

Best wishes,

[sender name]

Trainee Did Pass Teaching Demo

Subject: Carpentries instructor training: Teaching Demo

Hi [trainee name],

I'm happy to tell you that you have passed your teaching demonstration! You demonstrated a good command of the subject material and a solid understanding of The Carpentries teaching methods. We are excited about having you as a Carpentries instructor. I've forwarded this information to our Core Team. If this was the last stage in your instructor training checkout, you should get your official The Carpentries Instructor certificate in about a week, along with instructions for signing up to teach workshops. If you still have steps remaining in your checkout, please be sure to complete them before your deadline.

You can check your progress in the checkout steps by logging on to our instructor tracking system, AMY, using your GitHub ID here: https://amy.carpentries.org/account/login/. If you have any questions, or did not provide a GitHub user name when registering for training, please email checkout@carpentries.org. They can also answer any additional questions you might have about the checkout procedure.

Welcome to The Carpentries Instructor community!

Best wishes,

[sender name]

Templates in Spanish

Bilingual Demo Session Reminder Email

Subject: Carpentries instructor training: Teaching Demo

Hello,

Thanks for signing up to complete your "Teaching Demo" as part of the instructor certification process. We will meet on [Insert Date] at [Insert Time] in this Zoom videoconferencing room (https://carpentries.zoom.us/my/carpentriesroom3). Please read this short bi-lingual description of how Teaching Demo session works (https://github.com/carpentries/latinoamerica/blob/master/traducciones/demo.md#). Disclaimer: I understand Spanish better than I speak it. So, I will talk in Spanish as much as I can, but I will most likely give feedback about your teaching in English.

Please let me know if you have any questions or concerns.

Hola,

Gracias por inscribirte para completar tu demostración de enseñanza como parte del proceso de certificación para instructores. Nos reuniremos [Insert Date] [insert time] aquí: (https://carpentries.zoom.us/j/357144246). Por favor, lee ésta breve descripción bilingüe de cómo funciona la sesión de demostración de enseñanza aquí: (https://github.com/carpentries/latinoamerica/blob/master/traducciones/demo.md#). Aviso: Entiendo el español mejor de lo que hablo. Por lo tanto, voy a hablar en español un poco, pero es muy probable que les dé comentarios sobre su enseñanza en Inglés.

Por favor, hazme saber si tienes alguna pregunta o inquietud.

Best/Saludos,

[sender name]

Spanish: Trainee Invited to Repeat Teaching Demo

Nota a los Trainers: Incluso con un template, este tipo de emails son difíciles de redactar y enviar! Si tienes preguntas, no dudes en contactar con la comunidad de Trainers y/o nuestro personal para tomar decisiones, personalizar o responder preguntas sobre estos mensajes.

Subject: Formación para instructor de las Carpentries: Demostración de enseñanza

Hola [nombre del aprendiz],

Gracias por realizar tu demostración de enseñanza. A pesar de que has demostrado un buen [algo que hizo bien, puntos positivos, e.g. conocimiento de los materiales de enseñanza], me gustaría invitarte a realizar de nuevo la demostración de enseñanza. La razón principal es [razón]. [Explicar lo que te gustaría ver en el/la candidato/a, y por qué es fundamental de acuerdo a las prácticas educativas de Carpentries].

Esta no ha sido una decisión fácil de tomar – nos encantaría tenerte como instructor en Carpentries! Sé que es complicado hacer tiempo para este tipo de sesiones pero espero que consideres este tiempo adicional de práctica y feedback como una oportunidad.

Me he puesto en contacto con nuestro personal de checkout indicando que esta sesión debe repetirse. Si estás cerca de tu periodo de checkout, puedes enviar un email a checkout@carpentries.org para solicitar una extensión si la necesitas.

No dudes en ponerte en contacto si tienes cualquier pregunta!

Saludos,

[nombre del remitente]

Spanish: Trainee Did Pass Teaching Demo

Subject: Formación para instructor de las Carpentries: Demostración de enseñanza

Hola [nombre del aprendiz],

Me alegra informarte que has pasado tu demostración de enseñanza. Has demostrado un buen dominio del contenido de los materiales y de las metodologías de enseñanza de las Carpentries, por tanto, es un placer recibirte como instructor/a en las Carpentries. Ya he comunicado esta información a nuestro Core Team. Si esta fue la última parte de tu proceso de certificación, recibirás tu certificado oficial de las Carpentries junto con las instrucciones para inscribirte para impartir talleres en una semana aproximadamente. Si aún tienes que completar algún paso en tu proceso de certificación, asegúrate de completarlos antes de la fecha límite. Si tienes alguna pregunta, por favor envía un correo a checkout@carpentries.org.

Bienvenida/o a la comunidad de las Carpentries.

Saludos,

[nombre del remitente]

7.2 For Administrators

7.2.1 Tracking Trainee Checkout Progress

Accepting Trainee Applications

1. All trainees will be reminded before and during the training event to complete the instructor application.

2. Carpentries Core Team will assign all applications to the relevant training event in AMY.

Tracking Training Event Attendance

1. After a training event, trainers will email a list of trainees who completed and did not complete the event to checkout@carpentries.org.

2. Carpentries Core Team will go to this person's record in AMY and mark this step complete.

Tracking Discussion Attendance

1. After Community discussion sessions hosts will fill out the host questionarre.

2. Carpentries Core Team will use this information to update trainee's records in AMY and mark this step complete.

Tracking Teaching Demos

1. Discussion session hosts will email a list of trainees who participated in a teaching demo to checkout@carpentries.org, noting whether each participant passed or failed.

2. Carpentries Core Team will go to this person's record in AMY and mark this step complete.

Tracking Lesson Contributions

1. Trainees should email the link to their contribution to checkout@carpentries.org.

2. Carpentries Core Team will go to this person's record in AMY and mark this step as complete, including a link to their contribution.

Recording Extensions to Complete Checkout

1. A trainee may ask for an extension on their three months to complete their checkout.

2. Carpentries Core Team will go to this person's record in AMY and make a comment in the notes field that an extension has been granted for three months from when requested.

3. The note should read: `Extension granted through [DATE] - [Core Team INITIALS]`

Awarding badges

1. Search in AMY for all persons not badged but eligible for a badge.

2. Open that person's record and add SWC or DC instructor badge.

Trainee no-shows and cancellations

Cancellations

Cancellations with less than one week's notice are treated as no-shows. See below. If a trainee gives at least one week's notice that they will not be attending the event:

Cancellations (member seat):

1. In the Trainee's record in AMY, go to Edit –> Tasks. Click the red X next to the task for the training they missed.

2. In Eventbrite, cancel this person's registration. This ensures the member registration code can be used again.

3. Send Trainee and member contact this template email.

Cancellations (open seat):

1. In the Trainee's record in AMY, go to Edit –> Tasks. Click the red X next to the task for the training they missed.

2. In Eventbrite, cancel this person's registration.

3. Send trainee this template email.

No-shows

If a trainee does not attend the training and does not give notice at least one week in advance:

Emergency situations, as determined by Carpentries Core Team (member seat):

1. In the Trainee's record in AMY, go to Edit –> Tasks. Click the red X next to the task for the training they missed.

2. In Eventbrite, cancel this person's registration. This ensures the member registration code can be used again.

3. Send Trainee and member contact this template email.

Emergency situations, as determined by Carpentries Core Team (open seat):

1. In the Trainee's record in AMY, go to Edit –> Tasks. Click the red X next to the task for the training they missed.

2. Send Trainee and member contact this template email.

Non-Emergency situations (member seat):

1. In the trainee's person record in AMY in the "Instructor Training Progress" section, add "Training" = FAILED.

2. Send Trainee and member contact this template email.

Non-Emergency situations (open seat):

1. In the trainee's person record in AMY in the "Instructor Training Progress" section, add "Training" = FAILED.

2. No notification is sent. If the trainee contacts us, respond with template email.

7.2.2 Scheduling Training Events

The Quality Assurance Manager collects availability from Instructor Trainers and generates a four month training calendar (January-April, May-August, September-December) three times a year.

Trainees will be asked for their availability in October, March, and July for each four month block, and a calendar will be published 6-8 weeks before each four month block.

Once the calendar is confirmed, the Quality Assurance Manager updates it on the Member information page and on the internal Carpentries Core Team Zoom calendars. The Workshop Administration Team will create events in AMY for each of these scheduled trainings. The Workshop Administration Team will also create an Eventbrite registration page for each event and set up surveys in Survey Monkey for each event. Lastly, the Workshop Administration Team will reserve Zoom Room 1 for each event.

For Online Training Events

Trainees for each event may be a mix of member-affiliated and non-member affiliated (open training) applicants. Seats are first opened to member-affiliated applicants. One month before the event, remaining seats are offered to open training applicants.

The Director of Memberships or the Operations Manager notify the Quality Assurance Manager when new member sites are ready for instructor training in Asana. This includes information about the agreement start and end dates, number of workshops and instructor training seats allowed, and any other special information. The Administrative Specialist enters this information in AMY. The Workshop Administration Team creates an Eventbrite registration code for this new membership. *Note the registration codes document is available to Carpentries Core Team only.*

The Quality Assurance Manager emails member sites to introduce The Carpentries' Instructor Training Program and give their team members the opportunity to join posted training events according to these guidelines.

The Member contact invites their team members to sign up for an event as a team or as individuals. Individuals associated with member sites can sign up for an event at any time.

During the first week of each month, the Workshop Administration Team invites accepted applicants from the open application pool to register for upcoming events. The accepted applicant list is the union of these two queries in AMY:

- State = "Accepted" and Matched = "Unmatched"
- State = "Accepted" and Matched = "Matched trainee, Unmatched training"

One month before each event the Workshop Administration Team emails the event's Trainers with information about setting up the website and Etherpad for the event, and generally preparing to teach.

Two weeks before each event, the Workshop Administration Team will begin monitoring the event's waitlist. If there are any cancellations, the seat will be offered to the next person on the waitlist. If this person does not claim their seat, it will go to the next person, and so on.

One week before each event, the Workshop Administration Team:

- emails all registrants from Eventbrite with information to prepare for the training event.
- emails the Trainers with information including Zoom room access and survey results.

During the training event, the Workshop Administration Team:

- enters all registrants into AMY, associating them with the given event and membership.
- contacts trainees missing their application form, asking them to submit it.

After the event, the Workshop Administration Team:

- emails trainees missing applications
- asks Trainers to send attendance list
- records people who completed training and subsequent checkout steps in AMY. Emails about the training and checkout progress are typically sent to checkout@carpentries.org, a mailbox in Helpscout.

7.2.3 Email Templates (Administrators)

Initial Member Contact Email (Online Training)

SUBJECT: Carpentries Instructor Training for [site_name]

Hi [site contact name],

Congratulations on your institution's [new membership with The Carpentries / Carpentries membership renewal]. As a [silver/gold/platinum] member, you have a total of [number] seats in Instructor Training available to you. We'd like to get you set up for Instructor Training early in your membership year so that your new Instructors can productively build a Carpentries community at your institution.

We run two-day, online Instructor Training workshops multiple times per month. These events are scheduled for a range of time zones, to better serve our global community. We recommend, if possible, that your trainees join the same training event and are co-localised. This enables them to know each other over the course of the event and build up your local community. We recognise that it can be difficult to coordinate everyone's schedules, however, so we do provide the flexibility of trainees joining different events. If your trainees are not able to attend an event together as a team, we recommend that you host a social event for your trainees (and others in your community) to get together.

To register, please direct your team members to our Instructor Training workshop registration page (https://carpentries.github.io/instructor-training/training_calendar/index.html). Your trainees should register with the code: [insert code here in bold]. This code can be used [number] times. Please be sure to share this code with your trainees. They should also fill out our application form (https://amy.carpentries.org/forms/request_training/) using the same code. For guidance about how to select your trainees, please visit our Information for Member Organisations page at https://carpentries.github.io/instructor-training/members/.

You can use this email template (https://docs.carpentries.org/topic_folders/instructor_training/email_templates_admin.html#initial-trainee-contact-email-from-member-site-to-their-prospective-trainees-online-training) to send this information to your group. If one of your affiliates is not able to attend after they've registered for an event, please get in touch with us at team@carpentries.org as soon as possible. In some cases, we will be able to transfer your training seat to another event. However, because the success of our program depends on accurately predicting our capacity needs, we may not be able to accommodate changes in registration unless we are notified at least one week in advance of the event.

Note that in order to provide the best experience for our trainees, in rare instances events may be canceled due to low enrolment. If this happens, your trainees will be notified two weeks before the event and will have the opportunity to sign up for a future event.

For more information about our Instructor Training program, including details about our curriculum, certification process, and logistical details of the training event itself, please visit our Information for Member Organisations page at https://carpentries.github.io/instructor-training/members/.

I'm excited to help you build your team of Carpentries instructors at [site_name]. Please let me know once you've shared this registration information with your trainees so we know that your team is ready to come on board. Feel free to get in touch if you have any questions about this process, including checking on the status of your remaining seats.

Best,

[sender name]

Introducing Host and Trainers (in-person training)

SUBJECT: Carpentries Instructor Training [date] @ [site name]: Making Introductions

Hi all,

This email is to introduce [host_name] of [site_name] with trainers [instructor1_name] and [instructor2_name]. They will be teaching an in-person Carpentries Instructor Training on[workshop_date] at [site_name] .

Instructors will work directly with [host_name] to make travel arrangements. We are not part of this process. This may include airfare, ground travel, hotel, and meals/incidentals. [host_name], it is up to you whether you want to book things directly or have instructors make their own arrangements and get reimbursed. Either way, please keep in mind our instructors are volunteering two days of their time to train your participants, so please support them in making travel and reimbursement as smooth as possible.

[instructor1_name] and [instructor2_name] , please feel free to introduce yourselves and share a bit about your backgrounds. We value the background and expertise you bring to this, and want to hear about you.

[admin_name] will be sending an email to all of the trainees [month when email will be sent] with information needed to prepare for the workshop. I will also be supporting all the administrative details to make this event a success.

[host_name] as you prepare for the training please keep in mind that there will be several breakout sessions during the training. If possible, please reserve at least 2 additional rooms for this to take place. Also, the instructors will be using sticky notes throughout the training, so please have 2 colours of sticky notes (enough for each person to have at least 4 of each colour). These are essential to the way we operate.

Please let me know if you have any questions or concerns,

Best,

[sender name]

Initial Trainee Contact Email (from member site to their prospective trainees - online training)

SUBJECT: Invitation to become a certified Carpentries Instructor

Dear [name],

We are excited to announce that [site name] has become a member of The Carpentries!

The Carpentries (https://carpentries.org) is a global group of volunteers who develop and teach two-day, interactive, hands-on workshops on essential computing and data skills that are not part of basic research training in most disciplines.

As part of our Carpentries membership, we are able to have [number] people from [site name] complete The Carpentries' instructor training program (https://carpentries.github.io/instructor-training/) and become certified Carpentries instructors. Certified instructors can teach Carpentries workshops (https://carpentries.org/workshops/), helping

us reach more people and build these skills across our community. Instructors also have the opportunity to travel to teach Carpentries workshops at other institutions around the globe.

I would like to invite you to you to become one of our Carpentries instructors. Instructor training is held online via video-conference, over two consecutive days. If you are interested in becoming a Carpentries instructor, please register for one of the training events listed here: (https://carpentries.github.io/instructor-training/training_calendar/) Please note you must use this code to register: [code]. You will also need to complete The Carpentries instructor training application form using the same registration code: https://amy.carpentries.org/forms/request_training/. This application is a formality - you are guaranteed to be accepted into the training program - but The Carpentries Core Team needs this application in order to get your information for training into their system.

If you are not interested in becoming a Carpentries instructor, or don't have time - please let me know as soon as possible so that I can offer this seat to another person.

We are all excited to grow our Carpentries community and look forward to bringing you on board.

If you have any questions please contact me or The Carpentries team at team@carpentries.org.

Best,

[sender name]

Invitation to Open Training Applicants

NOTE: This template is for internal use by The Carpentries Core Team and contains language specific to our Open Instructor Training sponsorship program. Member contacts looking to invite trainees to register through a membership should use this template instead.

SUBJECT: Invitation to join The Carpentries Instructor Training

Dear future Carpentries Instructor,

Thank you again for applying to our open Instructor Training program. We are excited to offer you the opportunity to register for an upcoming online instructor training event. You can check out our calendar of events here: (https://carpentries.github.io/instructor-training/training_calendar/) and sign up for any event that is less than one month away.

To register, click on the event you are interested in and use the following code on the Eventbrite page: [INSERT CODE]. **Please do not share this code.** Registration for open training applicants begins one month before each event, and closes one week before each event. Since you have been accepted for training, you may verify that you have completed the application when prompted to do so. **It is not necessary to fill out the Instructor Training application again.**

This online training will be conducted using the Zoom video conferencing platform. No log in is needed, but you must install a browser extension to enable the required breakout group feature. Each participant needs their own laptop and earbuds/headphones. Note, unfortunately, that Zoom access is restricted in certain parts of the world. Once you are registered for an event, you'll receive details on how to connect one week before the event.

For more information about what will be covered at this training, check out our Instructor Training curriculum: https://carpentries.github.io/instructor-training/.

Attendance is required for the full two-days of the workshop in order to certify as a Carpentries Instructor. Participants who miss more than one hour will not pass our training requirements. If you know ahead of time that you will miss an hour of the training, please notify your Trainers.

Before your training, you will be asked to read some brief materials to become familiar with The Carpentries.

After your training, you will need to complete three exercises online in order to become a certified Carpentries Instructor. These requirements are detailed at https://carpentries.github.io/instructor-training/checkout/ and will be discussed at your training.

We will send periodic reminders when new events are open, but you may register for any event during the open period between 1 month and 1 week before the start date.

Please let me know if you have any questions about these instructions or if you would like to unsubscribe from these event invitations. We look forward to you joining The Carpentries community!

Best,

[INSERT SENDER'S NAME]

Decline Open Training Applications

Subject: The Carpentries Open Instructor Training Application

Hello,

Thank you for applying to The Carpentries Open Instructor Training program. This program provides training to individual applicants who do not otherwise have access to Instructor Training (e.g. through an institutional membership). If you did not intend to apply to this program, you may disregard this email.

This email is being sent to let you know that your application has received a low score and will not be accepted into the program. Low scores usually occur when an application does not meet any of our current growth priorities, and additionally can result from blank or insufficiently detailed free text responses, or answers that reflect a lack of clarity about the purpose of the training or The Carpentries' mission.

If you feel that you are a good fit to support the mission of The Carpentries and would like to be reconsidered for this program, we welcome you to reapply. In your application, be sure to provide detailed responses to the free text questions explaining your passion for becoming part of The Carpentries Instructor team. You may also want to read more about our mission and our Instructor Training program before reapplying.

Note that if you have filed multiple applications with us, this message only applies to one of them – if you might have an application on file with a higher score, you are welcome to inquire by replying to this email. **The application that triggered this message will now be archived**, so you will not be contacted again with respect to the same application.

We do our best to offer training for all, but we regret that there is a limit to the number of free seats we are able to offer for Instructor Training at this time. If you have questions about how to strengthen your application, please get in touch!

Best,

[Sender name]

One Month Trainer Email (online training)

Hi [INSERT TRAINER NAMES],

Thank you for volunteering to teach the online Instructor Training on [INSERT DATES/TIME ZONE]! This email will help you to prepare for the training - please read it carefully and let me know if you have any questions.

Please set up the website for your training using this template: https://github.com/carpentries/training-template. Your workshop ID is [INSERT SLUG 20xx-xx-xx-ttt-online]. Please be sure to send me the link to your website.

You can create an Etherpad for your training using this template: https://pad.carpentries.org/ttt-template. This template includes all of the exercises and key-points of the lessons. Please feel free to customise your Etherpad as appropriate.

Get in touch with your co-Trainer(s) to decide who will teach which sections of the curriculum: https://carpentries.github.io/instructor-training/. This is also a good time to decide how you and your co-Trainer(s) will communicate during the training. We recommend using Slack direct message for this.

One week before the event, I will send you the final number registered for this Training. Please let me know if you have any questions about how to prepare for your event. I'll also be checking in with you about a week before the event to share video-conferencing connection information and see if I can help with any last-minute questions.

Best,

[INSERT SENDER NAME]

One Week Trainer Email (online training)

Hi [INSERT TRAINERS NAMES],

We are just days away from the online Instructor Training to be held on [INSERT DATE/TIME ZONE]! Registration for your training has now closed and you have a total of [INSERT # OF PARTICIPANTS] signed up.

You should have just received the email I sent to your participants including Zoom room connection information and homework. Please let me know if there is any other information specific to your event that you would like shared with your trainees.

This event uses the Zoom video-conferencing platform. You can join the Zoom call at the link below. Once you have joined, you can claim host access using the host key provided below. Read more about how to claim host access and all the host capabilities here: https://docs.carpentries.org/topic_folders/communications/tools/zoom_rooms.html

Direct link: https://carpentries.zoom.us/my/carpentriesroom1 Host Key: [INSERT HOST KEY HERE]

Your participants will be completing a survey before the event. This survey gives information about your participants' backgrounds and expectations. Please look through the responses before your event. Your trainees will also be filling out a survey after the event. Below you will find the links to survey responses for your event. Please do not share these links.

Pre: [INSERT LINK] Post: [INSERT LINK]

Please be sure to take attendance both days of the training. Send the list of attendees who completed both days, as well as those who didn't, to checkout@carpentries.org, along with any notes or feedback you would like to share. We need this list of names in order to give credit to trainees.

If you have any questions, please let me know.

Wishing you much success during your training! Best, [INSERT SENDER'S NAME]

One Week Trainee Email (online training)

SUBJECT: Information for your upcoming Instructor Training with The Carpentries

Hello everyone,

Thank you for registering for The Carpentries Instructor Training workshop on [DATE-TIME-TIMEZONE]. This email contains important information to help you prepare for the training - please read it carefully and let me know if you have any questions.

This training is for people who want to become certified Carpentries instructors. This workshop will introduce you to evidence-based best-practices of teaching. We will teach you how to create a positive environment for learners at your workshops, provide opportunities for you to practice and build your teaching skills, help you become integrated into the Carpentries community, and prepare you to use these teaching skills in teaching Carpentries workshops. For more information about what will be covered at this training, check out our Instructor Training curriculum: https://carpentries.github.io/instructor-training/.

This is training for teaching, not technical training. We recommend that you be familiar with at least one of the technologies that we teach (R, Python, the Unix bash shell, SQL, OpenRefine, spreadsheet software, and/or Git) before taking Instructor Training. We will not be covering the contents of our workshop curricula during Instructor

Training, but we do provide optional post-training onboarding sessions and mentoring opportunities to help prepare Instructors to teach particular curricula.

Our instructor Trainers [trainer1] and [trainer2] will be leading your training. This online training will be conducted using the Zoom video conferencing platform. No log in is needed, but you may need to install a browser extension. To access the training please use this link: [INSERT LINK]. All participants are required to have their own laptop and earbuds/headphones. Screen sharing is necessary for some activities, and display of video as much as possible throughout the workshop is recommended for the best experience. Some participants may be attending the training in the same room. If this is the case, please be sure that everyone is wearing their earbuds/headphones and are muted at all times when not speaking. Your Trainers have put together a workshop website with information about the schedule: [INSERT LINK]

Attendance is required for the full two-days of the workshop in order to certify as a Carpentries Instructor. Participants who miss more than one hour will not pass our training requirements. If you know ahead of time that you will miss an hour of the training, please notify your Trainers.

Before your training, please:

- Complete our pre-workshop survey [INSERT LINK] . Your responses will help your Trainers understand your background and customize the workshop appropriately.

- Read this short paper: https://carpentries.github.io/instructor-training/files/papers/science-of-learning-2015.pdf which provides a brief overview of some key evidence-based results in teaching.

- Go to the Software Carpentry lessons page (http://software-carpentry.org/lessons/), the Data Carpentry lessons page (http://www.datacarpentry.org/lessons/), or the Library Carpentry lessons page (https://librarycarpentry.org/lessons/) to see what we currently teach. Carefully read through one episode of your choice. You will be using your selected episode for several in-class exercises, so be sure you are comfortable with the content. Note: an episode is not the entire lesson, but a single page of the lesson.

After your training, you will be asked to do three follow-up exercises online in order to become a certified Instructor. These requirements are detailed at https://carpentries.github.io/instructor-training/checkout/ and will be discussed at your training. If you have any questions about the workshop, the reading material, or anything else, please don't hesitate to get in touch.

Happy Training - we are excited to have you on board! [SENDER'S NAME]

Missing Instructor Training applications

SUBJECT: Carpentries Instructor Training: Missing Application

Hi [trainee name],

On [training_dates], you [participated (or) will be participating] in an Instructor Training event for The Carpentries, but we have not yet received an application from you. To ensure that we can get you into our system and track your progress towards Instructor certification, please fill out the Instructor application form here: https://amy.carpentries.org/forms/request_training/.

Please use [group_code] as your group name.

Please contact checkout@carpentries.org if you have any any questions.

Best, [sender name]

Attendance checkout

SUBJECT: Carpentries Instructor Training [DATE]: Final Attendance

Hi [TRAINER NAMES],

Thanks again for teaching The Carpentries Instructor Training on [INSERT DATE]. I hope that you had a great experience. This is a friendly reminder to please send a list of participants who attended both days of your training, as well as who did not complete the training, to checkout@carpentries.org. Without this list, we are unable to give attendees credit for completing the training.

Please let me know if you have any questions.

Best, [SENDER NAME]

Event Cancellation (online training)

Dear [Trainer names],

Thank you for volunteering to teach The Carpentries Instructor Training on [dates/ time/timezone]. Unfortunately, due to low enrolment, we will be cancelling this event. We are working on ways to better estimate our capacity needs so that we won't need to cancel events in the future. Thank you again for all of the time you give to the community - I greatly appreciate your time and regret having to cancel this event. I hope we can get you in on another event later this year. Please let me know if you have any questions.

Best,

[sender name]

No-Show - Emergency Member (online training)

Note: This email will be sent as a response to contact from trainee or member site contact and doesn't require a special subject line.

Dear [trainee name], (cc member site contact)

Thank you for letting us know why you were not able to attend The Carpentries Instructor Training on [date of training]. I'm sorry to hear about [reason for emergency] and would like to extend an invitation for you to attend a future online training event at a time that is convenient for you. When you're able, please look at our calendar of upcoming events here: https://carpentries.github.io/instructor-training/training_calendar/index.html and register for an event that matches your availability. If you won't be able to join an event and would prefer to transfer your seat in Instructor Training to someone else at your institution, please let us know and we will make the necessary arrangements with [name of member site contact].

Thank you for your involvement with The Carpentries community. We hope you'll be able to join the Instructor team soon!

Best, [name]

No-Show - Emergency Open Applicant

Note: This email will be sent as a response to contact from trainee and doesn't require a special subject line.

Dear [trainee name],

Thank you for letting us know why you were not able to attend The Carpentries Instructor Training on [date of training]. I'm sorry to hear about [reason for emergency] and would like to extend an invitation for you to attend a future online training event at a time that is convenient for you. When you're able, please look at our calendar of upcoming events here: https://carpentries.github.io/instructor-training/training_calendar/index.html and register for an event that matches your availability. If you won't be able to join an event and would prefer to transfer your seat to someone else on our waiting list, please let us know.

Thank you for your involvement with The Carpentries community. We hope you'll be able to join the Instructor team soon!

Best, [name]

No-Show - Non-Emergency Member (online training)

SUBJECT: Missed you at The Carpentries Instructor Training!

Dear [trainee name], (cc member site contact)

We missed you at The Carpentries Instructor Training on [date of training] and wanted to reach out to you. Generally, we need to count no-shows in the number of Instructor Training seats that our institutional member sites use towards their membership benefits. This is to ensure that we are able to accurately plan our capacity for trainings. Since we didn't hear from you before the event, we will be counting your seat as forfeited. We do make exceptions in limited circumstances (e.g. illness), so please do reach out to us if there was an extenuating circumstance and we will be able to make alternative arrangements for you to join another training event.

Looking forward to hearing back from you and to having you as part of The Carpentries Instructor team!

Best, [name]

No-Show Non-Emergency Open Applicant

Note: This email will be sent as a response to contact from trainee and doesn't require a special subject line.

Dear [trainee name],

Thank you for reaching out to us about missing The Carpentries Instructor Training on [date of training]. Generally, we need to count no-shows as forfeited seats to ensure that we are able to accurately plan our capacity for trainings. Since we didn't hear from you before the event, we will be counting your seat as forfeited. If you would like to be considered for a future Instructor Training event, you will need to submit a new application and be added to the waiting list. We do make exceptions to this policy in limited circumstances (e.g. illness), so please do reach out to us if there was an extenuating circumstance and we will be able to make alternative arrangements for you to join another training event without needing to go through the application process again.

Looking forward to hearing back from you and to having you as part of The Carpentries Instructor team!

Best, [name]

Cancellation - Member at Least One Week Notice (online training)

Note: This email will be sent as a response to contact from trainee or member site contact and doesn't require a special subject line.

Dear [trainee name], (cc member site contact)

Thank you for letting us know you will not be able to attend The Carpentries Instructor Training on [date of training]. We're sorry you won't be able to join us and would like to extend an invitation for you to attend a future online training event at a time that is convenient for you. Please look at our calendar of upcoming events here: https://carpentries.github.io/instructor-training/training_calendar/index.html and register for an event that matches your availability. If you won't be able to join an event and would prefer to transfer your seat in Instructor Training to someone else at your institution, please let us know and we will make the necessary arrangements with [name of member site contact].

Thank you for your involvement with The Carpentries community. We hope you'll be able to join the Instructor team soon!

Best, [name]

Cancellation - Open Applicant at Least One Week Notice

Note: This email will be sent as a response to contact from trainee and doesn't require a special subject line.

Dear [trainee name],

Thank you for letting us know you will not be able to attend The Carpentries Instructor Training on [date of training]. We're sorry you won't be able to join us and hope that you will be able to attend a future online training event. We have placed you back on the waiting list and you will continue to receive invitations to upcoming Instructor Training events when seats become available.

If you won't be able to join an event and would prefer to take your name off the waiting list, please let us know.

Thank you for your involvement with The Carpentries community. We hope you'll be able to join the Instructor team soon!

Best, [name]

Follow-up - Trainers Attendance List

Hi [INSERT TRAINERS NAMES],

Thank you for taking time to teach The Carpentries Instructor Training on [INSERT DATES]! I hope you had a great experience. I am following up with you to obtain the attendance from the training.

For your convenience, I have included the names of trainees in this [INSERT FILE]. Please indicate the attendance for both days so that I can record their progress and get them on track to becoming certified Carpentries instructors!

Please let me know if you have any questions.

Best,

[sender name]

Zoom test invitation to Host Site

Hi [Host Name],

Thank you for hosting a Carpentries Instructor Training on [date/time including time zone]. We will be using the Zoom videoconferencing platform for this event. To ensure that the training runs smoothly, I'd like to set up a Zoom test run with you prior to the event. This should not take much time, however, it is important that this happens to detect any problems and have time to troubleshoot them prior to the training. We all want to stick to the schedule, and want to avoid spending time troubleshooting on the morning of the event.

A few things to consider when conducting the test:

- Be in the room that the training will take place in.
- Have access to the audio system that will be used
- Have access to the projector that will be used

We will make sure that we can see and hear each other, and that I can see all the seats people will be in for the event itself.

To schedule a test run, you can [email me/look at my calendar]. Please let me know if you cannot find a time that works, so we can look for some other options.

I'm looking forward to having your team on board! Please let me know if you have any questions about how this works.

Best, [sender name]

Response to Instructor Training Inquiry

Hi [name],

Thank you for your interest in becoming a Carpentries Instructor! It sounds like you might be interested in applying to our Open Instructor Training program. Training slots are made available for free to Open applicants when they are not claimed by a member institution one month in advance.

We rank applications on a rolling basis; we are working to reduce wait times, but at present expect a delay of at least 1 month. If you have a specific need to be trained sooner (e.g. an upcoming workshop) please let us know. Multiple applicants from a single institution generally will not be invited at once, but may be accepted individually over time. To more rapidly build an Instructor community at your institution, consider becoming a Member. For more information see: https://carpentries.org/membership/.

The instructor training application is here: https://amy.carpentries.org/forms/request_training/. In order to have your application considered for Open training, be sure to leave the "Registration Code" entry space blank. Note that the expectations for Instructors are also listed on this page, and are a good idea to check before applying.

In the mean time, there are many ways to get involved with The Carpentries. For a complete list of roles, see our website here: https://carpentries.org/community/.

Thank you again for your interest in The Carpentries! I look forward to seeing you around the community.

Best regards,

[sender name]

Response to Instructor Training Application

This email is usually sent with a script. The canonical version of the text is the version below.

Hi [name],

Thank you for applying for The Carpentries Instructor Training program. We're excited to have you as part of our community.

If you submitted your application for a specific instructor training workshop, please disregard the message below.

We receive hundreds of applications, and we cannot provide no-cost training for every applicant. Please, don't let that discourage you! We'd like to help you bring workshops and instructor training to your organisation. We're working on ways to increase our capacity to offer trainings to individuals not affiliated with member institutions, and hope to be able to offer more of these trainings soon. Your application has been placed on our waiting list while we grow our capacity.

If you'd like to become a Member, get in touch with memberships@carpentries.org to learn more about how we can help you make the case at your organisation. In the meantime, please get involved!

- Join our discussion email list (https://carpentries.topicbox.com/groups/discuss)
- Follow us on Twitter (@thecarpentries, @datacarpentry, @swcarpentry, and @libcarpentry)
- Help at a local workshop (https://carpentries.org/)
- Learn about our community (https://carpentries.org/community/)

Learn more about us!

- Read our blogs (https://carpentries.org/blog/, http://www.datacarpentry.org/blog/, https://software-carpentry.org/blog/, and https://librarycarpentry.org/blog/)
- Sign-up for our newsletter (https://carpentries.org/newsletter/)

Most of our instructor training events are offered as part of institutional memberships and Member organisations receive training priority. To fast-track your application, consider becoming a Member. For more information see: https://carpentries.org/membership/.

If you have questions about your application, please contact team@carpentries.org. Thanks again for applying!

Best, [sender name]

Checkout Deadline Approaching

Subject: Carpentries instructor training: Deadline approaching

Hi everyone,

You're receiving this email because you recently attended a training event to become an Instructor with The Carpentries, but haven't yet completed the follow-up tasks to become certified. We generally require new instructors to complete certification within three months of their training, to ensure that they are up to date on our teaching methods and practices. If you are still planning on certifying and would like an extension on your deadline, please send an email to checkout@carpentries.org. If you believe you're receiving this email in error and have already completed the checkout process, please get in touch as we may have missed recording one of your checkout steps.

If you have any questions about the checkout process, please take a look at our checklist: http://www.datacarpentry.org/checkout/ and feel free to send any questions to checkout@carpentries.org.

Looking forward to having you as part of our Instructor community!

Best wishes,

[sender name]

Completed Everything except Lesson Contribution

Subject: Carpentries instructor training: Lesson Contribution

Hi [trainee name],

Thank you for participating in an instructor discussion session and a teaching demonstration. I'd like to check you off in our system and issue you your instructor certification, but I don't currently have a record of your lesson contribution. If you've already made a contribution, please send me a link to the PR or issue. If you're working on your contribution, please check out these guidelines for some tips.

Please get in touch if you have any questions.

Best,

[sender name]

Completed Lesson Contribution

Subject: Carpentries instructor training: Discussion and teaching demo

Hi [trainee_name],

Thanks very much for your lesson contribution. When you have a moment, please go to the instructor discussion Etherpad here: (https://pad.carpentries.org/instructor-discussion) to sign up for a discussion session, and then to the teaching demo Etherpad (https://pad.carpentries.org/teaching-demos-recovered) to sign up for your final demo. For more information about completing your instructor certification, please see our simplified checklist: (http://www.datacarpentry.org/checkout/) and let us know if you have any questions.

Best,

[name]

Checkout Extension Granted

Subject: Carpentries instructor training: Extension granted

Hi [trainee name],

Thanks for getting in touch. I've recorded an extension for you through the end of [Month Year]. Please let me know if there's anything else I can do to help with the checkout process. Looking forward to having you as a Carpentries instructor!

Best, [sender name]

Checkout Completed

This email is usually sent with a script. The canonical version of the text is the version below.

Subject: Carpentries instructor training: Checkout completed

Hi [trainee name],

Thank you for completing your checkout. I've updated your status in our database and you are now officially certified as a Carpentries instructor. Your certificate is attached. Congratulations!

Please note that although your certificate reads either Software Carpentry, Data Carpentry, or Library Carpentry you are fully certified to teach all workshops for The Carpentries.

If you haven't already, please be sure to join the instructors mailing list (https://carpentries.topicbox.com/groups/instructors). This is where you'll hear about opportunities to teach at upcoming workshops. You can also join the general discussion list (https://carpentries.topicbox.com/groups/discuss) for broader interactions with The Carpentries community. In addition to being able to teach at Carpentries-organised workshops, you are also able to organise and host your own local workshops. You can find more information about running a workshop here (https://docs.carpentries.org/topic_folders/hosts_instructors/index.html). Your status as a newly certified Instructor also makes you eligible to vote for The Carpentries' Executive Council. Read more here (https://docs.carpentries.org/topic_folders/governance/index.html).

You can check out some of our local communities, sign up for local mailing lists, and meet our Regional Coordinators who support The Carpentries activities around the world here (https://docs.carpentries.org/topic_folders/regional_communities/index.html).

Please let us know if there's anything we can do to help and welcome to the community!

Best,[sender name]

Recruiting New Trainers

Subject: Opportunity to join The Carpentries Trainers community

Hi [name],

I wanted to get in touch with you about an opportunity to get involved with The Carpentries community. Software Carpentry (SWC), Library Carpentry (LC), and Data Carpentry (DC) are lesson programs of The Carpentries (a fiscally sponsored project of Community Initiatives). We are focused on spreading computational literacy to researchers around the world. We run intensive, hands-on, two-day workshops to help researchers and other professionals develop the fundamental computational skills they need to do their research. Together, we run over 300 workshops a year, and have reached more than 25,000 learners in 30 countries.

Our workshops are taught by volunteers who go through a two-day training program focused on pedagogy and cognitive psychology. These training events are run by our Instructor Trainers who also help to develop and maintain our instructor training curriculum.

The Carpentries Trainers are an eclectic group. Some of us have formal training in pedagogy, some are experienced Carpentries instructors, others run Carpentries-like trainings as part of their jobs. We all share a commitment to helping new instructors become familiar and comfortable with The Carpentries teaching practices and principles.

If you're interested in joining the Trainer community, please apply here (https://goo.gl/forms/yTx9yJzdWy6OAPtS2)! Applications for this round will be open until [application_deadline].

If you have any questions about the training process or the expectations for being a Trainer, please contact team@carpentries.org

To learn more about what we teach, check out our lessons here: (https://software-carpentry.org/lessons/), here: (http://www.datacarpentry.org/lessons/), and here: (https://librarycarpentry.org/lessons/). More detailed information about what Trainers do can be found here: (https://github.com/carpentries/policies/blob/master/trainer-agreement.md#).

Looking forward to seeing an application from you!

Best,

[sender name]

Accepting New Trainers

Subject: Congratulations! Join The Carpentries Trainer Community

Hi all,

Thank you all for applying to become instructor Trainers with The Carpentries. A group of Trainers have reviewed the applications and we're excited to invite each of you to the Trainer team.

We'll be starting our new cohort of instructor Trainers in [month]. Our cohort will be [number] folks located in [countries]. We'll be meeting once a week starting in [month] to discuss our text and how it relates to our instructor training curriculum. More details can be found in the preliminary reading schedule.

If you're interested in being part of this cohort, please try to complete the following by [deadline] so that we can finalise the schedule and start our meetings!

1. Please fill out this poll [link] for scheduling book club meetings. Don't forget to adjust the timezone shown (pull down menu above the time list). Please choose the days and times that work for you for the entire 8 week period of our book club. To complete certification as a Trainer, we'll ask that you miss at most one of our 8 book club meetings. Since we are spread across several time zones, please be as accommodating as possible in filling out your availability. We will have two meeting times per week to accommodate all time zones, but you will only need to attend one of the weekly meetings.

2. Please take a look over the process for trainer training and make sure that all of the requirements of becoming a Trainer work with your schedule and other responsibilities. We're excited to have you in the Trainer community, but do want to make sure that all Trainers are able to commit the time required, so that we are able to realistically determine the number of instructors we train per year.

3. Please get a copy of our text [link]. I'll send out reading assignments and discussion guides in a later email.

4. Please also fill out your availability for instructor training events for [month through month] and add your name to the Trainers list in the second tab. This cohort of Trainers will be ready to co-teach instructor training events by the end of [month] and to teach on their own shortly after that.

5. Please add upcoming Trainer meetings (http://pad.software-carpentry.org/trainers-backup) to your calendar. These are also on the Community Calendar. Each of these is held in two different time zones - you don't need to attend both meetings, but you're welcome to!

6. Please sign up for the Trainers email list (https://carpentries.topicbox.com/groups/trainers) if you haven't already done so.

7. Please respond to this email with a quick introduction so that we can all get to know each other. I'll send out my introduction as a separate email following this.

I know that's a lot! Let me know if you have any questions. I'm looking forward to seeing you all at our first book club discussion.

Best, [name]

Trainers' reminder: Teaching Demos

Hi!

You're signed up to host a Carpentries teaching demo within the next two weeks!

Please double check your time/date link on the etherpad and confirm this one-hour time slot in your calendar.

If you know in advance that you will have a conflict and are unable to host your demo, please email the Trainers list request a replacement. In most cases staff will fill in as needed if a replacement isn't found.

If you have a last-minute conflict, it is best to use Slack as well as email to request a replacement, and tag both me and [name]in your request on Slack. If you are unable to get help in time, please contact your trainees to cancel or reschedule.

Instructions for hosting demos are here. Since we often have last-minute cancellations, if you have trainees contacting you to request an extra spot we suggest giving them permission to come, noting that they may not be able to present if everyone shows up. However, you are also very free to say 'no.' At the present time we are not able to track no-shows or cancellations for checkout, so it's only necessary to mention those who attended in your email to checkout@carpentries.org after the demo.

Please get in touch with questions, and enjoy your demo session!

Best,

7.3 For Member Organizations

7.3.1 Joining a Training Event

When a site signs a new member contract or otherwise schedules a training event with The Carpentries, the Program Manager will contact the site to discuss instructor training. This includes reviewing the training curriculum and certification process.

The Program Manager will share the member training process and the current member training calendar with the member site, and the site can choose the dates that work best for them.

The Program Manager will share information about the training with all participants, including a link to our application form and some pre-reading material.

7.3.2 Host Checklist

Our training events are typically offered using the Zoom videoconferencing platform.

Before the event, the Workshop Administration Team will be in touch with the host site to set a test run of the Zoom videoconferencing set up. For the test run, the host should:

- be in the same room as the event itself
- use the same equipment (computer, projector, speakers, microphone) as the event itself
- make sure people in the room can see and hear the person on the screen
- make sure the person on the screen can see and hear all participants

Other things to be set up for the event include:

- Reminding participants of the pre-reading material that was shared by the Program Manager
- Reviewing the schedule to arrange for lunch and coffee breaks. Providing refreshments is suggested (people learn better with fuel!), but not mandatory. A sample schedule is here.
- Allowing for break out space during the event. The training includes partner and small group activities. If the room is big enough this can be done in different corners of the room. Otherwise, a hallway alcove or nearby office may be a good fit.

LESSON DEVELOPMENT

For more information on lesson development with The Carpentries, please visit The Carpentries Curriculum Development Handbook.

8.1 Lesson Development Roles

8.1.1 Curriculum Advisory Committee

Curriculum Advisors are part of a team that provides the oversight, vision, and leadership for a particular set of lessons. Advisors represent The Carpentries community and should strive to embody The Carpentries philosophy by:

- Recognising the importance of communication and being welcoming to all contributors.

- Giving feedback to contributors using The Carpentries model:

    - Find what's good. Be specific about improvements needed. Use motivational language.

    - Evaluating lesson contributions in light of The Carpentries pedagogical model:

    - Teach what's most relevant and useful for learners.

    - Avoid getting bogged down in technical details.

    - Keep language motivating.

    - Emphasise the importance of continued learning and improvement.

Curriculum Advisors are responsible for:

- Routinely, as needed:

    - Responding to requests for comments on curriculum in GitHub.

    - Acting as Maintainers for the workshop homepage repository for their curriculum - making sure it's up to date with the overall goals of the workshops, correcting links to curriculum, and updating as needed.

- Meet bi-annually to:

    - Discuss curricular updates that have been proposed by Instructors, Maintainers, or other community members.

    - Provide recommendations for other potential updates based on current approaches in the field.

    - Discuss proposals for new lesson ideas and provide recommendations about whether they should be developed or accepted and whether they should be incorporated into existing workshop curriculum or standalone.

    - Provide a written report of the meeting regarding decisions around curriculum updates and recommendations.

- Review individual lessons to make sure curriculum-level learning objectives are being met by the set of lessons.

- Prepare the workshop homepage repository for lesson release. Curriculum Advisors will be listed as Editors for this repository at release.

Curriculum Advisors commit to serving a one year term, but are welcome to continue for additional years.

- Curriculum Advisors, Data Carpentry
- Curriculum Advisors, Library Carpentry
- Curriculum Advisors, Software Carpentry

8.1.2 Lesson Infrastructure Subcommittee

Members of the Lesson Infrastructure Subcommittee serve as Maintainers for The Carpentries lesson template and its documentation, as well as for the Carpentry workshop template. As Maintainers, they also follow the Maintainer Guidelines.

8.2 Bug BBQs

A Bug BBQ is a day-long community-wide lesson development event. The goal of a Bug BBQ is to prepare lessons for publication.

8.2.1 Scheduling a Bug BBQ

Information about how to schedule a Bug BBQ - coming soon!

8.2.2 Communicating about a Bug BBQ

Creating a Bug BBQ Website

Information about how to create a Bug BBQ website - coming soon!

Announcing a Bug BBQ (Blog post template)

The Carpentries is preparing to publish {{ lesson list }} on Zenodo in {{ month(s) }}. This will be the first publication for our new {{ new lesson list }} lessons. We regularly publish our lessons to provide stable identifiers for polished versions of the lessons. This enables referenced discussions of the lesson materials and gives contributors a verifiable product to cite on their CVs or resumes.

This release will include the following lessons: {{ bulleted list of lessons, for Data Carpentry lessons, link to the workshop home page instead of individual repos }}.

If you've made a contribution to one of these lessons, you're already an author. Help make sure the final product is polished and complete by getting involved in the lesson release.

Here's a run-down of the lesson release process and our timetable for this release.

- Resolve existing PRs. **{{ dates }}**
- Freeze lessons to new significant changes. **{{ dates }}**

- Bug BBQ to clean up lessons. **{{ dates }}**

- Publish! **{{ dates }}**

{{ day, month, time UTC - day, month, time UTC }}

Click [this link]({{ FIXME https://www.timeanddate.com/worldclock/fixedform.html }}) to see the event in your local time.

Join with the community in a hacky-day to submit Issues and PRs to identify and fix problems and get us ready to publish. We'll provide communication channels for you to work with other community members and guidelines for how to get started. Keep an eye open for more information about the Bug BBQ!

We're excited to work with the community to release {{ lessons }}. Put these dates on your calendar, and we'll send out reminders and updates too. These lessons belong to the community - help keep them great!

8.3 Release Process and Schedule

Lessons are released on a 6-month release cycle. Lesson releases are named by the year and month they happen, e.g., `2016.05`.

1. Each lesson lives in the `gh-pages` branch of its own repository.

2. When a release is made, the lesson Maintainer(s) create a branch named after the release, e.g., `2016.05`.

3. A Release Maintainer generates HTML pages for that release and adds them to the branch.

4. If there isn't already a directory for that release in the `swc-releases` repository, the Release Maintainer creates one and adds an `index.html` page to it.

5. The Release Maintainer adds a submodule to the release directory of `swc-releases` that points to the newly-created release branch of the lesson.

More information about lesson releases coming soon!

8.4 Lesson Release Checklist

For each lesson release, copy this checklist to an issue and check off during preparation for release

Scheduled Freeze Date: YYYY-MM-DDScheduled Release Date: YYYY-MM-DD

Checklist of tasks to complete before release:

- [ ] check that the learning objectives reflect the content of the lessons

- [ ] check that learning objectives are phrased as statements using action words

- [ ] check for typos

- [ ] check that the live coding examples work as expected

- [ ] if example code generates warnings, explain in narrative and instructor notes

- [ ] check that challenges and their solutions work as expected

- [ ] check that the challenges test skills that have been seen

- [ ] check that the setup instructions are up to date (e.g., update version numbers)

- [ ] check that data is available and mentions of the data in the lessons are accurate

- [ ] check that the instructor guide is up to date with the content of the lessons

- [ ] check that all the links within the lessons work (this should be automated)

- [ ] check that the cheat sheets included in lessons are up to date (e.g., RStudio updates them regularly)

- [ ] check that language is clear and free of idioms and colloquialisms

- [ ] make sure formatting of the code in the lesson looks good (e.g. line breaks)

- [ ] check for clarity and flow of narrative

- [ ] update README as needed

- [ ] fill out "overview" for each module - minutes needed for teaching and exercises, questions and learning objectives

- [ ] check that contributor guidelines are clear and consistent

- [ ] clean up files (e.g. delete deprecated files, insure filenames are consistent)

- [ ] update the release notes (NEWS)

- [ ] tag release on GitHub

8.5 Upcoming Lesson Releases

Information about upcoming lesson releases - coming soon!

8.6 Email Templates

8.6.1 Curriculum Advisory Committee Invitation

Subject: Invitation to Join the [carpentry org] [lesson title] Curriculum Advisory Committee

Dear [name],

Thank you for your interest in being a member of the [carpentry org] [lesson title] Curriculum Advisory Committee! Because of your experience working with [relevant data types] and your perspective on and commitment to teaching [lesson title] data skills, we would like to invite you to be a member of this committee. We think you bring important and unique insight to what skills should be taught to [lesson title] researchers as well as how they should be taught.

The [carpentry org] [lesson title] curriculum aims to teach the core skills and perspectives for working effectively and reproducibly with [lesson title] data. The role of the [carpentry org] [lesson title] Curriculum Advisory Committee is to provide the oversight, vision and leadership for the [lesson title] curriculum as a whole.

This Committee will meet bi-annually to:

- Discuss curricular updates that have been proposed by Instructors, Maintainers or other community members.

- Provide recommendations for other potential updates based on current approaches in the field.

- Discuss proposals for new lesson ideas and provide recommendations about whether they should be developed or accepted and whether they should be incorporated into existing workshop curriculum or as standalone lessons.

- Provide a written report of the meeting regarding decisions around curriculum updates and recommendations.

Additionally Committee members are expected to:

- Be familiar with [carpentry org] [lesson title] lesson content and respond to content-related issues on individual lessons as needed.

- Act as Maintainers for the '[lesson title] workshop' repository, making sure it's up to date with the overall goals of the workshops and correct links to curriculum and update as needed.

Prior to lesson release (currently on a 6 month schedule):

- Review individual lessons to make sure curriculum-level learning objectives are being met by the set of lessons.

- Prepare the '[lesson title] workshop' repository for release. Will be Editors for this repository at release.

Please let me know if you are still interested in serving on the [lesson title] Curriculum Advisory Committee and can commit to these responsibilities. If you have any questions before you can accept this role, please also let me know.

Thanks so much. We look forward to the opportunity to work with you!

Best,

[sender name]

8.6.2 Initiate Scheduling of First Meeting

Subject: Scheduling First Meeting of the [carpentry org] [lesson title] Curriculum Advisory Committee

Hi everyone,

Thank you to those who so far have confirmed your interest in being a part of the committee. I'd like to get us started on setting up our first bi-annual meeting. This meeting will be between [date] and [date], in advance of the [upcoming Bug BBQ or lesson release] which will be held [dates].

At our first meeting, we will be making decisions about some core proposed revisions to the existing [lesson title] lessons. The developers and Maintainers of the lessons will be providing that list, along with relevant background information, for people to look over in preparation for the meeting.

To help schedule the meeting, could everyone please add their availability to this [whenisgood](link to whenisgood poll) by this coming Friday [(date)]? Please make sure to put in your time zone at the top of the poll. I'll look at the results and let everyone know the meeting time by [date] so that you can clear up any holds on your calendar.

Please let me know if you have any questions in advance of our first meeting in a few weeks. I'm looking forward to meeting everyone soon!

Best, [sender name]

8.6.3 Announce Meeting Times and Dates

Subject: First Meeting of the [carpentry org] [lesson title] Curriculum Advisory Committee

Hi all,

Thanks again for being a part of the [lesson title] CAC. We'll be having our first bi-annual meeting to prepare for the [upcoming Bug BBQ or lesson release] which will be held [dates]. To accommodate the geographical diversity of our committee members, we'll be having two meetings. I strongly recommend that those who can attend both do so, as it will help to build consistency across the meetings and a team-feeling for the group. Of course, if you're only able to attend one meeting, that's fine too!

The meetings will be at the times linked below (please click the links to see the time in your own time zone). I'll be sending out information about meeting location and agenda early next week.

[meeting time 1](link to timeanddate event announcer) [meeting time 2](link to timeanddate event announcer)

Please let me know if you have any questions. Looking forward to meeting everyone soon!

Best, [sender name]

8.6.4 Follow up from Curriculum Advisory Committee Meeting

Subject: Follow-up Items from [lesson title] Curriculum Advisory Committee Meetings

Hi all,

Thank you again for a very productive set of meetings last week. I've put together minutes for our two meetings (combined in [this document](link to meeting minutes in https://github.com/datacarpentry/curriculum-advisors/)), including decision points and action items for follow-up. I wanted to run these by everyone to make sure that I've correctly identified the decisions that were made before I follow up with the Maintainers to move these decisions forward.

It would be greatly appreciated if you could take a look at the minutes and let me know by [date and time UTC](link to timeanddate event announcer) if you see any problems or have any objections to the decisions and action items. At that point, I will follow up with the Maintainers on the next steps.

Thank you everyone for bringing your backgrounds and expertise to the meetings last week and for your deep thought about this curriculum. I'm excited about [upcoming publication or major lesson change].

Please let me know if you have any questions or comments.

Best, [sender name]

8.7 The Carpentries Incubator Lesson Spotlight

The Incubator Lesson Spotlight is a regular feature in The Carpentries blog and newsletter, highlighting a lesson currently under community development. The purpose of the Spotlight series is to raise the visibility of that lesson among the broader community, and to encourage community members to contribute to the further development of that lesson.

Any lesson in The Carpentries Incubator is eligible to be included in the series, regardless of the stage of development that lesson is currently in. It is a good way for lessons in the early stages of development to attract new collaborators, and for those in later stages to invite others to informally review the lesson and to try teaching the material.

If you are a developer of a lesson in The Carpentries Incubator, you can submit your lesson to be featured in the series by filling in the Incubator Lesson Spotlight content submission form.

In the form, you will be asked to provide some basic details of the lesson and your collaborators, some information about the objectives and the history of the lesson, and a description of how The Carpentries community can best contribute to its ongoing development. This information will be used by the Core Team to create a post for The Carpentries blog, an item for the Carpentries Clippings newsletter, and related posts to social media. When the blog post has been drafted, a pull request will be opened to add that post to the website. You will be tagged for a (optional) review of this pull request before it is published.

Incubator Lesson Spotlight features are intended to raise the visibility of the lesson and to encourage other community members to get involved in its further development, so it is best to think about how you can prepare your lesson for new contributors before the feature is published. This might mean labelling existing issues (e.g. to appear on the Help Wanted page) or creating new ones, making sure that your CONTRIBUTING.md is up-to-date, and/or planning publication of the Spotlight feature to fit with a relatively quiet period in your schedule so that you can respond promptly to any new issues and pull requests.

LESSON MAINTENANCE

9.1 Maintainer Guidelines

The Carpentries Maintainers work with the community to make sure that lessons stay up-to-date, accurate, functional and cohesive. They monitor their lesson repository, make sure that PRs and Issues are addressed in a timely manner, and participate in the lesson development cycle including lesson releases. They endeavour to be welcoming and supportive of contributions from all members of the community.

Maintainers are responsible for:

- Routinely:
    - Ensuring reasonable response time to all submitted Issues and PRs. At a minimum, ensuring all Issues and PRs are acknowledged within two days.
    - Quickly addressing issues and PRs tagged as "bug"s.
    - Submitting Issues as they arise.
    - Adhering to the Code of Conduct and alerting the Policy Subcommittee to any potential violations.
    - Identifying potential new Maintainers based on their review activity.
- Every six months:
    - Participating in regular Issue Bonanza and Bug BBQ events, including organising and tagging issues.
    - Bringing in updates to the lesson template.

Maintainers represent The Carpentries community and should strive to embody The Carpentries philosophy, by:

- Recognising the importance of communication and being welcoming to all contributors.
- Giving feedback to contributors using The Carpentries model:
    - Find what's good. Be specific about improvements needed. Use motivational language.
- Evaluating lesson contributions in light of Carpentries pedagogical model:
    - Teach what's most relevant and useful for learners.
    - Avoid getting bogged down in technical details.
    - Keep language motivating.
    - Emphasise the importance of continued learning and improvement.

Note: These guidelines are adapted from those currently in use by the Data Carpentry Genomics Maintainers and are provisional. The Maintainer team will be deciding on official guidelines for the full set of Carpentries lesson Maintainers.

9.2 How to Stay in Touch

The overall Maintainer community communicates using our mailing list and our Slack channel. If you do not already have a Slack account with The Carpentries, you can create one.

The Maintainer community meets monthly to discuss issues relevant to all lesson Maintainers. Our meeting schedule can be found on our Etherpad and on the community calendar.

Each Lesson Team also has their own Slack channel. A link to join your lesson's Slack channel can be found in the README file in your lesson repository.

9.3 How to Handle Issues

Information coming soon.

9.4 How to Get Help

There are many ways to request help on an issue or PR you are reviewing. To get help from other Maintainers or the general community, use the `help wanted` or `good first issue` labels. If your lesson is included on the Help Wanted page of The Carpentries website, issues labelled `help wanted` will automatically be listed for potential contributors to find there.

If an issue affects the overall structure or scope of the lesson, you can refer the issue to your curriculum's Curriculum Advisory Subcommittee by using the `status:refer-to-cac` label. Remember that the Curriculum Advisors only meet once every six months (in advance of lesson releases) and they will likely not be able to provide a quick response to your question.

You can also get help from other Maintainers and interested community members by posting a question to your lesson's Slack channel.

9.5 How to Suggest Changes to the Styling for all Lessons

Information coming soon.

9.6 Maintainer Onboarding

The process for Maintainer onboarding is currently on hold. If you are interested in becoming a lesson Maintainer, please contact us at team@carpentries.org.

New Maintainers go through an onboarding process. The curriculum for onboarding new Maintainers is available as a Maintainer Onboarding Lesson. This documentation describes how to recruit new Maintainers and take them through the onboarding process.

1. The application to become a Maintainer is a Google form. Please ensure that this collects the Github usernames of new Maintainers.

2. Advertise for new Maintainers on the blog, mailing lists and Twitter.

3. Once the application period has closed, reviewing applications and send accepted applicants an invitation to become a Maintainer.

4. To set up a scheduling poll to schedule Maintainer Onboarding, use WhenIsGood. Click "Use Timezones" and then "SHOW OPTIONS". Unselect Sunday and Saturday. Add Duration = 60 minutes. Select "hide dates".

5. Add Maintainers who are going through training to the maintainer-onboarding Google Group. This is where announcements about upcoming meetings should be sent.

6. After the deadline has passed for responding to the Maintainer Onboarding scheduling poll, select the two times that maximise attendance. This needs to be done manually from the whenisgood results, as there is not a "choose two times" option.

7. Populate the Maintainer onboarding Etherpad with meeting dates and times. Use timeanddate meeting time announcer links to make it easy for people to convert meeting times to their own time zone.

8. Send out an email to the Google Group letting everyone know about the scheduling.

9. Set up a new event in AMY with the slug YEAR-MO-DA-maintainer-onboarding. Add all maintainer trainees as learners. Add onboarding leader as instructor.

10. One week before the first onboarding meeting, send a reminder email to the Google Group.

11. Run the three weeks of meetings according to the curriculum. Keep record of who participates in the AMY event.

12. If people are not able to make all of the meetings, email them to ask them to write out responses to the discussion questions and homework.

9.6.1 Adding Maintainers to Carpentries systems

1. Do the following for each of the Maintainers who have completed the onboarding requirements:

   - Add them to the appropriate team for Software Carpentry, Data Carpentry, Library Carpentry, or The Carpentries Lesson Maintainers. This will give them write privileges for that lesson's repo.

   - Award them a Maintainer badge in AMY. If the individual has consented to having their profile published, they will appear on The Carpentries Maintainers page within a day.

   - Add them to the "maintainers" channel in the Carpentries Slack.

   - Add them to the "maintainers" Topicbox email list.

2. Send email to the Maintainers email list announcing new Maintainers.

3. Run sendmail_maintainer_certificates.R to send new Maintainers their certificates.

4. Announce new Maintainers in the next newsletter.

9.7 Maintainer Community Meetings

The Maintainer community meets on the third Wednesday of every month. Times for these meetings can be found on the Community Calendar. A reminder for these meetings should be sent out to the Maintainers email list one week before the meeting takes place, and the Maintainers Etherpad should also be updated. Ideally, these meetings will be co-facilitated by a member of The Carpentries Core Team and the Maintainer Community Development Lead.

The following is a Etherpad template that can be used as a Maintainer meeting agenda:

```
Join from PC, Mac, Linux, iOS or Android: {Zoom link}

Meeting 1: Wednesday, {Date} at 16:00 UTC
Please click this link to convert to your local time: (add time converter link using
↪[TimeandDate's Event Time Announcer](https://www.timeanddate.com/worldclock/
↪fixedform.html))
```

(continues on next page)

```
Meeting 2: Wednesday, {Date} at 21:00 UTC
Please click this link to convert to your local time: (add time converter link using
→[TimeandDate's Event Time Announcer](https://www.timeanddate.com/worldclock/
→fixedform.html))

Attending (1st Meeting):

- {name}
- {name}

Attending (2nd Meeting):

- {name}
- {name}

Timekeeper:
Notetaker (please add notes within agenda below):

Agenda:

- Introductions (5 min)
- Updates from Carpentries team (10 min):
 - Topic 1
 - Topic 2
- Current Maintainer RFCs: https://github.com/carpentries/maintainer-RFCs/issues (10
→min)
- Quarterly Software Review (item owned by Lesson Infrastructure Technology
→Developer) (5 min)
- Lesson issues to discuss (please add links to the issues you would like feedback or
→insight on) (30 min):
 - Issue 1: {link}
```

9.8 How to Label Issues

"status" labels

9.8.1 How to Populate a GitHub Repository with these Labels

The chisel R package provides helper functions to create these labels from a CSV file using the GitHub API. To use the GitHub API, you need to obtain a GitHub Personal Access Token (PAT). This PAT is a way for GitHub to identify you and should be treated as a password.

1. Once you have installed R and RStudio, at the RStudio console, install the remotes package:

```
install.packages("remotes")
```

1. Go to https://github.com/settings/tokens, and click on the "Generate new token" button.

2. Choose a name that will help you remember what you use this token for, and click on the repo box. Finish the creation of the token by clicking on "Generate token" at the bottom of the page. The token will be displayed on the screen.

3. Using RStudio or text editor, open (or create if it does not exist), a `~/.Renviron` file, and add (replacing the XXXX with your actual PAT):

```
GITHUB_PAT=XXXXXXXXXXXXXXXXXXXXXXXXXXXX
```

4. Restart RStudio and check that your PAT is available by typing:

```
Sys.getenv("GITHUB_PAT")
```

If everything worked, you should see your PAT being displayed. If something did not work it will display empty quotes (`""`).

5. Use the `remotes` package to install `chisel`. Type at the R console in RStudio:

```
remotes::install_github("fmichonneau/chisel")
```

6. Make sure you have downloaded the CSV file that contains the information about the GitHub labels. It is in the repository for The Carpentries handbook in the data folder.

7. Load the `chisel` package and create the labels on one repository:

```
library(chisel)
create_github_labels(label_csv = "~/path/to/csv/file/github_labels.csv",
  owner = "owner_of_github_repo",
  repo = "name_of_github_repo",
  delete_previous = FALSE)
```

If you set `delete_previous` to `TRUE`, all existing labels will be deleted from the repository (and removed from issues/PR that had it).

9.9 GitHub Topics for Lesson Repos

Across The Carpentries lesson programs, lesson repos are assigned topics. From GitHub:

> *Topics are labels that create subject-based connections between GitHub repositories and let you explore projects by type, technology, and more.*

Following a maintainer discussion, The Carpentries has begun assigning topics to all lesson repositories. An overview of how these topics are assigned is in this Google document.

9.10 Email Templates

9.10.1 Response to Application

Hi {name},

Thank you for your application. Your experience looks absolutely perfect for the position and we would be more than happy to have you on the Maintainer team. I will be sending you an introductory email with the current Maintainers momentarily. Thank you again for volunteering and welcome to the team!

Best, {name}

9.10.2 Introduction to co-Maintainers

Subject: Welcome new Maintainer!

CC Current lesson Maintainers

Hi {names},

I would like to introduce {name}, who has just joined the {lesson name} Maintainer team. {name} has experience with {relevant things}. {name} is also {other roles in the community}. They are excited to lend a hand on the {lesson name} lesson and to be a part of this maintenance team. I will be setting {name} up with the appropriate GitHub permissions in the next few days. It would be great if you all could arrange a meeting to discuss logistics and help {name} get oriented. Please let me know if there is anything else you all need. Great to have you on the team {name}!

Best, {name}

9.10.3 Community information for new Maintainer

Subject: Getting connected with the Maintainer community

Hi {name},

Thank you again for joining the Maintainer team! I am excited to have you on board and wanted to give you some information about how to get connected up with the community. In addition to working directly with your lesson team, there are also opportunities to connect with and learn from the broader Maintainer team. Please sign up for our mailing list on TopicBox (https://carpentries.topicbox.com/groups/maintainers) and the maintainers channel on Slack (I have sent you an invitation). Those two channels are the primary communication channels for Maintainers and will be where you see announcements around technical changes, lesson releases, and other issues related to lesson maintenance.

Please also "watch" the maintainer-RFCs GitHub repo (https://github.com/carpentries/maintainer-RFCs) and your lesson repo, so that you can keep up to date with issues and PRs in those repos. The maintainer-RFCs repo is where we hold discussion around issues relevant to the broad Maintainers community.

Please also consider joining our monthly Maintainer community calls. You will find information about those meetings on our Etherpad (https://pad.carpentries.org/maintainers) and on the community calendar (https://carpentries.org/community/#community-events).

Please let me know what questions you have and welcome again to the team!

Best, {name}

9.11 Contributing to Carpentries Lessons

Lesson Maintainers actively maintain all Carpentries lessons. However, contributions are always welcome by all community members. Novice contributors can read this guide developed by Carpentries Instructors. It provides instructions for contributing to The Carpentries' lesson materials using graphical or command line interfaces with Git and GitHub. The Help Wanted page lists issues in need of attention and is a good place to find out where your contributions are most needed.

POLICIES

10.1 The Carpentries Privacy Policy

Effective date: 25 May 2018

This Privacy Policy covers personally identifiable information that may be provided to The Carpentries, including data provided at in-person events (e.g., workshops and conferences) and online. Changes to this Privacy Policy will be posted on this page. Any changes will only apply to information collected after the posted date of any such change. Additionally, information may be provided to governmental bodies and other entities as required by law. Information obtained and how it is used is described in sections below for

1. *Workshop participants*
2. *Instructors*
3. *Other volunteers*
4. *Online spaces*
5. *Opt-in surveys*
6. *All participants*

10.1.1 Definitions

- *Workshop participants* - people participating, including but not limited to as learner, helper, or instructor in a Carpentries workshop

- *Hosts* - people organising a workshop at their local site

- *Instructors and Trainers* - people who are teaching a Carpentries workshop

- *Instructor applicants and trainees* - people who have applied to become instructors or are in the process of completing certification

- *Lesson contributors and maintainers* - people who contribute to or maintain lessons

- *The Carpentries Core Team* - people employed by The Carpentries

- *Authorised administrators* - personnel, contractors or volunteers operating in an administrative capacity for The Carpentries as workshop or volunteer coordinators

How is personally identifiable information stored?

Personally identifiable information is stored in secure databases. Refer to *Limitations* section below.

Who has access to personally identifiable information?

Access will be limited to The Carpentries Core Team and authorised administrators.

10.1.2 Section 1: Workshop Participants

Workshop participants include Learners, Helpers and Hosts.

What information do we obtain?

We may obtain the name, email address and event attended of workshop participants. If you are a learner or helper, this information may be provided by you or by the workshop host. See *Section 5: Opt-in Surveys* for information on our Opt-In surveys.

How is this information used?

We use this information to communicate with participants, including sending workshop information and program evaluation forms. Names and email addresses may be shared with the workshop host for the purpose of workshop logistics. Additionally, we may use your information to contact you about additional opt-in opportunities for training, teaching, surveys and/or community engagement. This information may also be used for statistical purposes. We do not provide personally identifiable information to any third party. However, we may share de-identified aggregate or summary information regarding participants publicly or with volunteers, partners or third parties, including but not limited to funding entities. See *Section 6: All Participants* for further information.

10.1.3 Section 2: Instructors

Instructors includes Instructors, Trainers, Instructor Trainees and Instructor Applicants.

What information do we obtain?

We may obtain the name and email address of participants at instructor training events and of current instructors. This information may be provided by the participant or event host. If you choose to complete a volunteer/instructor profile, we may store your name, email address, gender, nearest airport location, organisational affiliation, occupation, ORCID ID, GitHub and Twitter handle, and personal URL.

How is this information used?

We use this information to communicate with Instructors, including for instructor training events, training completion materials, communication about the organisation, and opportunities to volunteer. Additionally, we may use volunteer information to contact you about additional opt-in opportunities for assessment, training, teaching, volunteering and/or community engagement. This information may also be used for statistical purposes. We do not provide personally identifiable information to any third party. However, we may share de-identified aggregate or summary information regarding instructors publicly or with volunteers, partners or third parties, including but not limited to funding entities. See *Section 6: All Participants* for further information.

10.1.4 Section 3: Other Volunteers

Other Volunteers includes Lesson contributors and maintainers and Volunteers for subcommittees or programs.

What information do we obtain?

We may obtain the name and email address of Other volunteers. If you choose to complete a volunteer/instructor profile, we may store your name, email address, gender, nearest airport location, organisational affiliation, occupation, ORCID ID, GitHub and Twitter handle, and personal URL.

How is this information used?

We use this information to communicate with Other volunteers, including communication about the organisation and opportunities to volunteer. Additionally, we may use volunteer information to contact you about additional opt-in opportunities for assessment, training, teaching, volunteering and/or community engagement. This information may also be used for statistical purposes. We do not provide personally identifiable information to any third party. However, we may share de-identified aggregate or summary information regarding volunteers publicly or with other volunteers, partners or third parties, including but not limited to funding entities. See *Section 6: All Participants* for further information.

10.1.5 Section 4: Online Spaces

This Privacy Policy is applicable to information that you provided/collected through physical (such as a paper form) and online means, including through our websites or other external online spaces (including but not limited to GitHub repositories, Etherpads, Google Documents, EventBrite and mailing lists). By using these spaces, you agree to the terms of this Privacy Policy. Some of these tools and services (including but not limited to GitHub, Google Documents, Eventbrite and SurveyMonkey) have their own independent privacy policies. See *Section 5: Opt-In Surveys*, for information specifically on survey information.

What information do we obtain?

We may collect information about visitors' devices and browsers, such as browser version and type, IP address, website referred from and country of visitor. In addition, we may collect textual input (e.g. Etherpad entries) from you which may be associated with your name, affiliation and/or social media handles. If you provide financial information to pay for a workshop or partnership or make a donation, the transaction information will be processed on a third-party secured site. This information will only be accessible to our Core Team or authorised administrators and to the Core Team of our fiscal sponsor who is involved in processing financial transactions. We engage with third-parties (including but not limited to Square, WeDidIt, Eventbrite) to gather and collect this information securely and do not have access to or store any payment details in our systems.

What do we do with this information?

We use this information to improve our sites and services. In addition, we may use contact information that you provide to contact you about additional opt-in opportunities for assessment, training, teaching, and/or community engagement. This information may also be used for statistical purposes. We do not provide personally identifiable information to any third party. However, we may share de-identified aggregate or summary information regarding visitors publicly or with volunteers, partners or third parties, including but not limited to funding entities. We may use publicly available data of the external online services in programmatic analysis and evaluation. See *Section 6: All Participants* for further information.

10.1.6 Section 5: Opt-in Surveys

Community and workshop participants are invited to participate in a variety of opt-in surveys to better serve our community. These include but are not limited to pre-workshop and post-workshop surveys of learners and various survey instruments to evaluate programs or events.

What information do we obtain?

Opt-in surveys are entirely voluntary and information is not collected in a way that it is linked to personally identifiable responses without the respondent's consent to self-identify. Surveys collect information particular to the event or program being evaluated and optional information about the participant. Gender and ethnicity data, when collected, is only collected from participants in the United States.

What do we do with this information?

We use this information to help evaluate and improve programs, report on impact and outcomes and understand the needs and interests of our community. This information may be used for statistical purposes. We do not provide personally identifiable information to any third party. However, we may share de-identified aggregate or summary information publicly or with volunteers, partners or third parties, including but not limited to funding entities. Where we share open-ended responses or testimonials, we always do so anonymously or ask for explicit consent to allow de-identified responses. See *Section 6: All Participants* for further information.

10.1.7 Section 6: All Participants

Can I decide what communications to receive?

Yes. All communication with us is opt-in, except for participants receiving information about their program and for instructors, information required to maintain instructor status. You may occasionally be sent emails asking if you would like to opt-in to communication channels that we feel may be of interest to you (for example, a mailing list dedicated to your geographical area). In the absence of specific action from you, we will assume you choose not to join these channels.

Removing personal information

Participants may choose to disallow us from retaining their personal information at any time by notifying admin@carpentries.org. If you choose to exclude your information, we will delete your personal information from our databases. This may interfere with our ability to give you credit for training events you have completed or to contact you about upcoming events in your area.

Limitations

Your privacy is very important to us. However, due to the existing legal and technical environment (e.g., third party interception of information), we cannot ensure that your personally identifiable information will not be disclosed to third parties in ways not described in this policy. We may disclose information when we believe such disclosure is necessary to comply with the law; enforce our agreements, or protect the rights, property or safety of our users or others.

What about third party links on our websites?

Our websites provide links to third party sites as a service to visitors. We are not responsible for the privacy practices, security measures or data collection practices of third party sites or for their content. The choice to access these sites is at the visitor's own risk.

Who should be contacted regarding this Privacy Policy?

For questions or comments about this Privacy Policy, please contact admin@carpentries.org.

10.2 Instructor No-Show Policy

The Carpentries is usually not involved in travel arrangements for workshops. Instead, once instructors have been selected, they negotiate travel and accommodation with the workshop's host, and are then reimbursed directly by the host. In order to consistently provide high-quality workshops, however, The Carpentries must ensure that instructors fulfill their commitments. In particular, it must do what it can to ensure that instructors show up for workshops they have agreed to teach, so that hosts have the appropriate number of instructors and do not incur unnecessary expenses.

Instructors who find that they will not be able to meet an agreed upon teaching engagement are required to notify The Carpentries workshop coordinator as soon as possible. If travel arrangement have not been made, and the workshop is at least 6 weeks away, instructors may cancel with no questions asked. If non-refundable travel has been booked or it is less than 6 weeks from the workshop, instructors should clearly communicate the reason for missing their teaching engagement. The workshop coordinator will then handle communication with the host and attempt to find an alternate instructor if possible.

Depending on their reason for missing their agreed upon teaching engagement, instructors may be required to re-imburse any non-refundable travel or accommodation costs that the host may already have incurred on their behalf. The Carpentries may waive this requirement in special circumstances outlined below, based on the judgement of The Carpentries Policy Subcommittee.

In some cases, The Carpentries will waive the requirement for the instructor to reimburse the host, and The Carpentries will reimburse the host for any expenses incurred. Circumstances in which The Carpentries will reimburse the host for any expenses incurred for missed workshops include, but are not limited to: illness, injury, family or work related emergencies, weather or transportation malfunction. Instructors may be required to provide appropriate documentation to the Policy Subcommittee. If an instructor is required to reimburse costs, but refuses to do so, or an instructor fails to provide adequate notice of withdrawal more than once, The Carpentries reserves the right to suspend their Carpentries instructor status.

10.3 The Carpentries Travel Reimbursement Policy

Designed to be consistent with Community Initiatives reimbursement policies.

10.3.1 Introduction

The Carpentries reimburses community and Core Team members for reasonable and necessary expenses incurred in connection with approved travel on behalf of The Carpentries. All travel should be pre-approved by The Carpentries Business Team prior to travel expenses being incurred. This policy provides broad guidelines for Carpentries-related travel reimbursement.

10.3.2 Contents

10.3.3 Policy Statement

Carpentries-related travel expenses may be reimbursed if an individual paid the expense from personal funds. Reimbursement of expenses is allowed within the parameters of this policy, and when the individual will not be reimbursed from any other source.

This policy establishes the following requirements for the reimbursement of allowable expenses:

- **Business Connection**: The Carpentries provides reimbursements of travel expenses paid or incurred in the performance of services as a Carpentries Core Team or community member.

- **Pre-Approval**: All travel should be pre-approved by The Carpentries Business Team prior to travel expenses being incurred.

- **Reasonable**: A travel expense that is commonplace and reflects a prudent decision to incur the expense on behalf of The Carpentries. The expense should be the minimum purchase or service required to achieve a particular objective.

- **Substantiation**: Documentation to support an incurred travel expense that includes the original receipt, documentation of business purpose, and the timely submission of an expense report or reimbursement request.

If a circumstance arises that is not specifically covered in this travel reimbursement policy, the most conservative course of action should be taken. The Business Team reserves the right not to approve expenses that are excessive (i.e., exceed the U.S. federal per diem rates) and/or do not meet the requirements of this policy.

10.3.4 Pre-Approval and Responsibilities

This policy affects all Core Team members, volunteers, independent contractors, Executive Council members, and guests seeking reimbursement from The Carpentries, or payment for allowable travel expenses. All persons seeking reimbursement of Carpentries related travel expenses need to be familiar with this policy and are responsible for discerning reasonable and allowable expenses, maintaining required receipt documentation and submitting reimbursement requests in a timely manner.

All travel requires pre-approval. Prior to incurring travel related expenses, individuals should verify that planned travel is eligible for reimbursement. The pre-approval process for Carpentries-related travel is outlined below:

- **Core Team**: Please use the planned expense form to submit requests for travel reimbursements. The Business Team lead or your supervisor will follow-up on the approval of submitted planned expense forms.

- **Workshops and Instructor Training**: If travel expenses will be reimbursed by The Carpentries (rather than the host institution), your Workshop Administration Team will pre-approve the reimbursement of your travel expenses and connect you with a member of the Business Team for more information on the reimbursement process.

- **Executive Council**: Members of the Executive Council will not need prior approval for travel expenses incurred during travel for an in-person Executive Council meeting. A budget will be created for each in-person meeting including planned travel expenses. Members of the Executive Council are approved to be reimbursed for expenses in accordance with the approved meeting budget. For other pre-approved travel, Executive Council members should use the workflow for Core Team members described above.

- **CarpentryCon and CarpentryConnect Travel**: Applications for travel support will be reviewed and approved by the event task force or planning committee. Individuals whose travel support applications have been approved will be connected with a member of the Business Team for more information on the reimbursement process.

10.3.5 Pre-Payment Prior to Travel

Typically, travelers will be reimbursed after travel is completed. In situations where travel expenses might cause undue financial hardship for travelers, The Carpentries can:

- Make airfare, travel insurance, accommodation, and conference registration purchases/reservations directly (Preferred Method)

- Reimburse travel expense purchases prior to travel

In the event that travel is cancelled completely or partially and reimbursement has already been issued, reimbursed funds must be returned to Community Initiatives, The Carpentries' fiscal sponsor. Return of excess funds must be completed within 60 days of the cancelled event or upon returning from travel. A check or wire transfer should be sent directly to Community Initiatives in the amount of the funds that need to be returned. Please contact the Business Team (finance@carpentries.org) for guidance on returning funds to Community Initiatives.

10.3.6 Receipt Documentation

Receipt Documentation In order for a travel expense to be reimbursed, it must be properly substantiated. The original receipt or invoice issued by the supplier or service provider is required. A digital image of the original receipt is allowable provided that it is legible. Electronic receipts received via email are allowable. A valid receipt typically includes:

- Date

- Item

- Amount

- Proof of purchase (i.e., Payment Method)

Splitting Receipts

The partial reimbursement of a receipt may occur when:

- The receipt includes purchases for others (i.e., one receipt was given while dining as a group.)

- Personal expenses/items are included on the receipt

- Items on the receipt do not align with this travel policy (i.e., alcoholic beverages)

If a partial reimbursement is needed, this information must be clearly communicated when the reimbursement request form is submitted.

Lost Receipts

If a required receipt has been lost, that information must be included when the reimbursement request form is submitted. Seek guidance on alternate methods to document the purchase by contacting The Carpentries Business Team at finance@carpentries.org.

10.3.7 Reimbursement Process

Once travel has been pre-approved, The Carpentries Business Team will share (via email) a summary of this reimbursement policy as well as The Carpentries Expense Reimbursement Request form (for community members).

Submitting Reimbursements

Reimbursement requests and documentation should be submitted to The Carpentries Business Team via finance@carpentries.org. Reimbursement requests should include:

- Completed Expense Reimbursement Request form:
  - Full Name
  - Purpose of Travel
  - Event Date(s)
  - Mailing Address of Traveler
  - Description and cost of each expense (Vendor and Item)
  - If applicable, explanation of why requirements are not being met (i.e., missing receipt, submitted later than 60 days after purchase)

- Receipts for all expenses
- Wire Transfer Form (*if applicable*)

The Carpentries Business Team will review the submitted documents and approve reimbursements before sending the request to our fiscal sponsor for payment.

Core Team members should follow the Reimbursement Workflow for the submission of expenses for reimbursement.

Timely Submission

To be reimbursable, travel expenses must be properly substantiated and submitted within the following timeframes:

- **Workshop and Instructor Training Related Travel**: For expenses incurred while traveling to teach workshops or instructor training, the traveler will have 14 calendar days upon returning from travel to substantiate and submit the expenses for reimbursement.
- **Other Carpentries-Related Travel**: The traveler will have 60 calendar days upon returning from travel to substantiate and submit the expenses for reimbursement.

If a reimbursement request is submitted later than the above listed timeframes, the reimbursement request must include an explanation for the delay. The Carpentries reserves the right to refuse reimbursement for late submissions.

Receiving Reimbursements

If you reside in the United States, you will be reimbursed with a physical check. Please allow 2-3 weeks for processing. You should receive a check addressed from The Carpentries' fiscal sponsor (Community Initiatives) about 3-4 weeks following your submission.

If you reside outside the United States, and are employed through Velocity Global (Community Initiatives' PEO), please refer to your employee handbook for reimbursement processes.

If you reside outside the United States, and are not employed through Velocity Global (Community Initiatives' PEO), you will be reimbursed with a wire transfer. Please allow 2-3 weeks for processing. You should receive the funds via wire 2-3 weeks following your submission.

10.3.8 Travel Expense Guidelines

Individuals are expected to travel in the most cost-effective manner that accomplishes the purpose and needs of The Carpentries. Travel expenses should not exceed the current US federal per diem rates for the location of travel within the U.S. and the International per diem rates for the location of travel outside of the U.S. If an expense exceeds these rates, a justification for additional spending should be included in the description of that expense. **In many cases the per diem rates suggested in the links above are excessive.** We created the guidelines below to provide guidance in the discernment of allowable expenses.

Transportation

Travel Classes: Travelers should book the most economical coach class airfare available which accomplishes the purposes and needs of The Carpentries. In making reservations, the traveler should balance the cost vs. the efficiency of the travel. For example, a cheaper fare that requires a long layover, or which does not include baggage charges, may not be the most effective choice. In those cases when an individual is requesting reimbursement for costs in excess of the most economical rate, they must provide justification. Such documentation must be uploaded and attached when submitting the request for reimbursement. If the traveler wishes to upgrade to business or first-class, the traveler will be required to pay the difference between the lowest price economy coach class airfare and the final airfare.

Ride Sharing: When traveling in groups, sharing of cars/rides is encouraged to reduce costs.

Ground Transportation: The cost of ground transportation to and from hotels, airports, railroad stations, or an event location in connection with approved Carpentries-related business activities is reimbursable.

- *Personal Vehicles*: Reimbursement for use of a personal vehicle is based on mileage. As of January 1, 2020, the reimbursement rate is 57.5 cents (USD) per mile. The mileage allowance covers all operating costs of the vehicle including gas. Repair costs are not reimbursable, whether they result from the traveler's acts or the acts of others. However, ferry, bridge, tunnel, toll road, and parking charges are reimbursable in addition to the mileage allowance. The Carpentries will reimburse for actual tolls incurred for business purposes, whether paid via cash or electronically.

  - Determining Mileage: The traveler must document business miles or calculate mileage using Google Maps, Mapquest, or similar to determine the total mileage for each trip being expensed.

  - Alternative arrangements for travel to airports should be considered when airport parking charges will exceed the cost of a round-trip taxi or car service.

- *Rental Vehicles*: Reimbursement for a commercial rental vehicle as a primary mode of transportation is authorized only if the rental vehicle is more economical than any other type of public transportation, if the destination is not otherwise accessible, and for travelers with mobility impairments or other disabilities which make public transportation inaccessible. When renting a car, fuel costs will be reimbursed based upon actual fuel purchased, not mileage.

  - Car Rental Insurance: For persons who own a vehicle with collision coverage on their insurance policy, collision damage insurance (sometimes referred to as CDW or LDW), personal accident insurance (PAI), and liability insurance supplement (LIS) should be declined when traveling within the United States. If your personal auto insurance policy does not extend coverage to rented vehicles, coverage will be reimbursed. When traveling outside the United States, this coverage should be selected and is reimbursable. Some states and/or car rental agencies require travelers less than 25 years of age to obtain insurance; If the insurance is required, it is reimbursable.

- *Public Transportation*: As the preferred mode of transportation, public transportation is to be used whenever possible, safe, and practical. Public transportation costs are to be itemized on the reimbursement request form. Travelers with mobility impairments or other disabilities that make public transportation inaccessible are authorized to use alternative transportation options.

- *Shuttle Service*: Shuttle service to and from airports and railroad stations, including reasonable tips (10 - 15%), is reimbursable when public transportation is not practical.

- *Taxi Service*: Taxi fares, including reasonable tips (10 - 15%), are reimbursable when taxi service is more economical than any other type of public transportation or shuttle service.

Air Transportation: Travelers are encouraged to make reservations **at least** 30 days in advance to ensure the most convenient and cost effective fares. Flights should be reserved to and from the traveler's home airport or a nearby airport if the flight is more economical.

- *Baggage*: Baggage fees for checking one piece of luggage are reimbursable. For travel of longer than two weeks, baggage fees for checking two pieces of luggage may be reimbursed. The reimbursement of baggage fees for 3 or more pieces of luggage must be pre-approved prior to travel.

- *In-Flight Internet* ** : Fees associated with Wi-Fi connections are reimbursable if accessed to support Carpentries work is required during flight. Please check with your supervisor prior to travel to request the reimbursement of in-flight internet fees.

- *Travel Cancellation Insurance*: Travel cancellation insurance is reimbursable and should be purchased if available.

- *Other Fees*: Fees associated with changes are allowable, provided there is a necessary business reason or extenuating circumstance. The individual assumes responsibility for any additional charges incurred (including seat upgrades).

10.3.9 Lodging (Accomodations)

The Carpentries will pay actual room costs, as substantiated by the detailed accommodation receipt, for each day that lodging away from home is necessary for business reasons. Travelers are encouraged to make reservations **at least** 14 days in advance to ensure the best accommodations at the most reasonable cost.

Travelers should choose convenient, safe, and reasonably-priced accommodations whenever practical. When attending a conference, travelers may stay at the conference hotel even if it is not the most economical option available.

Additional lodging costs:

- **Meals charged to hotel**: Meals purchased at the hotel (breakfast, lunch, dinner) are reimbursable only if this option is more economical than any other meal option available. Transportation or delivery costs should be included in estimates.

- **Other Fees**: Fees associated with changes or cancellation are reimbursable, provided there is a necessary business reason or extenuating circumstance. The individual assumes responsibility for any additional charges incurred (including room upgrades)

10.3.10 Meals

The Carpentries will reimburse meal expenses only when the travel requires overnight lodging (accomodations), or for business-related meals for groups of Core Team members. Travel meals include breakfast, lunch and dinner. Provided below are additional notes on meal expenses.

- **Provided Meals**: Meals served on the plane, included in a conference registration fee, included in the hotel room rate, or provided at an event should replace the appropriate travel-related meal whenever possible. Exceptions should be made for allergy and dietary restrictions, religious observances, etc.

- **Alcohol**: Alcoholic beverages are not reimbursed. Meals charged to a federal grant must have all alcohol clearly itemized on receipts.

- **Tips**: Reasonable tips will be reimbursed. Typically, reasonable tips range from 10% to 20% of the food bill depending on region, with 20% provided for exceptional service. Tips should be noted or included on meal receipts.

10.3.11 Vacation in Conjunction with Business Travel**

For cases in which vacation time is added to a business trip, any cost variance in airfare, car rental or lodging must be clearly identified and documented (e.g.. screenshot showing direct travel costs). The cost of airfare, travel or lodging should be equal to or less than the costs for direct travel on the days required for the business trip. Any costs in excess of the amount for direct travel on the required travel days will not be reimbursed. Similarly, travel meals will only be reimbursed on the following travel days:

- On the day of the departing flight

- On the day(s) of the event or reason for travel

- On the day of the return flight

10.3.12 Event Registration Fees**

The Carpentries will reimburse event registration fees, including business related banquets or meals that are part of the event registration. Many events offer optional recreational events for attendees at an additional cost. Decisions regarding the reimbursement for such events should be made by the traveler's supervisor **prior to travel.**

If the event does not provide a receipt, the following can be used to substantiate or document the expense:

- A photo of your conference badge, event ticket, etc.

- A check or bank statement showing the amount that was paid

- A URL link or screenshot from the conference website showing the cost of registration

10.3.13 Other Expenses**

If items are required for international travel, their reimbursement should be approved by the traveler's supervisor and the Business Team **prior** to travel. Examples include:

- *Phone*: The Carpentries will reimburse charges incurred outside a cell phone plan for business telephone calls.

- *Internet*: Internet charges while in travel status will be reimbursed if an appropriate business purpose is documented.

- *Chargers / Adaptors*: Chargers and/or adapters needed for travel will be reimbursed.

- *Medical*: Mandatory immunizations required by the country visited will be reimbursed.

- *Visa(s)/Passports*: Fees related to visas or passports, if required by the country visited will be reimbursed.

** These sections apply only to members of the Core Team or when expressed written prior approval has been given.

VII. Update Log

- Updated on 2020-07-30 to reflect industry and procedural changes and provide clarification of guidelines for travel reimbursements

- Updated on 2019-02-19 to replace Business Administrator with Administrative Support Specialist

- Updated on 2018-07-06 to include Business Administrator in procedures and add federal per diem rates as guidelines for expenses.

- Updated on 2018-03-06 to reflect that reimbursements cannot be denied due their time of submission.

- Updated on 2018-02-23 to reflect updated workflow with Community Initiatives and approval contacts.

- Updated on 2018-01-31 to refer to Community Initiatives as our fiscal sponsor.

- Updated 2017-12-22 to change from Data Carpentry to The Carpentries.

10.4 Carpentries Professional Development Policy

Core Team Professional Development Fund

The Carpentries Core Team have access to a professional development fund (hereon after "Core Team PDF") of $1000/year for each full time employee.

What Activities are Eligible?

The Core Team PDF makes available funds for the purpose of supporting Core Team participation in professional development programs such as workshops and seminars and research activities.

Requests must demonstrate how the activity for which funding is sought supports the:

1. Current Strategic Plan for The Carpentries;

2. Employee's Individual Professional Development:

    - Through improving performance in the employee's current position; or

    - Through improving the employee's qualifications for career opportunities that may arise within The Carpentries

When applying for reimbursement for professional development materials or activities, Core Team should provide a short description and justification of the expenditure. For large expenses (>$200), Core Team should seek prior approval from the Finance subcommittee.

ELEVEN

REGIONAL COMMUNITIES

11.1 Regional Coordinators

Around the world, Carpentries workshops are organised by a team of Regional Coordinators. Our Deputy Director of Workshops and Meetings, SherAaron Hurt, manages workshops in most of the world. In some parts of the world, local Carpenters support managing local workshops and building local communities. They work with our member sites or as volunteers.

Regional Coordinators are the front face of The Carpentries, promoting our work and our culture in their geographical area. They manage workshop logistics, communicate with hosts and Instructors, and respond to general inquiries. The Regional Coordinators work together to support each other and ensure communities can thrive locally while maintaining quality and consistency globally.

Read more about the Regional Coordinators' role.

More information about the Regional Coordinators can be found on The Carpentries website.

11.2 Carpentries in Africa

11.2.1 What We Do

- **Monthly African Community Meetup**: Our monthly African Carpentries Community meetups have been running since 2017. Here we discuss topics that are of interest to our instructors in the African context, including previous and upcoming workshops, available resources, opportunities, events, and more. We would love to hear more voices at our monthly online meetup, on the 4th Thursday each month, 12:00 - 13:00 SAST (10:00 - 11:00 UTC). If you are keen to join please sign up at our Etherpad.

2021 meetings:

- 28 January
- 25 February
- 25 March
- 22 April
- 27 May
- 24 June
- 22 July
- 26 August
- 23 September

- 28 October

- 25 November

- **Mentoring for Instructors and Helpers before a workshop**: Some members of the African instructor community are willing to host online mentoring sessions for instructors and helpers before a workshop to ensure everyone knows what to expect and what is expected of them. If you are available to meet with an instructor/helper team before they run a workshop to answer any questions they may have or to help them prepare for the lessons they will be teaching, please get in touch via our email and we can pair you up with a team at a time and date that will suit you.

- Angelique van Rensburg works with The Carpentries as the Regional Consultant for Southern Africa, and is ready to help you with any questions you have about running **Carpentries workshops** or any other ways you can get involved with **The Carpentries in Africa**! Contact her at admin-afr@carpentries.org

11.2.2 Join Us

To join the conversation about The Carpentries in Africa, sign up at Topicbox and join the Slack channel #african-carpentries. If you've trained as an instructor in Africa (even if you're not qualified yet), sign up at Topicbox

We would love to get more people involved in specific activities to support our growing African community - meet the South African instructors here!

Subscribe to the calendar below to watch all that is going on throughout our community.

11.2.3 Historical support

The first Carpentries workshops in Africa were run in 2013 but it only really kicked off in 2015. An African Task Force was established in 2016, consisting of international mentors from the USA, UK, and Australia, and guided the first batch of trained African instructors through the checkout process as most of them were very isolated and new to the world of The Carpentries.

Since then more than 100 African instructors have participated in online or in-person instructor training events. The African Task Force was revived in December 2017, then completely consisting of African instructors. The task force played a role in mentoring instructors who had been trained but hadn't qualified as well as qualified instructors who needed support before teaching a workshop. Small online sessions were hosted by task force members to demonstrate how various lessons are taught and to help solidify skills in the tools we teach. The second African Task Force finished its activities in December 2018. Some of the South African-based activities were funded through the Rural Campuses Connection Project II (RCCP II), which ended in March 2019. You can read more about the experiences of the African Task Force in this blog post and about RCCPII here.

11.2.4 Blog posts on Carpentries activities in Africa

- Reflections on my First Data Carpentry Workshop by Selorm Tamakloe.

- Lessons Learned - Data Carpentries Workshop for SADiLaR (August 31, 2020 by Jannetta Steyn, Benson Muite, Marissa Griesel, Maggi Mars, Lactatia Motsuku, Varshita Sher, SamuelLe Lelièvre and Angelique van Rensburg.

- Learners' Experiences from South Africa's Online Workshop by Samar Elsheikh, Caroline Fadeke Ajilogba, Martin Dreyer and Angelique van Rensburg

- Increasing Researchers' Digital Literacy in Ethiopia by Yared Abera Ergu

- Feedback: Remote Teaching of Genomics Data Carpentry Curriculum by Daniel Ouso and Bianca Peterson

- With Thanks from Carpentries Instructors in Africa by Yared Abera, Ayansina Ayangbenro, Mamsi Khantsi, Samar Elsheikh, Margareth Gfrerer, Martin Dreyer, Mesfin Diro, Abisola Regina Sholeye, Bianca Peterson, Nobublele Shozi and Angelique van Rensburg

- Introducing our new Regional Consultant for Southern Africa

- Teaching Software Carpentry at the University of Botswana by Raniere Silva

- Wrapping Up the Rural Campuses Connection Project Capacity Development Initiative by Anelda van der Walt and Katrin Tirok

- Highlights from the recent Instructor Training in South Africa by Katrin Tirok, Malvika Sharan, Samar Elsheikh and Saymore Chifamba

- CarpentryConnect Johannesburg 2018: Building Bridges for Digital and Computational Literacy by Anelda van der Walt and Juan Steyn

- A Wrap-up from the African Task Force by Anelda van der Walt, Katrin Tirok, Caroline F. Ajilogba, Juan Steyn and Kayleigh Lino

- CarpentryCon Experienced by the African Carpentry Task Force by Caroline F. Ajilogba, Mesfin Diro, Kayleigh Lino, Erika Mias, Lactatia Motsuku, Juan Steyn, Katrin Tirok and Anelda van der Walt

11.3 Carpentries-es

La construcción de una comunidad sostenible y activa en América Latina incluye varias iniciativas: traducción de lecciones, capacitación de instructores, coordinación de talleres y recaudación de fondos. Este repositorio sirve como punto de entrada para este grupo de actividades.

Building a sustainable and active community in Latin America include several iniatives: lesson translation, instructor training, workshop coordination, and fundraising. This respository serves as a landing point for this diverse group of activies.

11.3.1 Como puedes ayudar / Ways to Help

There are many ways to help build The Carpentries community in Latin America.

- We need native and fluent Spanish speakers to help translate lesson materials.

- We need a way to keep different language versions of The Carpentries lessons in synch so that contributions made to one version also appear in other versions.

- We need experienced instructors to teach with and to mentor new instructors in Latin America, especially those familiar with the region.

- We need Trainers located in Latin America or with strong ties to the region.

- We need help with workshop coordination from people familiar with pricing structures, geography and computational infrastructure in Latin America.

- We need local Champions to spread the word about The Carpentries and the work that we do and advocate for The Carpentries workshops and memberships in the region.

If you can help in any of these ways, or know of another way you can support development of The Carpentries community in Latin America, please get in touch via the mailing list!

11.3.2 Cómo participar / How to Get Involved

Para ponerse en contacto con este grupo, envía un correo electrónico a local-latinoamerica@lists.carpentries.org. Para unirse a la lista de correo electrónico, visita Topic-Box. Para contactarnos directamente también te invitamos a usar slack en el canal **carpentries_es**.

To contact this group, email local-latinoamerica@lists.carpentries.org. To join the email list, visit Topic-Box. To contact us directly you are invited to join slack in the **carpentries_es** channel.

11.3.3 ¿Quién está involucrado? / Who is Already Involved?

- Traducción de lección / Lesson translation: Paula Andrea Martinez, David Perez-Suarez, Rayna Harris
- Capacitación de instructores / Instructor training: Karen Word

11.3.4 Reuniones bilingües / Bilingual Meetings

- Hacemos reuniones bilingües para la sección "Demostración de enseñanza" de "Instructor Training Checkout". Inscríbase en el Etherpad o lea las instrucciones bilingües para saber cómo funcionan las sesiones de demostración.
- We host bilingual meetings for the "Teaching Demo Sessions" part of Instructor Training Checkout. Sign up on the Etherpad or read the bilingual instructions for how the demo sessions work.

11.3.5 Traducciones / Translations

Los respositorios de GitHub para las traducciones en progreso son mantenidos por la organización carpentries-es. Varias lecciones de Data Carpentry y Software Carpentry tienen traducciones al lenguaje español completas. Estas se encuentran listadas en los sitios web de las lecciones de Data Carpentry y Software Carpentry. Las lecciones en proceso de traducción antes de ser oficiales se pueden encontrar en la organización carpentries-i18.

The GitHub repos for translations in progress are maintained in the Carpentries-ES organization. Several Data Carpentry and Software Carpentry lessons have complete Spanish language translations. These are listed on the Data Carpentry and Software Carpentry lesson websites. Lessons that are being translated before becoming oficial can be found in the organisation carpentries-i18.

11.4 Regional Mailing Lists

All mailing lists for The Carpentries are hosted on Topicbox. This includes a number of mailing lists specific to local or regional communities.

11.4.1 Current local/regional mailing lists

Africa

- Africa

Asia

- India

Australia/New Zealand

- Australia and New Zealand

Canada

- Vancouver

Europe

- Germany
- United Kingdom
- Nordic countries

Latin America

- Latin America
- Puerto Rico

United States

- Bay Area
- Boston
- Colorado
- Davis, CA
- Lansing, MI
- Merced, CA
- Seattle, WA
- Southeast US Library Carpentry
- Southern California
- Southwest United States
- University of California
- Washington DC Area

TEACHING AND HOSTING

Opportunities for certified instructors to teach Carpentries workshops are listed here. Join the instructors mailing list to be notified when new opportunities are posted.

Certified instructors are also encouraged to run workshops themselves. When organising a workshop, you have two options: a centrally-organised or self-organised workshop.

One way to understand the distinction between centrally-organised and self-organised workshops is who is responsible for certain key workshop components:

12.1 Centrally Organized Workshop

- registration managed by The Carpentries Workshop Administration Team

- instructor recruitment managed by The Carpentries Workshop Administration Team

12.2 Self-Organized Workshop

- registration managed by local organizer

- instructor recruitment managed by local organizer

Note: Recruitment of Instructors for Self-Organised workshops

If you are organising a Self-Organised workshop, there are resources for you to recruit Instructors, Supporting Instructors, and/or Helpers. Below are the channels you can use:

- Any local or group specific mailing list on TopicBox

- Any local or group specific Slack channel

We ask that you only use the resources listed above. Please **do not** use the following channels. Any recruitment messages used on these channels will be removed.

- Discuss list on TopicBox

- General Channel on Slack

- Instructors Channel on Slack

In both cases, the host site is expected to pay for instructor travel (if needed) and cover local costs. For a centrally organised workshop, there is a fee if the organiser is not already a Carpentries member.

Note that you are free to charge what you choose for a workshop; this is a perennial topic of discussion among the Carpentries community and there's a good summary of points here: Carpentries Blog on Charging for Workshops.

In both cases (self- or centrally-organised), you can start the workshop process by completing the Carpentries workshop request form and then proceeding through the relevant checklists and list of tips below.

For centrally organised workshops, the Regional Coordinator will guide the host and instructor(s) on following through on all these steps. A global team of Regional Coordinators support workshop activity and community building in regions around the world. Read more about who they are and what they do.

For self organised workshops, the host and instructor are directly responsible for ensuring all the steps below are followed without support from the Regional Coordinator. If you are planning to self-organise a workshop, check out these Tips for Organising Your First Carpentries Workshop.

12.2.1 Workshop Checklists

Host Checklist

A workshop host contacts The Carpentries Core Team about running a workshop. They will work with The Carpentries Workshop Administration Team to plan and implement the workshop.

Before the workshop, the host will

1. Decide on the Software Carpentry, Data Carpentry, or Library Carpentry curriculum that would best serve your learners

2. Fill out the workshop request form

3. Work with The Carpentries Workshop Administration Team to set dates and location for your workshop, unless your workshop is virtual

    • Be sure to account for other events and programs at your site that may affect room availability and participant availability

    • Ensure your location is accessible

4. Recruit helpers to join your workshop. They do not need to be directly connected with The Carpentries. They do need basic knowledge of the tools we teach and enthusiasm to help others learn. We recommend 1 helper for every 8-10 students, not counting the two instructors.

5. Advertise your workshop. The Workshop Administration Team can help by creating an Eventbrite registration page.

6. Decide if you want to charge a workshop fee. Even a small fee can greatly reduce the no-show rate. If the Workshop Administration Team creates an Eventbrite registration page, The Carpentries can collect this fee via Eventbrite and use it to offset your workshop fee.

7. Work with The Carpentries Operations Manager to make arrangements to pay the workshop fee (only for centrally organised workshops). This includes being sure vendor forms or other documentation are in place. The actual invoice will be issued after the workshop is complete.

8. Make travel arrangements for visiting instructors (or communicate process to reimburse them for expenses) if the workshop is in person

9. Get emergency contact information for instructors in case of last minute changes

10. Arrange for required materials and equipment

11. Arrange for coffee, snacks, and/or lunch. We all learn better with fuel!

12. Email learners to remind them of workshop location, timing, pre-workshop survey and software installation requirements

13. Organise a meetup with the instructors the day before the workshop if the workshop is in person, or sooner if the workshop is virtual. While this is not always possible, it is useful for the host and instructors to get to know each other. This can be over coffee, dinner, or anything else that works for your team.

During the workshop, the host will

1. Meet the instructors and learners

2. Ensure that the room is set up with all necessary materials and equipment

3. Periodically check in on the class to be sure things are running smoothly

After the workshop, the host will

1. Collect workshop attendance

2. Send attendance and any other feedback to The Carpentries Workshop Administration Team

3. Pay the workshop fee (only for centrally organised workshops)

4. Reimburse the instructors

Billing Guidelines

Payment for workshops is generally due 30 days after the invoice is issued.

Invoices overdue 4 or more months may lead to the cessation of work on current activities involving the organisation to whom the overdue invoice was issued until the payment process is addressed.

Instructor Checklist

The Workshop Administration Team will introduce workshop hosts and instructors.

Before the workshop, instructors will

1. Decide on the order of the lessons and who will teach what modules

2. Set up the workshop website using the workshop template and send to The Carpentries Workshop Administration Team. Detailed instructions are in this repo's README.

3. Create a collaborative document for the workshop (e.g. an Etherpad)

4. Assist the host in recruiting helpers if possible

5. Assist the host in ensuring the workshop location is accessible

6. Share emergency contact information with host in case of last minute changes

7. Practice teaching the material

8. Remind the host of the necessary equipment

9. Join a community discussion

10. Confirm criteria for reimbursement (*per diem* or save receipts)

During the workshop instructors will

1. Review Code of Conduct with learners

2. Remind learners to use sticky notes to give feedback

3. Get feedback at lunch and end of each day using minute cards

4. Support host in collecting attendee names and emails

5. Send out the post-workshop survey at the very end of the workshop

After the workshop instructors will

1. Remind the host to send workshop attendance data to The Carpentries Workshop Administration Team

2. Submit receipts for reimbursement

3. Send their own feedback to the Workshop Administration Team including any configuration problems

4. Take part in a community discussion

5. Report any lesson errors or suggest improvements on GitHub or by email to The Carpentries Workshop Administration Team

Helper Checklist

Helpers are often recruited from the local community at the host site to support Carpentries workshops. Helpers support learners one-on-one if they are stuck installing software, understanding a certain line of code, or any other parts of the learning process.

Before a workshop helpers will

1. Introduce themselves to the instructors, letting them know any particular areas of expertise

2. Review the curriculum the instructors will be teaching

3. Review the software installation instructions to be prepared to troubleshoot with learners

4. Make sure the instructors have listed you on the workshop website

During the workshop helpers will

1. Help learners with setup problems or anywhere else they get stuck

2. Monitor room for anyone who may need help. Learners may put up a red sticky note or indicate in other ways that they are stuck.

3. Monitor any questions that come up on the collaborative document and answer them or remind the instructor about them during a break.

After the workshop helpers will

1. Send their own feedback to the instructors and the Workshop Administration Team including any configuration problems

2. Consider applying to become a certified Carpentries instructor

Teaching Rules:

Rule #1: Be kind

This means to be inclusive, respectful, mindful and welcoming.

Rule #2: Remember that we are all learners

Admitting that you do not know everything helps create a growth mindset, where we are all constantly learning. When you make a mistake, calmly talk about the error, how it is part of the process and necessary to make progress.

Rule #3: Be aware of demotivating attitudes

There are several things that can be demotivating or impair the learners' experience. Examples of what not to do:

- Take over the learner's keyboard. Instead, encourage and guide them through the solution, but let them type themselves.

- Dive into deep discussions with more advanced learners (who might actually not need to be there). You can have those conversations during the break.

Rule #4: Be aware of demotivating words

Avoid saying things like:

- Just: "oh, that is easy, you just. . ."

- "It is too easy. . ."

- "It is too hard. . ."

- "I cannot believe you do not know X . . ."

- Say negative things about any applications or OS (Word, Excel, Windows, Mac, GUI). No tool is perfect, and this kind of disdain is not productive or conducive to the learning process.

Code of Conduct (Summary View)

We are dedicated to providing a welcoming and supportive environment for all people, regardless of background or identity. By participating in this community, participants accept to abide by The Carpentries' Code of Conduct and accept the procedures by which any Code of Conduct incidents are resolved. Any form or behaviour to exclude, intimidate, or cause discomfort is a violation of the Code of Conduct. In order to foster a positive and professional learning environment we encourage the following kinds of behaviours in all platforms and events:

- Use welcoming and inclusive language

- Be respectful of different viewpoints and experiences

- Gracefully accept constructive criticism

- Focus on what is best for the community

- Show courtesy and respect towards other community members

If you believe someone is violating the Code of Conduct, we ask that you report it to The Carpentries Code of Conduct Committee completing this form, who will take the appropriate action to address the situation.

More info can be found here: https://docs.carpentries.org/topic_folders/policies/code-of-conduct.html

Email Templates

Use these templated emails for communicating with the learners

12.2.2 Tips For Instructors

This page has an assortment of practical tips for instructors.

Handling Software Installation

Installing software on laptops has gotten a lot better over the years, but it can still be a huge challenge at the start of a workshop. Here are some suggestions for making the process go as smoothly as possible.Software installation can be frustrating, but in the end, it almost always gets done. Be positive, and when it finally works, you can feel proud.

What you can do in advance:

- Plan for installation help at the start of both workshop days. Put it on the schedule and make sure it is clear that people can and should show up during that time.

- Email the participants a week in advance and the day before to remind them to install the needed software before the workshops.

- If possible, recruit helpers who use Linux, Mac, and Windows operating systems.

- If you/helpers/instructors have time, test the install instructions on a fresh user account on your computer.

- If you anticipate issues (or want to be extra prepared), have some of the emergency options listed below ready to go.

- If you are teaching for an organisation where participants are bringing work laptops where they do not have administrative access (common in government organisations) – ask about it. Try to plan ahead either with their central IT organisation or with the "emergency exits" listed below.

- Will you have decent Wi-Fi? A bunch of people installing software at once can kill a poor internet connection. If this is the case, prep a few flash drives with the relevant installers.

- Attend a Community Discussion session, where you can talk to other Instructors to ask questions and get feedback to help you prepare to teach.

On the day of:

- Refer to our Wiki page with common problems

- If someone has come in early and the software still cannot be installed by the time the workshop starts, try one of the "emergency exits" below or keep working with them one-on-one until they are able to start.

- If someone comes in late or is having such trouble with installation that they cannot start, have them watch (and maybe work with a neighbour) until the first coffee break, when you can keep working on installation issues.

"Emergency Exits"

If there is absolutely no way that you will be able to install the software locally on someone's computer, consider using the following solutions:

Read our blog post, "Scaffolding Installation for Online Workshops"

- Pre-configured "scaffolds" for RStudio Cloud and My Binder (hosting Jupyter and OpenRefine).

- Microsoft Azure gives you a cloud based Jupyter notebook with many languages and platforms installed. It also includes a shell terminal with git.

- If your institution's library does laptop rentals, rent 1-2 laptops and set them up with the software before the workshop and keep them on hand as loaners during the workshop.

Talking About the Code of Conduct

The Carpentries Code of Conduct is a key tool for fostering and upholding an inclusive, respectful learning environment. But for people who are new to the idea of a Code of Conduct, it can be a little awkward to talk about. Here is a sample of how you might introduce the Code of Conduct – please do not use this verbatim, but adapt it to your own audience and style of introduction:

> The Carpentries is a community-led project. We value the involvement of everyone in the community. We are committed to creating a friendly and respectful place for learning, teaching and contributing. All participants in our events and communications are expected to show respect and courtesy to others.
>
> What kinds of behaviours are expected?
>
> All interactions should be professional regardless of platform: either online or in-person. In order to foster a positive and professional learning environment we encourage the following kinds of behaviours in all Carpentries events and platforms:
>
> - Use welcoming and inclusive language
>
> - Be respectful of different viewpoints and experiences
>
> - Gracefully accept constructive criticism
>
> - Focus on what is best for the community
>
> - Show courtesy and respect towards other community members
>
> Examples of unacceptable behaviour by participants at any Carpentries event/platform can be found in the Code of Conduct. We Instructors take the Code of Conduct very seriously, and we have a process for dealing with violations and complaints. Read the Reporting Guidelines section for the details on how to handle Code of Conduct violations.

Using Exercises

When teaching a lesson, it is a very good idea to go through the lesson in advance and choose which exercises you want participants to try.

Once you have selected exercises, there are several ways to actually display them to the participants during the workshop. Any of these options may be the best choice depending on the tool you are using or the kind of exercises you want to use.

- From the lesson website (zoomed in)

    - This is the least effort, but requires having the right lesson page open + finding the right exercise

- Make slides

    - More effort, but easy to flip forward to the next one

- Have a document of some kind with all the exercises in it

    - More effort, but exercises are all in one place.

- Put exercises in the Etherpad

    - If you do this in advance, pretty low-effort.

    - Can also use this with any of the other strategies so people can find the exercise in two places.

- Online tool, like Socrative

    - Requires time to set up, but is great for multiple choice and T/F questions and promotes participation

In all of these examples, you will have to switch from the tool you are using for live coding to however you are showing the exercises. For something like R or Python, one way to reduce the amount of switching is to put all the exercises in an R script / Python notebook and have that open alongside your main working script/notebook so that it is relatively easy to switch back and forth.

General Tips

Introductions

The introduction is one of the most important pieces of the workshop! It sets the tone for the day. See the instructor training material for some suggestions of how to build a good workshop introduction.

Accessibility Check-In

Before you start, review our accessibility checklist..

Set up your computer and go to the back of the room. Is your font big enough?

If your room has a mic, use it, and have a helper stand in the back of the room as you start to confirm that you can be heard.

Varying Skill Level

Carpentries workshops frequently include many people with widely varying skills and experiences. See the end of The Carpentries Instructor Training on Carpentries teaching practices for some strategies to deal with a diverse classroom.

Preparing to Teach

It can be daunting to look at a Carpentries lesson and figure out just exactly how you are going to teach it. Here are some suggestions for tackling a new lesson that you have never taught before:

Read through the Instructor Guide for the Lesson

Most Carpentries lessons include a guide for instructors. These are great for novices preparing to teach a lesson for the first time. As an example, see the instructor notes for the Software Carpentry Unix Shell lesson. Find instructor notes for other lessons through the **Extras** menu on each lesson's home page.

Pick Exercises

Most of the lessons have more exercises than you will want to use. Go through the lesson and pick the ones that you think will be most helpful for your audience. If you anticipate mostly novices, look for easier or more scaffolded exercises. For a more advanced audience, a more general exercise might be better. If you will have both, have an option for each!

You will not want to use *all* the exercises, but make sure that in this process, you commit to actually doing exercises. Exercises are time-consuming and it can be tempting (in the moment) to talk instead of taking the time to do an exercise. However, doing exercises is a huge part of the hands-on Carpentries model and also gives people a chance to chat with their neighbours, so it should be prioritised.

Speaking of priorities. . .

Prioritise

All of The Carpentries lessons have more material than you can easily cover in the time allotted, especially with a novice group. The Data Carpentry materials are closer to realistic workshop time estimates, but can still run slowly depending on the group.

So no matter what, go through the lesson in advance and decide what is most important to cover and what you would feel okay skipping (either skipping outright, or dropping it if you do not have time).

As an example: the shell lesson has 7 sections – the first three are about basic file system navigation and file operations and the last four are about ways to use simple shell tools in more powerful ways. Often a workshop will cover the first three and then three out of the last four.

Practice

- At the very least, do a dry run of all the commands you will be running / code you will be writing so that you know they work on your computer.

- Hook your computer up to a projector and figure out how you are going to manage your screen real estate, especially if everything is magnified.

    – RStudio: RStudio can be particularly challenging because of all the panes. Reducing the size of the two right panes is usually needed to have enough space in the script/console panes.

    – Jupyter notebooks: you can toggle the headers/toolbar off so that you have more scripting space

- If you have the time, doing a full run-through where you actually practice what you are going to say can be extremely valuable. Words are hard when you are also trying to type and manage a classroom, so having said them once in practice gives you one less new thing to think about.

Join a community discussion

- Joining a community discussion before your workshop is a great way to ask/resolve your questions about your coming workshop and also learn from the experience of other instructors!

12.2.3 Teaching Non-standard Carpentries Workshops

A standard Carpentries workshop must cover the core lessons for that lesson program's curriculum. Read more about the Software Carpentry, Data Carpentry, and Library Carpentry lessons. The workshop must also be taught by at least one certified Carpentries Instructor. While Instructors do receive lesson program specific badges, The Carpentries considers any badged Instructor qualified to teach any lesson.

All our lessons are available under a Creative Commons license, so anyone is welcome to use our lessons as they wish, provided they attribute them back to us. We often get questions about certified Instructors running non-standard workshops – meaning they cover a portion of our curriculum but not the whole thing.

We are excited to hear when this happens! We know this happens because our community members recognise the value of our curricula and have taken the initiative to adapt it to other contexts, where a two day workshop covering our full lesson set may not be the best fit. This demonstrates a lot of effort by the instructors and organisers. Also, while the impact on the learners is different than what we would expect from a full workshop, there is still something significant that learners are taking away from this event. If you are running a non-standard workshop using Carpentries materials, please let us know by completing this form so we can ensure your workshop is recorded in our system.

12.2.4 Workshop Needs

Participants are expected to come with their own laptops. Setting up a computer lab space is not necessary. Before the workshop, participants will receive instructions on what software they need to install and set up on their laptops.

Venue

A good venue is crucial to establishing a positive learning environment. Some things to consider include:

- Tables arranged so participants can watch the instructor, use their laptops, and talk with their peers. Fold up desks are usually not a good choice.

- Tables should also be arranged so helpers and instructors can easily mingle around the room.

- The room should have a projector and screen that everyone can see, with HDMI, VGA, and Mac adapters to allow anyone to plug in their laptop.

- High speed Wi-Fi internet access that can withstand everyone using it together. This may include securing guest access codes.

- Power outlets for all participants. This may include setting up extension cords or power strips.

- High table or podium that instructor can stand at while teaching. A flat podium is important; it is difficult to use a laptop on a slanted podium.

- Refreshments. People learn better when they are well fed. They also will not lose as much instructional time if they do not have to leave to get coffee.

Equipment and Materials

- Power strips, as noted above, to ensure everyone's laptop stays charged

- Sticky notes in two contrasting colors. These are an important part of how we get feedback during a lesson. We should have enough for each person to have about 8 of each color. Note that colorblindness can be an issue with differently-colored stickies (say red/green or blue/yellow), so alternate methods for feedback include offering sticky notes in two distinct shapes, or using a heavy marker to draw symbols on the sticky notes to convey meaning.

- Name tags to help people get to know each other.

- Extra pens and paper in case people want to take notes by hand

- Sign in sheets

- Flipchart or whiteboard with felt-tip pen (ideally several in different colors) for the instructor to visualise concepts or note important details.

Accessibility

It is important to make sure the workshop space is accessible to all individuals. The registration form should ask whether instructors, helpers, and learners need any advance arrangements to ensure they can participate in the event. This may include considering whether or not:

- Building and room are accessible to those who can not use stairs (ramps, elevators, etc.)

- Restrooms are accessible

- There is a microphone for instructors

- The screen is large enough and bright enough to be easily read

- The building and room can accommodate service animals

- Lactation space is provided

12.2.5 Handling Emergencies

We know that unexpected things can happen, even with the best laid plans. Below are some tips to help deal with unexpected situations.

Situation: Co-instructor cannot come due to illness, flight delay, etc.

- Contact team@carpentries.org. Depending on how much notice we get, we may be able to help find another Instructor.

- Contact your helpers and host to see if any of them can provide extra support, and even teach a portion of the lessons

- If your co-Instructor is delayed (rather than having to cancel entirely), adjust the schedule of your event so that person's lesson come later in the event.

Situation: Group cannot get on wi-fi

- If you anticipate this in advance, come with a handful of thumb drives to install software and data files

- If only some learners can get on wifi, consider pairing them up so they can follow on the connected person's machine

Situation: Building or classroom is locked

- Ensure that you have emergency contact information for hosts(s) before the workshop and any other people involved in logistics.

- Contact all participants if possible, and put signs on doors letting them know the workshop is postponed until further notice.

- If your room is locked, check with building Core Team to see if a nearby room is available.

12.2.6 Learner Certificates

We do not badge learners, but we do give them certificates of attendance if requested.

If you would like to give your learners certificates of participation following a workshop, please refer to our certificates repo. This includes `svg` templates for the certificates and Python scripts to generate them.

12.3 Resources for Online Workshops

In the wake of COVID-19 in early 2020, The Carpentries community came together to share experiences, tips, and best practices for teaching online. This page lists all the resources developed and links to ongoing conversations by The Carpentries Core Team and community on different platforms.

12.3.1 Resources for Online Workshops

In the wake of COVID-19 in early 2020, The Carpentries community came together to share experiences, tips, and best practices for teaching online. This page lists all the resources developed and links to ongoing conversations by The Carpentries Core Team and community on different platforms.

Resources by The Carpentries

The Carpentries convened a Task Force to address the urgent demand for online Carpentries workshops as communities have shifted to distance work across the globe. The Task Force concluded its work on April 1, with an initial set of guidelines for teaching, supporting, and communicating about fully online versions of all Data Carpentry, Library Carpentry, and Software Carpentry workshops.

- Official guidelines and recommendations for teaching pilot-phase Carpentries workshops can be found here on The Carpentries website.

- April 24, blog post with information about cloud instances that are now available as backup for learners in Carpentries workshops with installation issues

- April 28, blog post with information to guide Carpentries Instructors as they teach workshops remotely.

- FAQ For Workshop Coordination can be found here on The Carpentries website.

- Announcing a New Series of Online Workshop Themed Discussions. Learn more here

- Carpentries Handbook: How to use Zoom Rooms

Resources by Community

Carpentries community members have written many blog posts and facilitated several webinars on this topic and they are listed below. If you are looking to write a blog post on your experiences from online workshops, check out the *blog post prompts* section.

Blog posts

- Elizabeth Wickes on March 12, Tips for Live Teaching Tech Online, Deeply Informed by The Carpentries

- Collaborative blog posts by Carpentries community in March 2020 as a result of this call for contributions

    - March 19, Tips for Teaching Online from The Carpentries Community

    - March 30, More Community-Contributed Tips for Teaching Online

- Radovan Bast et al April 20, Lessons Learned from Running Code Refinery's First Online Workshop

- David Perez-Suarez on April 21, Running University College London's First Online Git Workshop

- Darya Vanichkina on April 23, Mapping & Planning a Live Coding Workshop for Digital Delivery

- Darya Vanichkina on April 24, Having a Great Online Learning Experience: A Guide for Students

- Radovan Bast, Flavio Calvo, Richard Darst, Anne Fouilloux, Pavlin Mitev, Hasti Narimanzadeh, Pedro Ojeda May, João M. da Silva and Thor Wikfeldt on 14 April, Lessons learned from running our first online workshop

- Sarah Stevens on 12 May, Running a Virtual Social Carpentries Meetup in UW-Madison

- Charles Guan, Rachel Lombardi, Akshay Paropkari, Donny Winston on 14 May, Learnings from the First Centrally-Organised Online Workshop of 2020

- Samar Elsheikh, Caroline Fadeke Ajilogba, Martin Dreyer, Angelique van Rensburg on 28 May, Learners' Experiences from South Africa's Online Workshop

- Jane Koh on 15 June, Outlining a Successful Virtual Software Carpentry Workshop on Zoom

- Ibraheem Ali, Jamie Jamison, Kristian Allen, Leigh Phan and Tim Dennis on 16 Jun, Lessons Learned - Teaching Carpentries Workshop Online UCLA Spring 2020

- Daniel Chen on 26 June, Online Workshop Logistics and Screen Layouts

- Rosa Lönneborg, Omar Khan, and Serah Rono on 2 July, Lessons Learned - Teaching Carpentries Workshops Online in Sweden, May 2020

- Shoaib Sufi, Aleksandra Nenadic, Rachael Ainsworth, Lucia Michielin, Steve Crouch, Mario Antonioletti, Giacomo Peru on 10 July, The Software Sustainability Institute's Guidance for Running Online Training

- Richard Darst and Naoe Tatara on 26 August, Report from the Mega-CodeRefinery Workshop

- Jannetta Steyn on 24 September, Running Newcastle University's First Online Software Carpentries Workshop

- Jannetta Steyn, Benson Muite, Marissa Griesel, Maggi Mars, Lactatia Motsuku, Varshita Sher, Marissa Griesel, SamuelLe Lelièvre, Angelique van Rensburg on 7 October, Lessons Learned - Data Carpentries Workshop for SADiLaR (August 31, 2020)

- Selorm Tamakloe on 13 October, Reflections on my First Data Carpentry Workshop

- Ariel Deardorff, Reid Otsuji, Stephanie Labou, Tim Dennis, Khue Duong, Elizabeth McAulay, Leigh Phan on 22 October, Teaching a Library Carpentry Workshop in Southern California (and the Virtual Yonder)

Blog post prompts

Review these if you are looking to write about your teaching experiences:

1. How many learners were in the workshop and were they distributed locally (if locally, where?) or globally?

2. What other important contextual information can you give about the workshop?

   - When was it held, over what period of time?

   - Which lessons were taught?

   - Were there asynchronous portions or was it all live

     - If there was an asynchronous element to your workshop, did you create any resources that you can link to / share with the broader Carpentries community?

   - How many instructors and helpers were there? What were the roles?

3. What worked well for this workshop? Were there specific technologies or tools that you used that you would recommend? Please describe how the tools were used and what you would recommend in terms of their usage.

4. What challenges came up during the workshop. These can be challenges in teaching online or general challenges (It is important to know what aspects of the workshop experience remains the same regardless of online or in-person)

5. In migrating the content of the workshop online, what did you learn? Were there portions of the curriculum that were easier to modify for hosting online?

6. What do you wish you had known or considered before the workshop? What preparation would have been helpful in delivering the workshop?

7. Which resources (e.g. blog posts, carpentries recommendations) did you use prior to the workshop

   - Were they helpful?

   - How would you adapt the resources post workshop.

8. Would you be willing to share your experience briefly in a Themed Discussion session around running online workshops in the future? If yes, we would afford you a 5-15 minute slot to share your experiences. How much time would you need?

Webinars and Community Calls

- Jason Bell on February 27, Virtual Software Carpentry Workshops - key learnings to make it a success

- Darya Vanichkina on April 7, Jumping into digital: Lessons learned while moving live-coding workshops online

- Themed Discussions: Online Workshop Series

    - Session One, 1 June 2020

        * Planning/registering your online workshop - Led by Deputy Director of Workshops and Meetings, Sher! Hurt: Link to Recording

        * How to fill out the workshop template to set up your website correctly for online workshops - Led by Lesson Infrastructure Technology Developer, Zhian Kamvar, PhD: Link to Recording

        * How to use Zoom for online workshops - Led by Quality Assurance Manager, Maneesha Sane: Link to Recording Discussions on Discourse by The Carpentries Instructor Trainer community.

- CarpentryCon @ Home sessions

    - on July 15 by Angelique van Rensburg and Serah Rono - Carpentries Instructors' Experiences from Teaching Online - Session One

    - on July 23 by Kelly Barnes and Sher! Hurt - Carpentries Instructors' Experiences from Teaching Online - Session Two

Other Relevant Resources

- UK Software Sustainbility Institute's guidance for running online training events

- Laura Czerniewicz on March 15, What we learnt from "going online" during university shutdowns in South Africa

- Greg Wilson on March 24, Teaching Online at Short Notice

- Strategies for addressing unequal technological access from the University of Cape Town

- Lex Nederbragt on April 2, Scaling participatory live coding in an undergraduate computational biology course

- Detailed guide from the University of Cape Town on low-tech online teaching resources

- MetaDocencia, an educational community for teaching Spanish-speaking teachers to teach online. If you know Spanish-speaking teachers that could be interested in this new community of practice, share this report with them.

- Daniel Stanford on March 16, Videoconferencing Alternatives: How Low-Bandwidth Teaching Will Save Us All

- CodeRefinery's manual on using Zoom for online teaching

Discussions in Carpentries Socials

- March 17, Is COVID-19 virus demanding alternative software carpentry workshop delivery options? discussion on TopicBox

- April 6, Post-workshop eval questions related to online delivery? discussion on TopicBox

- April 16, Discussion under David Perez-Suarez' post in the #general Slack on his experiences from running an online workshop

- April 22, Discussion under Lex Nederbragt's post in the #instructors Slack channel over tips for participatory live coding online

- May 14, Discussion on using online sticky notes for feedback in the #general Slack channel.

- May 25, Discussion on using HackMD when teaching online workshops

- May 28, Discussion on using Zoom Breakout Rooms during online workshops

12.4 Publishing Workshops

Workshops are published to The Carpentries website and the appropriate lesson program sites (Data Carpentry, Library Carpentry, or Software Carpentry) when all of the following criteria are met:

- A workshop request or notification form has been submitted

- The workshop request form gives permission to list the workshop on our websites

- The workshop venue has been identified on the workshop website

- At least one instructor is identified

WORKSHOP ADMINISTRATION

Around the world, Carpentries workshops are organised by a team of Regional Coordinators. Our Core Team Workshop and Logistics Manager manages workshops in most of the world. In some parts of the world, local Carpenters support managing local workshops and building local communities. They work with our member sites or as volunteers. Read more about who they are and what they do.

This section outlines their work specifically as it relates to workshop administration.

13.1 Role and Expectations

The role of the Regional Coordinators is to be the front face of The Carpentries, promoting our work and our culture in their geographical area. The Regional Coordinators will manage workshop logistics, communicate with hosts and instructors, and respond to general inquiries. As a team, all administrators will work together to support each other and ensure communities can thrive locally while maintaining quality and consistency globally.

This includes the following responsibilities

- Attend monthly admin team meetings. Time zones will be taken into consideration when scheduling these meetings. Attending other Carpentries community meetings is also highly recommended.

- Read emails sent to the admin group. Stay up to date on all Carpentries operations as outlined in the Carpentries handbook. Respond to workshop requests from host sites in your region within two business days. This may include, but is not limited to:

    - Sharing general Carpentries information

    - Recruiting instructors

    - Setting up surveys and registration

    - Supporting other planning logistics

    - Recording all information according to Carpentries' systems.

- Follow up on all completed workshops to collect attendance data and other feedback, and record this in Carpentries' systems.

- Serve as the "front face" of The Carpentries in their region by responding to general public inquiries and supporting our larger communication efforts and other initiatives.

- Communicate Carpentries community values to instructors, host sites, and others constituents.

- Communicate successes and challenges with Carpentries Workshop and Logistics Manager and other Regional Coordinators.

- Promote The Carpentries culture of an inclusive and supportive learning environment informed by best practices in pedagogical research. Follow The Carpentries Code of Conduct and report any violations.

• Elevate questions and issues to Carpentries Core Team as needed.

13.2 Workshop Administration Workflow

13.2.1 For Centrally-Organised Workshops

1. One of the following occurs:

   • Someone submits the Carpentries workshop request form

   • Someone emails team@carpentries.org to request a workshop.

   • Someone contacts a Core Team member to request a workshop.

2. Deputy Director of Workshops and Meetings or the Regional Coordinators for that region responds to request by email or phone/video call.

   • Give them more information about The Carpentries as needed.

     – Software Carpentry lessons

     – Data Carpentry lessons

     – Library Carpentry lessons

   • Ask them for more information about their request.

     – Who is their target population?

     – What curriculum content do they want to cover?

     – What timeframe are they looking to host a workshop?

       ∗ Remind them we need 2-3 months notice

       ∗ Remind them to consider their own schedule and other events that may affect things like room availability

     – Remind them of the budget

       ∗ US$2500 standard fee due to our fiscal sponsor (for non-member university, government, or non-profit sites only)

       ∗ Costs for instructor travel (airfare, ground travel, hotel, and meals/incidentals) are managed entirely between host and instructors. We will look for local instructors but can not guarantee it. Member sites are still responsible for travel costs.

     – Ask them to complete the official request form

   • Deputy Director of Workshops and Meetings or the Regional Coordinators records request form in AMY.

3. For non-member sites, Regional Coordinator asks host for invoicing contact, and introduces them to the Operations Manager to begin the invoicing process.

4. Regional Coordinator adds workshop to appropriate tab (by geography) on call for instructors sign up sheet and sends email to instructors list notifying them of upcoming opportunities.

5. Regional Coordinator reviews list of instructors signed up as interested in upcoming workshops and tentatively places them based on experience, geography, and skill set. See blog post for details. Selection guidelines include:

- **Other workshops has that person signed up for in that time period** If they have volunteered to teach three workshops over the next few months, we likely won't place them at all of them. However, we will take advantage of their flexibility to get them in on at least one.

- **Each person's experience with The Carpentries** We want to be sure to match up experienced instructors with new instructors, so new instructors are supported by experienced instructors.

- **Each person's skill set with Carpentries material** We want to make sure each instructor is comfortable teaching the workshop content, and understands the other instructor's skills.

- **Each person's academic or professional domain** It can be helpful, but not required, to match the instructors' domain with the workshop audience. Instructors get opportunities to network in their fields, and learners get to hear from people working in those same fields.

- **Geography** While we do not guarantee local instructors at workshops, we do take this in consideration to keep the host site's cost down and to help build local communities.

6. Regional Coordinator emails these instructors to confirm their availability, and returns back to the other instructors on the list if a conflict has since come up.

7. Regional Coordinator sends email to workshop instructors and hosts with introductory information. This includes links to guides for roles of host, instructor, and helper.

8. Regional Coordinator emails everyone else who signed up for that event thanking them for their time, letting them know other instructors were placed, and encouraging them to sign up for other opportunities.

9. Regional Coordinator reminds instructors to set up a workshop website using the workshop template.

10. The Workshop Administration Team will share a link to view the survey results with hosts and instructors via email. The survey result link is for instructors/hosts and should not be shared publicly. *As a reminder, learner facing survey links are automatically generated on the workshop's GitHub webpage.*

11. If needed Regional Coordinator sets up registration in Eventbrite.

    - If there is a registration fee, Regional Coordinator informs the Business Team (finance@carpentries.org) that this will need to be refunded or applied to the workshop invoice.

12. In weeks leading up to workshop, Regional Coordinator sends check in emails to be sure planning is progressing smoothly.

13. After workshop is over Regional Coordinator sends email asking how things went.

14. Regional Coordinator records instructors/helpers and additional information if provided.

13.2.2 For Self-Organised Workshops
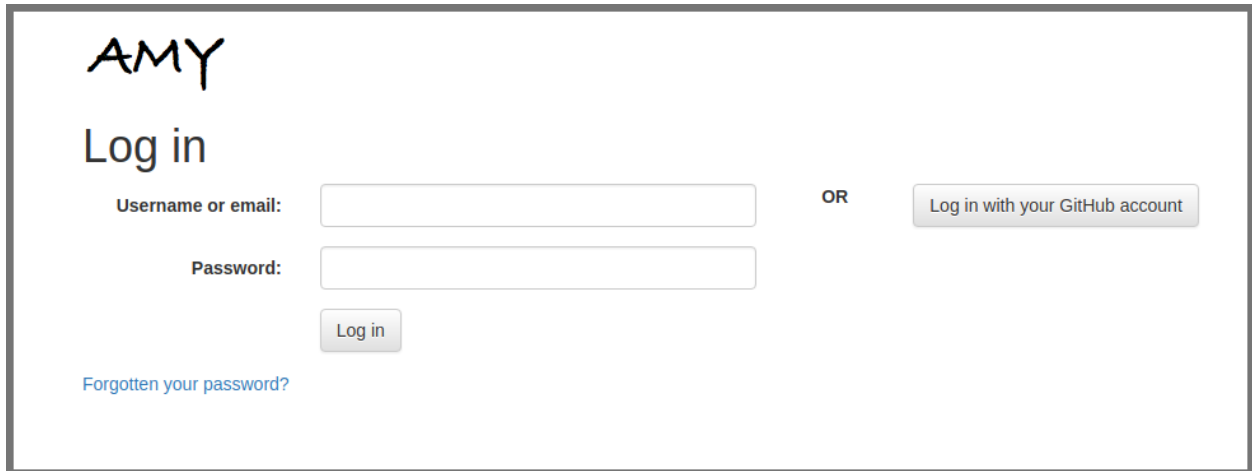
1. Host submits the Carpentries workshop request form. There is no fee (suggested or mandated) for a self organised workshop.

2. Regional Coordinator reminds them that as a self organised workshop they will have access to our surveys but will not receive any other support in coordinating this workshop.

3. Regional Coordinator reminds instructors to set up a workshop website using the workshop template.

4. Regional Coordinator records this in AMY.

5. The Workshop Administration Team will share a link to view the survey results with hosts and instructors via email. The survey result link is for instructors/hosts and should not be shared publicly. *As a reminder, learner facing survey links are automatically generated on the workshop's GitHub webpage.*

6. In weeks leading up to workshop, Regional Coordinator sends check in emails to be sure planning is progressing smoothly. This is optional as instructors and hosts should not be expecting direct support from us.

7. After workshop is over Regional Coordinator sends email asking how things went.

8. Regional Coordinator records instructors/helpers and additional information if provided.

13.3 AMY: The Carpentries' internal database

13.3.1 Logging in

- Log in to AMY here. Contact Carpentries Core Team if you need login credentials.
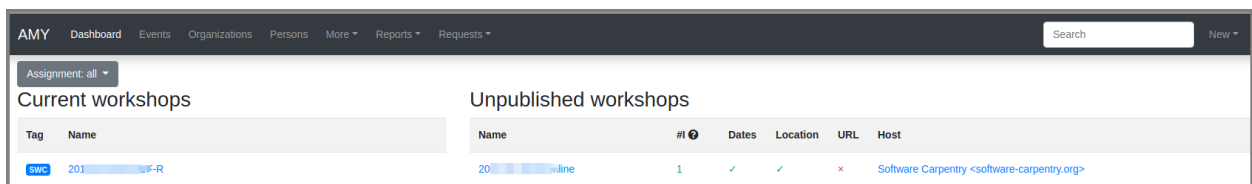
AMY
login screen goes here

13.3.2 AMY Dashboard

All the menus and a search bar are displayed across the top. The main page has two columns, showing published workshops and unpublished workshops.

This view can be filtered to show workshops assigned to the logged in administrator, unassigned workshops, or all workshops.

AMY
dashboard

- *Published workshops* have a complete start and end date, a valid url, and a complete location.
- *Unpublished workshops* are all workshops that do not meet the criteria to be published.

Published workshops will show up on the Software Carpentry, Data Carpentry, or Library Carpentry website, depending on how they are tagged.

From here you can also add new *persons*, *events*, *organisations*, or *airports* to the database.
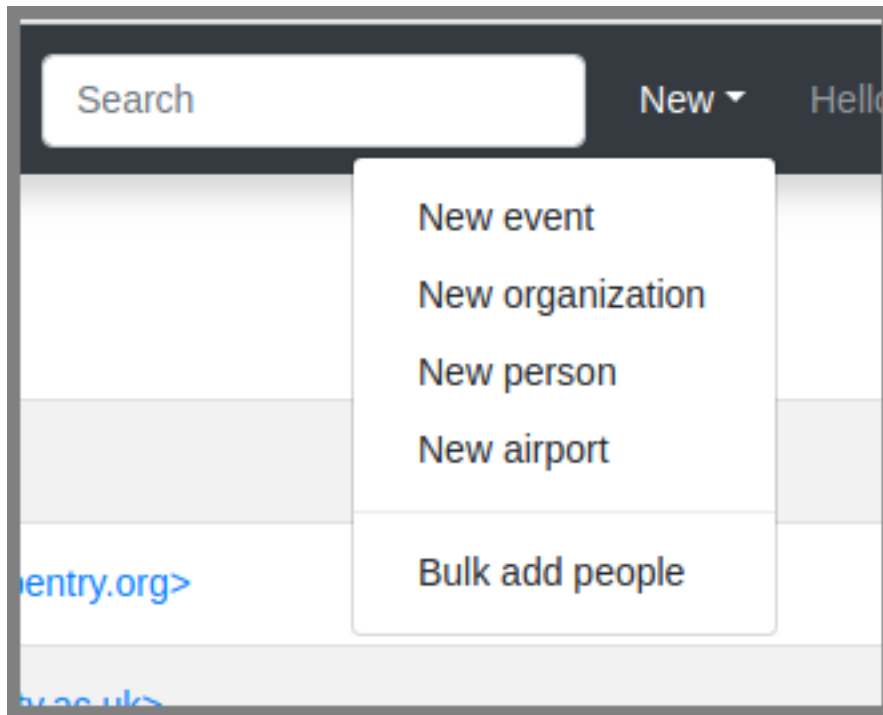
AMY add new elements

13.3.3 Adding a New Organisation

If the site name is not already in AMY, add a new one by selecting "New Organisation." Do not enter `http://` or any slashes in the domain name.

AMY add new organisation

13.3.4 Adding a New Person

If a person's record does not exist in the database, it can be added individually or as part of a bulk upload.

Adding an Individual Person Record

Select "New person" and enter in as much information as possible. At minimum a personal name is required. If the airport is not listed, it will need to be *added in*.

The person's privacy settings can also be set here. The person's profile will display on The Carpentries website only if the consent box is checked.

AMY

add new person

Adding Bulk Person Records

`Person` records can also be added in bulk from a `.csv` file using the `Bulk add persons` menu option in the `New` menu at the top right or the `More` menu. **Note: To bulk add records, the persons must have a role specified (instructor,helper,learner,host) associated with a specific event**.
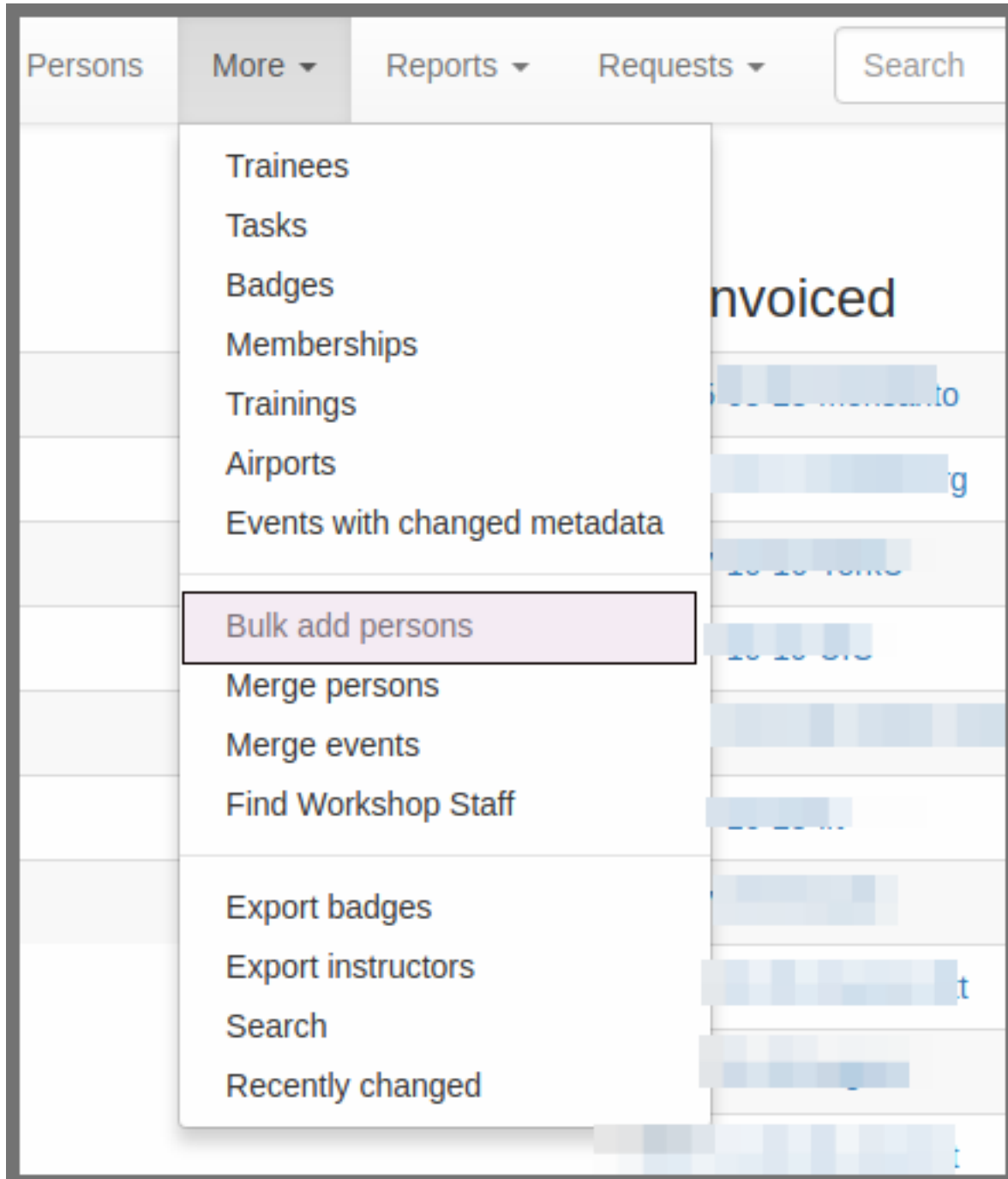
bulk add person menu

Use the blank template to generate a well formed CSV noting each person's personal name, family name (optional), email address (optional), role, and associated event. Any additional information about the person must be entered manually.
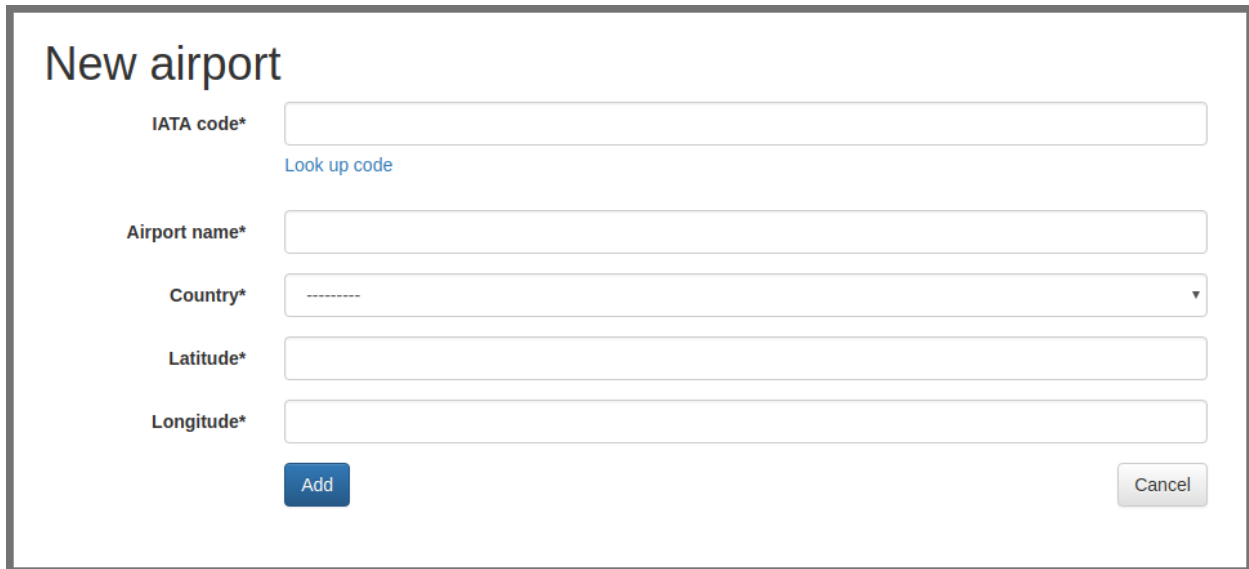
The role must exactly match the instructions here. The event slug must exactly match the slug for the event recorded in AMY.

This will take you to a screen where you can verify each record, correct any errors, and submit them for bulk upload. If a person with the same name and email already exists in the database, you will be able to match the new entry to the existing record. Otherwise a new person record will be created.

13.3.5 Adding a New Airport

Airports are used as approximate geographic identifiers for our instructors. Each airport is identified by its three digit IATA code which can be looked up using the link in AMY.

Enter in the airport's IATA code, full name, country, and latitude and longitude.

AMY add airport

13.3.6 Adding a New Event

New events can be created one of several ways:

- By manually entering all information on the *new event page*
- By importing from URL on the *new event page*
- By accepting a *workshop request*

Creating a New Event Manually

- Create the workshop slug. This must be in the form `YYYY-MM-DD-sitename` (for example, `2018-01-01-hawkins`. The same slug should be used for the workshop's GitHub page and any other place the workshop is identified. If the exact date is not known, `XX` can replace the month and/or day (for example, `2018-01-xx-starfleet`).

AMY

new event slug

- If known, enter in the workshop dates.

AMY

new event dates

- Select the host site name from the drop down menu. If the host site does not appear on the list, *create a new organisation*.
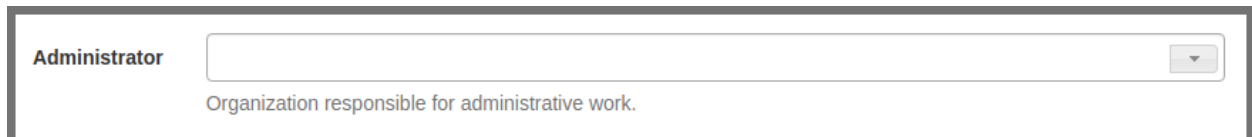
AMY

new event host

- Select the administrator from the drop down menu. This will almost always be `Software Carpentry`, `Data Carpentry`, `Library Carpentry`, or `self organised`.

AMY

new event administrator

- Select the name of The Carpentries Regional Coordinator responsible for managing this workshop.

AMY

new event assigned to

- Assign all appropriate tags to the event.

    - SWC: Software Carpentry

    - DC: Data Carpentry

    - LC: Library Carpentry

    - WiSE: Women in Science and Engineering

    - TTT: Instructor Training

    - LSO: Lesson Specific Onboarding

    - ITT: Trainer Training

    - LMO: Lesson Maintainer Onboarding

    - online: Online events

– stalled: When host stalled event planning before workshop occurred

– unresponsive: When host/instructors were unresponsive to requests for attendance data

– hackathon: Non-workshop events. Hackathons related to lesson development or other topics.

– cancelled: When a fully scheduled event gets cancelled

AMY

new event tags

• TTT Open applications. For instructor training events, member sites become associated with the event as individuals from that member site are assigned to that event. Checking this box will allow people from the open application pool to be matched to this event as well.

AMY

TTT Open Applications check box

• Select the curricula taught at this workshop.

AMY

curricula taught

• Enter in the workshop's url (to the GitHub page, not the repo). This is generally in the format `username.github.io/YYYY-MM-DD-sitename`.

AMY

new event url

- Enter in the human language the workshop is taught in. This is especially important for The Carpentries to track workshops in languages other than English.

Language	
AMY

new event language

- If the workshop is using **Carpentries** Eventbrite for registration, enter the Eventbrite key. This is not needed if the host site is using their own Eventbrite account or any other internal system.

Eventbrite key	
AMY

new event Eventbrite

- After the event is over, record the total number of learners who attended the workshop.

Attendance	
AMY

new event attendance

- Enter only the email address for the main contact person for this event.

Contact	
AMY

new event contact

- Add in the location including the country, venue name, address, and latitude/longitude coordinates.

Location details

Country	---------

Required in order for this event to be "published".
Use **Online** for online events.

Venue	

Required in order for this event to be "published".

Address	

Required in order for this event to be "published".

Latitude	

Required in order for this event to be "published".

Longitude	

Required in order for this event to be "published".

AMY

new event location

- Add in any other notes that may not be covered in any fields above. This will be transformed into a timestamped notes log once the event is saved.

Comment	
	This will be added to comments after the event is created.

AMY

new event notes

Click "Submit" to save this event.

Creating a New Event from URL

If you already have the event's URL with properly formatted metadata using The Carpentries workshop template, the following information can automatically be imported:

- Slug (created from GitHub repo name)

- Start and end dates

- Location details

Instructor and helper names will be in the notes field but not assigned in the database. All people will need to be *assigned to the event*.

All other information will need to be entered in as above.

Creating a New Event from a Workshop Request

A workshop can be requested from a host site, and this information can be used to create an event in AMY. Select "Workshop requests" from the "Requests" menu.
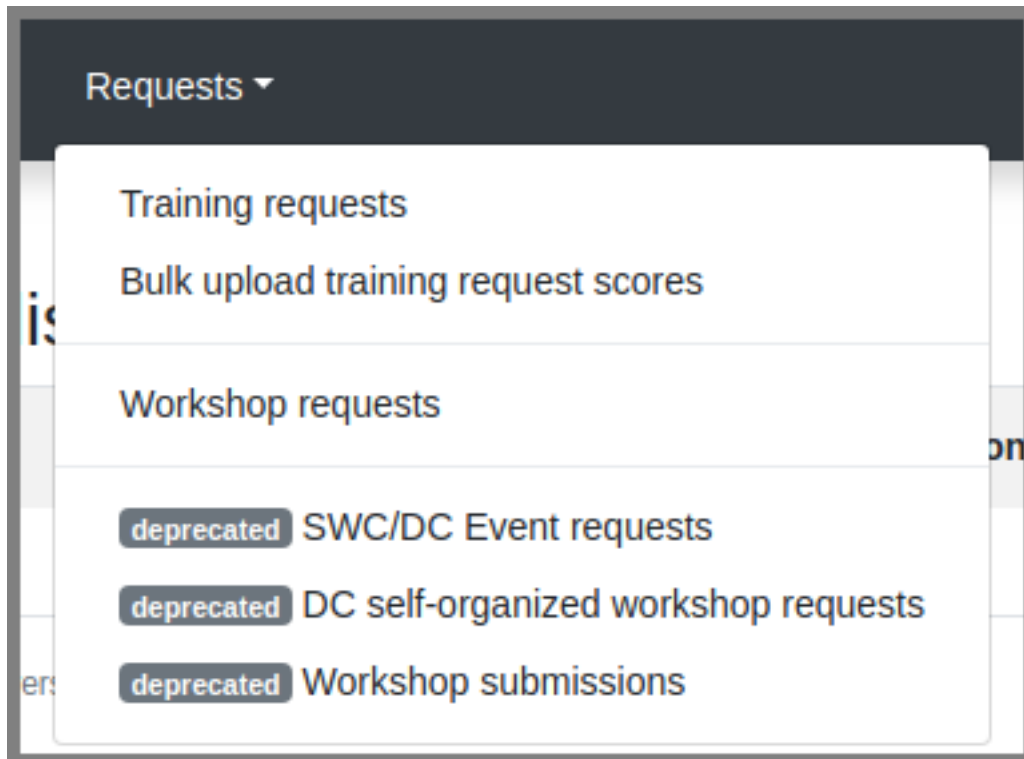
AMY workshop requests

This page will show a list of all open workshop requests, with the name/email of the requestor, their affiliation, their preferred dates, the Carpentry type, and any other comments.

AMY workshop request list

At the bottom of this page, the user has the option to accept or discard the request. Choosing "Change state to Accepted" will mark it as accepted in the workshop request list but will not create a new event. Select "Accept and create a new event" to create a new event from this request. All requests should be accepted (unless spam or otherwise inappropriate) so The Carpentries can maintain a history of workshop requests. Events can later be marked as stalled or cancelled.

This will open a page with a side by side view of the request details and view to create a new event. The new event can be created *manually* or if available, *from the URL*, as described above.

workshop accept request

13.3.7 Assigning People to Events

Regardless of how events are created, adding the people associated with each event can not easily be automated. Name matching is hard.

People can be associated with events one by one or as a bulk upload.

Assigning People to Events, One by One

Go to the event page and click the "Edit" button at the top of the page. Select the "Tasks" tab. (Note the sponsor tab is not currently being used.)

To add a new person to the event, start typing the person's name in the "Person" field. Auto-completed suggested names will appear.

Add the person's role in the event (Helper, Instructor, Workshop Host, Learner, Workshop Organiser). "Contributed to Lesson Materials" is not used in this context. "Title" and "URL" are also not used in this context.

If a person's name does not appear in the dropdown, they may need to be *added to the database*.

Below this form, a list of all people assigned to this event is displayed. A person's role can not be directly changed. Instead, delete the item and enter a new one.

When done, go back to the "Event" tab at the top of the page, and click "Submit" at the bottom of the event page to save changes. All people should now appear at the bottom of the event page.

Assigning People to Events in Bulk

See section above.

13.3.8 Instructor Training

Accepting Trainee Applications

In addition to tracking workshops, AMY also allows us to track applications to instructor training events. The public facing application is here. Applicants are given a group name if participating in a member training event. Open applicants will likely not have a group name.

Once an individual submits the form, the record can be viewed by going to Requests –> Training Requests.

Applications can then be searched by individual name, email address, group name, status (pending, accepted, or discarded), affiliation, or location.

Some trainees will already be in AMY because they were formerly learners or helpers at Carpentries events. If there is a record with a matching name and email address, they will show up with a "matched trainee" when you search for them. If "matched trainee" is blank, you will need to create a new person record for them.

To create a trainee record, click on the "i" icon at the far right of the individual's line. If you know this person is in AMY under a different name or email address, look this person up here and click "Match to selected trainee account." If this is a new person, click "Create new trainee account."

AMY Match Trainee Record

This will return you to the search screen, and this person's record will be updated with the new trainee account.

Continue doing this until all relevant applications have a new trainee account. This must be done individually; it can not be done in bulk.

Once all trainees for a given event have trainee accounts, we can assign them to a specific training event and associate them with a specific member contract. This part can be done in bulk for each group of trainees with a unique training date and member site affiliation. The *event* and the *member agreement* must already have been created in AMY.

Check all the names to be assigned to the training event and membership, and then select the training event from the first drop down menu. Select the member agreement from the second drop down menu. If the trainees are coming through the open application process rather than a member agreement, check this box instead of choosing a member agreement.

Click "Accept & match selected trainees to chosen training." The search screen will then update to show that the trainees have been matched to this event. The event page will also update to list these trainees as learners at that event.

Match trainees to instructor training event

Tracking Checkout Progress

The above steps note that a trainee was accepted in to a training event. Completion of the training event and three steps towards trainee checkout can be tracked in AMY. Each person's record will have a line for Instructor Training Progress.

AMY training progress

Click on the plus sign in the Training Progress line. This will go to a screen where you can track the all steps towards certification.

New training progress

AMY
training progress steps

Recording Completion of Training Event

On the screen above, select 'Training' and note whether they passed or failed.

Recording Completion of Discussion Session

On the screen above, select 'Discussion' and note whether they passed or failed.

Recording Completion of Teaching Demo

On the screen above, select 'DC Demo' or 'SWC Demo' depending on which lesson they used for their demo, and note whether they passed or failed.
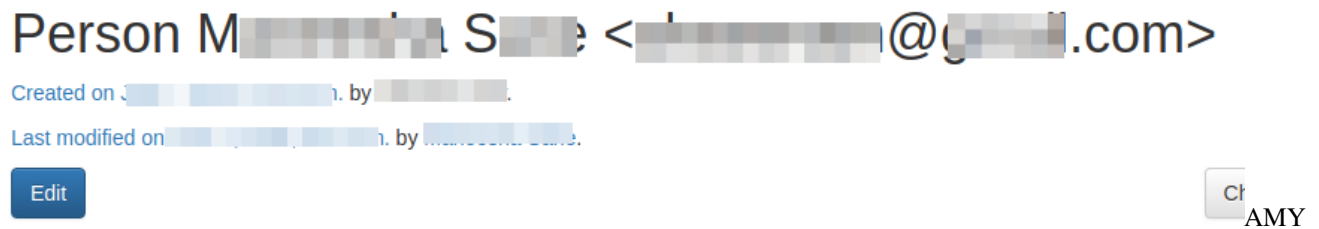
Recording Completion of Lesson Contribution

On the screen above, select 'DC Homework' or 'SWC Homework' depending on which lesson they used for their contribution, and note whether they passed or failed. In the notes section, link to their lesson contribution.

13.3.9 Issuing Badges
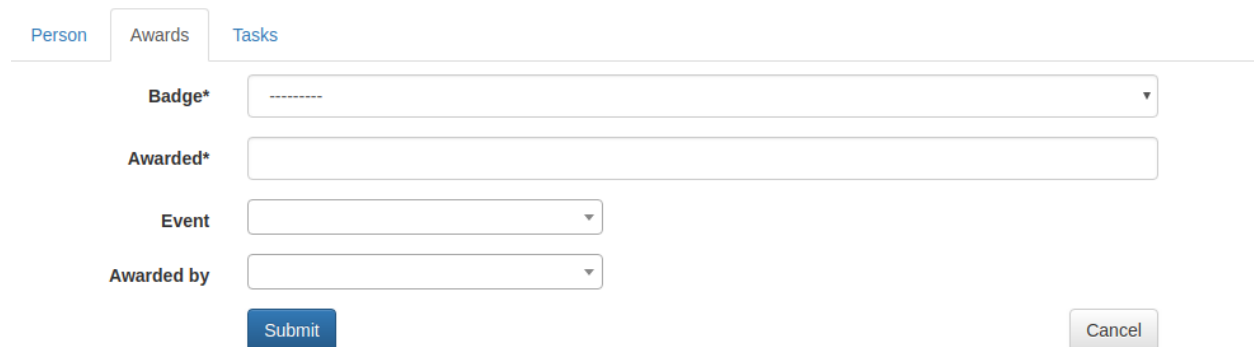
The Carpentries has various badges that can be issued, including Data Carpentry Instructor, Software Carpentry Instructor, Trainer, Maintainer, and more.

An individual badge can be issued by going to a person's record and clicking the `Edit` button.

edit person

Choose the `Awards` tab on the next screen. Select the Badge type from the drop down menu, and fill in the date it was awarded. The associated event (such as a training event) and awarded by fields are optional. Click `Submit` to save the entry.

issue badge

13.3.10 Memberships

AMY is also used to track all Carpentries memberships. To create a new membership, the site must first be listed as an *organisation* in AMY.

On the organisation's page, click the green "Add a membership" button. Enter the following information:

- Variant (membership type)
- Agreement start and end dates
- Contribution type (Financial, Person-days, or other)
- Workshops without admin fee per agreement
- Self organised workshops per agreement (can be left blank as this is typically unlimited)

- Instructor training seats (actual number allotted in contract)

- Additional instructor training seats (any additional seats allowed beyond contracted amount)

- Notes.

13.3.11 Reports

AMY comes with several built in reporting features that can be accessed by clicking `Reports` in the top menu. Most reports include an api link for further analysis.

- *List of instructors by time period* will generate a list of all instructors who have taught or will teach a workshop in a given time period and can be downloaded as a CSV file. This is especially useful when inviting instructors to discussion sessions.

- *Workshops over time, Learners over time, Instructors over time* show cumulative numbers of workshops, learners, and instructors from the start of The Carpentries to present day.

- *How often instructors have taught* returns a list of all instructors who have taught at least once with the number of workshops they have taught.

- *All activity over time* returns data on the number of workshops, number of instructors, number of learners, and identifies gaps in data.

- *Workshop issues* and *Instructor issues* identify specific workshops and instructors with gaps in data.

- *Find duplicates* identifies persons that may be listed as duplicates due to having the same name or email address, and allows the user to merge them.

13.3.12 Roles in AMY

What you are able to edit or view depends on your assigned role in AMY.

Instructor Login

Instructors can log in to AMY to view and update their own information. To do so, they must have a valid GitHub username in their profile. Instructors should visit the AMY login page and click on `Log in with your GitHub account`.

If an instructor is having trouble logging in, an administrator can verify the following information.

- Be sure the GitHub user name is accurate.

- Click on `Change permissions` and be sure `Is active` is checked. No other permissions should be checked unless the instructor is also an otherwise authorised user.

- `Logging in allowed` should show next to the GitHub name in the profile. If it says `Allow logging in with GitHub`, click this to allow logging in. This must be done **after** setting permissions to active above.

Admin Roles

Admin users will have rights to view and edit many other parts of the AMY database. The Django admin panel can be accessed from the top right menu, under the user's name, generating a unique URL for the session.

An admin user can view their profile as if they were an ordinary user on this dashboard page.

13.3.13 Other Tasks

Merging Duplicate Persons or Events

If duplicate persons or event records exists, they can be merged. Select "Merge persons" or "Merge events" from the "More" menu.

Choose the two Persons or Events to be merged, and click "Submit" to see merge options. Here you can choose to keep the value from Person/Event A, from Person/Event B, or to combine the values.

13.3.14 Searching

General Search

The quickest and easiest way to search is using the search box in the top menu bar. This will perform a case insensitive search of any field in AMY, including searching for partial matches. For example:

- `12-12-` will match any workshop slug containing that string (essentially any workshop on December 12 of any year.)

- `ola tes` will match `Nikola Tesla` and `Nolan Bates`

- `stanford` will match any one with a `stanford` email address, with `stanford` in their name, any workshops with `stanford` in the slug, or the site `Stanford University`.

Searching for Qualified Instructors

Under the "More" menu, select "Find Workshop Core Team." Here you can filter by the following criteria:

- Airport: This returns a list of all Instructors beginning with those who list that airport as their closest airport, and then continues reaching farther out.

- Country: This returns a list of all Instructors who are in that country. It does not continue to any proximate countries.

- Latitude and Longitude: Like the *Airport* search, this begins with people whose listed airport is closest to that latitude and longitude, and then continues reaching farther out.

- Badges: Selecting more than one Instructor badge will return a list of Instructors who have *any* of those badges. If no badge is selected, the search will return unbadged Persons.

- *Was helper at least once before*, *Was organiser at least once before*, *Is an in-progress instructor trainee* are based on AMY's current records

- *Languages*, *Gender*, and *Lessons* come from the Person record for that individual.

Searching for Events

Clicking "Events" on the top menu bar will take you to a list of *all* recorded events - past, present, and future, including those that were stalled or cancelled.

Events can be searched from the left side options by Assignee, Tags, Host, Administrator, Invoice status (deprecated), Completed, Country, and Status.

Searching for Organisations

Clicking "Organisations" on the top menu bar will take you to a list of *all* recorded organisations, regardless of their involvement with The Carpentries.

Organisations can be searched by Country and Membership type.

Searching for Persons

Clicking "Persons" on the top menu bar will take you to a list of *all* recorded persons, regardless of their involvement with The Carpentries.

Persons can be searched for by badges and by teaching history. See the section above to search specifically for *qualified instructors*.

13.4 Event Registration using Eventbrite

Host sites can opt to use their own systems for registering learners at their workshops, or we can set up a registration page using Eventbrite.

13.4.1 Logging In

The Workshop Administration Team will have log in credentials from The Carpentries. They will give hosts of individual events access to log in to that event only.

Contact team@carpentries.org with questions about logging in.

13.4.2 Creating a New Event

Click on "Manage Events" under "CARPENTRIES"
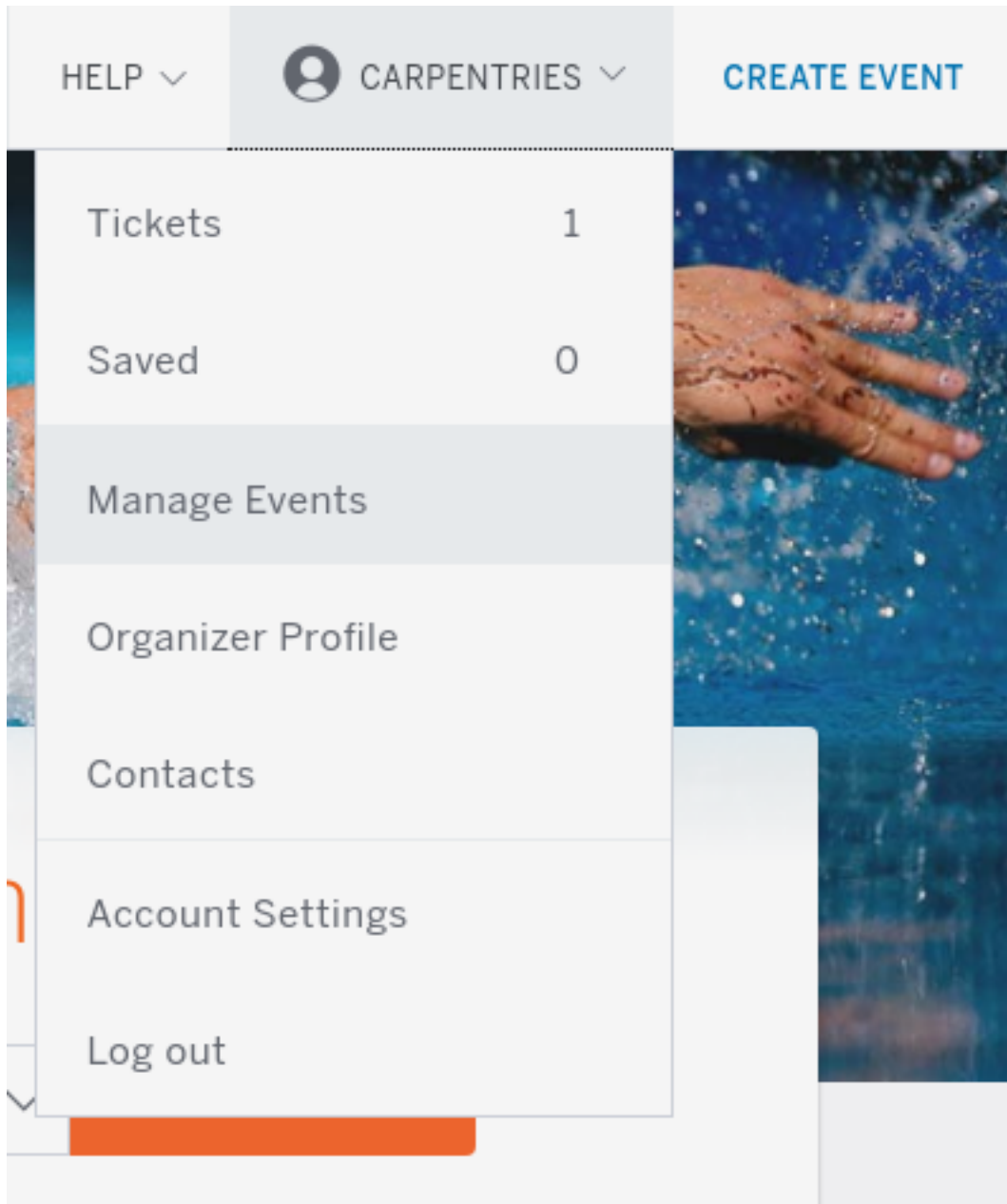
Eventbrite new event

You will see Live, Draft, and Past workshops. To create a new event, you can use one of the existing drafts as a template. Click on "Drafts."

Eventbrite events

Select "Manage" under the template for the appropriate Carpentries lesson program.

Eventbrite select draft

Copy this event, giving it a meaningful name.

Eventbrite select draft

Eventbrite copy event

You can now set up the new event page.

Eventbrite new event location and date

Fill in the address for the event location. If you don't see boxes for address, city, state, country, etc., click on "Enter Address" to display them.

Fill the start/end date/time information. Note that Eventbrite does not let you have multiple day events, so for an event

that goes 9 am to 5 pm both January 1 and 2 you have to make it look like it starts at 9 am on January 1 and goes until 5 pm on January 2. Otherwise Eventbrite treats it as two events. Be sure to select the correct time zone.

The overall template includes a templated description of the event. Update this with the start and end times, the GitHub link, and link to the pre-workshop survey. You can also add in any other information specific to that event.

Eventbrite new event description

13.4.3 Create Tickets

Eventbrite allows for both free and paid tickets. These settings can not be changed once the event has been published, so be sure to verify this in advance. You can have a mix of free and paid tickets.

Eventbrite ticket types

If the workshop is entirely free, delete the paid ticket option by clicking on the trash can icon (or delete the free option if all tickets are paid).

Click on the gear icon to edit settings for that ticket type.

For free tickets, you can customise the ticket type name. Edit the number of tickets available and dates when ticket sales start and end.

Eventbrite free ticket settings

For paid tickets, you can customise the ticket type name. Edit the number of tickets available and dates when ticket sales start and end. Edit the cost per ticket. Select "Absorb fees." You must also set a refund policy - be sure to confirm this with the host site.

Eventbrite

paid ticket settings
paid ticket settings

At this point the event is almost ready to be published. It is a good idea to let the host contact look over the page before it goes live. You can do this by initially publishing it as password protected.

Eventbrite password settings

Make it a private event, requiring a password.

You can now either save this event if you need to work on it more, or publish it (make it live).

Eventbrite password settings

This will take you to your event dashboard where you can monitor ticket sales. Click "view" on the top right corner to see what this page will look like publicly.

Share this link with the host site along with the password you created so they can look over the page and confirm that it looks good, or suggest changes if needed. Once it looks good, select "edit" from the dashboard and remove the password so the page can be shared publicly.

13.4.4 Giving Hosts Access to View Registration

Often a workshop host will want to check in to see who is registered, manage the waitlist, email registrants, etc. You can set this up through Account Settings.
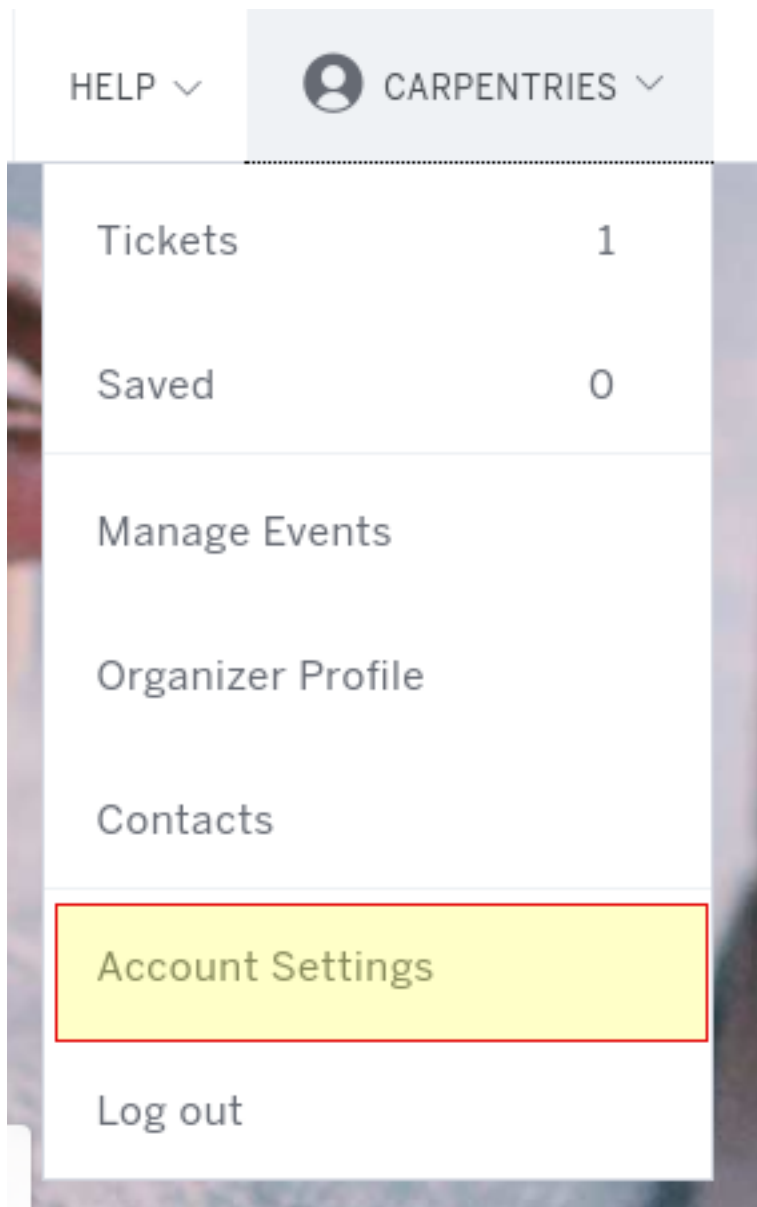
Eventbrite account settings

From here, select "Multi user access" from the options on the left.

You will see a list of all email addresses that have access to at least one of our events. If you are giving an existing user access to a new event, select "edit" next to their email address. Otherwise click the "Add Email Address" button at the bottom of the page.

Enter the person's email address and give them access to their event only.

Eventbrite new user event access

Give the user access to at most the following actions only:

- Edit event details not including payment options
    - Edit ticket types
    - Customise the registration page
- View order and attendee reports (read only)
    - Manage orders and attendees
    - Access to aggregate financial data
- Send invites, manage contacts, and email attendees
- Check in Attendees

Eventbrite new user event actions

The user should get notifications for:

- Order confirmations

- Contact the organiser

- Refund requests

Eventbrite new user event notifications

13.5 Email templates

13.5.1 From Regional Coordinator

Regional Coordinators use Helpscout to manage communication around workshop administration. All email templates used to communicate with workshop Organizers, Hosts, and Instructors can be found in Helpscout.

13.5.2 From Instructors and Hosts

For Self Organised Workshops: Recruiting Co-instructor

Subject: Recruiting co-instructors for Carpentry Workshop

Hi [person name],

I am organising a local [Data/Library/Software] Carpentry workshop for [estimated month/season of workshop]. The Carpentries is a fiscally sponsored project of Community Initiatives. They teach skills that are immediately useful for researchers, using lessons and datasets that allow researchers to quickly apply what they have learned to their own work. I am really excited about using the [Data/Library/Software] Carpentry curriculum here to help our [graduate students/Core Team/faculty - your target audience] become more efficient in their research.

I have completed instructor training for The Carpentries and am certified to teach their materials. To run a workshop, I will need at least one (preferably two) co-instructors to help out in teaching the material. The workshops are two days long and instructors usually switch every half day. I am planning to cover [your workshop topics] and was hoping you could teach the [topic] section of the workshop. The Carpentries provides ready-to-go lesson materials, so we would not need to develop anything from scratch. If you are interested, you can see the materials for [topic] here [link to lesson] and the rest of the curricular materials here [link to http://www.datacarpentry.org/lessons/ or https://software-carpentry.org/lessons/ or https://librarycarpentry.org/lessons/].

I am looking forward to running a workshop here and think it will be very helpful to our [target audience]. If you are interested in being a co- instructor, please let me know and we can get together and plan. Also let me know if you know anyone else who might be interested and able to help out with the [topic] part of the workshop.

Looking forward to working with you on this!

Best,

[sender name]

Recruiting Helpers

Subject: Recruiting helpers for Carpentry Workshop

Hi [name],

I am running a [Data/Library/Software] Carpentry workshop on [dates of workshop]. The Carpentries is a fiscally sponsored project of Community Initiatives. They teach skills that are immediately useful for researchers, using lessons and datasets that allow researchers to quickly apply what they have learned to their own work. I am really excited about using the [Data/Library/Software] Carpentry curriculum here to help our [graduate students/Core Team/faculty - your target audience] become more efficient in their research.

During the workshop, I will need a few people to help out in case learners run into problems or get stuck. Helpers move around the room to answer questions and help learners work through things like installation problems, error messages and unexpected output. You do not need to be an expert in the tools we are covering, just to have used one or more of them and be comfortable helping people troubleshoot. At this workshop, we are planning on covering [list of your topics]. I think you would be a great person to help out with [topic]. If you are interested, you can see the materials for [topic] here [link to lesson] and the rest of the curricular materials here [link to http://www.datacarpentry.org/lessons/ or https://software-carpentry.org/lessons/ or https://librarycarpentry.org/lessons/]. Please let me know if you are interested in being a helper and if you know anyone else who might be willing to help out.

Best,

[sender name]

Advertising your workshop

Subject: Carpentries workshop at [site name]

On [dates], [organisation name] is hosting a [Data/Library/Software] Carpentry workshop for [target audience/domain].

The Carpentries is a fiscally sponsored project of Community Initiatives. They teach skills that are immediately useful for researchers, using lessons and datasets that allow researchers to quickly apply what they have learned to their own work. I am really excited about using the [Data/Library/Software] Carpentry curriculum here to help our [graduate students/Core Team/faculty - your target audience] become more efficient in their research.

This workshop is focused on [Carpentry/domain]. The curriculum will include:

- [names of lessons]
- [names of lessons]
- [names of lessons]
- [names of lessons]

The target audience is learners who have little to no prior computational experience, and the instructors put a priority on creating a friendly environment to empower researchers and enable data-driven discovery. Even those with some experience will benefit, as the goal is to teach not only how to do analyses, but how to manage the process to make it as automated and reproducible as possible. For instance, after attending this workshop you will be able to:

- [skill 1]
- [skill 2]

- [skill 3]

Space is limited and it will likely fill quickly. [Add sentence about whether workshop is free or if there is a fee.]. Here is a registration link [link to your registration page], and the workshop webpage [link to your workshop webpage] for more information. Questions? Send email to [email contact].

We hope to see you at the workshop!

Best,

[sender name]

Email Learners before Workshop

Hello,

We are excited for the [Data/Library/Software] Carpentry workshop this coming [days of week] and hope you are too. A few notes:

Be sure to complete the pre-workshop survey [link to survey]. We use this to calibrate the pace of the workshop and, together with a post-workshop survey, to assess how it went.

Make sure you have the necessary software installed on your laptop [list required software for your workshop]. Here are the instructions [link to instructions]. If you have any trouble, send us an email or come a little early [day of week] morning. Someone will be there by [time] to help with installation issues.

[Say if you will be providing coffee, snacks, and/or lunch. Include time of lunch break if not providing lunch.]

If you will not be able to attend, please let us know so that we can offer your seat to someone on the waitlist.

Some links that will be used in the workshop: workshop page [link to workshop page], lesson materials [link to lesson materials], Etherpad [link to workshop Etherpad].

Getting to the workshop: [add directions to your workshop location]

Please read The Carpentries Code of Conduct (http://docs.carpentries.org/topic_folders/policies/code-of-conduct.html) so that we all are aware of how to treat each other respectfully.

We are committed to making sure that the workshop is accessible to everyone. Please tell us if there is anything we should know in advance in order to make the workshop accessible for you (e.g. sign-language interpreters, large-print handouts, lactation facilities).

Let us know if you have any questions, otherwise we will see you [day of week] morning!

Looking forward to seeing you soon!

Best,

[sender name]

Email Helpers before Workshop

Hi [helper names],

Thanks for making yourselves available to help with the [workshop name] workshop on [workshop date].

The workshop is being held at [add location and directions]. The teaching component will run from [start to finish time]. Please arrive at the venue at [briefing time] for a briefing – we will go through the schedule for the day and make sure we all have an understanding of the goals for the day. We want to ensure the learners optimise their time with us.

The material we will be teaching is available at: [add workshop webpage]. Please look through this prior to the workshop and also read through the Code of Conduct for The Carpentries workshops that we will be abiding by: https://docs.carpentries.org/topic_folders/policies/code-of-conduct.html

[Say if you will be providing coffee, snacks, and/or lunch. Include time of lunch break if not providing lunch]. Please bring a drink bottle and/or a re-useable cup so we can reduce waste.

Please remember to bring your laptop charger so you don't run out of power. We look forward to running a great workshop with you!

Best, [sender name]

Email Learners after Workshop

Hello, Thank you for attending our [Data/Library/Software] Carpentry workshop. We hope that you had fun and learned a lot of useful skills.

Please be sure to complete our post-workshop survey [link to survey]. Your answers are essential to allow us to continuously improve our workshops for future learners.

If you have any other feedback about the workshop, or would like to get involved in The Carpentries community, please contact us (mailto:team@carpentries.org). You can also join The Carpentries Discussion mailing list (https://carpentries.topicbox.com/groups/discuss), follow us on Twitter (https://twitter.com/datacarpentry and https://twitter.com/swcarpentry), and get involved with lesson development on GitHub (https://github.com/datacarpentry and https://github.com/swcarpentry/).

We hope to see more of you as you continue to develop your data analysis skills!

Best,

[sender name]

Encourage Learners to Complete Pre-workshop Survey

Hello,

We are excited to meet you at the upcoming [Data/Software/Library Carpentry workshop] (INSERT WORKSHOP WEBSITE LINK). To help your instructors provide an inclusive environment, and to learn more about your current experience with the tools you will learn, we ask that you complete our pre-workshop survey (INSERT LINK TO SURVEY).

Your responses will be recorded anonymously. Your IP address will be registered; however, your responses will remain anonymous. You are not required to take this survey to participate in our workshop, but your responses are very valuable to us. You may quit the survey at any time, or skip any item other than those required to correctly sort your responses.

If you have any questions about our assessment strategy, please contact Kari L. Jordan, Director of Assessment and Community Equity for The Carpentries at kariljordan@carpentries.org.

Our best,Your instructors

Encourage Learners to Complete Post-workshop Survey

Hello,

Thank you for attending the recent [Data/Library/Software Carpentry workshop]. We hope you left your workshop feeling empowered to continue learning more about the tools that were covered. We would like to capture your thoughts about what was covered and your perception of the workshop overall. Please complete the post-workshop survey at (INSERT LINK TO SURVEY) as soon as possible.

If you have any questions about our assessment strategy, please contact Kari L. Jordan, Director of Assessment and Community Equity for The Carpentries at kariljordan@carpentries.org. We look forward to your continued involvement with our community!

Our best, Your instructors

WHY WAS THIS HANDBOOK CREATED?

Historically, information and resources related to The Carpentries have been spread across various websites, Google docs, GitHub repos, and more. The handbook is a one-stop shop that consolidates information on running a workshop, developing or maintaining lessons, participating in an instructor training event, and more!

Many community members have contributed to this handbook, and we welcome feedback on this Handbook. Feel free to submit issues or pull requests to this GitHub repo to improve this community resource.

BUILDING THIS SITE

This site is built using the Sphinx documentation generator (a Python tool) and the Read the Docs theme for the style. (Not to be confused with readthedocs.io - the site is *not* hosted at readthedocs.io!)

For more information about using Sphinx, see the Getting Started guide (sphinx-doc.org) or the Quick Start (readthedocs.io) for an explanation of how to use Sphinx.

15.1 Required dependencies

To install the required dependencies (Sphinx and the ReadTheDocs Sphinx theme), execute the following command from the repository directory to install all Python dependencies:

```
pip install -r requirements.txt
```

After installing the dependencies, you can build the site locally by executing the following command from the repository:

```
$ make html
```

Open the file _build/html/index.html to preview the site locally. Python offers a quick way to run a web server to serve local files. Run the following:

```
$ cd _build/html

# Python 2: (Deprecated; not recommended)
$ python2 -m SimpleHTTPServer

# Python 3:
$ python3 -m http.server
```

In both cases, a local web server will be run on port 8000, so navigate to http://localhost:8000 in your browser to view the site locally.

You can make changes to the contents of the repository, and re-run make html, to update the website contents. If you are having problems with the site not refreshing, you can delete the contents of the _build directory (which are automatically generated) with rm -fr _build/*.

If new files or folders are added to the Handbook, index.rst will need to be updated for those to be included in the final site by Sphinx.

15.2 Site structure

The root level `index.rst` generates the main categories and the sidebar navigation. Each sub-section is a folder in the `topic_folders` directory. Each folder within the `topic_folders` directory has its own `index.rst` file. These then expand into the subcategories in each directory.

Within each folder's `index.rst` file, the section heading is defined by a string of = beneath it. Subheadings can be defined using ### in each markdown file or by a heading with – under it in the `index.rst` file.

15.2.1 Formatting Hyperlinks

In markdown documents, links can be formatted in standard markdown, with the text in square brackets and the hyperlink in parentheses:

```
[text](hyperlink)
```

For the `index.rst` files, links must be formatted as follows. Note the text is followed by the hyperlink in pointy brackets, everything is wrapped in backticks, and then followed by an underscore.

```
`text<hyperlink>`_
```

Links to external markdown documents

Something in this template causes `.md` extensions to get stripped, breaking links to things like markdown documents in a GitHub repo. This can be fixed by adding an anchor tag (#) to the end of the url. For example, `https://github.com/carpentries/handbook/blob/topic_folders/file.md` would become `https://github.com/carpentries/handbook/blob/topic_folders/file.md#`.

15.3 Additional information

This site is built from the main branch of this repo (carpentries/handbook). Changes can be previewed live here: http://docs-src.carpentries.org/. Changes to the actual site https://docs.carpentries.org/ can take up to a day to go live once changes have been pushed to GitHub, since the contents of the site are behind a CDN (Content Distribution Network) that caches content.

If you are making experimental changes to content please be sure to do so in a non-main, non-live branch. When your changes are complete and ready to be pushed to the live site, open a pull request in carpentries/handbook.

Draft content can be added to the drafts folder of the carpentries/userguides repo (in the main branch) without breaking anything. Draft content is not built to the live site and these files may contain inaccurate or out of date information.

LICENSE

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