



Strategic Plan for 2020-2025

EIA Roadmap Goals

GOAL 1:
Build regional and local capacity to empower sustainable communities.

Create and implement a program for developing Local Leadership, including mentorship for new Leaders, communication channels for connecting Local Leaders, and explicit training in our values, Code of Conduct, and Equity, Inclusion, and Accessibility.

Develop a kit of resources, templates, and documentation to help build local communities and enable them to run their own CarpentryConnect events so that they can share experiences and learn from one another locally, regionally, and globally.

Develop a plan to work with local and regional communities to ensure they are supported appropriately by Regional Coordinators, Trainers, and other community roles that work in a location-specific manner.

Develop an Onboarding for Member Organisations that empowers them to build community locally and connect globally, including reports and recommendations for building local capacity for training and community; guidance for establishing an equitable, inclusive, and accessible culture of learning; and information on getting involved in the global Carpentries community.

- Provide professional development opportunities for community members.
- Objective: Eliminate barriers to participation for teaching and helping with workshops.
- Empower instructors to run self-organised workshops.
- Assess and improve Instructors' sense of validation, belonging, and personal safety.

- Provide professional development opportunities for community members.
- Revise The Carpentries templates for improved access and usage.

- Provide avenues for conversations and collaboration among community members
- Empower instructors to run self-organised workshops.

- Create Member Onboarding to include strategies for local community building and training capacity with equity, inclusion, and accessibility in mind.
- Provide Member Organisations reports and recommendations for building local capacity for training and community to establish a culture of learning.



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	Develop a plan for strategically engaging libraries and research computing centres as Carpentries hubs for their institutions.	
GOAL 2: Intentionally incorporate equity, inclusion, and accessibility to support a diverse community.	Create an Equity Council to work with the community and Core Team members on establishing and implementing equity, inclusion, and accessibility metrics for all of our programs and our administrative processes, including employment and contracting.	
	Develop a program for supporting community growth and training in under-resourced institutions and communities and in new geographical regions.	• Recruit and retain a diverse and inclusive Instructor and Trainer community. • Develop pathways for new geographical regions and areas with unstable internet.
	Improve mechanisms for participation and contribution to our community by investigating ways to support more languages, better understanding the needs of signing and non-signing members of the Deaf and hard of hearing community, and enabling more ways to participate that are not dependent on stable internet access.	• Through community discussion, interviews, and a review of our current systems and qualitative feedback, we have also realised areas of potential improvement. Some of these include access to community meetings from areas where internet is a limitation, improving our contribution infrastructure for novice GitHub users, and helping instructors share resources and connect with one another. • Provide infrastructure to support community contributions to and development of written lessons in non-English languages. • Develop pathways for Deaf/deaf/HoH trainees.
	Create a roadmap for improving the accessibility of our lessons, lesson infrastructure, online resources, and sign-up workflows for teaching workshops.	• Workshop automation to improve the experience for instructors who sign up to teach workshops • Develop an accessible workflow for signing up to teach workshops.
	Enhance our Instructor Training materials through the inclusion of information about Culturally Responsive	• Maintain a Culturally Responsive Instructor Training Curriculum and Continuing Education.



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	Teaching and the development of an instructor resource guide about equity, inclusion, and accessibility.	• Explicitly integrate principles of culturally responsive education into Instructor Training and Trainer training curricula.
	Develop a workflow for responding to accessibility information and feedback to improve accommodations for Instructors and Learners.	• Eliminate barriers to participation for teaching and helping with workshops.
GOAL 3: Provide opportunities for growth and professional development of our volunteers and Core Team.	Develop an externally-valid, community-led badging and recognition program for both online and in-person roles.	
	Solidify current committee leadership roles, responsibilities, and governing documents.	
	Form and support a Communications Committee to broaden opportunities for community members to engage in our communications to a broad audience.	
	Develop Instructor Training refresher modules to keep Trainers current in educational and Carpentries-specific practices, and provide opportunities for continued learning.	• Provide pathways for Instructors to develop and strengthen their cultural competence, inclusivity, and accessibility perspectives and practices.
	Create structures and pathways for identifying and utilising training opportunities for Core Team members to develop professional skills in management and/or independent contributor roles.	
GOAL 4: Facilitate the creation and maintenance of relevant, high-quality, Community-curated curricula.	Improve the overall experience for contributors by developing accessible templates and documentation, revising existing processes and documentation for novices, and curating contribution opportunities for new contributors.	• Maintain a high quality and accessible lesson stack across each lesson program. • Provide accessible avenues for community contributions to lessons.
	Develop a comprehensive Maintainer program including onboarding, mentorship, regular recruitment/retirement cycles, and accessible lesson infrastructure.	



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	Develop a Community-led Curriculum Advisors program, including roles and responsibilities, regular cycles for recruitment/retirement, and communication pathways between Maintainers, Curriculum Advisors, and lesson program Advisory Councils.	
	Empower Community members to develop lessons by lowering barriers to contributing to The Carpentries Incubator program and making the lesson development and release process more transparent.	• Maintain a high quality and accessible lesson stack across each lesson program.
	Develop an Instructor Training curriculum variant that is intended for training people who do not intend to teach Carpentries workshops.	
GOAL 5: Strengthen organisational structure and capacity to be strategic and responsive.	CORE TEAM Develop Core Team structures (e.g. programmatic team roles, supervisory structures) that enable individuals to be both empowered and accountable through clear roles, expectations, communication, and pathways for advancement. Develop fair and equitable human resource policies for Core Team members in collaboration with our fiscal sponsor. Establish workflow and documentation for our essential ongoing processes (e.g. budget creation and review, communication channel use), and identify areas for effective and appropriate automation or other improvements needed to scale support.	• Develop a career planning program to support full-time paid staff and contractors. • Develop a seamless hiring and contracting workflow. • Acknowledge and embrace staff cultural practices.
	REVENUE Pursue grant opportunities and explore ways to manage and diversify our revenue streams, including pursuing	• Develop a scholarship program for workshops and à la carte instructor trainings.



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	corporate sponsorships, that are aligned with our values and priorities. Develop opportunities for more communities to participate in workshops and Memberships through programs that plan for and offset associated costs. Update the model for Carpentries Membership to match the needs of different types of communities, support the development of local capacity for training, improve operational efficiency, and be a significant part of the revenue model that provides adequate funding to sustain Carpentries activities.	• Develop a Robust, Empowering, and Prestigious Membership Program. Performance Goals
	BUSINESS & GOVERNANCE Work with our fiscal sponsor to establish guidelines and methods to conduct business internationally, to manage volunteers, and to explore other relevant activities. Be aware of and implement best practices in privacy management, copyright, and trademarks. Create an organised and engaged Lesson Program governance structure and strengthen Lesson Programs' oversight of their Programs. Establish an Advisory Council for The Carpentries that will meet biannually to advise the Executive Council regarding strategic planning, finances, governance, and other relevant topics.	• Lower barriers to international accessibility and engagement to our community from a business perspective
GOAL 6: Advocate for our values and vision to empower more people	Identify speaking and presenting opportunities for Core Team, Executive Council, and Community members that are strategically appropriate to strengthen the visibility of The Carpentries and model our values.	• Empower community members to promote foundational computational skills.



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to work with data and software.		
	Develop slide decks and other supporting materials for the Core Team, Executive Council, and Community members to use/adapt when advocating for our values and vision.	
	Intentionally reach out to related communities to create relationships and develop synergies.	• This roadmap is being developed through the lessons learned from Community Discussions, interviewing diversity and inclusion leaders in open science, reviewing The Carpentries post-workshop survey open ended responses, and liaising with several of The Carpentries committees and task forces. We have completed a number of projects and initiatives and have reached a point where we hold a robust Code of Conduct and consider equity, inclusion, and accessibility in our project planning.
	Write and share position papers related to training and empowering people to work with data and software.	
	Encourage Core Team and Community members to serve on advisory boards of other organisations to provide guidance and advocacy in areas key to The Carpentries mission and vision and respond to requests for comments in these areas.	• Develop The Carpentries Request for Comments/Feedback procedure.