
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](#).

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 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.

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 organizers 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

- 2019-02-28 Added appeal process, procedure for following up with a reportee, terminology, CoC incident response procedure, termed suspension checklist, and expanded clauses for conflicts of interest.
- 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 this document: Adam Obeng, Aleksandra Pawlik, Bill Mills, Carol Willing, Erin Becker, Hilmar Lapp, Kara Woo, Karin Lagesen, Pauline Barmby, Sheila Miguez, Simon Waldman, Tracy Teal. Additional language was added by [Otter Tech](#) from the [PyCon U.S. 2018 Code of Conduct](#) (licensed CC BY 3.0)

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 diffuse 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 (Tracy Teal) can also be contacted by telephone at +1-530-341-3230 or email at tkteal@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 Staff will be informed in order to prevent future harm to the community, and the Carpentries Staff [Immediate Response Checklist](#) will be employed.

Some incidents happen in one-on-one interactions, and though details are anonymized, 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 anonymized 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 Staff 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-organized 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 Organizing Workshops

If the suspended member is a Regional Coordinator or serves in another role whereby they organize 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.

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

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 here:

- [Software Carpentry pre-workshop survey](#)
- [Software Carpentry post-workshop survey](#)
- [Data Carpentry pre-workshop survey](#)
- [Data Carpentry post-workshop survey](#)

- [Library Carpentry pre-workshop survey](#)
- [Library Carpentry post-workshop survey](#)
- [Carpentries Long Term Impact 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 karijordan@carpentries.org.

3.1 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, but not necessarily in lessons. 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 organization is The Carpentries. However, terminology such as ‘A Carpentries workshop ...’ is acceptable.

3.1.1 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.

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.

3.1.2 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
-

3.1.3 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 Organization 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, 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 organization 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 ... ’

3.1.4 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.

3.1.5 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.

3.1.6 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.

first name, forename, given name

These terms to be used in preference to the term ‘Christian name’, which might offend non-Christians. Use first names 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.

foreign accents

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

foreign 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.

foreign words and phrases

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

fractions

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

3.1.7 H

honorifics and titles

Honorifics which denote occupations, *e.g.*, Doctor, Professor, can initially be used within text or in blog posts. Drop honorifics 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. . .’

Honorifics such as FRCS should not include full stops.

3.1.8 I

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 capsise.

italics

Foreign words and phrases, and scientific names, *e.g.*, *Macropus rufus*, *Bufo marinus*.

3.1.9 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* foreign names.

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.’

3.1.10 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 use the Oxford comma.

3.1.11 P

per cent

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

3.1.12 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.’

3.1.13 R

roles

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

3.1.14 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.’

3.1.15 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 Getting your news out there

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 Submitting blog posts

The Carpentries welcomes blog posts from our community members including workshop host sites, instructors, learners, and more.

3.3.1 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.

- 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've 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 staff 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.

If you wish to submit a blog post about a favourite tool or research workflow, you can submit the post through [this form](#) and we will post it on the blog for you.

3.3.2 How to Contribute a Blog Post to Data Carpentry

- 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/>.
- Posts go in the `_posts` folder.
- 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
```

- 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 Assessment Hackathon
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.

- 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"]`.
- 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've 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 staff 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.

If you wish to submit a blog post about a favourite tool or research workflow, you can submit the post through [this form](#) and we will post it on the blog for you.

3.3.3 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've 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 staff 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.

3.3.4 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've 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.

Alternative Ways to Post

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

If you wish to submit a blog post specifically about a favourite tool or research workflow, you can submit the post through [this form](#) and we will post it on the blog for you.

3.3.5 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.

3.4 Newsletter

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

3.4.1 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 standardized for all newsletter issues.

3.4.2 Submitting newsletter content

Carpentries staff manage newsletter content through this [private Asana project](#). Submissions from community members are welcome by emailing newsletter@carpentries.org.

3.4.3 Publishing the newsletter

This information is intended for staff 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 don't 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 staff channel so staff 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 doublecheck 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.

3.4.4 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.

3.5 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.

3.6 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 staff 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.

3.7 Presentations

It's great for community members to give presentations on The Carpentries! Include your work with The Carpentries in a presentation, or you're more than welcome to give talks or discuss the organization 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're 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.

[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!

3.8 Scheduling Online Community Events

The Carpentries offers three Zoom rooms for public community events. Zoom rooms are available for events such as discussion sessions, teaching demos, and committee meetings.

3.8.1 General Room Usage and Links

Rooms are generally used as follows. However, any room can be used for other purposes if it is available. Links below will open Zoom and enter the respective room.

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

Each room can have a host who will have privileges to mute people, create breakout rooms, etc. Please contact team@carpentries.org if you would like host privileges for an event.

3.8.2 Zoom Manual

The Carpentries online community events are held on [Zoom](#). The Carpentries staff will set up host access to our Zoom rooms for people leading community events. No login is needed for event guests; however a browser plug in may be required.

If you are leading an event, you will be given host access to the event. This will give you extra privileges including the ability to mute participants and assign participants into breakout rooms. Only one person can be logged in as host at a time, and another person logging in as host will kick the original offline. However, the host can transfer host privileges to other participants if you need to trade host status with co-facilitators during the event.

All Carpentries online events are set up such that participants can enter the room without the host being present. If you ever get an error message saying you can't join the room because you're not the host, please contact The Carpentries staff immediately.

Host abilities:

- “Mute” is in the lower left. To mute other participants, the host can go to “Manage Participants”, hover over a participant’s name, and click “mute”.
- 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.
- Only the host has the ability to create “Breakout rooms”. The button for this is on the lower left. Breakout rooms can be assigned automatically. By default, participants will be assigned to the same groups each time breakout rooms are used. You can change participants assignments manually if desired.
- The host can move between breakout rooms and can send messages to all rooms simultaneously.

General tips:

- “Gallery view” in the upper right toggles the display to show more participants videos.
- “Share screen” is at the bottom middle of the screen. To end “share screen” you click the red button that will appear at the top middle of the screen when you are in screen sharing mode.
- When you screen share, you have the option to share individual apps or your entire desktop. The default is the full desktop.
- The Zoom chat is not stable (it is not saved across sessions or after going into breakout rooms). We highly recommend using the Etherpad or Google Doc chat instead.
- 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.

3.8.3 Viewing Zoom Room availability

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

Room availability can be viewed below.

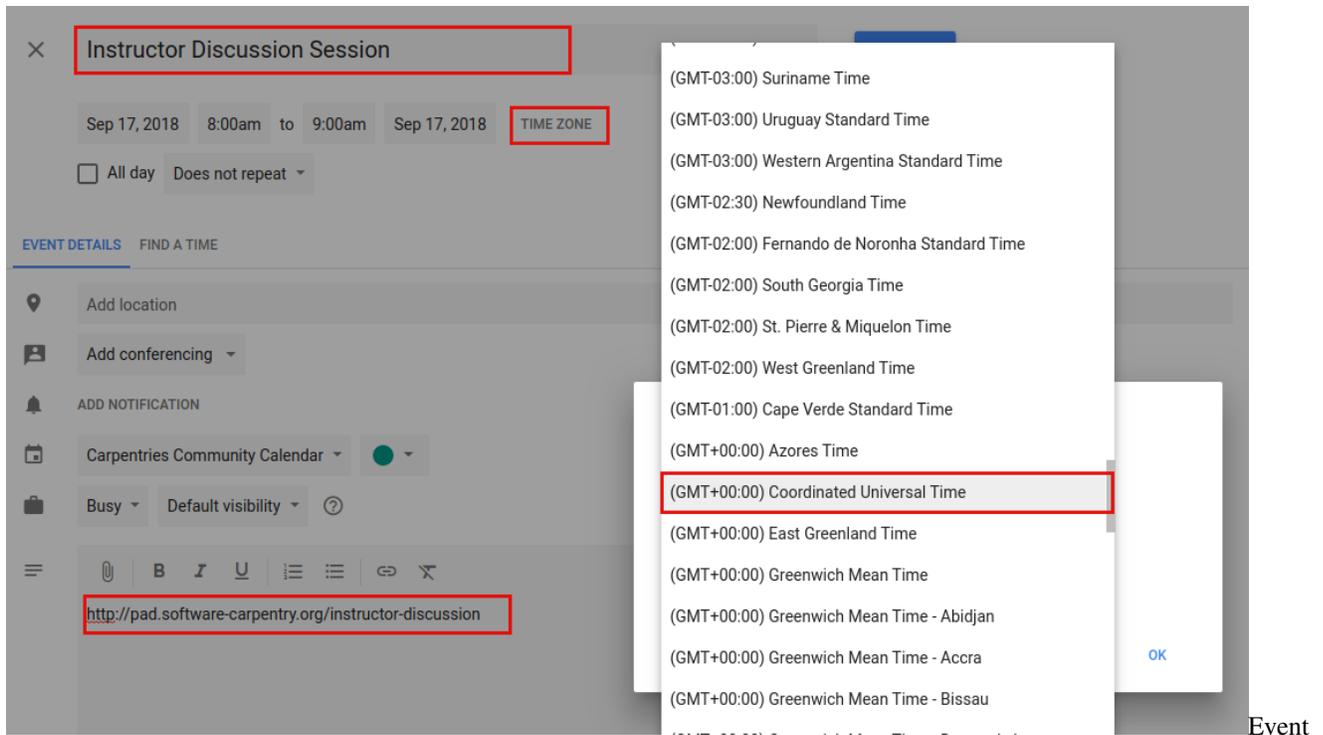
- Red: Room 1
- Orange: Room 2
- Green: Room 3

3.8.4 Adding an Event to the Community Calendar

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

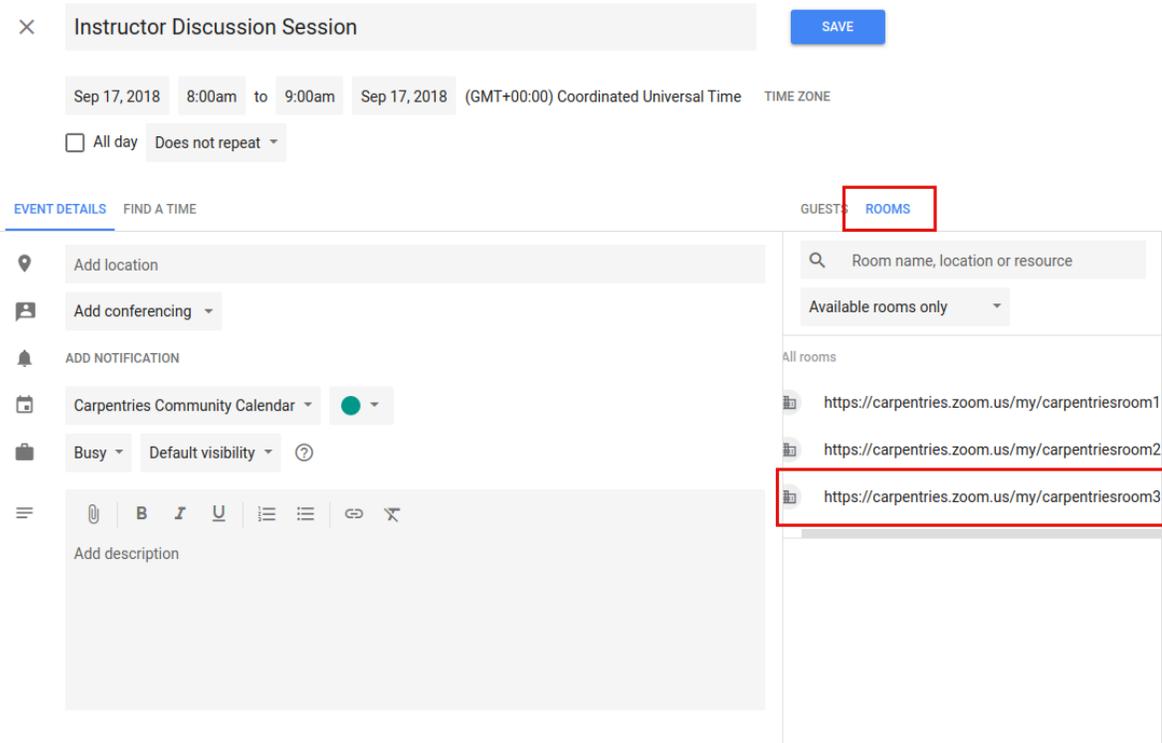
To add an event to the [Community Calendar](#) and book a Zoom Room for it:

- 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.



Setup

- Select a room.



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.

The screenshot shows the Google Calendar event creation interface. The event title is "Instructor Discussion Session" with a "SAVE" button. The date and time are set to "Sep 17, 2018 8:00am to 9:00am" on "Sep 17, 2018 (GMT+00:00) Coordinated Universal Time". There are options for "All day" and "Does not repeat". The "EVENT DETAILS" tab is active, showing a location field with a red border containing the Zoom link "https://carpentries.zoom.us/my/carpentriesroom3". Other options include "Add conferencing", "ADD NOTIFICATION", "Carpentries Community Calendar", "Busy", and "Default visibility". A rich text editor is visible for adding a description. On the right, the "ROOMS" tab is active, showing a search bar and a list of available rooms: "https://carpentries.zoom.us/my/carpentriesroom1", "https://carpentries.zoom.us/my/carpentriesroom2", and "https://carpentries.zoom.us/my/carpent". A "Reserved" label is visible at the bottom right of the room selection area.

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).

3.8.5 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.

3.9 Etherpads

3.9.1 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 synchronized 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.

3.9.2 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.

3.10 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.

3.10.1 Links to logo files

- [The Carpentries](#)
- [Data Carpentry](#)
- [Library Carpentry](#)
- [Software Carpentry](#)

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

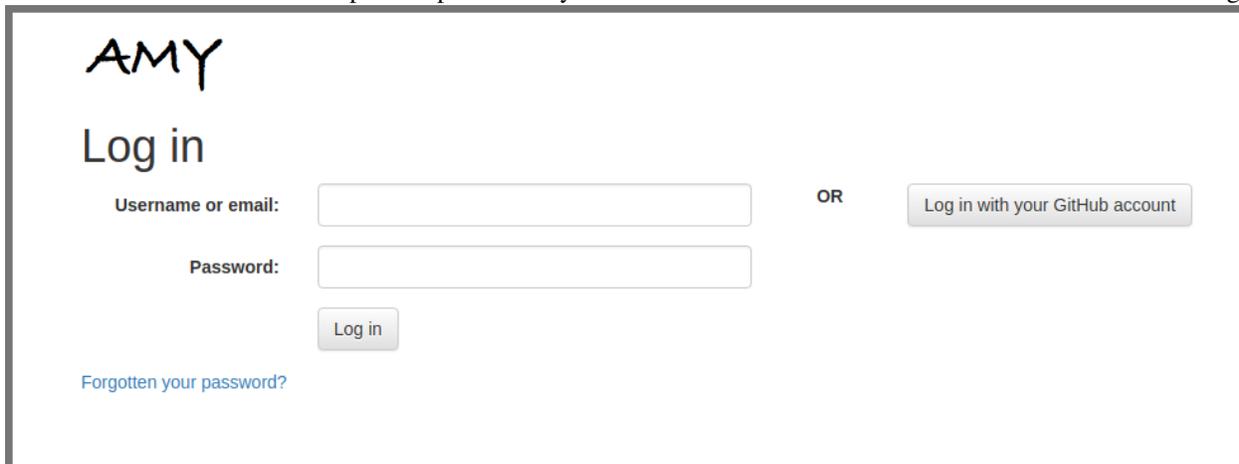
If you are interested in building a local community, then consider joining the [Carpentries Champions](#). Champions calls are run quarterly and you can hear from more experienced community members about what strategies you can try to build grassroots communities. There is already a [Carpentries Community 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 Instructor Profile

We maintain a record of information for each of our instructors in our AMY database system. To keep your AMY profile up-to-date 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. 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.



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

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. You can find a number of contacts for specific areas of work on our [Get Involved](#) page. Please [email us](#) if you'd 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’ll 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’s 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. While we would like to help everyone, we do need to prioritise people at our member organisations, who have provided funding to us to ensure that they can develop Instructor capacity in-house.

Therefore, if you are at an institution that is not affiliated to The Carpentries, there may be a substantial wait to become trained as an instructor.

We periodically review and score applications that have been submitted. When training places go unclaimed by member institutions, we invite applicants in order of scoring to fill any training seats unclaimed by a member institution.

How do we score applicants? See our [scoring rubric](#).

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, applicants from our waiting lists are personally invited to attend as seats become available.

5.1 The Carpentries Bylaws

5.1.1 1. Purpose

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 Program Membership

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 Membership

The Executive Council is responsible for assessing a prospective Lesson Program for acceptance into The Carpentries, which requires a majority vote. The Executive Director will be responsible for developing and implementing policies related to Lesson Program incubation and assessing the ability of the staff 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 Lesson Program Committee to serve as community governance organization and act as a point of contact with The Carpentries Executive Council and staff. The Lesson Program 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 Lesson Program Committee can choose to discontinue the Lesson Program's association with the Carpentries. In either case, notice must be given to the other organization to arrange for separation of responsibilities and resources.

5.1.3 3. Organizational Membership

Eligibility, Rights, and Termination of Organizational Members

Member Organizations 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 Organizations financially support The Carpentries in exchange for priority access to instructor training and guidance in building training capacity at their organization.

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

Individuals who satisfy at least one of the following conditions are eligible for Voting Membership, as assessed in a yearly timeframe associated with the dates of the election (Dec 1 to Nov 30):

1. Every individual who has completed instructor or trainer certification in the past year
2. Every individual who has completed their instructor certification in the last two years and has taught at least one workshop of The Carpentries
3. Every individual who is a certified instructor and has taught at least two workshops of The Carpentries in the past two years

4. Any individual who has participated on a committee, served as a mentor or maintainer, or otherwise made a significant contribution, to any Lesson Program or The Carpentries organization in the past year, as determined on a case-by-case basis by the Executive Council, and thus is considered active in the community

The Executive Director is not eligible for Voting Membership.

All individuals who satisfy conditions for 1-3 above are automatically tracked and will receive Voting Membership. Any individual who only satisfies condition 4 may receive Voting Membership by contacting The Carpentries staff within a reasonable timeframe prior to release of ballots to confirm their participation, as dictated by the Election Policy.

Any individual who no longer wishes to be affiliated with The Carpentries or included as a Voting Member must inform The Carpentries staff 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 organization, the Executive Council is responsible for:

- determining the mission and purposes of the organization
- selecting the Executive Director and evaluating their performance
- strategic and organizational 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 organization's mission, policies, programs, and needs
- reading and understanding the organization's financial statements
- serving as active advocates and ambassadors for the organization 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 organization'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 (9) Members, each serving a two-year term, without limit on the number of terms. Member terms will begin on February 1st, except when filling between-election vacancies (see below). Five (5) Members of the Executive Council will be elected by the Executive Council (hereafter referred to as “Council-elected Members”). The other four (4) Members will be elected by the Membership of the organization (“Community-elected Members”). No employer may have more than two elected or appointed representatives on the Executive Council, and Carpentries staff 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 (10) 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.

Compensation

Members of the Executive Council shall not receive compensation from the Organization 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 (3/4) of the other Members of the Executive Council. A vote to remove a Member must be announced in writing to the entire Executive Council at least ten (10) days in advance of the vote. 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 (4) to five (5) of the nine (9) 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-October: 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 November: Self-nominations and recommendations close and the Executive Council hosts Community Calls to discuss the election and introduce candidates for Community-elected Members

- Early December: Voting Members vote for Community-elected Members
- Mid-December: 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 (2) 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 staff may not stand for election. If there are fewer than two candidates for the election, the current Community-elected Members 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 (2) or three (3) 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

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

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)
- Receive all communication from community to Executive Council and relay as necessary

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 year.

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.

5.1.8 8. Committees

Committee Formation

Committees are organized by the Executive Council to carry out specific tasks as delegated on an ongoing basis. Task forces are similar in that they perform specific tasks, but on a short-term basis (e.g., a year or less) and may be organized by staff. Both committees and task forces are overseen by staff, although the Executive Council may request quarterly reports on each group's activities.

5.1.9 9. Staff

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 organizations, 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 and interviewing 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

5.2 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.

5.2.1 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 staff.
- 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 staff 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 staff 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 communities and domains 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.

Update log:

- [Approved 2018-11-01](#) 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 Community Engagement Lead) 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 Staff 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:

- Organizing 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 organizes Community Discussions. This document describes how community discussions are organized 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:

- African Task Force
- Carpentries en Latinoamérica
- CarpentryCon Task Force
- Code of Conduct Committee
- Instructor Development Committee
- Lesson Infrastructure Committee
- The Carpentries Executive Council

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 based 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’re 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 don’t have to “fly solo” in your first session.

6.2.4 Signing up to Host or co-Host a Community Discussion

If you'd like to host a pre/post-workshop session:

- Identify a session you'd like to host OR co-host on the Community Discussions etherpad: <http://pad.carpentries.org/community-discussions>
- Type your name in the “Host” or “Co-host/notetaker” slot for the session you've chosen (email next to your name optional, however, if you provide your e-mail it may help facilitate communication before and after the discussion)
- Add the time/date details of the discussion session you're going to be a “Host” or “Co-host/notetaker” for on your calendar
- Copying the etherpad link in your calendar event is a good idea, too!
- Make sure that you're subscribed to the [discussion-hosts mailing list](#).

If you'd like to host a pre/post-workshop session:

- Complete [this form](#).

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 here: <http://carpentries.github.io/instructor-training/checkout/>.
- Encouraging attendees to create issues or pull requests to correct problems.

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 organizing 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.

The Discussion Session Coordinator is responsible for scheduling the events and inviting instructors who are about to teach and who have recently taught.

Meeting scheduling will be coordinated via this [Etherpad](#).

The dates of community discussions are also listed in the Carpentries [community calendar](#).

1. Invitations for checkout participants are tracked through two spreadsheets - one for instructors doing a [post-workshop debriefs](#), sent weekly, and one for instructors doing a [pre-workshop discussion session](#), sent every other week.
2. Use the [email templates](#) for the respective discussion invitation. Replace the variables in brackets with the appropriate information for that session.
3. Log in to [AMY](#). Go to the [reporting section](#) to the “List of instructors by time period” section. Filter for instructors in the relevant time period. Download this list as CSV to easily read each instructor’s email address.
4. Send the templated email to all participants as `bcc`, and copy the Instructor Development Committee Co-Chairs as well as `team@carpentries.org`.
5. Email `team@carpentries.org` with any instructors with missing or invalid emails.

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.
 - Don’t 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 organization?
 - 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’d 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 Email Templates

Pre-workshop Discussion

Subject: Carpentries Pre-Workshop Discussions

Dear instructors,

If you are receiving this message, you are scheduled to teach a Carpentries workshop over the next several weeks.

The Carpentries Instructor Development Committee hosts community discussions every week to share ideas and experiences among instructors. If you have any questions or concerns about your upcoming workshop, or are interested in chatting with other instructors about your or their own experiences teaching, we encourage you to attend!

Upcoming discussions will occur on [Date 1], [Date 2] and [Date 3]. Each date has two time slots to accommodate time zones. You can sign up for the most convenient time on this Etherpad:

<http://pad.carpentries.org/community-discussions>

We hope to see you in the next few weeks!

Cheers, [Your name] Carpentries Instructor Development Committee

Post-workshop Debriefing

Subject: Carpentries Workshop Debriefing

Dear instructors,

If you are receiving this message, you have recently instructed at a Carpentries workshop.

The Carpentries Instructor Development Committee hosts community discussions every week in order to hear how workshops have gone, and we invite you to attend a discussion in the next few weeks to share about your recent workshop. Even if you have attended a debriefing discussion before, we would appreciate feedback on any workshops you have done since then - we value hearing about your experiences.

Upcoming discussions will occur on [Date 1], [Date 2] and [Date 3]. Each date has two time slots to accommodate time zones. You can sign up for the most convenient time on this Etherpad:

<http://pad.carpentries.org/community-discussions>

In addition to participating in the general discussion, we also welcome past instructors to co-host future discussions. Co-hosting a community discussion is a great way to share your expertise with both new and experienced instructors and is a lot of fun! To co-host a future discussion, just sign up on the same Etherpad above, or complete [this form](#) if you'd like to host a themed discussion session.

We hope to see you soon!

Cheers, [Your name] Carpentries Instructor Development Committee

Call for Instructors (to Instructor Development Committee)

Subject: Call for Hosts - Carpentries Community Discussions

Hello,

The Discussion Host Coordinator has posted new community discussion dates on the Community Discussions Etherpad: <http://pad.carpentries.org/community-discussions>

The following discussion sessions are in need of discussion hosts!

- [Date 1, UTC time, time zones - example below]
- Tuesday, May 1, UTC 21:00 UTC (Wed 7am AEDT, 5pm NYC, 2pm LA) - Aus/S. America/N. America

Please feel free to browse other community discussion sessions to see if there is a date/time that works for you to sign on as a host! If you have questions about hosting, please visit the Instructor Development Committee onboarding document's section about host expectations: https://docs.carpentries.org/topic_folders/mentoring/mentoring-subcommittee-roles.html#discussion-hosts

We hope to see you soon!

Cheers, [Your name] Carpentries Instructor Development Committee

6.3 Community Discussions Workflow

This workflow was established for the [Instructor Development Committee Discussion Session Coordinator](#) to organise The Carpentries [Community Discussions](#).

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'll 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
```

(continues on next page)

(continued from previous page)

```

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’ve contacted the individuals.
- Communications Tasks
 - Inform the Carpentries Staff 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 Community Engagement Lead on serah@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’s a handy blog post drafting guide to help them get started](#)

6.3.2 Preparing to Host a Carpentries Community Discussion

- [Optional] Identify a Community Discussion Moderator
 - Identify someone to moderate the Community Discussion. This individual will:
 - Introduce the facilitator
 - Remind participants that we are following the Carpentries CoC
 - 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 recognize those attending the discussion for checkout and facilitate Q&A for checkout participants.
- Share Zoom Room Credentials & Practice Breakout Rooms
 - Contact the Community Engagement Lead on serah@carpentries.org in case you need alternative Zoom Room Credentials shared.
- [Optional] Review [The Carpentries Community Discussions Host Onboarding slide deck](#)

6.3.3 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 Engagement Lead on serah@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 Engagement Lead to merge by emailing serah@carpentries.org or tagging [@serahrono](#) 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 Community Engagement 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: Organizing Workshops

- Introductions, review the Carpentries community culture, and communication channels.
- Introduce existing workshop resources. Identify challenges for organizers.
- 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'd 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)
- Organizing Workshops
 - Logistics of organizing 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 staff 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.
- Personalize 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's 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 Kari L. Jordan. 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 Community Engagement Lead on serah@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

7.1 For Trainers

7.1.1 Trainer Duties and Agreement

As of May 2017, the Trainers group adopted a Trainer Agreement outlining Trainer duties. Only active Trainers are voting members of the Trainer community. An inactive Trainer may re-activate their Trainer status at any time by resuming Trainer activities.

Trainer Agreement

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 “show, don’t tell” policy 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. Therefore, to be an active Trainer, I agree to:

- Teach at least two instructor training events per year
- Host on average four teaching demonstrations per year (1 per quarter)
- Regularly attend [Trainer meetings](#) when possible and read meeting minutes/notes when I am not able to attend
- Read emails sent to the Trainer listserv
- Keep up-to-date with the instructor training curriculum

- Teach a curriculum that fulfills all of the current requirements for instructor certification
- Provide feedback to other trainers and Carpentries staff about training events to help continue developing our offerings

I understand that The Carpentries staff need 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 a Trainer, I will let The Carpentries staff know. I understand that only active Trainers are voting members of the Trainer community, but that I will be able to re-activate my Trainer status at any time by resuming Trainer activities.

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 enrollment. 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)

Four weeks before the event

- Contact your co-Trainer(s) and decide who will teach what.
- Create an event Etherpad (using the [Etherpad template](#)) or Google Doc (using the [Google Doc template](#)) and a workshop website (using the [training template](#)). *Note the Google Doc is not currently maintained and may not be in sync with lesson materials.*
- Send Etherpad/Google Doc and website links to training@carpentries.org.

One week before the event

- Plan logistics with co-Trainer(s)
- Review (or set aside time closer to the event to review) the pre-assessment survey results for your workshop
- If teaching remotely:
 - Get acquainted with using [Zoom](#) for videoconferencing.
 - Test videoconferencing set up with co-Trainer(s) using login credentials provided.
- Decide with co-Trainer(s) whether all Trainers should be present for the full event or if you will log on during your scheduled teaching times only.
- Make a copy of the [Virtual Minute Cards template](#) and personalize for your event.
- If teaching in person:
 - Confirm with your host that breakout rooms are available or make an alternate plan
 - Create a plan for printing handouts & determine who will bring sticky notes
 - Make sure you're prepared for the audiovisual setup in your room with the correct dongles/connectors etc.
 - Check on availability/timing of coffee, lunch, or any other details that matter to you

During the event

- Take attendance.
- Remind member trainees to fill out application (Open Training applicants have already done this).
- Remind trainees to sign up for demo, discussion (links in [checkout checklist](#)).
- Monitor the Etherpad / Google Doc for questions and responses to exercises.
- If teaching remotely: Turn off video during long exercises and coffee breaks and disconnect during lunch.

Immediately after the event

- Send a list of those who completed the training to checkout@carpentries.
- Send an email to trainees thanking them for participating and linking to [checkout checklist](#) using [this template](#)
- Review survey results and prepare to discuss at upcoming [Trainers discussion meeting](#).
- File any relevant issues or PRs to the [instructor training repo](#).

Long-term after the event

- Join a [Trainer meeting](#) to discuss how your event went.

Differences Between In-person and Online Training Events

In-person trainings

- When watching videos, project them to the whole group.

- Assign (or let participants select) physical breakout groups.
- Use physical sticky notes to get minute card feedback at lunch breaks and end of each day.

Online trainings (a few small groups)

- When watching videos, have one Trainer do a screenshare with their audio on or have one person in each group play the video for the participants at their site.
- Assign (or let participants select) physical breakout groups.
- Use the [virtual minute card](#) form to get feedback at lunch breaks and end of each day.
- Have participants do all small-group exercises with participants at same site.

Online trainings (completely distributed)

- When watching videos, have all participants watch separately.
- Assign breakout groups randomly to breakout rooms in Zoom. Be sure to remove Trainers and helpers when assigning groups.
- Use the [virtual minute card](#) form to get feedback at lunch breaks and end of each day.
- Have participants screen share with their breakout room during the live coding exercises.
- For exercise to set up a workshop website, put participants in breakout rooms and have one person screen share while the others help guide them verbally.

Running a Teaching Demonstration

If you would like to watch an example teaching demo, there is a recording of one [here](#).

Before the demo

- Sign up to [lead demos](#).
- Get acquainted with using [Zoom](#) for videoconferencing.
- 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 summarize 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 emphasize 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.

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

- Email checkout@carpentries.org with names, pass/fail, and SWC/DC/LC for each of your trainees.
- 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.

- 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 8 weeks meetings; can miss one meeting; ~10 hours reading
- Join Trainer meetings
 - Time commitment: 1 hour per month; can miss one meeting
- Shadow a teaching demonstration session
 - Time commitment: 1 hour one time
- Shadow at least half a day of an online instructor training event
 - Time commitment: 4 hours one time
- Teach once either online or in person with experienced Trainer (after finishing book club)
 - Time commitment: 2 days one time plus prep
- Agree to the [Trainer Agreement](#).

Total time commitment for continuing Trainers: 4 days per year + 2.5 hrs per month

Total time commitment for new Trainers: 3 days + ~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 staff 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 emphasizes 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 Trainer Coordinator

The Trainer Coordinator plays an essential role in The Carpentries community by ensuring that teaching demonstrations run smoothly and by coordinating meetings for the Trainers group. The duties for this position are estimated to take about two hours per month.

Duties

Weekly:

- Check the [teaching demonstration Etherpad](#) to ensure that all events for the next two weeks have Trainers listed.
- If any events don't have a Trainer listed, send out a reminder to the [Trainer Slack channel](#) and the [Trainer mailing list](#) asking Trainers to sign up. See the [email templates](#) for suggested language.
- If one week before the demo is scheduled to take place, there is still no Trainer available, email team@carpentries.org. The Carpentries staff will try to find a staff member to cover the demo.
- If three business days before the demo, there is still no one available to lead, send [an email](#) to the trainees who are signed up. Also, change the status to "Cancelled" on the Etherpad and [notify the Trainers group](#) that we had to cancel an event.

Bi-monthly:

- Add teaching demonstration sessions for the next two months to the [teaching demonstration Etherpad](#).
- Use the [Event Time Announcer](#) to create a new event. Set the event location as "UTC".
 - Set the month, day, year, hour, minute, and second to reflect the recurring times on the Community Calendar.
 - Click "show result" and verify that the event is displaying in UTC. It will also display in your computer's system time.
 - Add the link to the [teaching demonstration Etherpad](#).
- Make sure that the sessions are also listed on the community calendar.
 - Events are listed on the community calendar as recurring with no end date. They will only need to be modified if there are changes made to the teaching demo schedule.
 - If you do not have edit access to the community calendar, contact team@carpentries.org.
- [Email the Trainers mailing list](#) and post a message to the [Trainer Slack channel](#) asking people to sign up for teaching demos for the next two months.

- Add Trainer Discussion and Business meetings to the [Trainers Etherpad](#) using the template at the bottom of the Etherpad.

Bi-weekly:

- Send out reminders to the Trainers mailing list and Slack channel about upcoming *Trainer Discussion* and *Business meetings*.

Monthly:

- Take notes in Trainer Business meetings.
 - If not available to take notes, coordinate a replacement notetaker.
 - Submit notes as a pull request to the [Trainers' GitHub repository](#).
 - Send *email to Trainers mailing list* and post to Slack channel after Business meetings with a link to the notes.
 - * Note: There is no need to take notes in Trainer Discussion meetings.

Email templates (Trainer Coordinator)

Teaching demos without hosts

Subject: Need hosts for upcoming teaching demos

Dear Trainers,

Thanks to everyone for signing up for leading teaching demonstrations in the coming weeks. Please note that we are missing a Trainer to lead a session on [time and date UTC] [time and date link]. If you are available to lead, please add your name to the Etherpad. If we don't have a host scheduled one week before the event we will need to cancel the demo and ask trainees to reschedule.

Here are some additional events in the next month that don't have a Trainer listed yet. Please sign up on the Etherpad if you're available.

- [list available sessions by UTC and with time and date links]
- [list available sessions by UTC and with time and date links]

As always, if you haven't led a teaching demo before, now's a great time to start! You can get a feel for how they are run by observing someone else's demo session or watching a recorded [teaching demo session](#). If you'll be attending someone else's training, please let the Trainer who is running the session know that you'll be there.

If you have any questions about running a teaching demo, please contact [Erin Becker](#).

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 next week at [time in UTC from Etherpad] [time and date link]. Unfortunately, due to lack of volunteer availability, we need to cancel this session. There are still spots open in the upcoming sessions listed below (for which we do have leaders confirmed!).

- [list available sessions by UTC and with time and date links]
- [list available sessions by UTC and with time and date links]

Please add your name to one of these or another session. I apologize for any inconvenience this has caused for you and hope that you are able to reschedule your demonstration soon. I'm looking forward to having you in our instructor community.

Sincerely,[Name]

Teaching demo cancelled - Trainers

Subject: Teaching demo cancelled - no host

Dear Trainers,

This is just a quick notice that we've had to cancel a teaching demo for this coming week due to lack of Trainer availability. I've already followed up with the trainees who were scheduled to teach during that session and asked them to reschedule. If you haven't led a teaching demo in a while, please check out the upcoming sessions on our Etherpad: <http://pad.software-carpentry.org/teaching-demos> and sign up if you're available.

As always, if you haven't led a teaching demo before, now's a great time to start! You can get a feel for how they are run by observing someone else's demo session or watching a recorded [teaching demo session](#). If you'll be attending someone else's training, please let the Trainer who is running the session know that you'll be there.

Best,[Name]

New teaching demos available

Subject: New teaching demos available for [Months]

Hi folks, I've updated the teaching demo Etherpad to include dates through the end of [Month]. It would be great if everyone could check out the available time slots and sign up. Please remember that we need each Trainer to run one teaching demo every three months in order to cover all of the events.

A few events still need coverage in [Month]. Please sign up on the Etherpad if you can take any of the following:

- [list available sessions by UTC and with time and date links]
- [list available sessions by UTC and with time and date links]

As always, if you haven't led a teaching demo before, now's a great time to start! You can get a feel for how they are run by observing someone else's demo session or watching a recorded [teaching demo session](#). If you'll be attending someone else's training, please let the Trainer who is running the session know that you'll be there.

Thanks!

All the best,[Name]

Discussion Meeting reminder

Subject: Trainer Discussion meeting this week

Hi all,Just a quick reminder that we'll be having our Trainer Discussion meeting this week. Please join us to share your recent instructor training experience and get advice about upcoming events. Meeting details are here: <http://pad.software-carpentry.org/trainers>.

All the best,[Name]

Business Meeting reminder

Subject: Trainer Business meeting this week

Hi all, Just a quick reminder that we'll be having our Trainer Business meeting this week. Please check out the agenda and join here: <http://pad.software-carpentry.org/trainers>.

All the best, [Name]

Business Meeting notes available

Subject: Trainer Business meetings notes

Hi all,

Thank you to all who attended our Business 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 comments, contact [Erin Becker](#) or send a mail 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-recovered> 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 didn't pass teaching demo

Subject: Carpentries instructor training: Teaching Demo

Hi [trainee name],

Thank you for doing a teaching demonstration. While you demonstrated good command of the subject material, I've determined not to pass you based on [reason]. [Explanation of this reason.] We are excited about having you as a Carpentries instructor and I would be happy to see you do another teaching demonstration [making these changes] to certify as an instructor.

Please let me know if you have any 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 staff. 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. If you have any questions, please email checkout@carpentries.org.

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/traduccion/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](https://github.com/carpentries/latinoamerica/blob/master/traduccion/demo.md) de cómo funciona la sesión de demostración de enseñanza aquí: (<https://github.com/carpentries/latinoamerica/blob/master/traduccion/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 did not pass teaching demo

Subject: Entrenamiento para instructor de las Carpentries: Demostración de enseñanza

Hola [nombre del aprendiz],

Gracias por presentar tu demostración de enseñanza. A pesar de que has demostrado un buen conocimiento de los temas cubiertos, he determinado no aprobarte basada/o en [razón]. [Explicar la razón]. Estaremos muy contentos de recibirte como instructor de las Carpentries en el futuro y me gustaría verte hacer otra demostración [especificar los cambios necesarios] para certificarte como instructor.

Por favor, hazme saber si tienes alguna pregunta o inquietud.

Saludos,

[nombre del remitente]

Spanish: trainee did pass teaching demo

Subject: Entrenamiento para instructor de las Carpentries: Demostración de enseñanza

Hola [nombre del aprendiz],

Estoy muy contenta/o de 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. Es un gusto recibirte como instructor/a de las Carpentries. Ya he mandado esta información a nuestro staff. Si esta fue la última parte de tu proceso de certificación recibirás tu certificado oficial de las Carpentries en alrededor de una semana junto con las instrucciones para inscribirte para impartir talleres. Si aún tienes que completar algunos pasos en tu proceso de

certificación asegúrate de completarlos antes de la fecha límite. Si tienes alguna pregunta, por favor manda un correo a heckout@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 Staff 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 Staff 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 questionnaire](#).
2. Carpentries Staff 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 Staff 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 Staff 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 staff 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] - [STAFF 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 staff (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 staff (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 Program 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 Program Manager updates it on the [Member information page](#) and on the internal Carpentries staff 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 Administrative Specialist notify the Program 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 staff only.*

The Program 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-localized. This enables them to know each other over the course of the event and build up your local community. We recognize 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 (http://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 <http://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 enrollment. 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 <http://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 colors of sticky notes (enough for each person to have at least 4 of each color). 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 (<http://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 staff 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

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.**

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]

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 customize your Etherpad as appropriate.

Get in touch with your co-Trainer(s) to decide who will teach which sections of the curriculum: <http://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 read more about how to use Zoom here: https://docs.carpentries.org/topic_folders/instructor_training/trainers_guide.html?highlight=zoom#zoom-manual-online-trainings. Logging in with the credentials below will give you host access, including creating breakout rooms and muting participants as needed. Please do not share these credentials with anyone. Participants will be given a direct link to enter the Zoom room and do not need these credentials.

Username: room1@carpentries.org Password: (hide for template email) Direct link: <https://carpentries.zoom.us/my/carpentriesroom1>

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: <http://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. 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 <http://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!

Best, [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 enrollment, 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: http://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: http://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: http://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 organization. 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 organization. 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://softwarecarpentry.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 organizations 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-organized workshops, you are also able to organize 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).

We also have a team of Regional Coordinators who help run workshops and build Carpentries communities around the world. You can read more about who they are and what they do here: <https://carpentries.org/regionalcoordinators/>

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 finalize 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 (<http://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]

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:

- Recognizing 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.
 - Emphasize 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](#)

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/fixform.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-DD Scheduled 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]

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 endeavor 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 organizing and tagging issues.
 - Bringing in updates to the lesson template.

Maintainers represent The Carpentries community and should strive to embody The Carpentries philosophy, by:

- Recognizing 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.
- Emphasize 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 don't 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 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

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](#).

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 maximize attendance. This needs to be done manually from the whenisgood results, as there isn’t 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 homeworks.
13. After the final onboarding meeting, do the following for each of the Maintainers who have completed the onboarding requirements:
 - Give them “write” access to their lesson repository on GitHub.
 - Add their name to the lesson table on the website.
 - Award them a Maintainer badge in AMY.
14. Send [email](#) to the Maintainers email list announcing new Maintainers.
15. Run `sendmail_maintainer_certificates.R` to send new Maintainers their certificates.
16. Announce new Maintainers in the next newsletter.

9.7 How to label issues

9.7.1 How to populate a GitHub repository with these labels

The `carpenter` 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 doesn’t exist), a `~/ .Renviron` file, and add (replacing the `XXXX` with your actual PAT):

```
GITHUB_PAT=XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
```

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 didn’t work it will display empty quotes (`" "`).

5. Use the `remotes` package to install `carpenter`. Type at the R console in RStudio:

```
remotes::install_github("fmichonneau/carpenter")
```

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 `carpenter` package and create the labels on one repository:

```
library(carpenter)
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).

9.8 Email Templates

9.8.1 Inviting new Maintainers

Subject: Invitation to become a Carpentries Maintainer CC: Existing Maintainers for the repo and other new Maintainer applicants for the same repo.

Hi all,

Thank you for applying to become a Maintainer for {lesson name and link to repo}. We’re excited to have you on the Maintainer team! Your co-Maintainers are cc’d here.

As a Maintainer, you’re part of a team that is responsible for ensuring that your lesson materials stay up-to-date, accurate, functional and cohesive. You’ll monitor your lesson repository, make sure that PRs and Issues are addressed in a timely manner, and participate in the lesson development cycle including lesson releases. {Add a sentence about when the next lesson release is scheduled for.}

The new Maintainers for all of the Carpentries lessons will be meeting a few times before {month} for onboarding and training in the Carpentries maintenance workflow. Please fill out this schedule poll {add link to poll} by {deadline} with your general weekly availability. Our first meeting is tentatively set for the first week in {month} and we will be meeting three times. Don’t forget to select your timezone before filling out your availability. We have new Maintainers joining the team from all over the world, so please be as flexible as possible.

New Maintainers will be given write access to their lesson repos after completing the onboarding process. In the meantime, please start becoming familiar with your lesson materials, sign up for the [Maintainer mailing list](#), and check out the dates of the next [Maintainer general meeting](#). You're more than welcome to start attending Maintainer meetings before our onboarding. Please let me know if you have any questions. Looking forward to seeing you in March!

Best, {name}

9.8.2 Maintainer onboarding meetings

Subject: Maintainer Onboarding Meetings

Hi everyone,

Thank you for adding your availability to the scheduling poll. Based on everyone's responses, we will be meeting at two different times. You do not need to attend the same meeting each week, and I would actually encourage those who can do so to switch which meeting they attend so that we can all meet one another over the course of the onboarding.

We will be meeting for three weeks, starting the week of {date}. You can see the meeting times in your local time zone on [our Etherpad](#). If you know that you will need to miss one of our meetings, please let me know as soon as possible so that we can make alternative arrangements for you to complete the training.

Before our first meeting, please:

1. Sign up for the [Maintainer mailing list](#). This is a low-volume channel for communicating about issues relevant to the Maintainer community.
2. Add Maintainer meetings to your schedule. The meeting times are listed on the [Maintainer Etherpad](#) and on the [Community Calendar](#). The Maintainer monthly meetings are not mandatory, but are encouraged as a way of getting to know the more experienced Maintainers.

If you have any questions, please let me know.

Looking forward to meeting all of you next month!

Best, {name}

9.8.3 Onboarding reminder

Subject: Reminder - Onboarding starts next week

Hi all,

Just a quick reminder that we'll be starting our onboarding meetings next week. Please sign up for one of the two available sessions on our groups [Etherpad](#).

During our meetings, we'll be test-running a [new curriculum for Maintainer Onboarding](#). Your suggestions and pull requests to this repository are more than welcome! This curriculum will form the basis for onboarding of new groups of Maintainers in the future, so please help to improve it.

Before our first meeting, please look at the first lesson in the Maintainer Onboarding curriculum ([Social Aspects of Lesson Maintenance](#)) and do your best to work through the exercises marked "Preparatory Homework".

Looking forward to seeing you all soon. Let me know if you have any questions.

Best, {name}

9.8.4 Missed onboarding meeting

Subject: Unable to attend Maintainer Onboarding

Thanks for letting me know. What I'm doing for people who have to miss a session is asking that they send me an email with their responses to the homeworks (including the preparatory homeworks) and discussions. Could you please take a look through the first lesson and send me your thoughts sometime next week?

Best, {name}

9.8.5 Welcoming new Maintainers

Subject: Welcome New Maintainers!

Today I'm happy to announce the addition of {number} new Maintainers to our team. Please join me in welcoming:

{Table of names and lessons for new Maintainers}

Each of these new Maintainers has gone through a three week onboarding program to help prepare them for the complex role that Maintainers serve in our community. We certainly couldn't cover everything in these three meetings! Please help your new team mates as they run into snags and feel free to reach out to me with any questions or concerns.

Looking forward to seeing everyone in action!

Best, {name}

Subject: Opportunities to complete The Carpentries Maintainer onboarding

Hi all,

Thank you again for volunteering to act as a Carpentries Maintainer. You're getting this email because you expressed interest in being a Maintainer but were not able to attend the onboarding sessions. If you are still interested in becoming a Maintainer, please choose one of the two following paths:

1. Reading through the three Maintainer Onboarding episodes, writing up your responses to the discussion questions and homeworks, and sending me your responses by {deadline}.

or

1. Joining the next Maintainer Onboarding session, which will be held in {month}.

Please let me know as soon as possible which of these two paths you'd like to follow, or if you are no longer interested in joining the Maintainer team.

Looking forward to hearing back from you.

Best, {name}

9.9 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.

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 organizing 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 staff* - people employed by The Carpentries
- *Authorized 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 staff and Authorized 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 V: 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 VI: 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, organizational 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 organization, 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 VI: 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, organizational 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 organization 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 VI: 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 V: 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 staff or authorized administrators and to the staff 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 VI: 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 VI: 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 reimburse 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 Reimbursement Policy

Designed to be consistent with Community Initiatives reimbursement policies.

I. Policy Statement

Business expenses may be reimbursed if an individual paid the expense from personal funds.

This policy establishes the three components required for reimbursement of allowable non-compensation business expenses:

- An allowable business expense
- Substantiation of the expense with receipts and expense report
- Approval of the expense

II. Who is Affected by this Policy

This policy affects all employees, volunteers, independent contractors, and guests seeking reimbursement or payment for necessary and reasonable non-compensation business expenses.

III. Definitions

Necessary Minimum purchase or service required to achieve a particular objective.

Reasonable An expense that is ordinary and reflects a prudent decision to incur the expense on behalf of The Carpentries business. Not extreme or excessive. Travel expenses should not exceed the current [US federal per diem rates](#) for the location of travel. If an expense exceeds these rates, a justification for additional spending should be included in the description of that expense.

Appropriate expense An expense that is suitable or fitting for a particular valid The Carpentries business purpose or activity.

Allowable expense A necessary, reasonable, and appropriate expense incurred for the primary benefit of The Carpentries activities and therefore permitted to be reimbursed or directly charged based on the permission of The Carpentries. Allowable expenses must meet [501\(c\)3 expense policies](#).

Original Receipt The original merchant receipt or invoice issued by the supplier or service provider to document and substantiate the business transaction. A digital image of the original receipt is allowable provided that it is legible. Electronic receipts are allowable.

Substantiation Documentation to support an incurred business expense that includes the original receipt, documentation of business purpose, names of persons in attendance, and an appropriate expense report for the incurred cost.

IV. Policy

The Carpentries provides reimbursement for appropriate and allowable expenses. These are business and travel related expenses, including transportation, hotels, and food. These expenses must be reasonable and necessary, as well as job-related.

SUBSTANTIATION AND ORIGINAL RECEIPTS

In order for a business expense to be approved and reimbursed, it must be properly substantiated. Original receipts (see above definition) for all expenditures are required. If sponsored by a particular agency or organization and requirements are more restrictive, the more restrictive receipt requirement will take precedence. If a required receipt has been lost, that information must be included when the reimbursement request is made.

EXPENSE REPORT

Reimbursement as a nontaxable payment can be made as long as:

- the expense qualifies as an allowable business expense and
- all substantiation and receipt requirements are met.

The sections below establish The Carpentries policy for reimbursement based on proper substantiation of the business expense, timely request for reimbursement, and payment approval.

APPROVAL AND REIMBURSEMENT

For each business expense reimbursement being requested, the request must include

- the valid business purpose of the expense and
- if travel related, the location and dates of the event.

DEADLINE TO SUBMIT EXPENSE REPORTS AND DOCUMENTATION

Expense Reimbursement Deadlines To be reimbursable, business expenses must be properly substantiated and submitted within certain time limitations.

- Substantiation for the reimbursement should be submitted within **60 calendar days** of when the expenses were incurred. For expenses incurred while traveling, the traveler will have 60 calendar days upon returning from travel to substantiate and submit the expenses.
- If substantiation occurs more than 60 calendar days after the expenses were incurred, the expense reimbursement request must include an explanation for the delay.
- Funds can be reimbursed before travel is completed, with receipts for the travel expenditure. If travel is not completed or is changed to have a lower cost, funds must be returned according to the 'Return of Excess Amounts' section.

RETURN OF EXCESS AMOUNTS

Return of excess amounts must be done within 120 days after expenses are paid or incurred.

Community Initiatives will guide the process for repayment of funds.

If individuals are volunteers, they will be expected to repay "excess amounts" and it may affect their volunteer status with the organization.

V. Procedures

REIMBURSEMENT REQUEST

Those expecting reimbursement are responsible for discerning appropriate and allowable expenses. Requests must include

- Person requesting
- Vendor (for business expenses)
- Meeting, location and dates of meeting (for travel expenses)
- Reason for travel or expense
- Designated expense category (travel, infrastructure, other)
- If applicable, explanation of why requirements aren't being met (e.g. missing receipt, submitted later than 90 days after purchase)
- If a meal for business purposes besides travel, the people in attendance at the meal
- Additional notes

Reimbursement requests and documentation should be submitted to the Administrative Support Specialist at finance@carpentries.org. The Administrative Support Specialist will organize the forms for the request, then submit to the Executive Director or the Executive Council Treasurer for approval, before sending the request to our fiscal sponsor for payment, in accordance with our reimbursement workflow. Reimbursement workflow guidelines are available for staff.

VI. Contact Roles and Responsibilities

- Executive Director - Tracy Teal
- Executive Council Treasurer - Raniere Silva
- Administrative Support Specialist - Talisha Sutton-Kennedy

VII. Update Log

- 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 guideline 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

Staff Professional Development Fund

The Carpentries staff have access to a professional development fund (hereon after “Staff PDF”) of \$1000/year for each full time employee.

What Activities are Eligible?

The Staff PDF makes available funds for the purpose of supporting staff 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, staff should provide a short description and justification of the expenditure. For large expenses (>\$200), staff should seek prior approval from the Finance subcommittee.

REGIONAL COMMUNITIES

11.1 Regional Coordinators

Around the world, Carpentries workshops are organized by a team of Regional Coordinators. Our staff Workshop and Logistics Manager, 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

Support for the African community is provided by community members and the [regional coordinator who will be appointed in 2019](#)

- **Monthly African Instructor Meetup:** Our monthly African instructor meetups have been running since 2017 and are attracting more and more interest. 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. The meetings are restricted to folks who have already participated in instructor training as we also focus on helping instructors to complete their checkouts, connecting instructors with others who can co-teach or co-organise workshops, and more.
- **Provide logistical support for workshops in Africa:** The African Regional Coordinator will work closely with experienced African instructors to provide logistical support for workshops when needed.

- 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.

11.2.2 Join Us

To join the conversation about The Carpentries in Africa, sign up at [Topicbox](#).

If you've trained as an instructor in Africa (even if you're not qualified yet), please join the [African instructors mailing list](#).

We would love to get more people involved in specific activities to support our growing African community.

Join the monthly African meetup: 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 or host a session, please sign up at our [Etherpad](#).

Provide mentorship before workshops: 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.

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](#).

11.3 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 initiatives: lesson translation, instructor training, workshop coordination, and fundraising. This repository serves as a landing point for this diverse group of activities.

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!](#)

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 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, Francisco Palm, Rayna Harris
- Capacitación de instructores / Instructor training: Karen Word (with help from Sue McClatchy, Rayna Harris, Belinda Weaver)

11.3.4 Reuniones bilingües / Bilingual meetings

- Hacemos reuniones bilingües para la sección “Enseñanza de las sesiones de demostración” de “[Instructor Training Checkout](#)”. Inscríbese 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 repositorios 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](#).

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.

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

Latin America

- Latin America
- Puerto Rico

United States

- Bay Area
- Colorado
- Davis, CA
- Merced, CA
- Seattle, WA
- Lansing, MI
- Southern California
- Southwest United States
- University of California

- Southeast US Library Carpentry

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.

For centrally organized workshops, the Regional Coordinator will guide the host and instructor on following through on all these steps.

Certified instructors are also encouraged to run self organized workshops. For self organized workshops, the host and instructor are directly responsible for ensuring all the steps below are followed without support from the Regional Coordinator.

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.

12.1 Workshop checklists

12.1.1 Host checklist

A workshop host contacts the Carpentries staff about running a workshop. He or she will work with the Carpentries Program Manager and Workshop Administration Team to plan and implement the workshop.

Before the workshop, the host will

- Decide on the [Software Carpentry](#), [Data Carpentry](#), or [Library Carpentry](#) curriculum that would best serve your learners
- Fill out the [workshop request form](#)
- Work with the Carpentries Program Manager and Workshop Administration Team to set dates and location for your workshop
 - 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](#)

- Recruit helpers to join your workshop. They don't need to be directly connected with us. 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.
- Advertise your workshop. The Workshop Administration Team can help by creating an Eventbrite registration page.
- 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.
- Work with the Carpentries Program Manager and Administrative Support Specialist to make arrangements to pay the workshop fee (only for centrally organized workshops). This includes being sure vendor forms or other documentation are in place. The actual invoice will be issued after the workshop is complete.
- Make travel arrangements for visiting instructors (or communicate process to reimburse them for expenses)
- Get emergency contact information for instructors in case of last minute changes
- Arrange for [required materials and equipment](#)
- Arrange for coffee, snacks, and/or lunch. We all learn better with fuel!
- Email learners to remind them of workshop location, timing, and software installation requirements
- Organize a meetup with the instructors the day before the workshop. While this is not always possible, it's 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

- Meet the instructors and learners
- Ensure that the room is set up with all [necessary materials and equipment](#)
- Periodically check in on the class to be sure things are running smoothly

After the workshop, the host will

- Collect workshop attendance
- Send attendance and any other feedback to the Carpentries Workshop Administration Team
- Pay the workshop fee (only for centrally organized workshops)
- Reimburse the instructors

12.1.2 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 organization to whom the overdue invoice was issued until the payment process is addressed.

12.1.3 Instructor Checklist

The Program Manager or Workshop Administration Team will introduce workshop hosts and instructors.

Before the workshop, instructors will

- Decide on the order of the lessons and who will teach what modules

- 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](#).
- Create an [Etherpad](#) for the workshop
- Assist the host in recruiting helpers if possible
- Assist the host in ensuring the workshop location is accessible
- Share emergency contact information with host in case of last minute changes
- Practice teaching the material
- Remind the host of the [necessary equipment](#)
- Join a [community discussion](#)
- Confirm criteria for reimbursement (*per diem* or save receipts)

During the workshop instructors will

- Review Code of Conduct with learners
- Remind learners to use sticky notes to give feedback
- Get feedback at lunch and end of each day using minute cards
- Support host in collecting attendee names and emails
- Send out the post-workshop survey at the very end of the workshop

After the workshop instructors will

- Remind the host to send workshop attendance data to the Carpentries Workshop Administration Team
- Submit receipts for reimbursement
- Send their own feedback to the Workshop Administration Team including any configuration problems
- Take part in a [community discussion](#)
- Report any lesson errors or suggest improvements on GitHub or by email to the Carpentries Workshop Administration Team

12.1.4 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

- Introduce themselves to the instructors, letting them know any particular areas of expertise
- Review the curriculum the instructors will be teaching
- Review the software installation instructions to be prepared to troubleshoot with learners
- Make sure the instructors have listed you on the workshop website

During the workshop helpers will

- Help learners with setup problems or anywhere else they get stuck
- 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.

- Monitor any questions that come up on the etherpad and answer them or remind the instructor about them during a break.

After the workshop helpers will

- Send their own feedback to the instructors and the Workshop Administration Team including any configuration problems
- 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 don't 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's 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

Rule #4: Be aware of demotivating words

Avoid saying things like:

- Just: "oh, that's easy, you just..."
- "It's too easy..."
- "It's too hard..."
- "I can't believe you don't 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] (<https://goo.gl/forms/KoUfO53Za3apOuOK2>), 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

12.1.5 Email Templates

Use [these](#) templated emails for communicating with the learners

12.2 Tips For Instructors

This page has an assortment of practical tips for instructors.

12.2.1 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's 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're teaching for an organization where participants are bringing work laptops where they don't have administrative access (common in government organizations) – ask about it. Try to plan ahead either with their central IT organization 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.

On the day of:

- Refer to our [Wiki page with common problems](#)
- If someone has come in early and the software still can't 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're able to start.
- If someone comes in late or is having such trouble with installation that they can't start, have them watch (and maybe work with a neighbor) until the first coffee break, when you can keep working on installation issues.

“Emergency Exits”

If there's absolutely no way that you'll be able to install the software locally on someone's computer, consider using the following:

- The “cloud” variants of [RStudio](#) or [Jupyter](#).

- [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.

12.2.2 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's a sample of how you might introduce the Code of Conduct – please don't 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 behaviors 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 behavior 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.

12.2.3 Using Exercises

When teaching a lesson, it's a very good idea to go through the lesson in advance and choose which exercises you want participants to try.

Once you've 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're 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'll have to switch from the tool you're using for live coding to however you're 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's relatively easy to switch back and forth.

12.2.4 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.

12.2.5 Preparing to Teach

It can be daunting to look at a Carpentries lesson and figure out just exactly how you're going to teach it. Here are some suggestions for tackling a new lesson that you've 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'll have both, have an option for each!

You won't 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 neighbors, so it should be prioritized.

Speaking of priorities...

Prioritize

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 don't 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'll be writing so that you know they work on your computer.
- Hook your computer up to a projector and figure out how you're 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're going to say can be extremely valuable. Words are hard when you're 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!

12.3 Teaching unofficial Carpentries workshops

An official 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 running un-official Carpentries workshops – meaning they are taught by non-certified instructors, or they cover a portion of our curriculum but not the whole thing. We are excited to hear when this happens, but it is not something we are formally tracking.

We know this happens because our community members recognize 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 organizers. Also, while the impact on the learners is different than what we'd expect from a full workshop, there is still something significant that learners are taking away from this event. We may consider exploring ways to track these non-standard workshops (both to acknowledge the effort instructors put in and the impact it has on learners), but we don't currently have the capacity to commit to this. So please continue doing all the wonderful work you do - and we hope we can reflect on this more soon!

12.4 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.

12.4.1 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's difficult to use a laptop on a slanted podium.
- Refreshments. People learn better when they are well fed. They also won't lose as much instructional time if they don't have to leave to get coffee.

12.4.2 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.
- 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.

12.4.3 Accessibility

It's 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

WORKSHOP ADMINISTRATION

Around the world, Carpentries workshops are organized by a team of Regional Coordinators. Our staff 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 staff as needed.

13.2 Workshop Administration workflow

13.2.1 For centrally organized 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 staff member to request a workshop.
2. Workshop & Logistics Manager 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](#)
 - Workshop & Logistics Manager 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 Administrative Support Specialist 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. Regional Coordinator sets up surveys in Survey Monkey and emails results links to hosts and instructors.
11. If needed Regional Coordinator sets up registration in Eventbrite.
 - If there is a registration fee, Regional Coordinator informs Business Administrator 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 and collecting attendance data.
14. Regional Coordinator records workshop attendance in AMY, and if additional information is provided, in the [Workshop Documents GitHub repo](#).

13.2.2 For self organized workshops

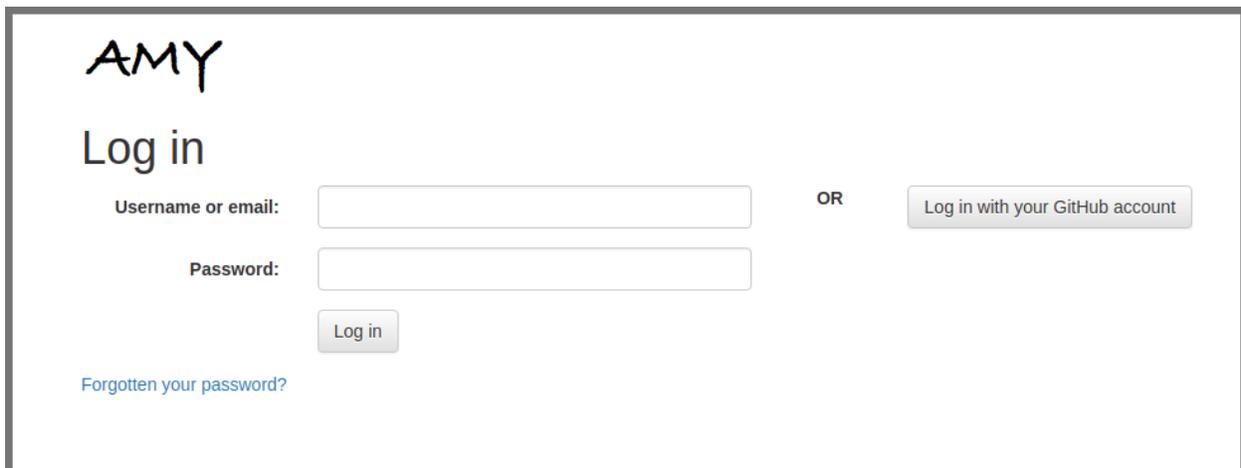
1. Instructors notify Regional Coordinator about upcoming self organized workshop. This is no fee (suggested or mandated) for a self organized workshop.
2. Regional Coordinator reminds them that as a self organized workshop they will have access to our surveys but will not receive any other support in 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. Regional Coordinator sets up surveys in Survey Monkey and emails results links to hosts and instructors. Explain to the hosts and instructors that this link should not be shared. Regional Coordinator informs hosts and instructors where to find the pre and post survey links to distribute to learners.
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 and collecting attendance data.
8. Regional Coordinator records workshop attendance in AMY.

13.3 AMY: the Carpentries' internal database

13.3.1 Logging in

- Log in to AMY [here](#). Contact [Carpentries staff](#) if you need login credentials.

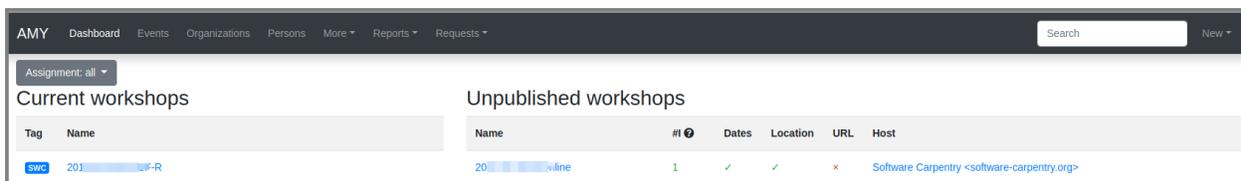


login screen goes here

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.



Tag	Name
SWC	201...-R

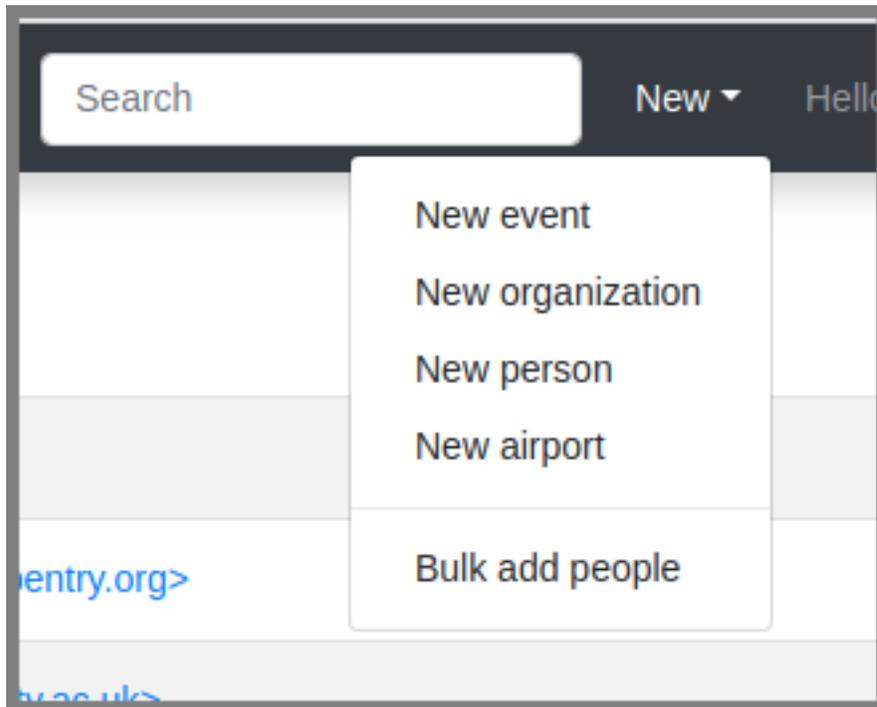
Name	#1	Dates	Location	URL	Host
20...vline	1	✓	✓	✗	Software Carpentry <software-carpentry.org>

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*, *organizations*, or *airports* to the database.



AMY add new elements

13.3.3 Adding a new organization

If the site name is not already in AMY, add a new one by selecting “New Organization.” Do not enter `http://` or any slashes in the domain name.

New organization

Domain*

Fullname*

Country

Notes

AMY

add new organization

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.

New person

Personal (first) name*

Middle name

Family (last) name

May contact
Allow to contact from The Carpentries according to the [Privacy Policy](#).

Consent to making profile public
Allow to post your name and any public profile you list (website, Twitter) on our instructors website. Emails will not be posted.

Do you consent to have your name or identity associated with lesson publications?

When we publish our lessons, we like to include everyone who has contributed via pull request as an author. If you do make any contributions, would you like to be included as an author when we publish the lesson?

I have read and agree to [the data privacy policy](#) of The Carpentries.

Email address

Gender*

Country

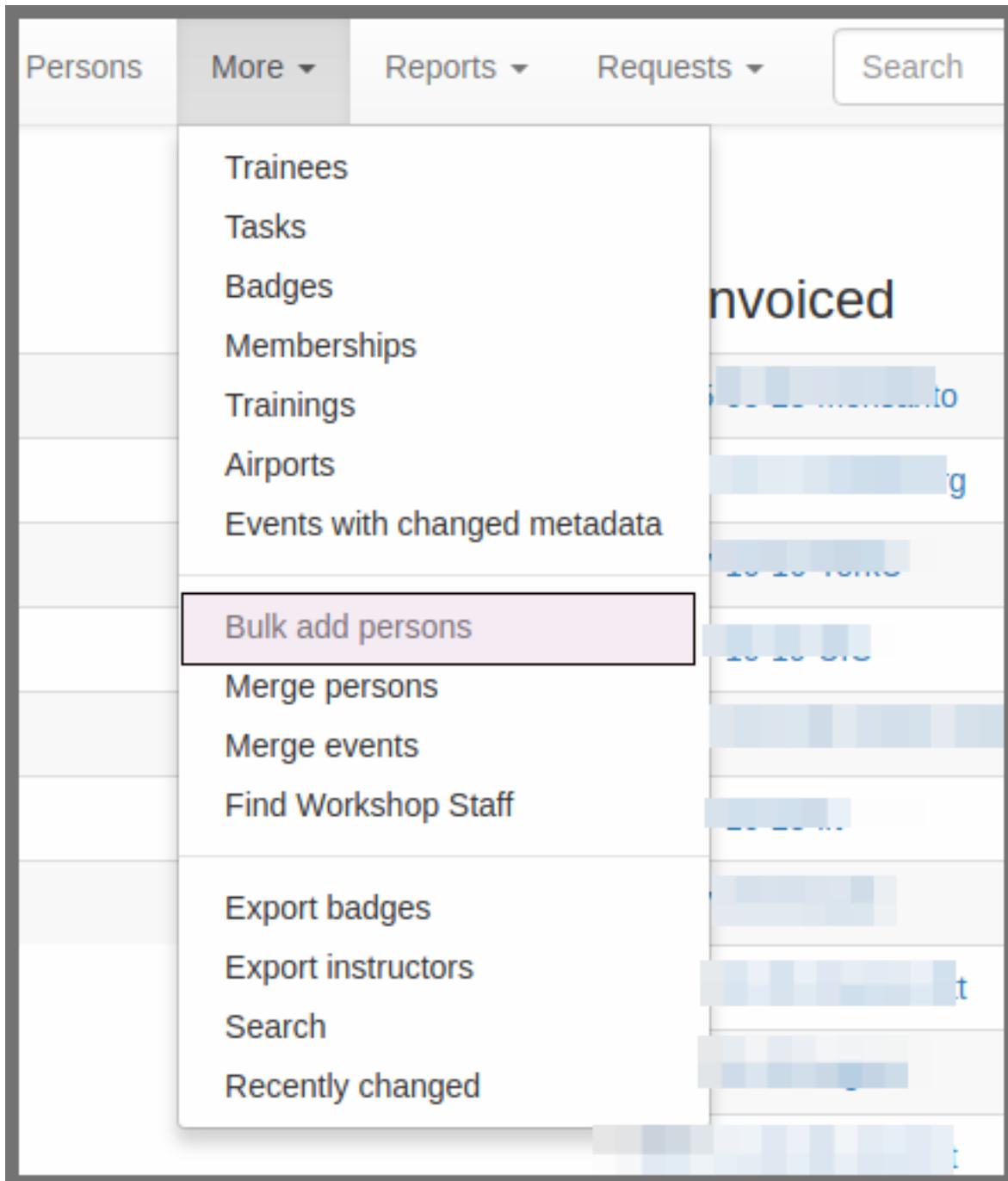
Person's country of residence.

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.

The screenshot shows a form titled "New airport" with the following fields and controls:

- IATA code***: A text input field with a "Look up code" link below it.
- Airport name***: A text input field.
- Country***: A dropdown menu with a downward arrow.
- Latitude***: A text input field.
- Longitude***: A text input field.
- Buttons**: "Add" (blue) and "Cancel" (grey) buttons at the bottom.

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).

The screenshot shows a form field labeled "Slug*" with the text "2018-01-01-hawkins" entered inside the input box.

AMY

new event slug

- If known, enter in the workshop dates.

Start
Required in order for this event to be "published".

End

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 organization*.

Host*
Organization hosting the event.

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 organized.

Administrator
Organization responsible for administrative work.

AMY

new event administrator

- Select the name of the Carpentries Regional Coordinator responsible for managing this workshop.

Assigned to

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

Tags*

SWC
DC
LC
WiSE
TTT
online
stalled
unresponsive
hackathon
cancelled
LSO
ITT
LMO

- *stalled* — for events with lost contact with the host or TTT events that aren't running.
- *unresponsive* – for events whose hosts and/or organizers aren't going to send us attendance data.
- *cancelled* — for events that were supposed to happen, but due to some circumstances got 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.

TTT Open applications

If this event is TTT, you can mark it as 'open applications' which means that people not associated with this event's member sites can also take part in this event.

AMY

TTT Open Applications check box

- Select the curricula taught at this workshop.

Curricula taught at the workshop

- Data Carpentry (Ecology with Python)
- Data Carpentry (Ecology with R)
- Data Carpentry (Genomics)
- Data Carpentry (Geospatial)
- Data Carpentry (other)
- Data Carpentry (Social Sciences with Python)
- Data Carpentry (Social Sciences with R)
- Library Carpentry (Intro to Data, Unix Shell, Git, and/or OpenRefine)
- Library Carpentry (other)
- Software Carpentry in Spanish (shell, git, Python)
- Software Carpentry in Spanish (shell, git, R)
- Software Carpentry (other)
- Software Carpentry (shell, git, Python)
- Software Carpentry (shell, git, R)

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`.

Url

Required in order for this event to be "published".
Use link to the event's **website**, not repository.

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

new event language

AMY

- 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

new event eventbrite

AMY

- After the event is over, record the total number of learners who attended the workshop.

Attendance

new event attendance

AMY

- Enter only the email address for the main contact person for this event.

Contact

new event contact

AMY

- 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".

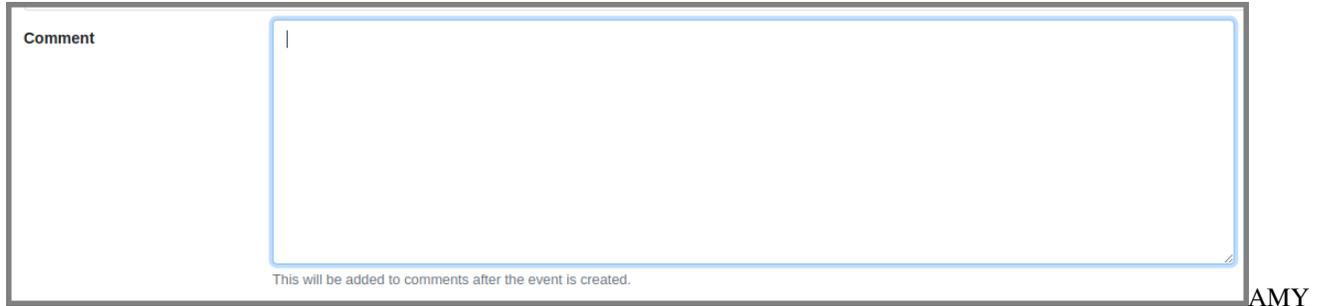
Longitude

Required in order for this event to be "published".

new event location

AMY

- 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:

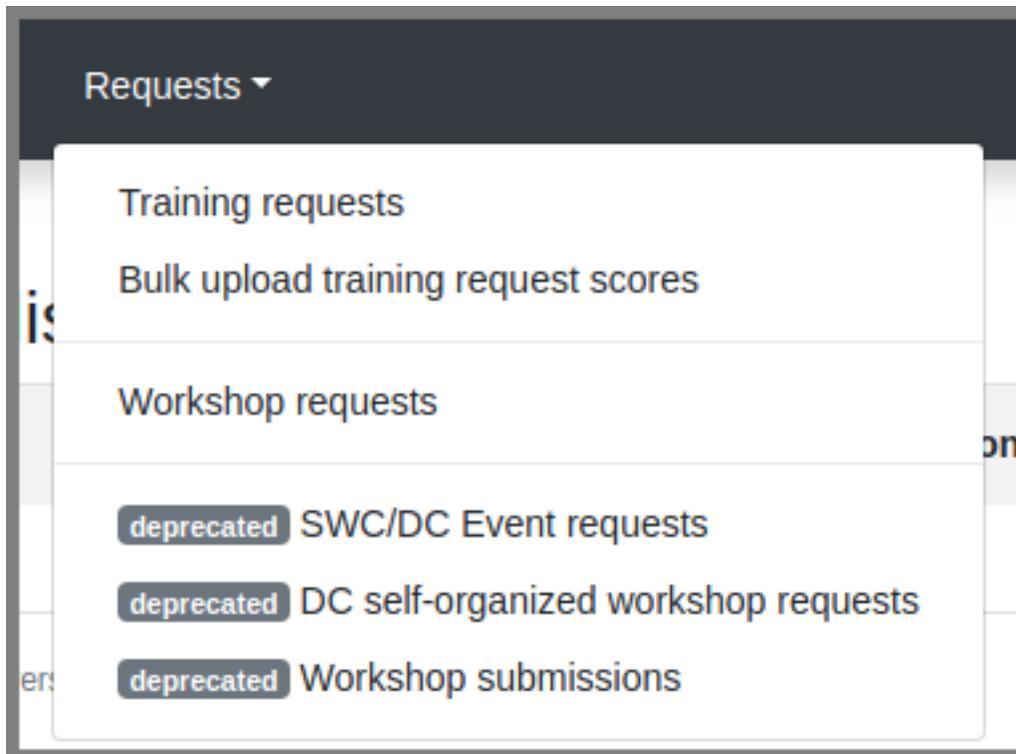
- Slug (created from GitHub repo name)
- Start and end dates
- Location details

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 re-

quests

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.

Workshop requests						
Assignee	Person	Institution	Country	Preferred dates	Types	State ?
	Shirley NIKOU <shirley@la...nz>	Ma... ch <...>	New Zealand	4th to 5th of December 2018	swc-python swc-r	Pending i
	Elizabeth Howard <...@...org>	Ma... school	United States	March-August 2019	swc-python	Pending i

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 request #347

Workshop type:	Software-Carpentry
Person:	Barack Obama <obama@usa.gov>
Affiliation:	United States Government
Location:	Washington DC
Country:	United States 
Alongside of a conference:	—
Preferred date:	Spring 2018, flexible
Approx. number of attendees:	20-40 (one room, two instructors)
Attendees' fields:	• Don't know yet
Attendees' academic level:	• Don't know yet
SWC Attendees' level of computing experience:	• Don't know yet
DC Workshop data types:	
DC Attendees' level of data analysis:	
Travel and accomodation costs covered by institution:	no
Administrative fee understanding:	yes
DC Fee waiver requested:	no
Travel reimbursement:	
SWC Administrative fee payment option:	Non-profit / non-partner: US\$2500
Comment:	—

New event

Slug*

Use YYYY-MM-DD-location format, where location is either an organization, or city, or both. If the specific date is unknown, use xx instead, for example: 2016-12-xx-Krakow means that the event is supposed to run sometime in December 2016 in Krakow. Use only latin characters.

Completed
Indicates that no more work is needed upon this event.

Start
Required in order for this event to be "published".

End

Host*
Organization hosting the event.

Administrator
Organization responsible for administrative work.

Assigned to

Tags*

- SWC
- DC
- LC
- WISE
- TTT
- online
- stalled
- unresponsive
- broken

AMY

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 Organizer). “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

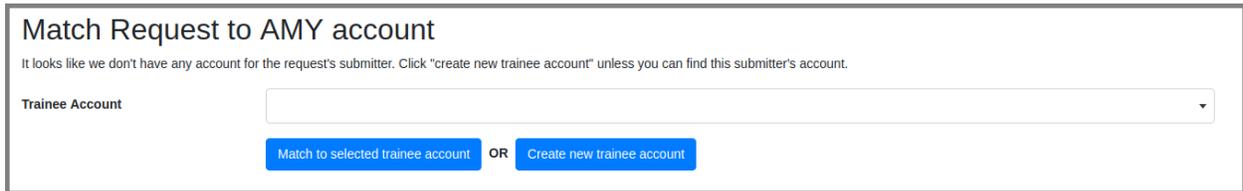
In addition to tracking workshops, AMY also allows us to track applications to instructor training events. The public facing application is [here](#). Applicants are given a group name if participating in a member training event. Open applicants will likely not have a group name.

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

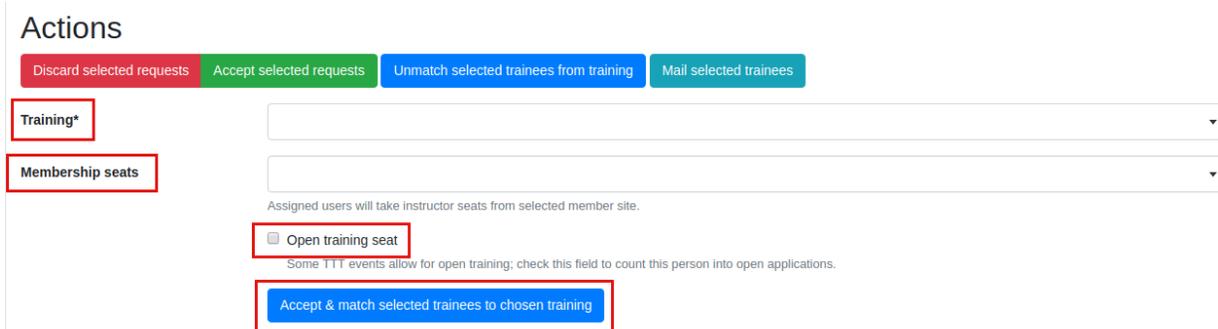
This will return you to the search screen, and this person’s record will be updated with the new trainee account.

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.



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

training progress steps

AMY

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.

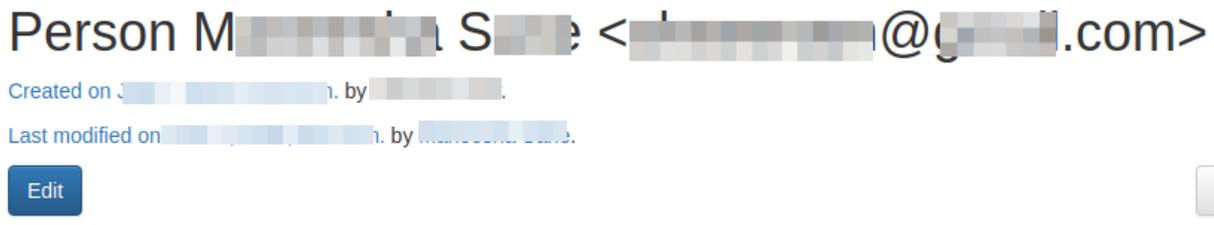
Recording completion of lesson contribution

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

AMY

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 *organization* in AMY.

On the organization’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 organized 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 authorized 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, the site Stanford University and any records with stanford in the notes.

Searching for Qualified Instructors

Under the “More” menu, select “Find Workshop Staff.” 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 organizer 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 Organizations

Clicking “Organizations” on the top menu bar will take you to a list of *all* recorded organizations, regardless of their involvement with The Carpentries.

Organizations 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 Setting up surveys using Survey Monkey

The Carpentries uses [Survey Monkey](#) to manage all workshop surveys.

13.4.1 Logging in

The Workshop Administration Team will have log in credentials from the Carpentries to set up surveys. They will share links to view survey results with workshop hosts and instructors. Hosts and instructors do not need log in credentials.

Contact team@carpentries with questions about logging in.

13.4.2 Setting up a workshop survey

If a learner accesses the survey from that workshop’s website (in the format `username.github.io/YYYY-MM-DD-sitename`), the survey links will be appended with the workshop slug (so `https://www.surveymonkey.com/r/swc_pre_workshop_v1` becomes `https://www.surveymonkey.com/r/swc_pre_workshop_v1?workshop_id=YYYY-MM-DD-sitename`).

The “naked” link will take them to the exact same survey, but will make it slightly more difficult for us to share survey results.

The survey has already been designed, and we will not customize any of the questions for specific workshops or sites.

The existing questions about which workshop the learner is attending are being deprecated in favor of a new question:

* 5. The id of the workshop you are attending follows, in red, in the format YYYY-MM-DD-sitename.

Please copy and paste this exact id into the text box below.

If you do not see this id, or if it does not look right, please enter your workshop id or the date and location of your workshop in the text box below.

2018-01-01-site

Survey

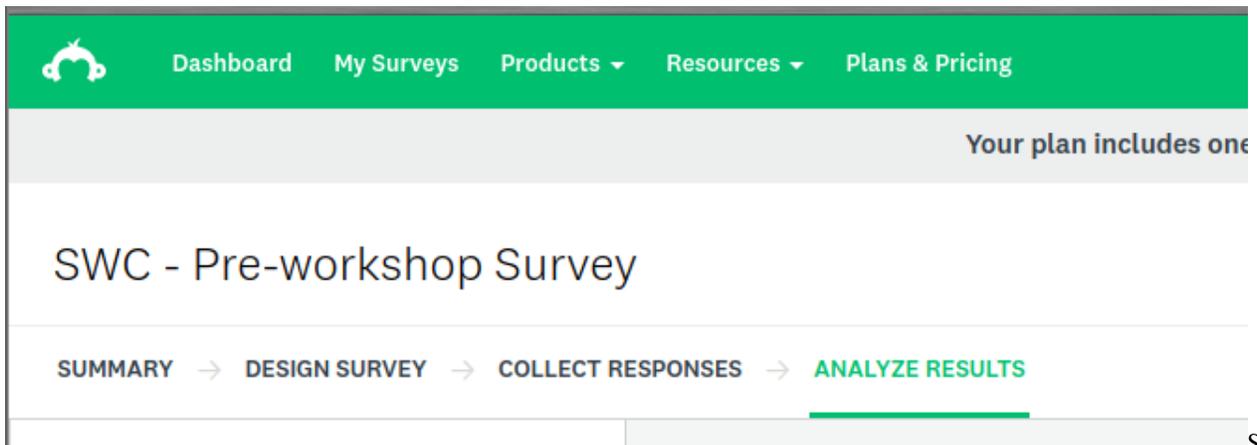
workshop id

Learners are prompted to fill in their workshop ID or the workshop date and location if the ID is not known. Having this information accurate and complete is crucial to being able to share survey results.

13.4.3 Sharing survey results: Web view

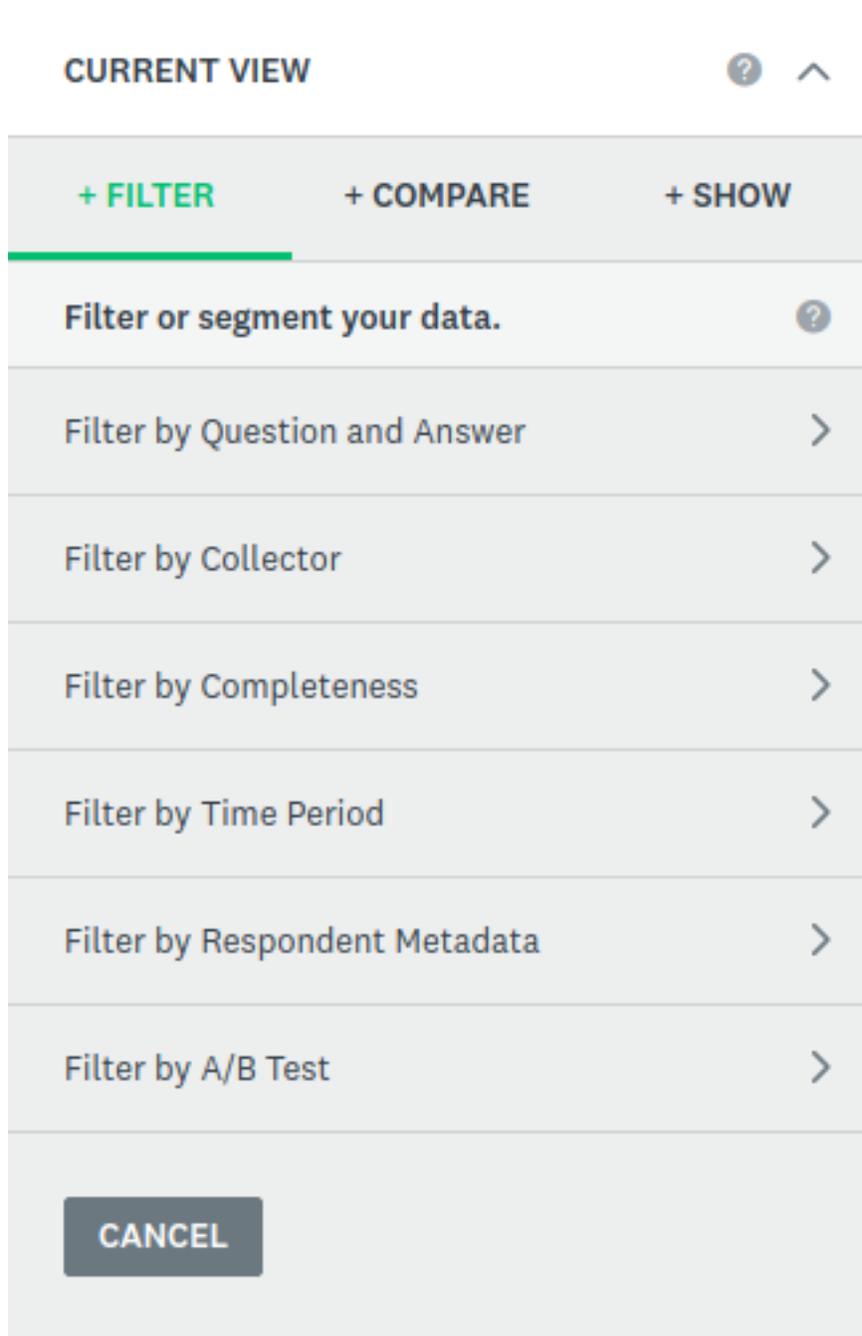
Survey results can be shared as a website view with charts and graphs of aggregate data.

From the workshop page, select `Analyze Results`.



analyze results

Select `Filter` and `Filter by Question and Answer`.



Survey filter results

Select the question about the workshop ID:

+ FILTER + COMPARE + SHOW

Question and Answer

Choose... All Pages ▼

Choose...

Q1: I consent to this survey

Q2: When are you taking this survey?

Q3: Please select the workshop you are attending. Events are listed in chronological order.

Q4: Will this be your first time attending a Software Carpentry Workshop (as a learner)?

Q5: The id of the workshop you are attending follows, in red, in the format YYYY-MM-DD-sitename.

Survey

results select question

In the next box, enter the workshop ID that you want to get results for. Select `Exact phrase` to get that workshop ID exactly.

+ FILTER **+ COMPARE** **+ SHOW**

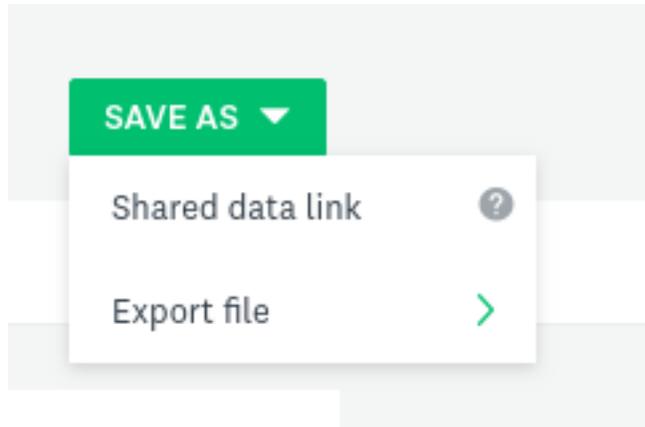
Q5: The id of the workshop you are attending follows, in red, in the format YYYY-MM-DD-sitename. Please copy and paste this exact id into the text box below. If you do not see this id, or if it does not look right, please enter your workshop id or the date and location of your workshop in the text box below. {{ custom.workshop_id }}

Matching Words:

APPLY **CANCEL**

Survey results matching words

This will take you to an internal view of the survey results for that event. To create a public view, click the green **Save** as button at the top right, and select **Shared data link**.



Survey results save as

This will open a new page for you to set up your public view.

Set the following options:

- Access: Private. This means anyone with the link can view the results. You can make this password protected by selecting “Restricted.” You can then share passwords with hosts, instructors, and anyone else who may need access.
- Page Title: This will prepopulate with a default value. You can change this as you wish.
- Page Description: Add any other information about the workshop.
- Include: Be sure to check off Open-Ended Responses and Data Trends. Individual Responses should **not** be checked.
- Branding: Leave this unchecked.

Click `Get link`.

Share Data

Share your data via a webpage

ACCESS	<input checked="" type="radio"/> PRIVATE <input type="radio"/> RESTRICTED	?
PAGE TITLE	Software Carpentry Pre-Workshop Survey	?
DESCRIPTION	Give your page a description	
INCLUDE	<input checked="" type="checkbox"/> Open-Ended Responses <input checked="" type="checkbox"/> Data Trends <input type="checkbox"/> Individual Responses	?
BRANDING	<input type="checkbox"/> Hide logo on shared page	?

results share data

You will be given a link to the survey results. Click save.

Share Data

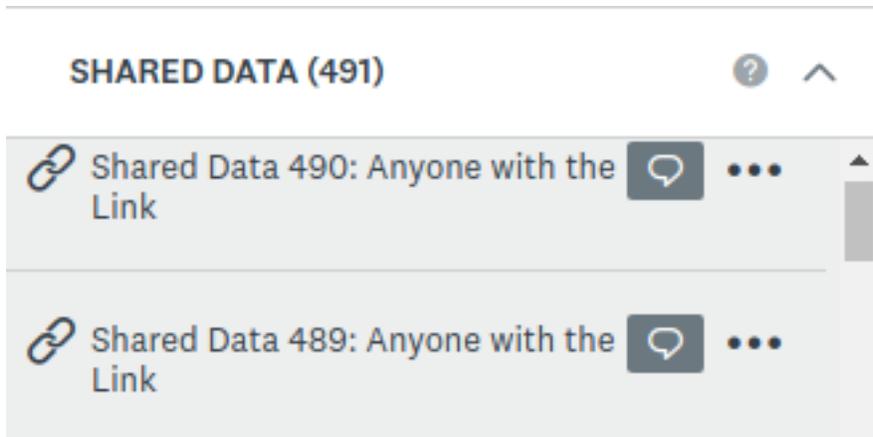
WEB LINK


<https://www.surveymonkey.com/results/SM-S2QQT73Z8/>

results get link

Your browser will now redirect to this link. The link can be shared with hosts and instructors.

This link will also be included in the Shared Data List, at the bottom of the left side of the screen.



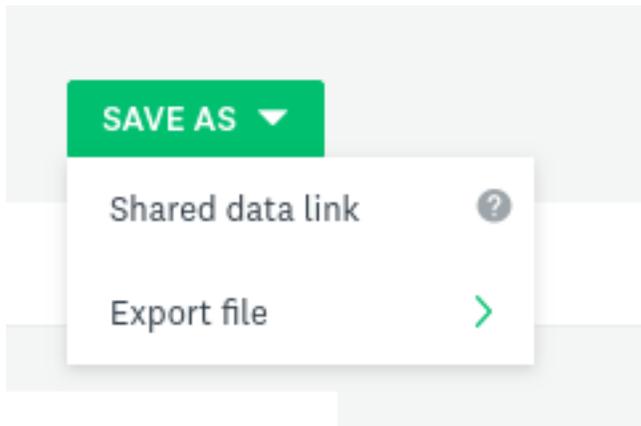
Survey shared data list

It will be given a sequential number. Click on the . . . to rename it to the workshop ID. This list is monitored regularly, and anything with the sequential number will be deleted.

13.4.4 Sharing survey results: Raw data

If requested, raw data as csv can be exported and shared with hosts and instructors.

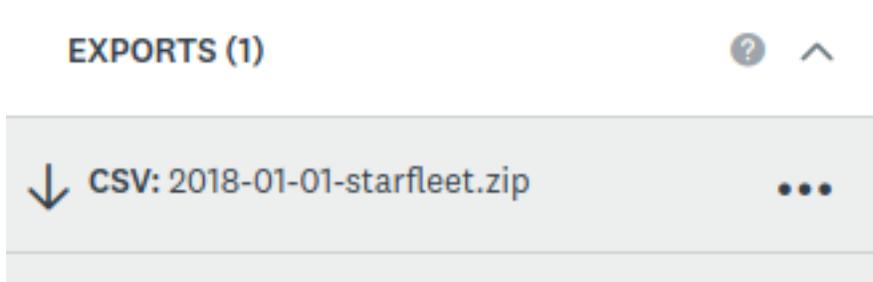
From the internal view of the survey results click the green *Save as* button at the top right. This time, click *Export file*.



Survey results save as

From here you will have various options about what data to export and what format to export it in. Make your selections and name the filename with the workshop ID.

This will then show up in the “Exports” list on the left side of the screen. Click the “. . .” to download data to share with hosts and instructors.

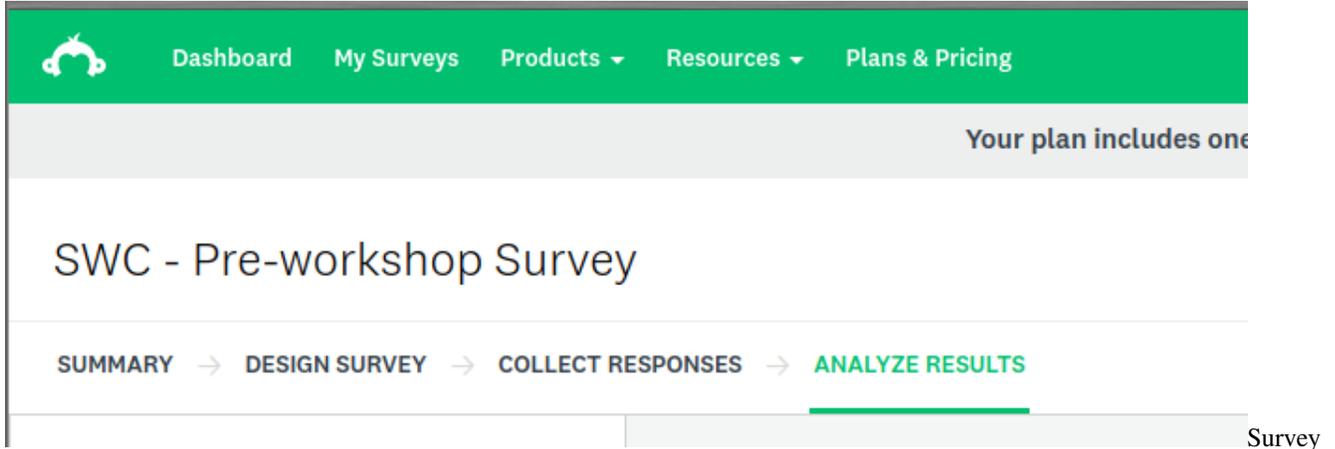


Survey results export

13.4.5 Modifying survey responses

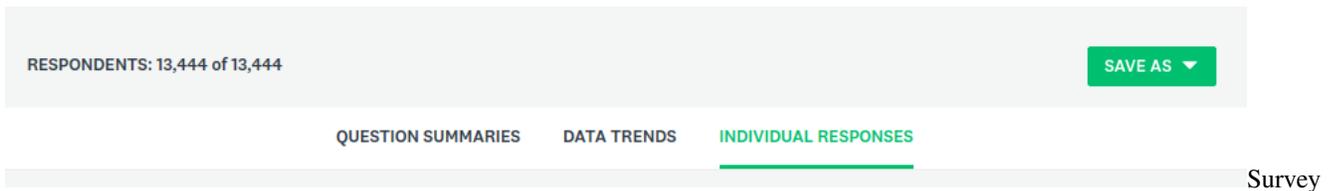
Survey data can be modified once a user has submitted their response. To protect the integrity of our data, this should be done *only* if it is known that a respondent filled in an incorrect or incorrectly formatted workshop id.

From the survey page, select `Analyze Results`.



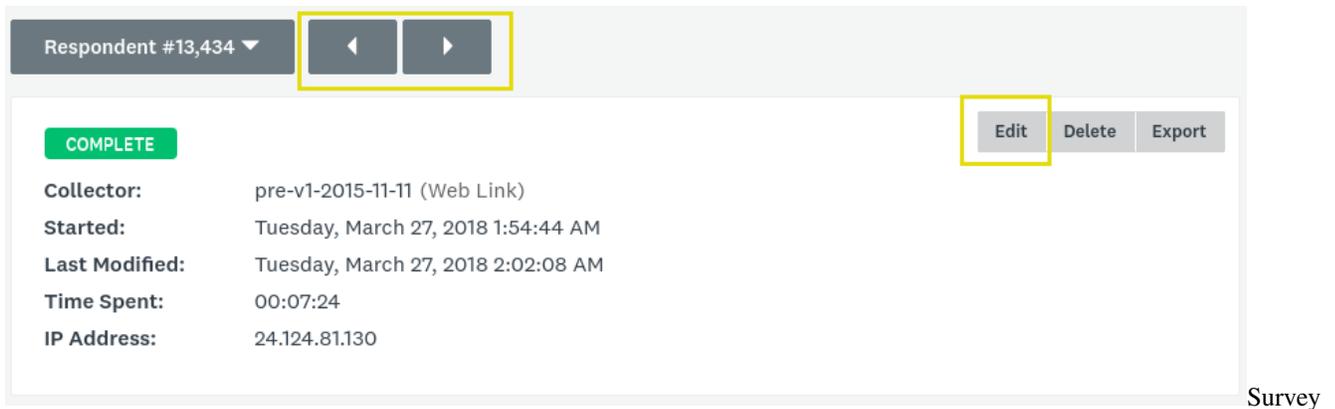
analyze results

Following the instructions above, search for the possible responses to a workshop id. For example, search for all responses containing the word 'starfleet' to find any one who may have attended the workshop '2018-01-01-starfleet'.



individual responses

Use the arrow icons to navigate to the response that needs editing, and click "edit".



select response

The survey will open in a new window. Navigate to the workshop id question without editing any other responses.

*** 5. The id of the workshop you are attending follows, in red, in the format YYYY-MM-DD-sitename.**

Please copy and paste this exact id into the text box below.

If you do not see this id, or if it does not look right, please enter your workshop id or the date and location of your workshop in the text box below.

Survey

find incorrect response

Type in the correct workshop id and click next.

*** 5. The id of the workshop you are attending follows, in red, in the format YYYY-MM-DD-sitename.**

Please copy and paste this exact id into the text box below.

If you do not see this id, or if it does not look right, please enter your workshop id or the date and location of your workshop in the text box below.

Prev

Survey

add correct response

Close this window so no other responses are affected. This should now show up modified and correct in the Survey Monkey responses.

Continue this for any incorrect response.

Running a report as described above should now give you correct responses.

13.5 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](#).

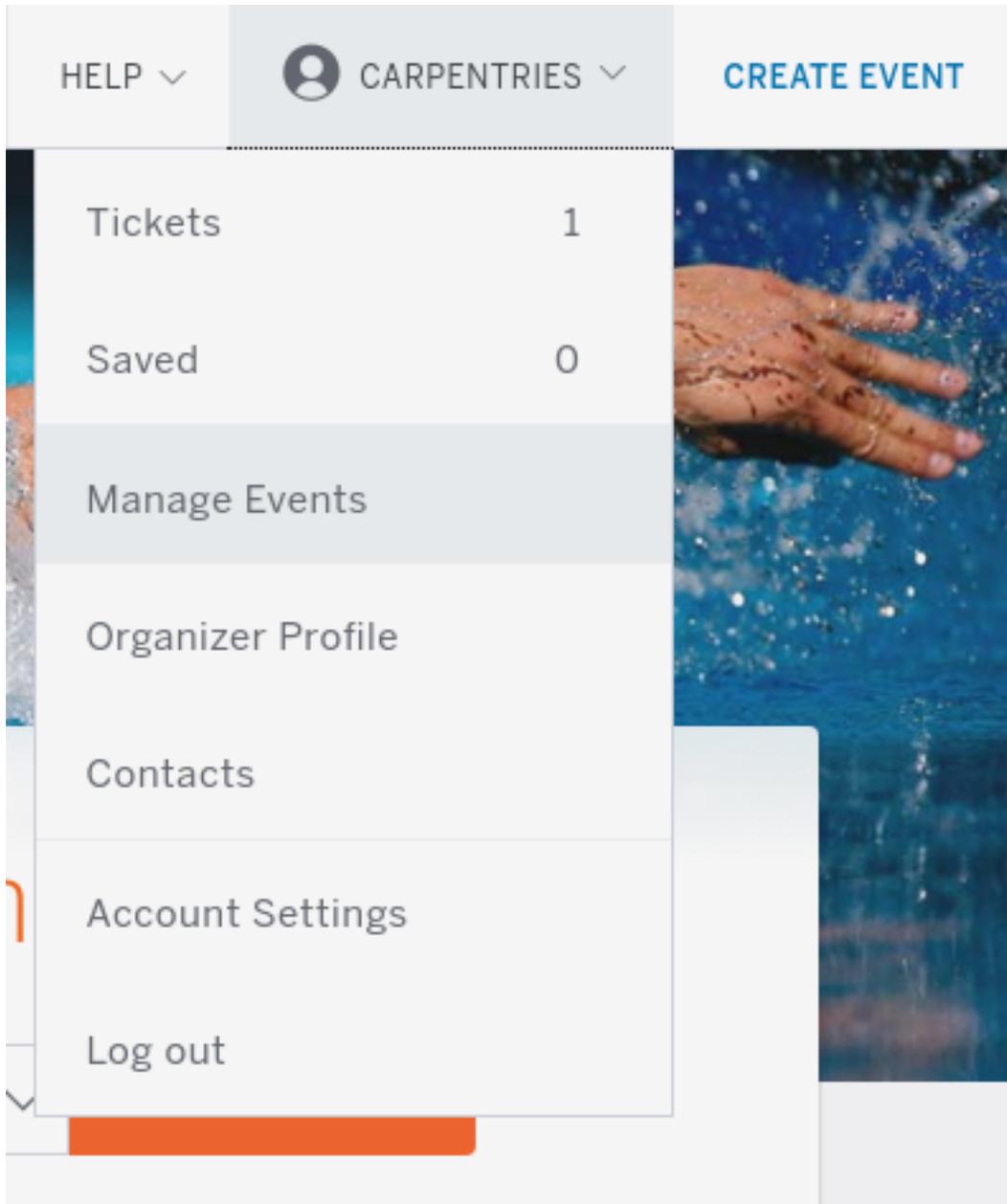
13.5.1 Logging in

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.

13.5.2 Creating a new event

Click on “Manage Events” under “CARPENTRIES”



event

You'll 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.”

Manage Events

LIVE 4 DRAFT 2 PAST 0

Eventbrite

events

Select “Manage” under the template for the appropriate Carpentries lesson program.

LIVE 4 DRAFT 2 PAST 0

EVENT TEMPLATE - SOFTWARE CARPENTRY WORKSHOP 0 / 80
Nov 14, 2020 9:00 AM
[Manage](#) [Edit](#) [View](#)

EVENT TEMPLATE - DATA CARPENTRY WORKSHOP 0 / 60
Feb 4, 2021 9:00 AM
[Manage](#) [Edit](#) [View](#)

Eventbrite

select draft

Copy this event, giving it a meaningful name.

[COPY](#) | [CANCEL](#) | [DELETE](#)

Eventbrite select draft

Copy this event

You may copy this event to quickly create a new event with the same description, ticket types, survey, and dates. You may also make whatever changes are necessary to the new event, both before and after publishing. You must press the Publish Event button on the next page before the new event will be available for attendee registrations.

New Event Name:

Starfleet Academy| - SOFTWARE CARPENTRY WORKSHOP

COPY EVENT

Eventbrite

copy event

You can now set up the new event page.

1 Event Details

EVENT TITLE *

Starfleet Academy - SOFTWARE CARPENTRY WORKSHOP

LOCATION

Big Campus Building

123 Fake Street

Room 999

Fakeville

XX

99999

Please select a country.



[Reset location](#)

Show map on event page



No map

STARTS

11/14/2020

09:00am

ENDS

11/15/2020

05:00pm

[Schedule multiple events](#) [Timezone & date settings \(EST\)](#)

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.

EVENT IMAGE



[Adjust](#) [Remove](#)

We recommend using at least a 2160x1080px (2:1 ratio) image that's no larger than 10MB. [Learn more.](#)

EVENT DESCRIPTION 🔍

[HTML Editor](#)

B *I* Paragraph ☰ ☰    

This event is an example-driven two-day workshop on basic computing skills. Short tutorials alternate with hands-on practical exercises, and participants are encouraged both to help one another, and to try applying what they have learned to their own research problems during and between sessions. Participants should bring their own laptop to work on. This should be a "real" laptop - not a Chromebook, tablet, etc. You should also be sure to have admin privileges on this computer.

See <http://software-carpentry.org> for more information about the organization.

This event runs from **START DATE** to **END DATE**, from **START TIME** to **END TIME** each day.

For more information about this workshop, see **INSERT GITHUB LINK HERE (BE SURE TO HYPERLINK)**.

Participants are asked to complete our pre- and post- workshop survey to help us understand how to serve you. The pre-workshop survey can be found here: **INSERT LINK TO PRE-SURVEY**

Eventbrite

new event description

13.5.3 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.

Ticket name*	Quantity available*	Price	Actions
General Ticket	40	Free	Ticket Settings ⚙️ 🗑️
General Paid Ticket	40	\$ 15.00	⚙️ 🗑️
Buyer total: \$15.00 ⓘ			
<input type="button" value="⊕ FREE TICKET"/> <input type="button" value="⊕ PAID TICKET"/> <input type="button" value="⊕ DONATION"/>			Total capacity: 80

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 customize the ticket type name. Edit the number of tickets available and dates when ticket sales start and end.

Ticket name*	Quantity available*	Price	Actions
General Ticket	40	Free	Ticket Settings  

Settings for General Ticket

Ticket description
 Tell your attendees more about this ticket type.

Show ticket description on event page

Sales channel 
 Online only 

Ticket sales start
 10/05/2017 05:35 AM 

or when ticket sales end

Ticket sales end
 11/14/2017 06:00 PM 

Ticket visibility
 Hide this ticket type
[Add ticket auto-hide schedule](#)

Tickets allowed per order
 1 10
 minimum maximum

TICKET CODE GROUP
 None specified.
[+ Add to group](#)

Eventbrite

free ticket settings

For paid tickets, you can customize 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.

General Paid Ticket

40

\$ 15.00

Buyer total: \$15.00 [ⓘ](#)

Settings for General Paid Ticket

Ticket description

Tell your attendees more about this ticket type.

Show ticket description on event page

Sales channel [ⓘ](#)

Everywhere ▼

FEES

Absorb fees ▼

Online: Fee: \$2.82 Buyer total: \$15.00
 At The Door: Fee: \$1.45 Buyer total: \$15.00 [ⓘ](#)

Ticket sales start

02/07/2018 05:15 PM ▼

or when ticket sales end

Ticket sales end

11/14/2020 08:00 AM ▼

Ticket visibility

Hide this ticket type
[Add ticket auto-hide schedule](#)

Tickets allowed per order

1

10

minimum maximum

Eventbrite

REFUND POLICY

- 1 day:** Attendees can receive refunds up to 1 day before your event start date.
- 7 days:** Attendees can receive refunds up to 7 days before your event start date.
- 30 days:** Attendees can receive refunds up to 30 days before your event start date.
- No refunds:** No refunds at any time.

[Unselect](#)

paid ticket settings
 paid ticket settings

Once your event is published, a refund policy cannot be changed or added. [Learn More](#)

At this point the event is almost ready to be published. It's 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.

3 Additional Settings Tips

LISTING PRIVACY

- Public page:** Discoverable by anyone on Eventbrite, our distribution partners, and search engines.
- Private page:** Accessible only by people you specify.

- Turn attendees into your biggest promoters by letting them share your event on Facebook, Twitter, and LinkedIn
- Make your event invitation-only (guests must receive an Eventbrite invitation to attend)
- Require a password to view the event page:

REMAINING TICKETS

- Show the number of remaining tickets on your event listing

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).

Nice job! You're almost done.

SAVE

MAKE YOUR EVENT LIVE

Eventbrite

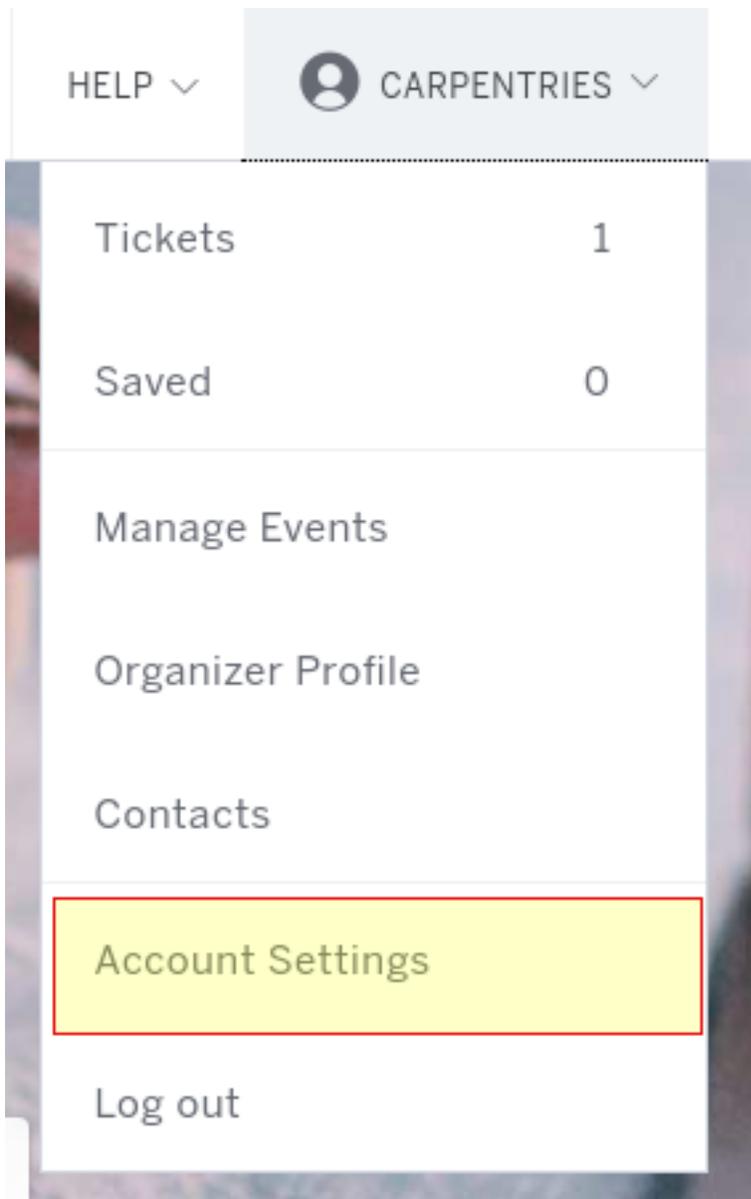
password settings

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.

13.5.4 Giving hosts access to view registration

Often a workshop host will want to check in to see who's 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’ll see a list of all email addresses that have access to at least one of our events. If you’re 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.

Add New Email Address To This Account

To give a user access to your account, add a user's email address. They will be sent a link that lets them setup a password for their account.

EMAIL

GRANT THIS USER ACCESS TO

- All events
- Selected events only

[Select All Events](#) | [Deselect All Events](#)

- E...
- E...
- S...
- K...
- B...
- T...
- Starfleet Academy - SOFTWARE CARPENTRY WORKSHOP (2020-11-14) (Live)

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
 - Customize 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

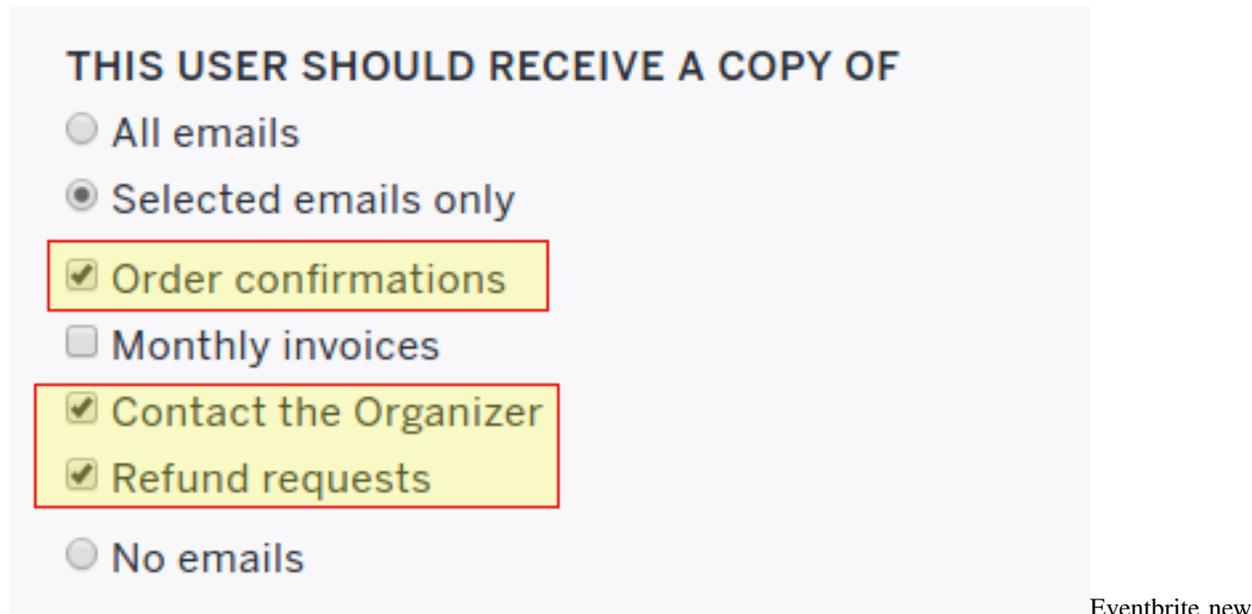
ACTIONS THIS USER CAN PERFORM All actions Selected actions only[Select All Actions](#) | [Deselect All Actions](#) Create new events Edit event details not including the payment options Edit ticket types Customize the registration page Edit payment options (e.g. credit/debit card payments, PayPal) View order and attendee reports (read-only) Manage orders and attendees Access to aggregate financial data Manage discount codes Manage affiliate links Send invites, manage contacts & email attendees View fees and invoices View and manage payouts Check in Attendees Sell tickets at the door Access and edit Organizer Profile Auto-Assign numbers to attendees Manage event registration transfers Manage reserved seating events Manage reserved seating holds Sell reserved seating holds Manage tracking pixels Create and manage event or ticket groups Create and manage guestlists. (Also grants permission to manage orders and attendees)

Eventbrite

new user event actions

The user should get notifications for:

- Order confirmations
- Contact the organizer
- Refund requests



user event notifications

13.6 Email templates

13.6.1 From Regional Coordinator

General inquiry response

Subject: About hosting a Carpentries Workshop

Dear [name],

Thanks so much for inquiring about hosting a Carpentries workshop at [site_name]. Here's some background about our programs and how we run.

Software Carpentry (SWC), Data Carpentry (DC), and Library Carpentry (LC) are programs of The Carpentries (a fiscally sponsored project of Community Initiatives). All programs offer two day long workshops taught live in-person by a team of two trained instructors. Software Carpentry focuses on best practices in computational programming that help scientists and researchers be more effective with their work. Lessons are domain agnostic and use generic data. All Software Carpentry workshops always cover three core areas: shell scripting (bash), version control (Git), and a programming language (R or Python). Read more here (<https://software-carpentry.org/lessons/>). Data Carpentry has a similar foundation but focuses on the data lifecycle, from cleaning & organization to analysis & visualization. Lessons and the data they use are domain specific, with offerings in ecology/biology, genomics, geospatial data, and more in the works. Read more here (<http://www.datacarpentry.org/lessons/>). Library Carpentry workshops teach people working in library- and information-related roles how to apply concepts from software development fields in library tasks and identify and use best practices in data structures.

All workshops have a standard fee of US\$2500, plus any costs for instructor travel (which may include airfare, ground travel, hotel, and meals/incidentals). You can read more about the costs and how to request a workshop here for Software Carpentry (<https://software-carpentry.org/workshops/request/>) and here for Data Carpentry (<http://www.datacarpentry.org/workshops-host/>).

Workshops are offered on demand, not on a set schedule, and typically require 2-3 months lead time to plan.

I'd be happy to answer any questions you have about holding a Carpentries workshop at [site_name] by email, or set some time to talk by phone or videocall. Let me know what you're thinking of doing, and we'll talk about how we can work together. I look forward to hearing back from you.

Best,

[your_name]

New Teaching Opportunities on Signup Sheet

Subject: Upcoming Carpentries teaching opportunities in [REGION]

Hi Everyone,

We have uploaded new teaching opportunities in [REGION]! Please take a moment to review the upcoming workshops and be sure to add your name if you are interested. Travel within [REGION] will be covered.

Here is the signup sheet for your convenience: (INSERT THE LINK FOR THAT REGION FROM THE SIGN UP SHEET).

Feel free to email me with any questions! (SENDER NAME)

Logistics Information from Host

- Use this template if the host did not fill out a workshop request form.*

Hi [Host Name],

Thanks so much for planning a Carpentries workshop at [site name]. I'm excited to work with you to ensure you have a successful workshop!

To help us learn more about what you want to do and support you accordingly, please fill out our workshop request form here (<https://amy.carpentries.org/forms/workshop/>). We'll follow up with you promptly so we can get started planning.

Best,

[sender name]

Confirming instructor availability

Hi [instructor name],

You signed up as interested in teaching the [Carpentry type] workshop at [site name] on [scheduled dates]. I'm writing to see if you are still interested and available in doing this, and what questions you may have about it. If this works, I'll send an email to you and the hosts at [site name] so we can get started planning.

If flexible dates Could you also let me know if you have any preferences or constraints in the date range we're looking at?

Thanks so much for considering this - I'm hoping it works out for you. Can you let me know by [date]? I look forward to hearing from you.

Best,

[sender name]

Host and instructor introductions

Subject: Carpentries workshop at [site_name], [Date of Workshop] - Making introductions

Hi everyone,

This email is to introduce [host_name] of [site_name] with instructors [instructor1_name] and [instructor2_name]. They will be teaching a [carpentry_type] workshop on [workshop_date].

I also want to introduce our Regional Coordinator, [admin_name]. [She or he] will be supporting all of the logistical details with this workshop.

You can all read more about the roles of workshop hosts, instructors, and helpers here (http://docs.carpentries.org/topic_folders/hosts_instructors/index.html). I'll highlight a few things here. There's a lot of information here, so please take some time to read through things carefully and ask questions as needed.

Instructors will work directly with [host_first_name] to make travel arrangements. We are not part of this process. This may include airfare, ground travel, hotel, and meals/incidentals. [host_first_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 teach with you, so please support them in making travel and reimbursement as smooth as possible. Instructors, please be sure to review the site's policies around making travel arrangements and handling reimbursements - we want to be sure everything is handled quickly and efficiently.

[host_first_name], can you share a little about who your learners are and what you and they are expecting? That will help our instructors be prepared. We also like to have a couple of helpers at each workshop from the local community. Would you be able to help secure a couple of helpers? They don't need to be connected with us; they just need a good understanding of the technologies we teach and an enthusiasm to help others.

[instructor1_first_name] and [instructor2_first_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.

[instructor1_first_name] and [instructor2_first_name] will divide up the curriculum:

<https://software-carpentry.org/lessons/>

OR

<http://www.datacarpentry.org/lessons/>

OR

<https://librarycarpentry.org/lessons/>

to know who's teaching what. One of them will create the workshop's web page on GitHub, which will include workshop details and instructions on what learners will need to install on their computers. The template can be found here:

<https://github.com/carpentries/workshop-template>

Please use the workshop id [workshop_id in form of YYYY-MM-DD-sitename]

[host_first_name], if you want to handle registration internally that's fine. Otherwise [admin_name] can work with you to create an Eventbrite registration page. She will need to know a total count, the registration fee (if any, as well as a refund policy), and the exact location. Regardless, all learners should complete pre/post workshop surveys which will be available on the webpage the instructors create. [admin_name] will share links so you all can view survey results.

[admin_name] will check in over the next few weeks and after it's all over to hear how it went – including getting attendance figures, ideally broken out by number registered and number attended each day. Any of you are also welcome to join our instructor discussion sessions before and/or after the workshop. It's a great way to ask questions and share ideas with other instructors before you teach, and to give us feedback after you teach. Check out the schedule and sign up here: <http://pad.software-carpentry.org/instructor-discussion>

We are so glad to have everyone confirmed for this. Please email any questions you all may have for us or each other.

Thanks so much!

Best,

[sender name]

Other instructors placed

Subject: Carpentries workshop at [site_name]: Other instructors placed

Hi [names],

You signed up as interested in teaching at the [Software_ / Data / Library] Carpentry workshop at [site_name] scheduled for [date].

This is to let you know we have placed other instructors there. Thanks so much for signing up and please keep an eye out for other opportunities to teach. We'll be sure to get you in on another workshop. Any questions please let me know.

Thanks!

[sender name]

Eventbrite information needed for Registration

Subject: Carpentries workshop at [site name]: Eventbrite Registration Information

Hi [names],

I look forward to working with you to ensure you have a fantastic workshop!

I can help you set up your registration page. If you would like my assistance, please provide me with the following information:

- Exact location (address, building name, room number)
- Number of registrants
- Time of event
- Fee (if any)
- Refund policy (if there is a fee): none/1/7/30 days prior to event
- Email address of those who will need access to the Eventbrite page to see registration and make changes

The registration form will be completed after the workshop website has been created and shared with me. Please remember to use the workshop id: [INSERT SLUG]

Best,

[SENDER]

Eventbrite Registration Setup

Hi [insert name]

I look forward to working with you to ensure you have a fantastic workshop!

I can help you with your registration. If you need my assistance, please provide me with the following information:

- Exact location
- Number of registrants
- Time of event
- Fee (if any)
- Refund policy (if there is a fee): 1/7/30/none days prior to event
- Who will need access to the Eventbrite page to see registration and make changes

Also, once you have created the workshop url, please remember to share. Using the workshop id:[workshop_id in form of YYYY-MM-DD-sitename]

Best,

[sender name]

Eventbrite Registration Complete

Hi [insert name],

Here is your link to the Eventbrite page: **[insert eventbrite registration link]**

Currently, there is a password **[insert password]** for you to go in and make any changes. Once you have approved, the password will be removed.

I have granted access for you to make edits to the emails you provided, please check your email. Feel free to update or edit when you see the need, this will eliminate you having to wait for me, if there is something urgent.

The Eventbrite Key is **[insert eventbrite key, which is the 11 trailing numbers of the registration link]** for you to add to your workshop url.

Please let me know if you have any other questions!

Best,

[sender name]

Sharing survey results

Hi Everyone,

Below you will find the pre & post survey result links for your workshop on [DATE/LOCATION] . Please do not share these links with the learners - these are just for your review. These are for you as instructors and hosts to prepare for and reflect on this workshop and as constructive feedback to prepare for future workshops.

- pre: [LINK GOES HERE]
- post:[LINK GOES HERE]

As a reminder, the actual survey links for learners are found on the workshop GitHub page [LINK].

Here are a few things for you to keep in mind as you prepare for your workshop:

- Review the host checklist (hosts_instructors_checklist.html) - this will provide you with a detailed list of the items you should consider having in place prior to the workshop.
- Review the accessibility checklist (workshop_needs.html#accessibility) for learners - it is important that all of the learners attending the workshop have accessibility. The checklist will help to make sure you have taken the necessary steps to provide the needs of everyone.

- Review the equipment and materials ([workshop_needs.html#equipment-and-materials](#)) - There may be a few things that may need to be supplied/purchased including two colors of sticky notes. These are essential to the way our operations run.

As you prepare for your workshop, please remember to take attendance daily. I will be asking for this information along with the total number registered each day along with any other feedback you would like to provide. Thanks so much for all you are doing - I look forward to hearing how it all goes.

Please let me know if there are any questions.

Best,

[sender name]

Pre workshop check in

I'm checking in to be sure you're ready for your upcoming workshop on [WORKSHOP DATE]. If there are any last minute questions you have please let me know. As a reminder please be sure to review the items below to help you prepare for your workshop.

- Review the host checklist: ([hosts_instructors_checklist.html](#))
- Review the accessibility checklist: ([workshop_needs.html#accessibility](#)) for learners
- Review the equipment and materials: ([workshop_needs.html#equipment-and-materials](#)) needed for workshop
- Lastly, please remember to take attendance daily. I will be asking for this information along with the total number registered each day along with any other feedback you would like to provide.

If you have any questions regarding any of this information, please do not hesitate to ask. Wishing you much success and I'll check back in after it's over to hear how it went.

Best,

[sender name]

Post workshop check in

Hi [instructors/hosts],

Thank you for volunteering your time to teach a [Software | Data | Library Carpentry]workshop on [dates] at [site]! We appreciate the dedication you've shown to help spread data management and computational programming skills, and the hard work you put into preparing for your workshop.

We want to be sure to give credit to all of our instructors and helpers in our database. Please take a moment to provide us with the following person's email address:

- [INSERT NAME 1]
- [INSERT NAME 2]

Additionally, please remind your learners to complete the post-workshop survey. This survey asks them to self-evaluate how much they've learned and also to give their perspectives on the workshop's major strengths and opportunities for improvement.

Here are your pre and post survey response links for you to review. As a reminder, please do not share these links publicly.

- pre: [LINK GOES HERE]
- post:[LINK GOES HERE]

For your convenience, below you will find several resources that are available to you as an instructor.

Weekly instructors discussion sessions where you can share your feedback and hear from other instructors. Feel free to join us whenever you are available. Check out the calendar here (<http://pad.software-carpentry.org/instructor-discussion>). Be sure to check your timezone when you sign up.

Data Carpentry (<http://www.datacarpentry.org/blog/>), Software Carpentry (<https://software-carpentry.org/blog/>), Library Carpentry (<https://librarycarpentry.org/blog/>) and The Carpentries (<https://carpentries.org/blog/>) also welcome blog posts from instructors and workshop hosts who share their experience conducting a workshop. You are more than welcome to contribute as well! If this is something that interests you, please let me know.

If you have any questions regarding anything I've shared do not hesitate to email me directly. Thanks for all of your hard work running this workshop!

Best,

[sender name]

Host and Business Administrator Introductions (non-members)

Subject: [SWC/DC/LC] Carpentries Workshop @ [LOCATION/DATE]: Introducing Administrative Support Specialist

(send to host and cc finance@carpentries.org)

Host,

This is [INSERT NAME OF Administrative Support Specialist], who will be assisting from The Carpentries with invoicing for your [WORKSHOP TYPE (SWC/DC/LC)] workshop on (DATE) at (LOCATION).

[PROVIDE Administrative Support Specialist SHORT DESCRIPTION OF WORKSHOP, I.E. BILLING AMOUNT, WHETHER OR NOT THEY WILL HAVE EVENTBRITE, ANY OTHER INFORMATION YOU HAVE RELEVANT TO BILLING]

He/She has put together this list of questions (<https://carpentries.typeform.com/to/T1qPcJ>) that usually gives him/her everything she needs to complete the invoicing process, including information about the billing contact, vendor registration paperwork, and POs.

If the person processing the invoice is someone other than you, it is probably best that they fill out this form, and Talisha will reach out with any questions and follow up on any paperwork that your organisation's process requires. Alternatively, please feel free to connect [INSERT NAME OF Administrative Support Specialist] directly with your billing contact or respond to him/her directly with any information that is appropriate!

Please feel free to work with [INSERT NAME OF Administrative Support Specialist] directly. [INSERT NAME OF Administrative Support Specialist] will take care of all of the billing from here. As always, please feel free to let me know if you have any questions or concerns regarding workshop logistics.

Best,

[Sender]

Host and Business Administrator Introductions (members using Eventbrite)

Subject: [SWC/DC/LC] Carpentries Workshop @ [LOCATION/DATE]: Introducing Administrative Support Specialist

(send to host and cc finance@carpentries.org)

Host,

This is to introduce [INSERT NAME OF Administrative Support Specialist], who will be working with you to handle the Eventbrite revenue from your [WORKSHOP TYPE (SWC/DC/LC)] workshop on (DATE) at (LOCATION).

This revenue can either be donated to The Carpentries or returned to you by check (or wire, if needed) after the completion of the workshop.

Please let [INSERT NAME OF Administrative Support Specialist] know what you would like to do, and, if you would like the funds returned to you, the name the check should be made out to and the address where it should be sent. He/She is also happy to answer any questions or concerns you may have.

Eventbrite revenue is received by us 5-7 days after the event registration closes, and the processing time required to receive and then send out the funds to you can be up to two weeks, so you can expect to receive your funds within a month after your event.

Please feel free to work with [INSERT NAME OF Administrative Support Specialist] directly. [INSERT NAME OF Administrative Support Specialist] will take care of all of getting you the Eventbrite funds. As always, please feel free to let me know if you have any questions or concerns regarding workshop logistics.

Best,

[Sender]

Instructions for Instructors to Update AMY Profile

Hi [person name],

Thank you for inquiring about how to update your profile in AMY (<https://amy.carpentries.org/>). In order for you to be able to view and update your profile, we need to have a valid GitHub user ID for you. Once you share this with me, I will set up log in access for you.

From here you can update information such as your email address, twitter handle, location, and more. You can also select your privacy settings if you would like your profile to be displayed on our website (<https://carpentries.org/instructors/>).

Please let me know if you have any other questions.

Best,

[sender name]

13.6.2 From Instructors and Hosts

For Self Organized Workshops: Recruiting Co-instructor

Subject: Recruiting co-instructors for Carpentry Workshop

Hi [person name],

I'm organizing 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've learned to their own work. I'm really excited about using the [Data/Library/Software] Carpentry curriculum here to help our [graduate students/staff/faculty - your target audience] become more efficient in their research.

I've completed instructor training for The Carpentries and am certified to teach their materials. To run a workshop, I'll 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'm 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 wouldn't need to develop anything from scratch. If you're 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/>].

I'm looking forward to running a workshop here and think it will be very helpful to our [target audience]. If you're 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'm 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've learned to their own work. I'm really excited about using the [Data/Library/Software] Carpentry curriculum here to help our [graduate students/staff/faculty - your target audience] become more efficient in their research.

During the workshop, I'll 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 don't need to be an expert in the tools we're covering, just to have used one or more of them and be comfortable helping people troubleshoot. At this workshop, we're planning on covering [list of your topics]. I think you would be a great person to help out with [topic]. If you're 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/>]. Please let me know if you're 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], [organization 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've learned to their own work. I'm really excited about using the [Data/Library/Software] Carpentry curriculum here to help our [graduate students/staff/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 won't 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 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 (<http://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'll learn, we ask that you complete our pre-workshop survey (https://www.surveymonkey.com/r/swc_pre_workshop_v1 OR <https://www.surveymonkey.com/r/dcpworkshopassessment>).

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'd like to capture your thoughts about what was covered and your perception of the workshop overall. Please complete the post-workshop survey at (<https://www.surveymonkey.com/r/dcpworkshopassessment> OR https://www.surveymonkey.com/r/swc_post_workshop_v1) 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

CHAPTER 14

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.

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:
$ 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>`_
```

15.3 Additional information

This site is built from the master branch of [this repo \(carpentries/handbook\)](https://github.com/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-master, non-live branch. When your changes are complete and ready to be pushed to the live site, open a pull request in [carpentries/handbook](https://github.com/carpentries/handbook).

Draft content can be added to the [drafts folder of the carpentries/userguides repo](#) (in the master branch) without breaking anything. Draft content is not built to the live site and these files may contain inaccurate or out of date information.

16.1 Documentation

The Carpentries documentation material in this repository is made available under the [Creative Commons Attribution license](#). The following is a human-readable summary of (and not a substitute for) the [full legal text of the CC BY 4.0 license](#).

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