

**ANNUAL  
REPORT**

**2018**



**You Belong In The Carpentries**



## A letter from our Executive Director

One of the things I learned early on is that it's not the road that you take, but who is on it with you. Trying new paths, being ok with stumbles, sharing the road, listening, sharing laughter (green stickies!) as well as challenges (red stickies!) and constantly learning and supporting each other make the **journey** worthwhile. In The Carpentries we teach **computational** and **data skills**, increasingly important in this digital age, but it is the approach that we share as a community that is our strength. We teach to include, to **empower**, to allow others to pursue curiosity and address questions that **impact** science and society, and we do this together. We started with Software Carpentry, added Data Carpentry, joined the two to form The Carpentries, and are now incubating Library Carpentry as an additional lesson program. We've taken a lot of roads together, and what has been consistent has been our community's commitment to each other and to **including** ever more people in the journey. In the next year, we plan to offer more support for local communities, while continuing to prioritize the connection of global communities. We are an open global team of volunteers, instructors and learners, and we have proven that we can go **further together**.

*Tracy K. Teal*  
Tracy K. Teal  
Executive Director



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Left to Right: Ethan White, Kate Hertweck, Amy Hodge, Ranieri Silva, Mateusz Kuzak, Sue McClatchy, Karen Cranston, Lex Nederbragt, Tracy Teal, Elizabeth Wickes

## A letter from our Executive Council

Governance is an important part of our community-focused organization. In 2014, Software Carpentry became its own fiscally sponsored project with just 1.5 staff and a democratically elected governance group. Around the same time, Data Carpentry was founded with an appointed governance group and core group of 3.5 staff. The emergence of The Carpentries as a **unifying** organization has included development of a revised governance strategy. The new Executive Council combines community-elected and council-elected members, and focuses on high-level strategic **planning** and **oversight**. This year, the Executive Council has been proud to lead the development of the mission, vision, and bylaws of The Carpentries. In drafting new **mission** and **vision**, the Executive Council recognized that the community-building aspects of the Carpentries now seem as important, if not more important, than the teaching of workshops. This is reflected in the new mission and vision statements and will be critical in strategic planning. The **bylaws** lay the foundation for how we will operate and continue as a sustainable project. We built upon the Software Carpentry bylaws, with new text reflecting lessons learned from the governance history of Data Carpentry and addressing the process of **expansion** through incorporation of new Lesson Programs, such as Library Carpentry. A top priority in 2019 is medium and long-term strategic planning to ensure **sustainable** growth in line with The Carpentries' mission and vision.

*K Cranston*

Karen Cranston  
Executive Council, Chair

*Kate Hertweck*

Kate Hertweck  
Executive Council

# OUR 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.

1998

Software Carpentry Founded

Data Carpentry Founded

2014

2015

Software Carpentry Lessons Published

Library Carpentry Founded

First Data Carpentry Lesson Published

2017

> 30 K Learners Reached

> 1 K Instructors Trained

Executive Council of The Carpentries Elected

Software and Data Carpentry Merge into The Carpentries

2018

Data Carpentry Social Science Lesson Published

Begin Incubation of Library Carpentry

First CarpentryCon

> 70 Member Organisations

Data Carpentry Geospatial Lesson Published

"It is great to see how much participants grow post Carpentries and then at some point start giving back. This community made such a big difference in my own personal growth."  
- Juan Steyn



Aligned in vision and sharing staff, Software Carpentry and Data Carpentry functioned as separate but collaborative projects until 2018. In order to better support the community, our Member Organizations, and curriculum, the two merged to form The Carpentries in January 2018.

The newly merged Carpentries became a fiscally sponsored project of the non-profit Community Initiatives in February 2018. The wide range of administrative services that Community Initiatives provides is tailored to projects with large numbers of volunteers and fully supports our mission.



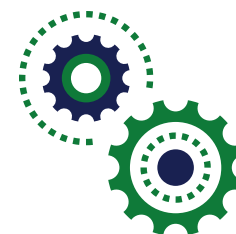
The first Executive Council of The Carpentries was elected and met throughout this year to develop our community's by-laws, mission and vision statements, and growth goals.

We held our first bi-annual conference, CarpentryCon in Dublin, Ireland. There were 120 attendees from around the world, and this represented the opportunity for many of them to collaborate for the very first time in '3-D'.



We released The Carpentries Handbook, which consolidated a very large range of resources scattered across websites, GitHub repos and mailing lists. The Handbook is a fantastic resource for anyone involved in our community.

Funding from the Alfred P. Sloan Foundation to build a collaborative lesson development framework allowed us to hire a Curriculum Development Lead. Work is now underway to develop infrastructure, guidelines and pathways for community engagement to establish open source lesson development as a practice. Scalable, collaborative data training is also in the works.



We have updated our Mission and are in the process of updating our Vision through community consultation to reflect the breadth of the newly merged Carpentries community. These principles communicate the values that unite our community and will guide our future activities.

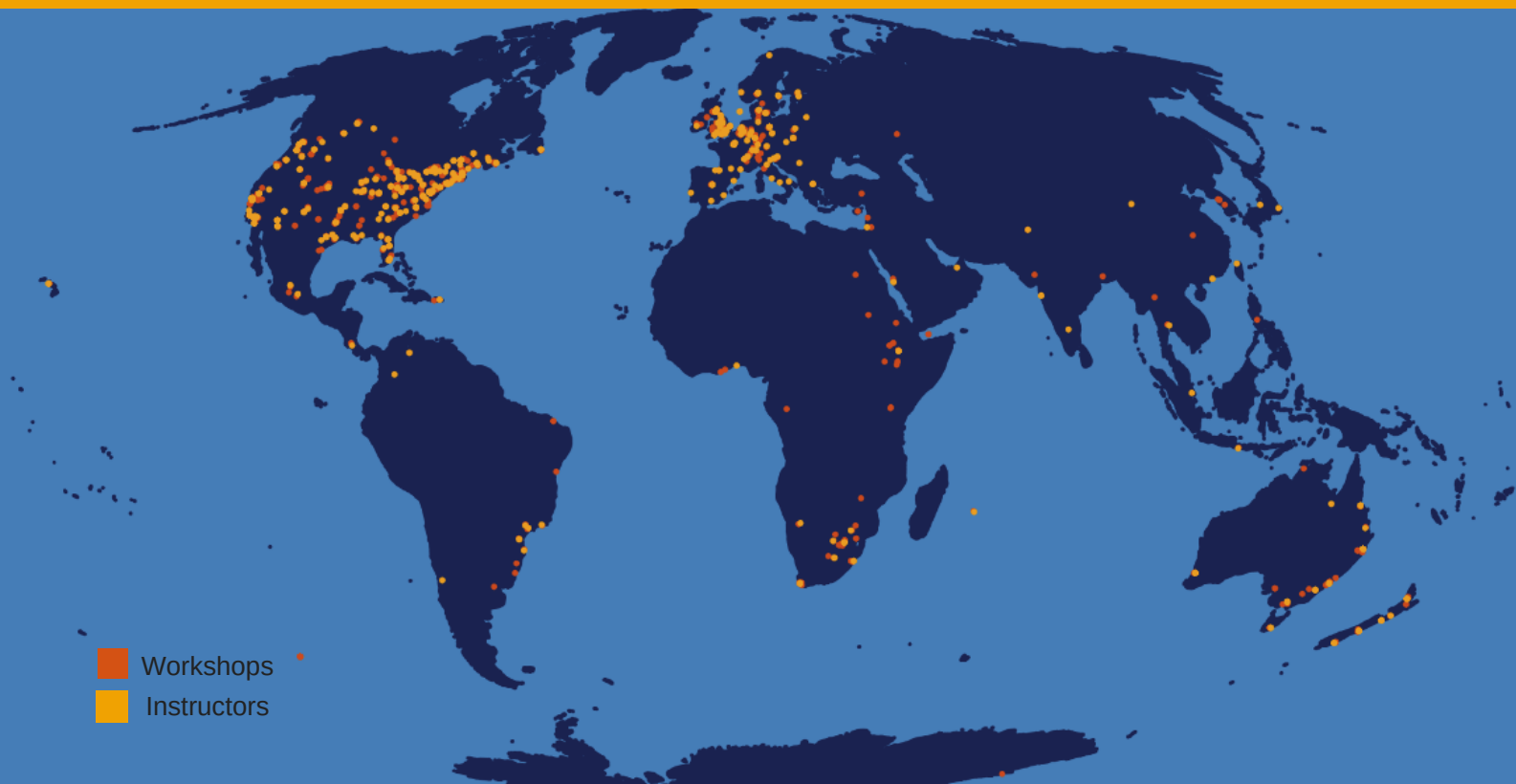
The Carpentries Executive Council voted to incubate Library Carpentry as a Lesson Program. This active, growing community has developed Carpentries-style lessons and shares a similar vision. A grant from the Institute of Museum and Library Services to the California Digital Libraries has provided support for the continued growth and development of Library Carpentry.



We conducted a review and subsequent revision to our longstanding Code of Conduct, which guides all our community interactions. The Code of Conduct Committee also participated in training to prepare them to enforce the code, if needed, and help protect the tenets of equity and inclusion so essential to our community.

In 2019 we will continue to run workshops and instructor trainings. We plan to create a lesson development curriculum, to support and develop local communities, and to integrate Library Carpentry as a Lesson Program. We are looking forward to an exciting and busy year ahead!

# OUR IMPACT



**76**  
Member  
Organisations

**38K**  
Learners  
Reached

"In my opinion the most revolutionary thing about The Carpentries is not *what* we teach, but *how* we teach it."  
- Damien Irving

**1.6K**  
Trained  
Instructors

**1.7K**  
Workshops  
Run

"...The Carpentries is the best way to prove that it is easy to learn new skills, it is fun to do it together, and that you don't need to be a super specialist to help other people solve their problems."  
- Gladys Nalvarte

**7**  
Continents

**46**  
Countries

"One of the reasons I got the job is that I am a qualified Software Carpentry instructor! Will definitely be using some of the materials to teach my colleagues."  
-Raissa Philibert

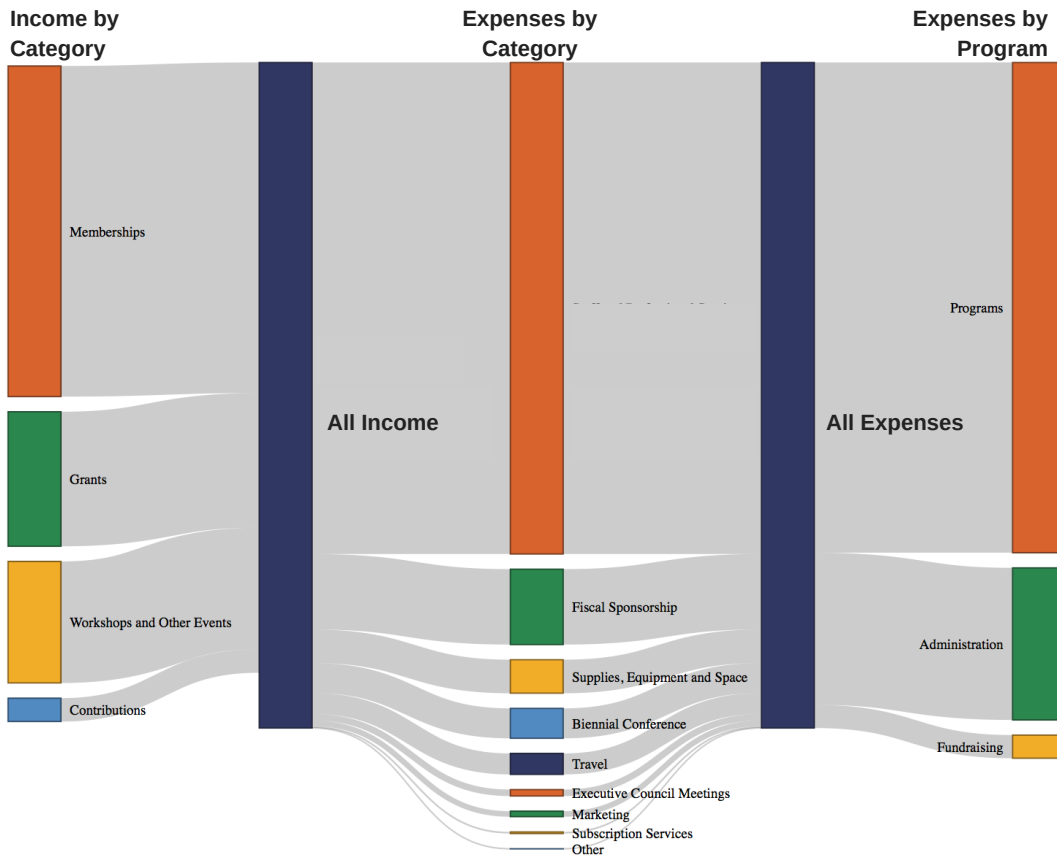
**74%**

of learners surveyed would recommend Carpentries workshops to a friend or colleague.

# OUR FINANCIALS

Fiscal year September 2017 to August 2018

## Flow of income and expenses

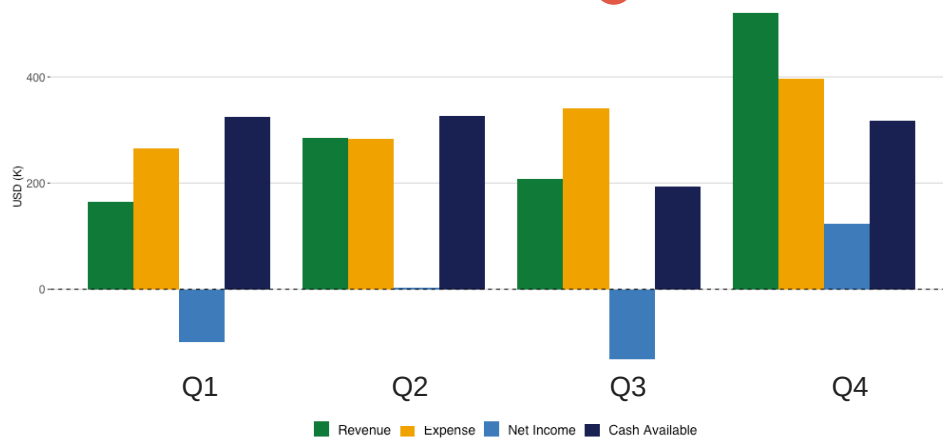


Income by Category	USD	Percent
Memberships	\$639,100	54.18
Grants	\$260,150	22.05
Workshops and Other Events	\$235,008	19.92
Contributions	\$45,379	3.85
<b>Total</b>	<b>\$1,179,636</b>	<b>100.00</b>

Expenses by Category	USD	Percent
Staff and Professional Services	\$950,126	73.85
Fiscal Sponsorship	\$145,833	11.34
Supplies, Equipment and Space	\$64,901	5.04
Biennial Conference	\$57,935	4.50
Travel	\$40,556	3.15
Executive Council Meetings	\$12,639	0.98
Marketing	\$10,769	0.84
Subscription Services	\$3,317	0.26
Other	\$455	0.04
<b>Total</b>	<b>\$1,286,529</b>	<b>100.00</b>

Expenses by Program	USD	Percent
Programs	\$947,581	73.65
Administration	\$294,072	22.86
Fundraising	\$44,875	3.49
<b>Total</b>	<b>\$1,286,529</b>	<b>100.00</b>

## Finances through the year



Q1 Finances	USD
Revenue	\$164,726
Expense	\$264,654
Net Income	(\$99,928)
Cash Available	\$325,230

Q2 Finances	USD
Revenue	\$285,432
Expense	\$284,187
Net Income	\$1,245
Cash Available	\$326,475

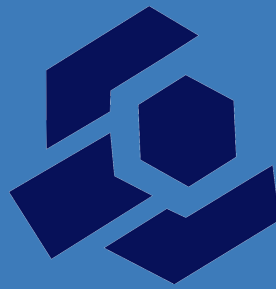
Q3 Finances	USD
Revenue	\$208,198
Expense	\$340,509
Net Income	(\$132,311)
Cash Available	\$194,164

Q4 Finances	USD
Revenue	\$521,280
Expense	\$397,178
Net Income	\$124,076
Cash Available	\$318,240

Thank you and congratulations to The Carpentries community for all the impactful and inspiring work that you contribute!

Instructors  
Instructor Trainers  
Champions  
Lesson Maintainers  
Learners  
Helpers  
Executive Council Members  
Hosts  
Member Organisations  
Community Initiatives Staff  
Carpentries Staff Members  
Workshop Administrators  
Curriculum Advisory Committee Members  
Code of Conduct Committee Members  
Instructor Development Committee Members  
CarpentryCon Task Force Members

# Further Together



[carpentries.org](https://carpentries.org)



[/thecarpentries](https://twitter.com/thecarpentries)



[/carpentries](https://github.com/carpentries)



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