Library Carpentry Lesson Incubation Roadmap updates

In May 2018 Both Library Carpentry governance and The Carpentries Executive Council have approved motions to have ‘merger’ discussions.

Since then The Carpentries have continued to develop the Lesson Program Policy and drafted a Lesson Incubation Roadmap to guide the discussion and process.

Library Carpentry has continued to develop a governance group and define who they are and their goals. LC now has a consistent and engaged governance group, with monthly meetings and decision making capacity. They also have defined who they are, in terms of who is their audience and what the goals of the curriculum are.

“Library Carpentry develops lessons and teaches workshops for and with people working in library- and information-related roles. Our goal is to create an on-ramp to empower this community to use software and data in their own work as well as be advocates for and train others in efficient, effective and reproducible data and software practices.”

They also have a separate Curriculum Advisory Committee to focus on the lessons.

In their last governance meeting, Kate Hertweck, from The Carpentries Executive Council, joined the call and they used the current Policy and Roadmap documents to outline where they are and next steps. The main outcome of that meeting was to put together a mechanism for us to review the roadmap conditions and to vote on them: Roadmap steps

Libraries have continued to have a key strategic role in The Carpentries in general. Chris Erdmann, the Library Carpentry Community and Development Director, has done a great job of connecting The Carpentries with libraries and we’re including Library Carpentry in Carpentries discussions, and we continue to sign Memberships and have interest in Memberships from libraries, as exemplified by this post from Elaine Westbrooks vice provost of University Libraries at University of North Carolina at Chapel Hill on The Strategic Value of Library Carpentry and The Carpentries to Research Libraries.

Current status

Taking the **Roles and Responsibilities** of a Lesson Program from the Bylaws:

- 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.

Library Carpentry currently has all of these elements. While still a draft, if we were using the Lesson Incubation Roadmap, they would be in Phase 4 and they have votes on these different elements. The **Policies** document also has more specific steps, outlined and addressed below.

Overall, most governance and alignment with policy issues have been resolved.

The Lesson Program must:

- Follow all general policies as outlined by The Carpentries, such as the Code of Conduct
    - LC has committed to this
- Conduct and administer workshops as outlined in The Carpentries guidelines, including tracking activities
    - LC is doing this, including tracking in AMY. There is some debate about tracking Library Carpentry-inspired workshops that deviate from the core lesson curriculum. The Carpentries is working with Library Carpentry to determine how to include this information in AMY.
- Conduct assessment of workshops through, and in coordination with, The Carpentries assessment efforts
    - LC has developed a survey based on Data Carpentry and are now actively using this survey, using our survey platform SurveyMonkey. They coordinate with Kari Jordan, Director of Assessment and Community Equity, around assessment.
- As per instructor guidelines, use at least one trained instructor per workshop to call it a Carpentries workshop.
    - While initially this was not a requirement, the current governance group all agrees that this is the right approach.
- Commit to recruiting or onboarding instructors who can teach workshops in the Lesson Program
    - They have funding and are running instructor trainings specifically for librarians. Chris is working with Erin Becker, Associate Director, to develop a general onboarding strategy for current instructors, like we did for Data Carpentry.
- Identify the audience that the Lesson Program is intended to serve that aligns with The Carpentries mission and vision
    - See Our Audience page

- Identify the learning goals of the overall Lesson Program that align with The Carpentries mission and vision
    - They have done this with their statement on Library Carpentry
    - “Library Carpentry develops lessons and teaches workshops for and with people working in library- and information-related roles. Our goal is to create an on-ramp to empower this community to use software and data in their own work as well as be advocates for and train others in efficient, effective and reproducible data and software practices.”
- Identify learning objectives for a workshop and each lesson
    - See Our Lessons and Learning Objectives section
- Maintain a website that has information about its goals, workshops and curriculum
    - Currently https://librarycarpentry.org/ but moving to SWC/DC website template at https://librarycarpentry.github.io/test
- Have at least one articulated core curriculum for a two-day workshop
    - See Our Lessons
- If multiple combinations of lessons comprising workshops are available, provide guidelines on what content is required for it to be called a Lesson Program Carpentry workshop
    - There is consensus on the core lessons for LC: https://librarycarpentry.github.io/test/lessons/
    - For future LC lesson development, the CAC is working with Carpentries staff and members of the community to develop its role in providing guidance
- Release (publish) lessons with permanent identifiers on a regular basis (following standard community practices about lesson publications, to be linked to and/or written)
    - Lesson Roadmap has been updated and lesson release and publication via Zenodo is not a requirement. Still, this is a goal of the CAC to publish lesson, particularly core lessons in 2019.
- Develop all content collaboratively and openly with a CC-BY or CC0
    - Done
- Utilize a transparent and inclusive decision making process
    - The Governance Group and Curriculum Advisory Committee use a variety of means to communicate and engage with the community including: group Etherpads, Library Carpentry Blog, Library Carpentry GitHub repositories, Gitter Library Carpentry Lobby, Topicbox discussion list, and Twitter.
- Provide evidence of community member commitment to LP governance (see below), lesson maintenance, and curriculum development
    - This is evident with community and governance engagement
- Communication with Carpentries: Curriculum development: What is a workshop for the Lesson Organization?
    - Draft website responds to this condition
- Lesson maintenance: What is lesson life cycle (goals of lesson, when does it become supported, when is it retired), maintaining lesson repositories in GitHub based on the lesson example from The Carpentries GitHub organization, determining processes

associated with lesson maintenance (recommendations for lesson incubation and maintenance?), specific roles of maintainers
    - This will be consistent with Carpentries lesson maintenance approaches. Following the formation of the CAC, there is an open call for new Maintainers and Chris is working with the CAC, community members, and Carpentries staff.

The Carpentries must:

- Workshop coordination, including infrastructure
    - We are tracking LC workshops in AMY and helping Chris with workshop coordination
- Lesson and workshop templates
    - Using the same templates.
- Lesson development infrastructure
    - Using the same infrastructure (mainly templates at this point)
- Assessment
    - Consistent assessment and aligned with assessment plans going forward. The question “What is your current occupation/career stage?” will be updated to better reflect library roles.Instructor training
- Communications
    - Carpentries staff and community will work with Chris to integrate LC material and language into the website, handbook, and instructor (training) material. This project will be coordinated using the standard Carpentries project development and management workflow in Asana.
- Community support
    - Carpentries staff and community will work with Chris to determine communication strategy and approaches for including the LC community. This project will be coordinated using the standard Carpentries project development and management workflow.
- Communicate with Lesson Program CAC on issues that will significantly affect them related to these topics
    - Coordinate visits from Carpentries staff/EC members in Governance Group, CAC meetings.
- Reporting on impact metrics related to the LP, including raw data, summaries, and analyzed context from the entire Carpentries community
    - Chris has access to this information for LC in AMY and in SurveyMonkey. LC CAC will use this information to assess effectiveness and impact of LC workshops, in coordination with Carpentries assessment efforts.
- Reporting on the financial status and stability of The Carpentries
    - LC CAC will receive annual reports on Carpentries finances, as well as financial information related to LC programmatic efforts.
- Workshop workflows feeds

    - Determine best approach to integrating LC-inspired workshops into overall Asana/AMY workflow, to replace LC manual feeds with automated feeds
- Expand LC instructor pool
    - Work with Carpentries staff and community members to prioritize instructors from libraries while updating instructor training material so that all Carpentries instructors are prepared to teach LC workshops