



THE
CARPENTRIES

2021
**ANNUAL
REPORT**

Table of Contents

- 2. A Message From Executive Director, Dr. Kari L. Jordan
- 3. A Message from the Executive Council
- 5. Our Values
- 6. Our Mission
- 7. 2021 in Summary
- 9. Operational Priorities for 2022
- 10. The Carpentries at a Glance
- 12. Our Financials
- 15. Acknowledgments



A Message From Executive Director, Dr. Kari L. Jordan

Community,

I am writing this letter having completed the first hybrid retreat for The Carpentries Core Team. During our retreat, we participated in a journaling and reflection period. Storyteller Joy Ofodu guided us through a meditation where we learned how gratitude helps us feel seen and connected. We wrote a gratitude note to someone we care about and a second to ourselves in the journaling exercise. **Here is my gratitude note to you, The Carpentries community, for all you have done to advance The Carpentries' mission in 2021.**

As stewards of The Carpentries' vision and values, I want to thank you for teaching over 330 Carpentries workshops in 2021, helping novices and others improve their research practices and learn foundational coding skills. Our temporary shift to virtual instruction is now permanent. Online workshops would not be possible without all of YOU! Thank you for your feedback, ideas, practice, trial and error, and the work you have put into making online workshops a success.

We look forward to continuing to offer online workshops in 2022 and beyond.

Our workshops are unique, not only because we provide a welcoming, inclusive learning environment but because we develop our lessons collaboratively. In 2021 we welcomed new maintainers and curriculum advisors and spotlighted several incubator lessons, including [Interactive Data Visualizations in Python](#), [Programming with Julia](#), and [Foundational Computer Skills](#). Thank you to our thriving lesson development community for your innovation and drive to keep our curricula in sync with the ever-changing landscape of research and software.

I want to thank you all for your excitement and support for the work we are doing to advance equitable outcomes in data literacy for Black, Latinx, and Indigenous researchers. In 2021, The Carpentries onboarded an Equity Council to advise on our goal to integrate inclusive pedagogy and culturally responsive teaching into The Carpentries curricula. Equity is not optional in Carpentries programming. Being surrounded by community members who embody our [values](#)—inclusive of all, people first, strength through diversity—gives me the utmost gratification.

As we focus on current and future needs (e.g., accessibility, financial sustainability, equity), know that your contributions are vital to our success. Read on to learn more about the accomplishments we made in 2021, and consider writing yourself a note of gratitude for all you have done.

With sincere thanks,

A handwritten signature in black ink that reads "Kari L. Jordan". The signature is written in a cursive, flowing style.

*Dr. Kari L. Jordan
Executive Director*

A Message From the Executive Council

In 2021, The Carpentries reached 100 active memberships - a phenomenal achievement and a clear indicator of healthy growth of the community and also a foundation for sustainable operations. The Carpentries Executive Council is proud of this development which is possible due to the constant efforts of the Executive Director, Dr. Kari L. Jordan, the Core Team, and all members of the community.

Besides the numerous workshops that are still mostly performed remotely - accepted as “the new normal” - several wonderful events such as CarpentryConnect South Africa 2021 took place. Other developments including the creation of the Code of Conduct Facilitators Module and establishment of the Trainers Leadership, elected by the Instructor Trainer community, will help to further increase the quality of our community work.

The Executive Council tries to continuously improve its structure and working mode. Our aim is to support the community with an efficient governance body which complements the management performed by the Executive Director. As a new development in 2021, we established five Standing Committees in which the members of the Executive Council can perform focused work on selected topics in smaller groups. We also further clarified where decision making lies in the organization, allowing the Executive Council to focus more on governance, and the Core Team on the day-to-day running of the organization. Together, these developments represent important steps to transform the Executive Council into functioning similarly to the board of a nonprofit organization.

In 2022 we will further work toward this goal and - among numerous tasks - we will revise the bylaws.

Pictured left to right, and top to bottom: Cedric Chambers, John Chodacki, Konrad Förstner, Paula Andrea Martinez, Lex Nederbragt, Aleksandra Nenadic, Michael Smith, Sarah Stevens, Masami Yamaguchi



Our Values

Act Openly

Empower One Another

Value All Contributions

Always Learning

Inclusive Of All

People First

Access For All

Community Collaboration

Strength Through Diversity

Our Mission

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



2021 Highlights

CarpentryConnect South Africa

In September, The Carpentries community in Africa came together for the first-ever virtual CarpentryConnect. With workshops, networking, and other sessions, this event was a success and saw more than 120 attendees from 28 countries worldwide, including 16 in Africa.

New Director of Community, Workshop Administrator, and African Capacity Development Manager

The Carpentries Core Team continued to grow with the addition of Director of Community Alycia Crall, Workshop Administrator Danielle Sieh, and African Capacity Development Manager Angelique Trusler, who had formerly served in an independent contractor role as the Regional Consultant for Southern Africa.

Lesson Development Study Groups

In February, we ran the inaugural round of Lesson Development Study Groups to help community members take the first steps in designing lessons for The Carpentries Incubator. This cohort included 28 participants working on 18 lessons.

Curriculum Advisors Program

We reactivated our Curriculum Advisors Program. Curriculum Advisors provide strategic guidance for our curricula. We onboarded 23 Curriculum Advisors in early 2022.

Pricing Model Change

In order to better serve organisations outside of high-income countries, we introduced geographically tiered prices into our pricing model for Workshops and Instructor Training. We also inaugurated a financial support program to offer assistance to under-resourced organisations, irrespective of location.

2021 Highlights

Trademarks work - transferring trademarks to CI

In July, we began the process of transferring the trademarks for The Carpentries and its respective logo in the US, Data Carpentry through WIPO, and Software Carpentry in the US and Canada to our fiscal sponsor, Community Initiatives.

Sponsorship Program

In October, we launched our pilot Sponsorship Program to diversify our revenue streams through partnering with organisations that align with our mission and values. Our first corporate Sponsor was RStudio, joining in November.

GDPR and Privacy Policy Update

Furthering our commitment to our community's privacy and data rights, this year we updated our Privacy Policy and Terms and Conditions to align with Europe's General Data Protection Regulation (GDPR) and California's Customer Privacy Act (CCPA).

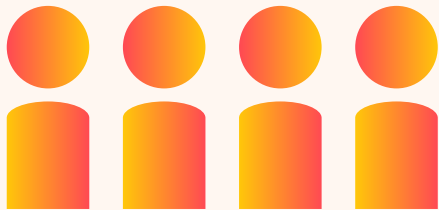
Sloan Foundation and CZI grants for EIA

With funds from The Alfred P. Sloan Foundation and Chan Zuckerberg Initiative we are expanding our equity, inclusion, and accessibility (EIA) work, including the creation of an Equity Council to expand our impact in communities of colour and adding a full-time Accessibility Manager to our team.



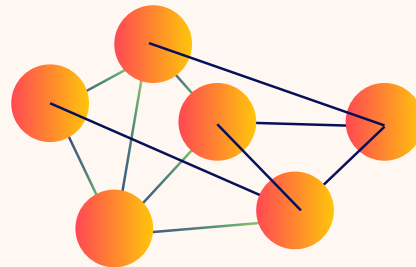
2022 Operational Priorities

Priority 1



Invest in **equity, inclusion, and accessibility** so that all community members can access The Carpentries' resources, and so that the organisation can increase its reach globally.

Priority 2



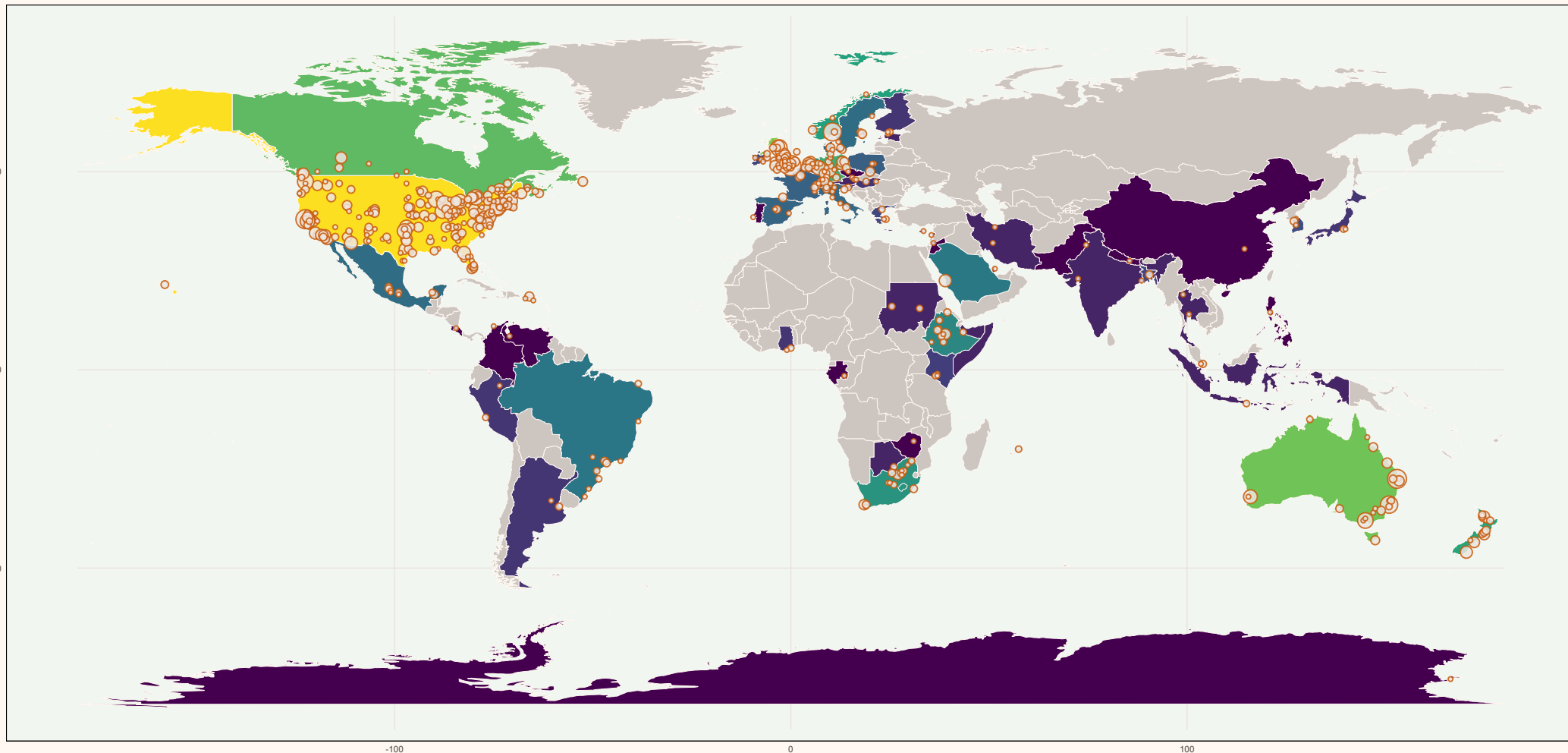
Develop the **infrastructure** for The Carpentries to support the community, including team structure, management systems, and procedures.

Priority 3



Develop a business model for the **long-term sustainability** of the organisation which also aligns with The Carpentries' mission, community and values.

The Carpentries at a Glance



407

Workshops in 2021

3,000

Total workshops

*64

Countries

Since 2012 and as of the end of 2021, we have run **3,000** workshops in **64** countries and trained **3,419** volunteer instructors to deliver our **45** collaboratively developed, open lessons to **74,000** novice learners at our **92** member sites

and beyond...

3,419

Certified Instructors

74,000

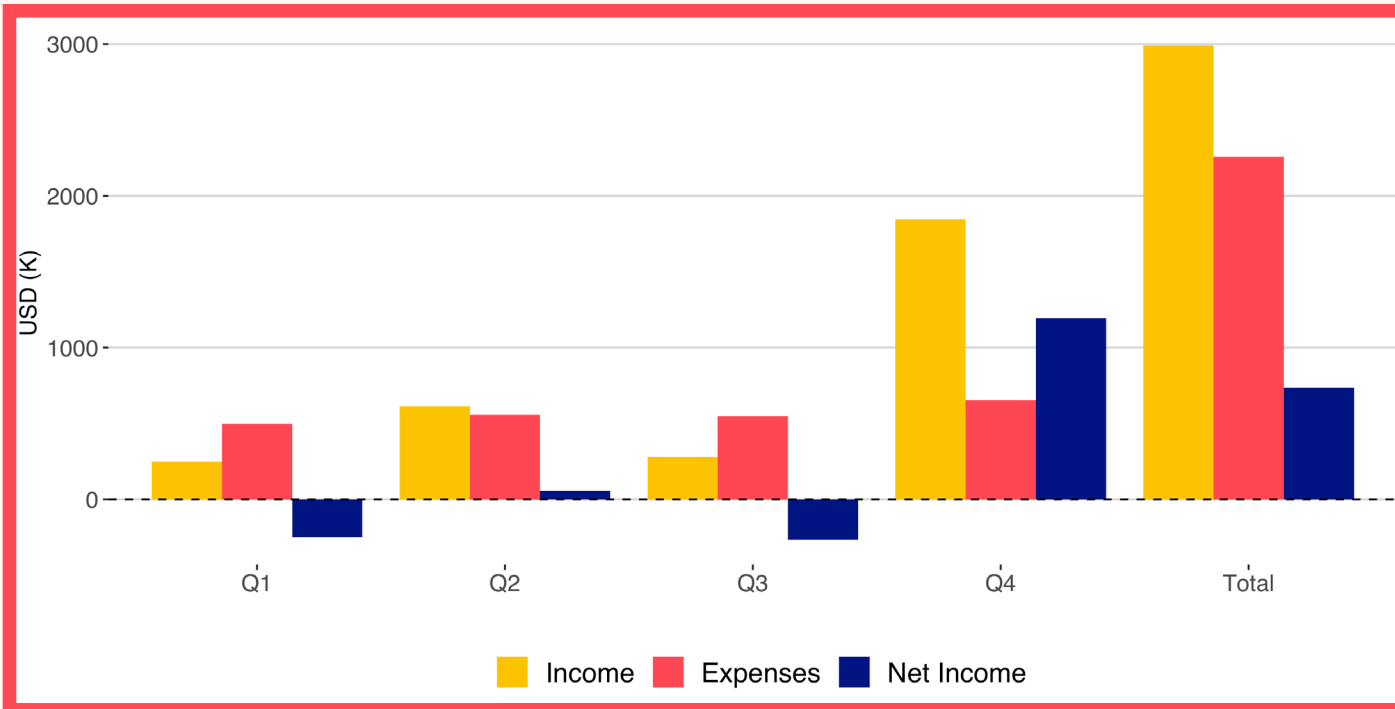
Total learners

92

Members

* Note: A previous annual report stated the number of countries was 71. This was due to an error in our queries that has since been corrected. The new total is the correct number.

Our Financials



Quarterly Financial Overview

Yearly total

Income	2,991,020
Expenses	2,256,399
Net Income	734,621

Q1 Finances	USD
Income	\$249,382
Expenses	\$497,943
Net Income	(\$248,561)

Q2 Finances	USD
Income	\$612,841
Expenses	\$556,491
Net Income	\$56,351

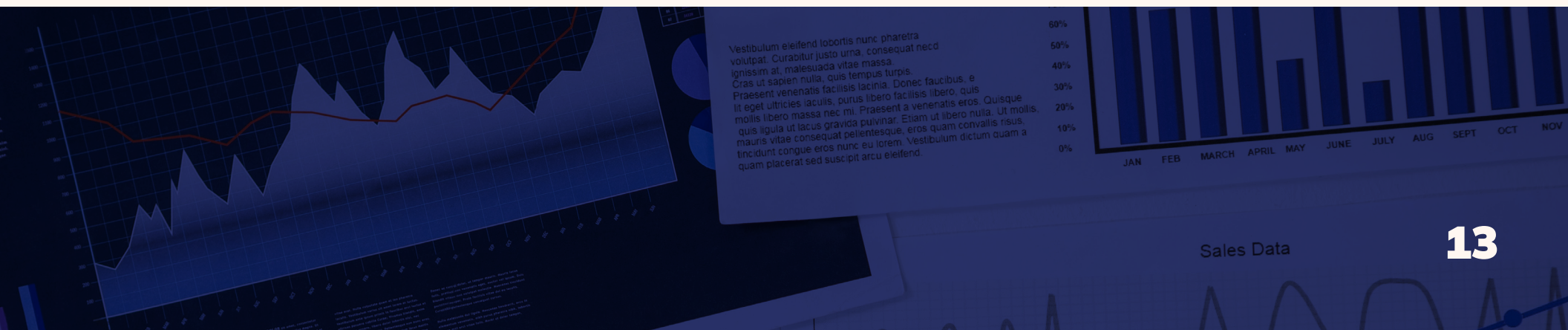
Q3 Finances	USD
Income	\$281,243
Expenses	\$548,041
Net Income	(\$266,798)

Q4 Finances	USD
Income	\$1,847,104
Expenses	\$653,924
Net Income	\$1,193,180

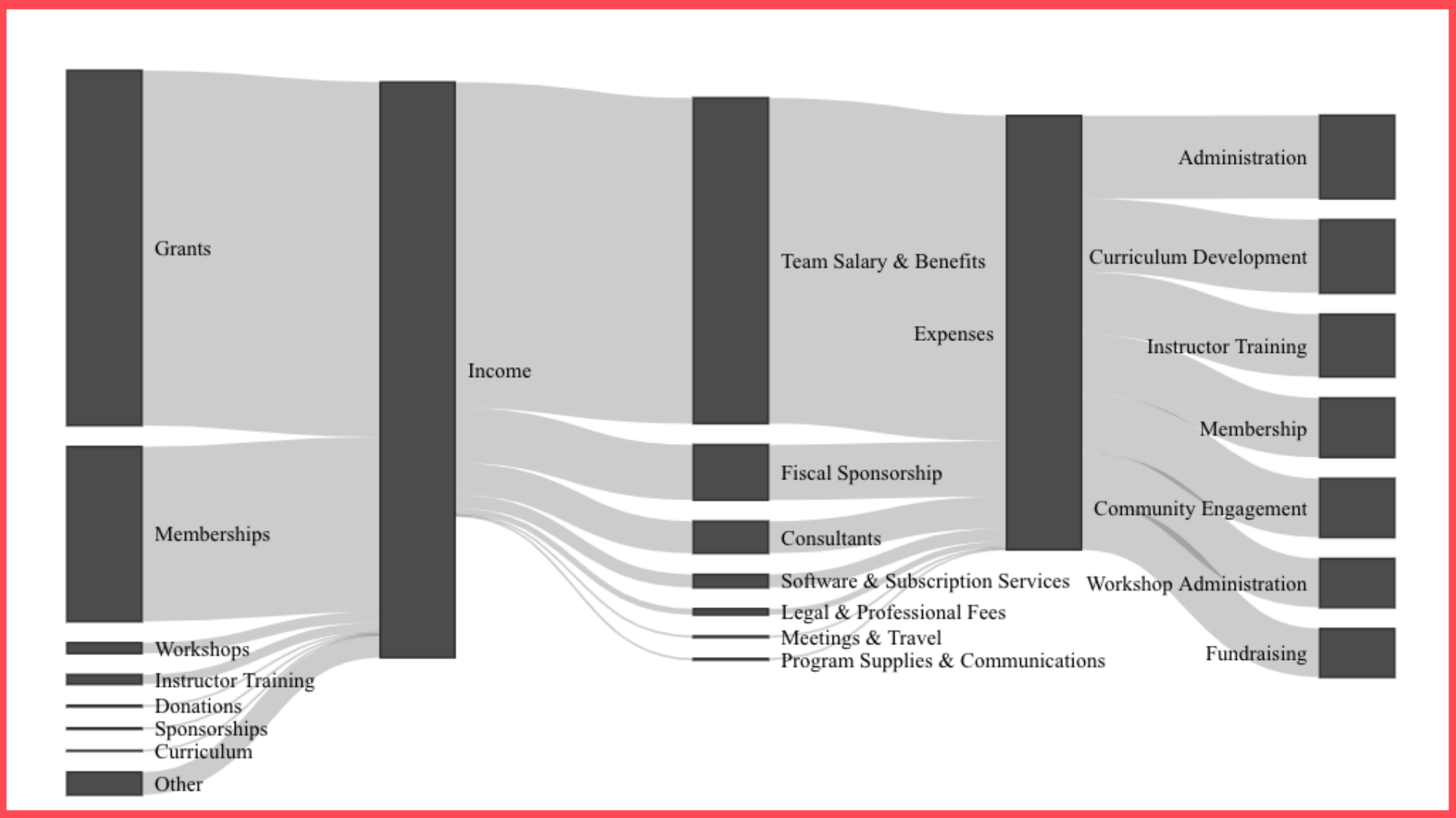
Our Financials

Income by Category	USD	Percent
Grants	\$1,844,827	61.69
Memberships	\$908,838	30.39
Workshops	\$55,169	1.84
Instructor Training	\$48,971	1.64
Donations	\$6,526	0.22
Sponsorships	\$6,059	0.20
Curriculum	\$2,500	0.08
Other	\$117,681	3.94
Total	\$2,990,571	100.00

Expenses by Category	USD	Percent
Team Salary & Benefits	\$1,692,223	75.00
Fiscal Sponsorship	\$287,199	12.73
Consultants	\$165,511	7.34
Software & Subscription Services	\$68,003	3.01
Legal & Professional Fees	\$30,978	1.37
Meetings & Travel	\$6,288	0.28
Program Supplies & Communications	\$6,196	0.27
Total	\$2,256,399	100.00



Our Financials



Thank You And Congratulations To The Carpentries Community For All The Impactful And Inspiring Ways That You Contribute!

- Carpentries Core Team Members
- CarpentryCon Task Force Members
- Community Initiatives Staff
- Code Of Conduct Committee Members
- Curriculum Advisors
- Executive Council Members
- Workshop Hosts
- Independent Contractors
- Instructor Development Committee Members
- Instructor Trainers
- Learners
- Library Carpentry Advisory Group
- Lesson Maintainers
- Member Organisations
- Regional Coordinators
- Workshop Instructors, Supporting Instructors, and Helpers