



**SOCIETY OF RESEARCH
SOFTWARE ENGINEERING**

TRUSTEES' ANNUAL REPORT

Registered Charity Number: 1182455

1st July 2020 - 30th June 2021

ABOUT THE SOCIETY

OBJECTIVES AND ACTIVITIES

The objective of the Society of Research Software Engineering is to advance the practice of research software engineering for the public benefit in such ways as the charity trustees consider appropriate.

The Society organises an annual conference and other events such as training, meetings, workshops or seminars. The Society may undertake or sponsor research related to Research Software Engineering and provide information, advocacy and advice in relation to Research Software and RSEs. It may also provide grants or other finance for activities that will help meet the Society's aims.

All trustees have regard to the commission's public benefit guidance when exercising any powers or duties to which the guidance is relevant. Specifically, Trustees are made aware of the guidance as part of their induction and each trustee has been registered with the charity commission. The guidance is considered for any decisions made by the charity and there have been no deviations from the guidance to report.

The Society accepts contributions from volunteers, specifically, RSECon19 was led by the Society but relied heavily on volunteers for both the organising committee and the venue volunteers during the conference. SORSE - the series replacing this year's conference is fully staffed by volunteers from many countries, usually through their national RSE chapter.



A MESSAGE FROM THE PRESIDENT



Despite what has been a difficult year as a result of the Covid-19 pandemic, the Society and its members have shown huge amounts of innovation in adapting to new ways of delivering on our charitable aims. The way in which the community has responded en masse to provide key support for nationally important work in tackling the pandemic has been incredible. The Society released a statement regarding the impact of research software engineering on COVID-19 (<https://society-rse.org/covid-software-statement/>) but it is worth repeating that one positive outcome from the controversy around the modelling of the COVID-19 pandemic is that many more people are aware that the reliability of research results is inexorably linked to the reliability of the software used to generate them. Put plainly, the COVID-19 pandemic has led more people to understand the importance of software in research and the RSE community has played a vital role in the delivery of key scientific discovery.

Some highlights from the trustees dedicated work this year includes: our growth in membership, trustee involvement in SORSE, introduction of a funding and events policy which is already supporting great work, expansion of our communication and support for RSE themed podcasts, development of a mentoring scheme, development of an EDI policy and much needed investigation into RSE role diversity, expansion and improvement to our digital infrastructure, and of course financial sustainability, despite the lack of an in person conference.

At the start of the reporting period the Society adopted a trustee working group model. This model ensures that there is a shared responsibility for areas of the Society's work. Each working group has at least two (usually three) members, reducing our "bus-factor" over a time period involving frequent and necessary absences at short notice. This report expands upon the highlights above by giving a breakdown of achievements reported on by each trustee sub group.

I wanted to conclude my personal message by highlighting that the Society is nothing without its community and it is fantastic that this community has continued to grow. I would encourage RSEs at all stages to consider standing as a trustee in future years. Volunteering is a great way to give back to the community and learn new skills. I want to thank all trustees for their dedicated work and thank the RSE community for continuing to support the Society.

Paul Richmond (President of the Society of RSE)

A handwritten signature in black ink, which appears to read "Paul Richmond". The signature is stylized and fluid, with a long horizontal stroke at the end.

ACHIEVEMENTS





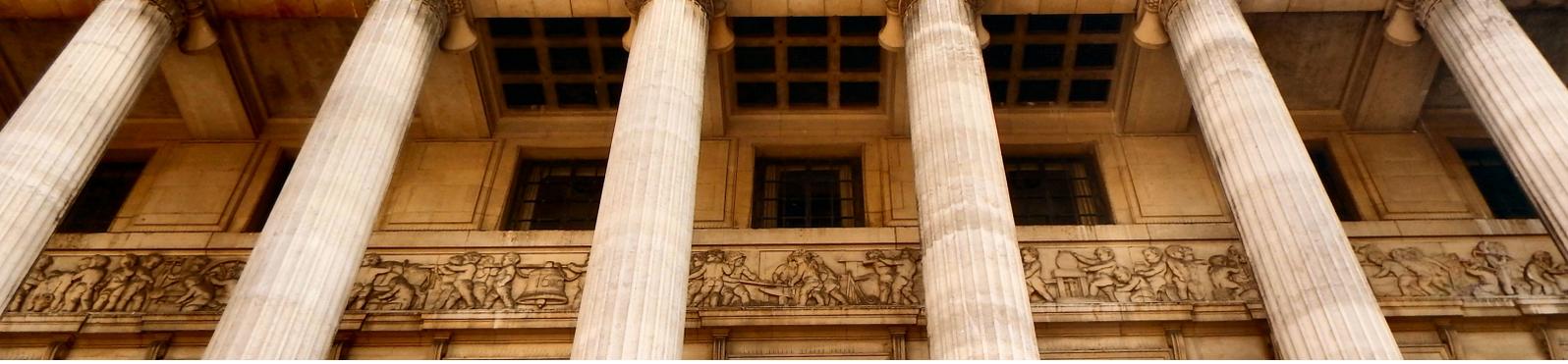
GOVERNANCE

As a new charity, the trustees have undertaken a large amount of work in understanding charity governance and setting up appropriate working practice. Over the current reporting period a substantial effort has been made to strive towards having robust governance in place to protect the Society and its members. While this work involves a lot of internal effort it will stand the charity on a solid foundation for many years to come. More importantly the work undertaken will ensure that there is a clear process for new trustees to follow in continuing to improve our governance as the Society adapts and moves forwards in meeting its aims.

From January 2021, the Governance subgroup has met regularly every two weeks to discuss new policies, review standard items like the risk register and the table of delegation. We have also spent a considerable amount of time this year working on the policy documents that we need to effectively run and manage the Society. We have therefore created, along with consultation from trustees from other subgroups, the following:

- Complaints and Grievance Policy - initially approved 08/01/21, then updated and re-approved 10/06/21
- Rules and Etiquette for Responsible Corporate Engagement on our web platforms - approved 02/02/21
- Policy for Events and Initiatives Grants - approved 02/02/21
- Trademark Policy - approved 04/03/21
- Equality, Diversity and Inclusion Policy - approved 16/04/21
- Conflicts of Interest Policy - approved 16/04/21
- Scheme of Delegation - initially approved 16/04/21
- A Trustee Code of Conduct - approved 11/05/21
- Terms of Reference for the Conference committee - approved 11/05/21

The Society is aware of the importance of transparency and accountability and as such, have also asked all trustees to complete a Declaration of Interests form, adopt the 7 principles of public life, and complete four online courses of mandatory EDI training. We have added these last steps to the induction material so they should be completed by all trustees when newly elected.



GOVERNANCE CONT.

The Society's constitutional process means that trustees serve a two-year term. To ensure a longer-term strategy the Society governance group developed and published a public strategy based around three pillars which align with the Society's aims:

- Environment: Creating a research environment which recognises software and its contributors
- Skills: Enhancing the provision of skills for researchers and the RSE community
- People: Increasing awareness and opportunities for the role of RSEs

The Society plays an important role in managing relationships with key stakeholders to ensure that the RSE community's views are reflected. The governance group holds regular meetings with EPSRC and UKRI to ensure that they remain engaged with the RSE community in their decision making. This has resulted in numerous events in which the Society has directly contributed (see the events and events participated in section). In order to ensure that we support international colleagues, the Society governance group has undertaken work to co-found the International Council of RSE Associations. This important initiative ensures that the Society can support the emergence of new associations as well as providing a platform for collaborative endeavour and discussion between international Associations/Societies. We have continued to ensure that we have a strong relationship with other external stakeholders such as the SSI, ReSA and the Chartered Institute for IT by holding regular meetings with them to share our strategic vision and identify initiatives and policies where we have overlapping interests.

Alongside the work conducted by the governance group, the governance group have been actively involved in working with both the constitution and elections governance groups which have been established short term to explore specific areas of improvements. The constitution group has made several recommended changes which will be presented to the members at the AGM following this accounting period (September 2021). The elections group was set up to oversee the next election period in September 2021, exploring how we can better run the election process. Although outsourcing of the elections process is an area which the Society is keen to explore it was decided that this wasn't yet possible without significant changes to our constitution. The group has however proposed improved methods to let members vote at the upcoming election, which obscures an individual's vote from the scrutineers and restricts the vote to members only.

IN NUMBERS

430

Paid members in the society as of June 2021.

47%

Increase in members over 1 year (since June 2020)

5000

Follows on our Twitter account



MEMBERSHIP

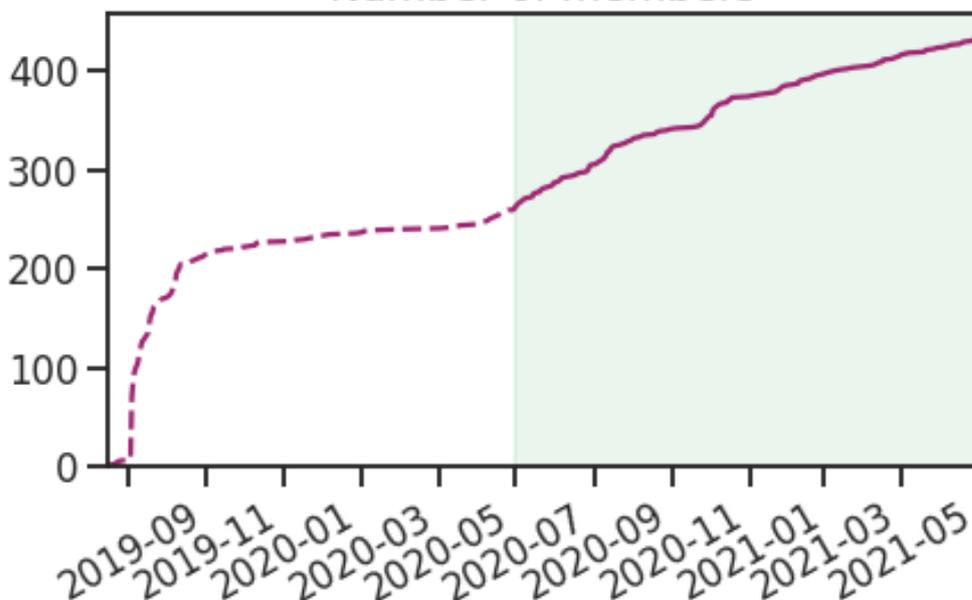
The Society officially launched paid membership back in September 2019. Becoming a member of the Society offers an opportunity to support our work gaining recognition for research software engineering and helping advance research with software. We continue to use White Fuse as our sales portal. This allows payment by direct debit, credit card or debit card for the annual membership fee (£20). The fee level has remained unchanged during the last year. As of the 30th June 2021 our membership stands at 430 (twelve months ago it was 292). A small change this year was making sure a confirmation email was sent out when a new member signed-up. An added benefit to UK-based members this last year was an arrangement with Dell UK whereby our members can get up to 20% off selected computer equipment, such as desktops, laptops and accessories. Our thanks go to Dell UK.

In addition to paid membership, people can subscribe for free to our mailing list. Our mailing-list membership (including paying members) was 839 members on 30th June 2020 (up from last year's figure of 700).

Our website provides some important areas of information for the RSE community, including events, policies and governance for the Society, news, maps of national (UK) RSE groups, an international page for information on other RSE associations and a jobs' page for RSE career opportunities.

We have around 3000 members in our Slack workspace. There are 120 public Slack channels in the RSE space that RSEs can join. We encourage everyone on joining to introduce themselves in the #introductions channel.

Number of members



"Our mailing-list membership was **839** members"

RSE CONFERENCE

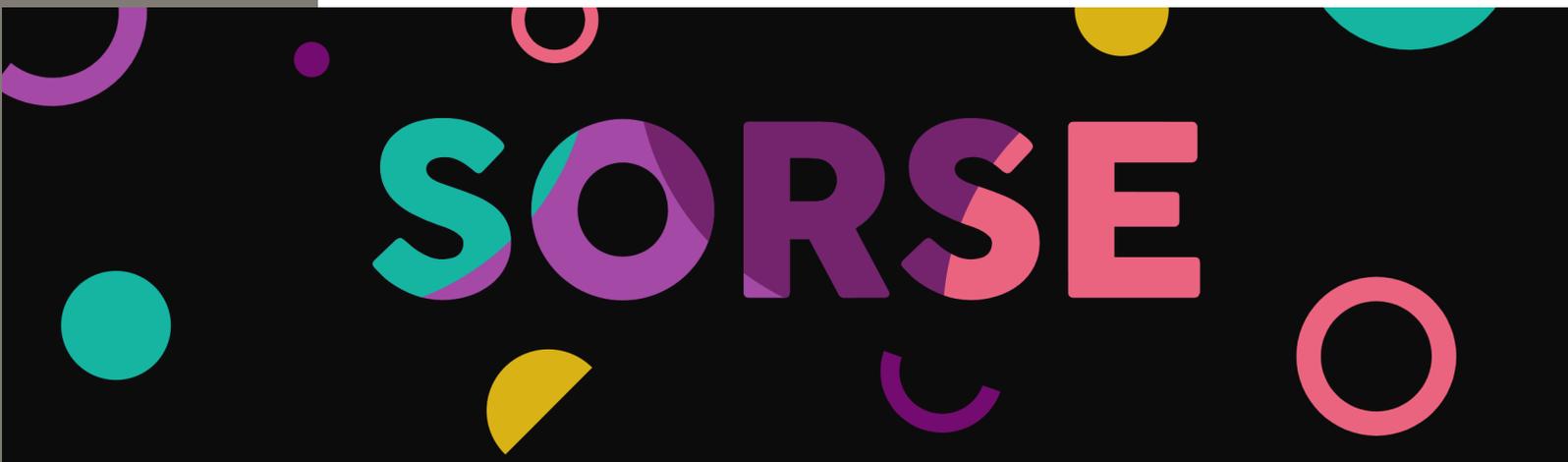
When we realised in March 2020 that an in-person conference was not possible, we looked for ways that we could bring together the international community of RSEs for an online conference and after many months of discussion and debate we launched SORSE (<https://sorse.github.io/>), a Series of Research Software Events in September 2020 with an international committee lead by the RSE Community Manager, Claire Wyatt.

SORSE delivered an online conference while we were unable to meet in person with one event a week over six months on any topic related to research software. It was our international answer to the COVID-19-induced cancellation of many national RSE conferences. We want to provide an opportunity for RSEs to develop and grow their skills, build new collaborations and engage with RSEs worldwide.

This series was an open call to all RSEs and anyone involved with research software worldwide, to propose a talk, a workshop, a software demo, a panel or discussion, blog post or poster.

SORSE ended with its final event on March 24th 2021. Our huge thanks goes to all the contributors who submitted abstracts and gave presentations, discussions, demonstrations, and thanks to everyone who participated in one of our sessions to make all of this possible. All the SORSE events are available on the youtube channel.

Although the launch date of the 2021 conference falls outside of the scope of this annual report, much hard work has already gone into making it a success from January 2021 onwards. Several trustees sit on the conference committee. Claire Wyatt is the Sponsorship Chair and has been contacting our industry partners once again in the hope that they will continue to support the RSE community with its annual meet. Mozghan Kabiri Chimeh is the Liaison Chair acting as the conduit between the conference committee and the trustee board as well as offering her extensive experience in running events, both virtual and in person. This event will go live in September 2021 and it has so much content that there will be a full day of events everyday for the month of September! A more detailed report will be included in next year's annual report.

The logo for SORSE is displayed in large, bold, multi-colored letters. The letters are filled with various colors including teal, purple, pink, and yellow. The background is black and decorated with several colorful geometric shapes: circles, semi-circles, and arcs in shades of purple, teal, yellow, and pink.

SORSE

OUR EVENTS

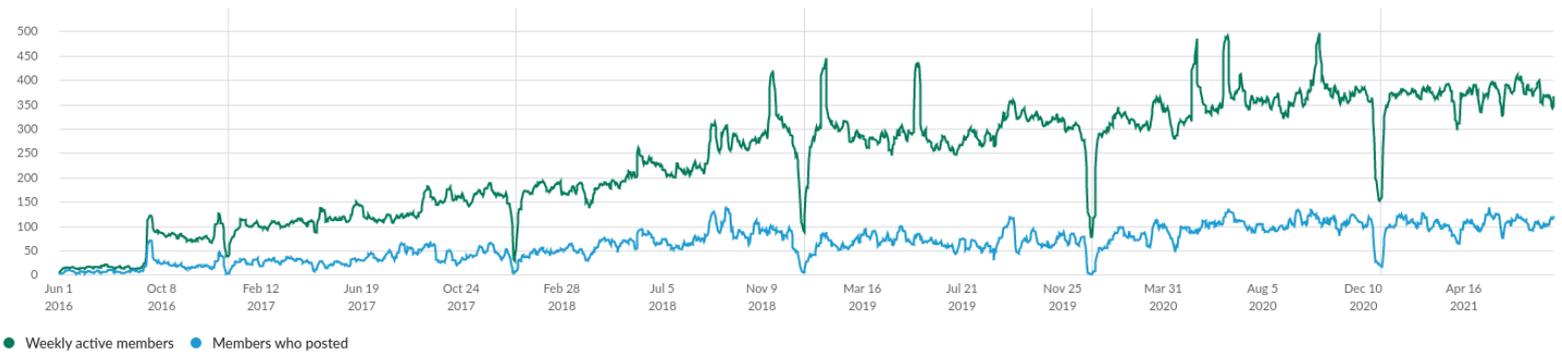
The Society has an events committee that meets every two weeks to plan a range of events that we run. It's been an unusual year for events, but nevertheless we have run and supported a range of events. For example, in October 2020 we held our annual Society of RSE feedback session, and received some great ideas and interesting insights. There was strong support for a RSE mentoring scheme (which will launch this month) and also discussion about the role of regional RSE networks and feedback on the membership package for our members. Of course, members can give feedback at any time via slack to any of the trustees or by email (info@society-rse.org).

RSE Fellowships calls have played a very important part in supporting RSEs in independent research. Ahead of the most recent EPSRC /STFC Fellowship call, the Society of RSE organised a EPSRC/STFC Fellowship webinar with representatives from EPSRC, the Society of RSE and also current RSE Fellows all represented. The webinar was designed to support applicants by answering any questions potential applicants might have. The event received over 200 registrations.

On the 17th June 2021 the Research Software Engineering (RSE) Society held an RSE Careers Pathway event which attracted over 200 registrations. Research Software Engineers (RSEs) come from a diverse set of backgrounds and career stages. The RSE Careers Pathway event aimed to explore and expose some of the boundaries to career progression which impact on the diverse yet talented community of RSEs within the UK. The event included presentations on Research Development Concordat and the Technicians Commitment as well as presentations from RSEs in the community from various career stages. At the end of the session, we ran a feedback session, and the response was overwhelmingly positive. The event feedback attracted 34 responses. In response to the survey question of which initiative (concordat or TC) individuals felt related to them, 50% related themselves to Researcher Development Concordat, 38% with Technician Commitment and 44% felt a new RSE specific initiative is required.



COMMUNICATIONS



The Communications and Publicity team met regularly every two weeks to discuss and coordinate our activities. Ongoing activities include our monthly newsletter which is sent to 800+ mailing list subscribers and Society members, and usually gets around 10-20% click rate (not counting those who read it through a link on Slack or Twitter). In addition to the newsletter, the comms team is sending daily tweets through the Twitter account, with more than 5000 followers, as well as sending announcements in our Slack workspace, which recently surpassed 3000 members in the General channel and is being actively used by the RSE community. We also have a LinkedIn group, which, however, is not very active.

At the beginning of 2021, the Society gave kick-start sponsoring to a new podcast – Code for Thought. Since then, we are continuing our support both in kind (introductions to interviewees) and financially. The podcast publishes two episodes per month and is getting around 100 listeners. In total since launch in January 2021 it has had a total of 1634 downloads. The numbers are slowly going up as we get the word out to the wider community. It also depends on the episode – a recent Julia episode had 300 listeners because the participants put the word out in the Julia community. It is worth noting that downloads continue over time and even though some episodes are 5 months old, they continue to be downloaded. Peter Schmidt, who runs the podcast, has already planned a second series starting in Autumn 2021.

The Society comms team has also started writing a Communications Review and Plan, which outlines the comms and stakeholder policies, describes processes and suggests future comms work. This document will continue to be developed, and will also serve as hand-over document for future members of the comms team. In the process of writing this document, we have introduced a more structured approach to our communications, with a daily communications plan spreadsheet to keep an overview of what needs to go out and what has already gone out.

MENTORING

There have been several requests from the community for the Society of RSE to create a central mentoring scheme for RSEs. The advantages of this over relying on local programmes are that it can be tailored to RSEs and that it could support members whose institutions don't offer any local options. This year the Society developed a plan for the scheme, taking into account feedback from our members from previous events including a discussion session at the 2019 RSE conference and the RSE Society feedback event in 2020. The scheme will match a cohort of mentors and mentees for one-on-one non-technical mentoring as well as group sessions, with mentoring training and support made available to mentors.

It has been important to us to find an external organisation to work with that has a good track record of delivering programmes in higher education and is a good fit for our community, and this year we have talked to a number of potential options. The planned start date for the pilot cohort is the second half of September, following a final decision on which external organisation to work with and a launch event during SeptembRSE. If this pilot period is successful, the goal is to run further cohorts at regular intervals.





EQUALITY, DIVERSITY AND INCLUSION

The Society of Research Software Engineering is committed to encouraging equality, diversity and inclusion among our members and volunteers, and eliminating unlawful discrimination. While the Society is not an employer, our aim is that our membership and board of trustees to be truly representative of all sections of society, and for everyone to feel respected and able to give their best. Over the last year, the Society has developed a number of policies to support implementation of EDI practices. Also, our EDI team contributes and is consulted on our day-to-day activities and when setting up a new programme e.g. mentoring. Our EDI policy which was developed this year and was voted by the board of trustees on 16/04/2021 clearly sets our commitments, including:

- Create a safe environment in all events organised by (or on behalf of) the Society by following our Code of Conduct for events. This Code of Conduct was reviewed in 2021
- Ensure accessibility of our events and online material. Anyone (trustee, volunteer, member or participant in one of our events) can make a request for reasonable adjustments by contacting a member of the EDI team. The policy describes how the request and related information is handled.
- Take complaints of bullying, harassment, victimisation and unlawful discrimination seriously. To this end, The Society's Code of Conduct for trustees and our initial Complaints and Grievances Policy were developed and voted into policy on 11/05/2021 and 08/01/2021, respectively.
- Adoption of mandatory EDI training for trustees

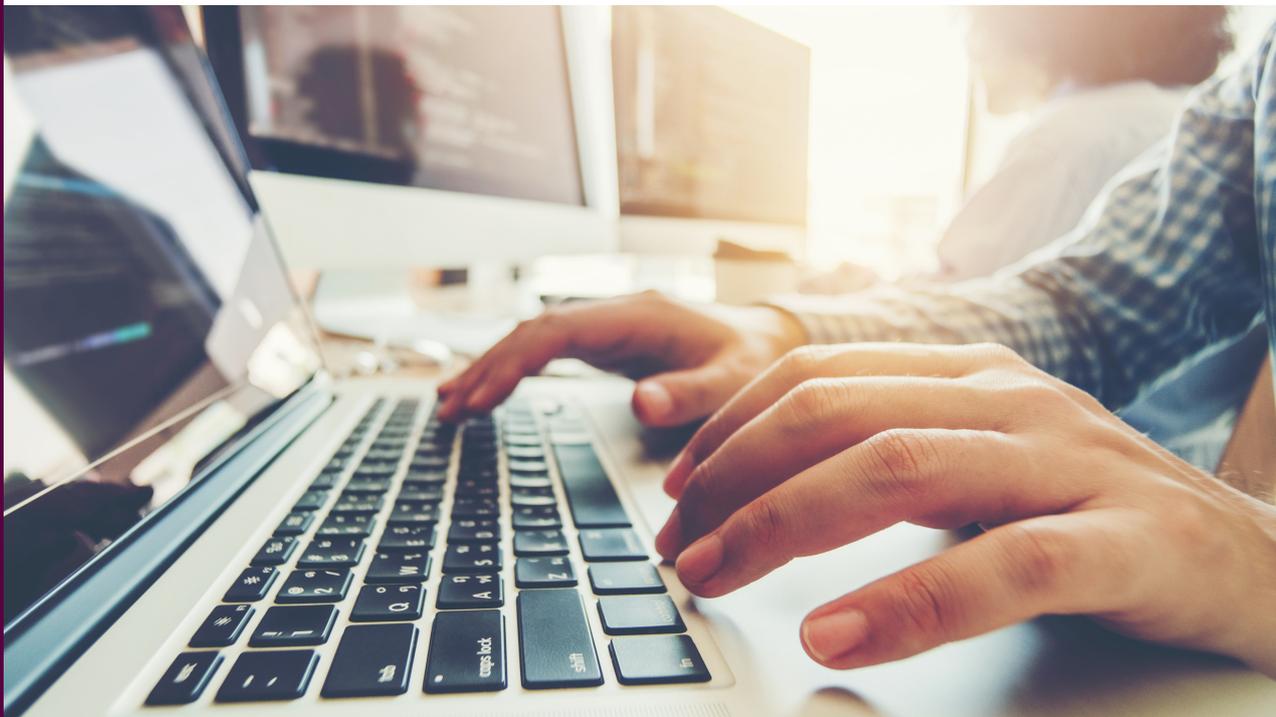
Furthermore, starting from this year, we monitor the make-up of the candidates standing for trustee election regarding information such as age, sex, ethnic background, sexual orientation, religion or belief, disability as well as career stages and type of RSE roles in encouraging equality, diversity and inclusion. A Survey is prepared which will be sent to all candidates. Monitoring this information allows us to take data-informed actions if some groups are not well-represented in our board of trustees.

WEB AND INFRASTRUCTURE

Over the course of this year we have added a range of new information to the Society's website. Some of this information has been driven by policies adopted by the Society, such as our new event funding policy, annual strategy documents and internal policies, and updates to our code of conduct. Others are driven by input from Society members, such as the monthly newsletter, guest blog posts and the long-requested resources database. This resources database is a space for members to suggest resources which they think would be useful to others and contains links to resources on topics such as RSE careers, programming language-specific training materials and essential software skills for researchers. We continue to receive many posts to the Society jobs board with 157 submissions for RSE and RSE-related roles, indicating that demand for RSEs continues to grow despite the effects of COVID-19 on the university sector.

Aside from the main website, the Society's digital infrastructure has expanded and now has sufficient flexibility to offer support-in-kind to events and Special Interest Groups (SIGs) by providing services such as shared mailing lists, document storage, website hosting and communication platforms. One such example is SeptembrSE, which is taking advantage of each of these.

Finally, the migration away from the old <https://rse.ac.uk> site is almost complete. An archived version is now available at <https://socrse.github.io/legacy-website/>, hosted on GitHub Pages. The landing page and many of the most popular pages are already redirecting to their equivalents on the current website. We expect to continue this slow transition with the old site closing fully within the next reporting period.





FINANCIAL SUMMARY

"The Society's financial year ran from the 1st of July 2020 to the 30th of June 2021."

Opening Balance (July 2020)	£104,444
Income	£10,470
Expenses	£17,741
Closing Balance (June 2021)	£97,173



FINANCE

The majority of the income in the period comes from membership subscriptions with a smaller amount of £1,610 being a donation from the University of Southampton. This donation represents the remainder of the RSE association's account balance which was previously held in a University account. The balance is an accumulation of operating profits from the RSE Association with the sole source of this income being from the 2016-2019 RSE conferences which attracted sponsorship and attendance fees.

Our outgoings cover costs associated with the running of the Society (web infrastructure, insurance, professional subscriptions) which we expect to remain largely stable in future. This year we have undertaken significant work on our governance which includes paying for an audit with the NCVO and we have undertaken work to professionalise our accounting practices by moving to a fully-integrated accounting platform. The rest of our expenditure has been on costs directly supporting our charitable aims through our Events and Initiatives programme and through providing financial support for SeptembRSE. Due to Covid-19, there have still been a reduced number of in-person events happening and so the amount that we could support these events was diminished. We expect that as restrictions ease and in-person events resume we will have more opportunities to further our aims by supporting these events.

This year we ran at an overall deficit. The trustees do not see this as a problem as we should be spending on furthering our charitable aims rather than keeping hold of money. In future years we expect that the annual conference will allow us to run at a surplus allowing us to budget to increase spending on these aims while remaining in a healthy financial position.

This year we have revised our policy whereby the unrestricted funds not committed or invested in tangible assets held by the charity should be maintained at a level to provide financial support for one year of operation. This equates to £45,000 to cover our basic running costs and costs associated with the annual conference. The trustees consider that reserves at this level will protect the Society in the event of any unexpected problems with conference funding such as a significant loss in sponsorship or in the event of forced cancellation in which we would not be eligible for refund.

The trustees have reviewed the major risks to which the charity is exposed which are broadly categorised as governance and financial. The trustees maintain a risk register to categorise risk treatment criteria. The trustees review these risks on an ongoing basis and satisfy themselves that adequate systems and procedures are in place to mitigate risk.

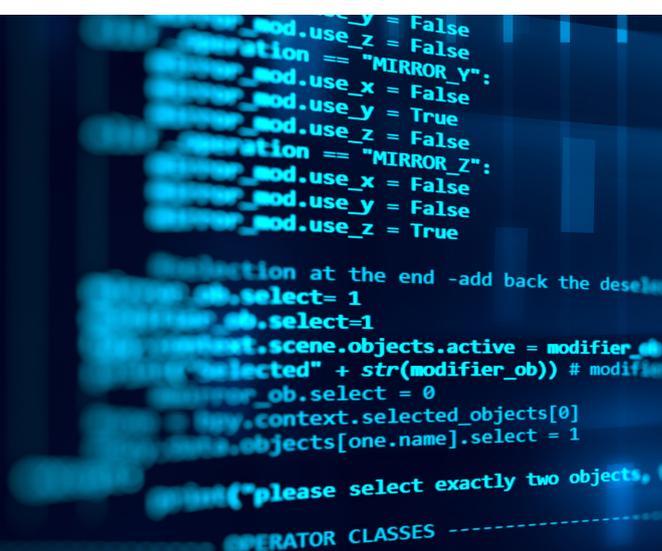
THE RSE LANDSCAPE

The RSE Society aims to benefit everyone that associates as a Research Software Engineer, but this encompasses a very wide range of different roles. The Society has been working to try and understand more about the range of roles that RSEs can have (and the challenges of each!) so we can aim to better support the whole community. To this aim, we have set up the RSE Role Diversity subgroup, which discussed the issue with other trustees, and from this discussion went on to realise some ideas that came up.

We first introduced the idea of learning more about the roles within the community at a session at a workshop entitled "The RSE landscape" at the Collaboration Workshop 21, in which we asked people where they felt their role lay on various scales (e.g. embedded vs central RSE groups, software development vs research). The results are written up at <https://society-rse.org/the-rse-landscape/>.

We have also started writing a series of case studies with RSEs in different roles, which will be published on the Society website. There are three case studies in the process of being created, but we are still looking for more people willing to be interviewed, so if you are interested in being interviewed for a case study please email comms@society-rse.org.

Finally we will be running a workshop at the SeptembrSE conference in which we will run a series of interactive activities in order find out more about different roles within our community (and the wider community that will attend SeptembrSE), and ideally even reach out to people who do not necessarily consider themselves to be RSEs but who might benefit and appreciate becoming a part of our community. Results from this workshop will be used to inform the work of the Society in the next few years.



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OPERATOR CLASSES -----
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REPRESENTING THE SOCIETY

- Teri Forey, James Graham, Marion Weinzierl, Paul Richmond and Ania Brown - Collaborations Workshop 2021 (CW21) on the RSE landscape
- Ania Brown – RSE Movement talk, opening a workshop at the useR conference
- 2nd International RSE Leaders Meeting – Summer/Autumn 2020
- Paul Richmond and Ian Cottam – Discussions with the BCS's Head of Policy
- Ian Cottam – Meetings with Dell UK leading to a new members' benefit (discount)
- Paul Richmond - Invited participant in Research England Future Research Assessment Exercise Round Table (June 2021)
- Paul Richmond - Invite to the EPSRC Learned Societies workshop - Review of doctoral training provision (March 2021)
- Paul Richmond - International invited talks at Platform of national e-Science Centres in Europe (PLAN-E) November 2020
- Paul Richmond - Invited participant in the 2nd International RSE Leaders Workshop September 2020
- Paul Richmond - JISC Digital Community Meetings
- Paul Richmond, Claire Wyatt - UKCRC Meeting to discuss UK Policy relating to RSE
- Paul Richmond, Claire Wyatt, Round table discussion with ICT and e-infrastructure SAT on grant submission guidelines for RSE





TRUSTEES

The Society is a charitable incorporated organisation (CIO) governed by our constitution. This is the second trustee annual report of the Society of Research Software Engineering since becoming incorporated in March 2019.

In accordance with our constitution, this reporting period has seen an election held in September 2020 in which six new trustees were elected, and six of the founding trustees stepped down. The trustees have voted to appoint a president, vice president, treasurer and vice treasurer following the established system of shadowing for key roles to ensure that there is always a smooth transition of responsibilities following elections.

Current Trustees

Paul Richmond (President, Elected Sep '19)

Matt Williams (Treasurer, Elected Sep '19)

Anna (Ania) Brown (Web Co-Lead, Elected Sep '19)

James Graham (Web Co-Lead, Elected Sep '19)

Mozhgan Kabiri Chimeh (Diversity Inclusion and Accessibility Lead, Elected Sep '19)

Joanna Leng (Diversity Inclusion and Accessibility Co-Lead, Elected Sep '19)

Claire Wyatt (Vice-President, Communications and Publicity Co-Lead, Conference Co-Lead, Re-elected Sep '20)

Ian Cottam (Membership Lead, Elected Sep '20)

Teri Forey (Secretary, Elected Sep '20)

Fouzhan Hosseini (Conference Co-Lead, Elected Sep '20)

Kirsty Pringle (Vice-Treasurer, Elected Sep '20)

Marion Weinzierl (Communications and Publicity Co-Lead, Elected Sep '20)

Trustees (Term Ended)

Alys Brett (President - until Sep '20)

Simon Hettrick (Treasurer - until Sep '20)

Tania Allard (Diversity and Inclusion Lead - until Sep '20)

Mihaela Duta (Membership Lead - until Sep '20)

Andy Turner (Secretary - until Sep '20)