



**SOCIETY OF RESEARCH
SOFTWARE ENGINEERING**

TRUSTEES' ANNUAL REPORT

Registered Charity Number: 1182455

1st July 2021 - 30th June 2022

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.

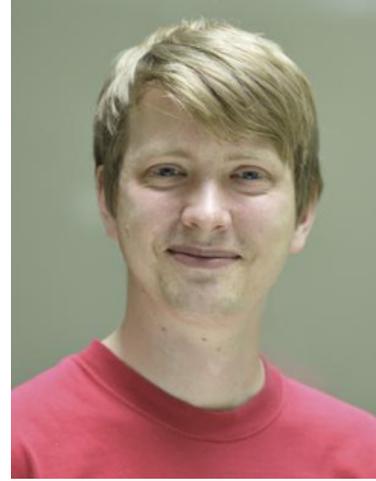
The Society organises an annual conference and other events such as training, meetings, workshops or seminars. The Society may undertake or sponsor research related to Research Software Engineering and provide information, advocacy and advice in relation to Research Software and RSEs. It may also provide 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. SeptembrSE - the series which replaced last year's conference was fully staffed by volunteers from many countries, and supported by the Society.



A MESSAGE FROM THE PRESIDENT



Now in our third year, and having moved through a difficult period due to Covid-19, we are starting to see a return of in-person meetings and events. Our trustees, members and the community beyond are continuing to work hard to support the work of Research Software Engineers to enhance research through the use of software.

After missing it in 2020 due to Covid-19, this year we saw the return of the RSE annual conference in the form of SeptembrSE, an entirely online month-long series of events, talks and workshops, providing a way to bring the community back together. This hard work allowed us to keep the momentum to build towards our upcoming annual conference in Newcastle in September 2022.

We have been working hard to move to a model which will allow us to involve the community more readily in the organisation of the Society by setting up working groups around topics such as EDIA, mentoring and role diversity, a trend that I hope to see increasing in the future.

Some things that I see as particular highlights this year are the success of SeptembrSE, the incredible hard work behind the scenes to prepare for this year's in-person conference, the success of the mentoring scheme and the further development of our community model through the creation of the UK regional RSE groups, providing a place for local conversations to happen and to facilitate in-person meeting more readily. It's not just that visible work that matters though, as the hard work of our trustees to manage our communication platforms, organise our membership, run our IT infrastructure and the effort that goes into maintaining our finances are absolutely essential.

I'd like to finish with a moment of thanks to all those in the community for all that you do, both doing the daily work of research software engineering to enhance research and education as well as the organisational level efforts. Particularly the volunteer effort of the trustees to facilitate all the outputs that we do, without whom none of this would be possible and the Society owes you a debt of gratitude.

Matt Williams, President

A handwritten signature in black ink, appearing to be 'Matt Williams', with a long horizontal stroke extending to the right.

ACHIEVEMENTS





GOVERNANCE

The trustees have undertaken a large amount of work in understanding charity governance and setting up appropriate working practice. Over the current reporting period an on-going 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.

The Governance subgroup has met regularly every two weeks to discuss new policies and 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:

- Safeguarding Policy
- Code of Conduct for Events
- Environmental Policy
- Membership Terms and Conditions
- Personal Data and Privacy Policy
- Procurement Policy

All of the Society's policies can be found at <https://society-rse.org/about/policies/>.

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.

IN NUMBERS

574

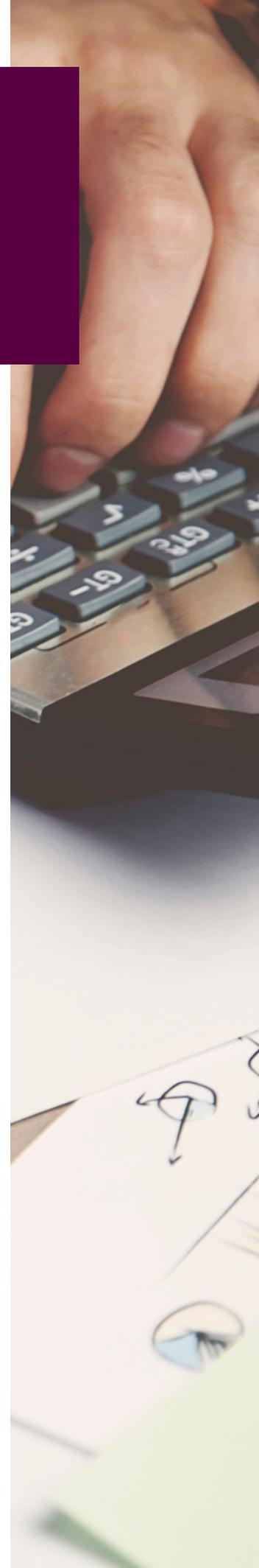
Paid members in the Society as of June 2022.

33%

Increase in members over 1 year (since June 2021)

6000

Follows on our Twitter account

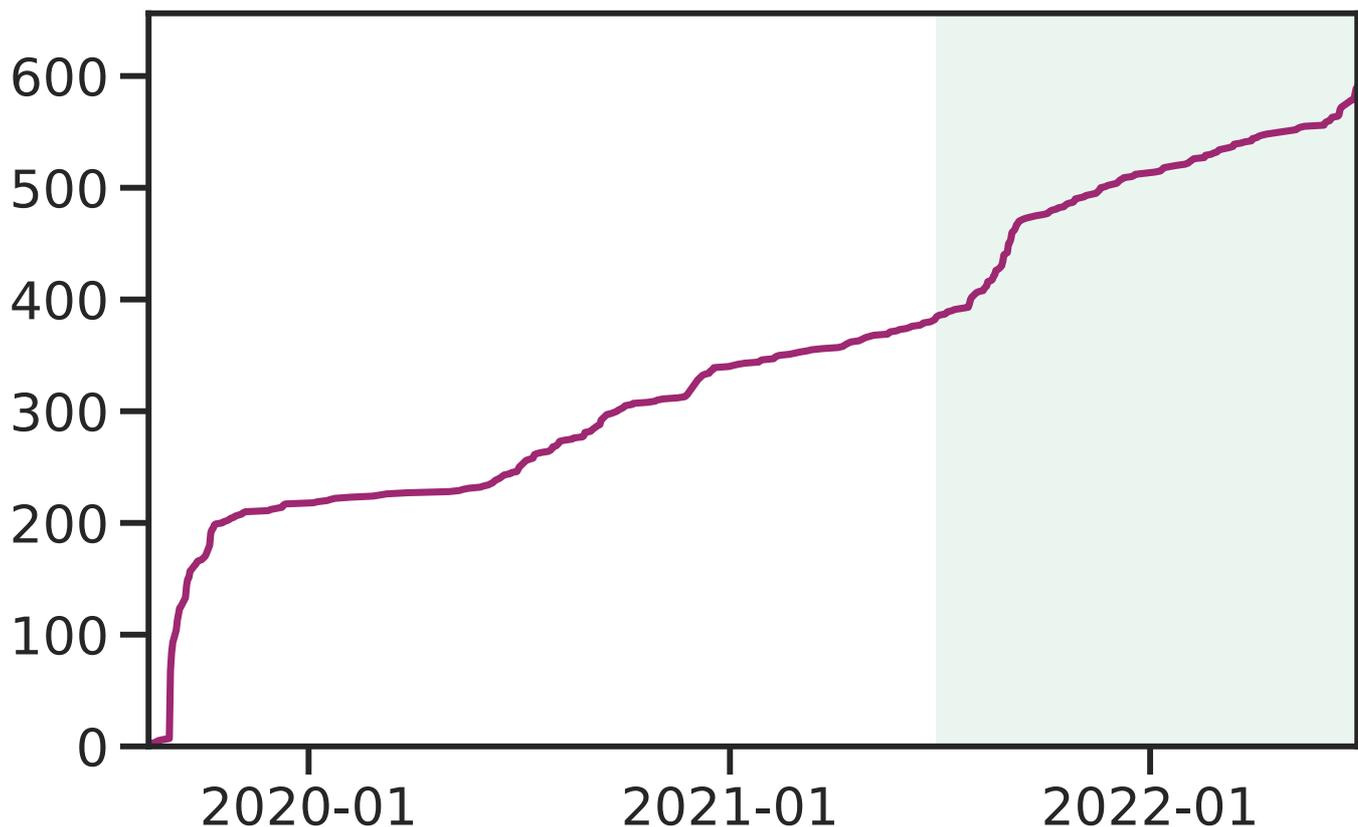


MEMBERSHIP

The Society officially launched paid membership three years ago, 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. Currently, we use White Fuse as our sales portal. This allows payment of the £20 annual membership fee by direct debit, credit card or debit card. The fee level has remained unchanged during the last three years. As of the 30th June 2022 our membership stands at 574 (twelve months ago it was 430). At the time of writing [early August 2022] we have 613 fully paid-up members. When the membership clock ticks over another 100 we present that lucky person with a small prize, usually a t-shirt or sweatshirt.

We provide three main ways in which members of the community (including but not exclusively members of the Society) can interact and stay informed. Anyone may subscribe for free to our mailing list. Our mailing list membership (including paying members) was 1069 on 30th June 2022 (up from last year's figure of 839). Our website provides key information for the RSE community, including events, policies and governance associated with the Society, community news, details of national (UK) and international RSE groups and organisations, and job listings for RSE career opportunities. Our Slack workspace provides an online space for the community to interact. There are around 3900 members in over 120 public Slack channels. We encourage everyone on joining to introduce themselves in the #introductions channel.

Number of members



MEMBERSHIP (CONT.)

The membership subgroup, containing a number of trustees of the Society, continuously work helping members with membership platform issues, cancellations and other enquiries, successfully answering almost all requests within 3 working days, while managing the membership platform and sourcing new membership benefits.

As in previous years, members received a discount on our annual conference. Due to a change in conference platform, the group set up infrastructure to verify attendee memberships. We also worked on offering new membership benefits guided by community survey responses. Currently, we are in discussion with several new, potential commercial partners to offer free or discounted access to courses and accreditations. Our thanks go to Dell UK who continue to offer our UK-based, paid-up members significant discounts. The membership subgroup investigated what would be involved in offering members post-nominal letters; however, following discussions on slack, the community appears not to be in favour of such, and therefore we have not progressed this. In contrast, offering email addresses to members does appear to be well received and may offer a simple way to verify membership; we are looking into the feasibility of this.

Our membership platform (White Fuse) has not fully lived up to its initial promise, requiring Trustee involvement in routine tasks like cancelling memberships or changing payment methods. We have performed a requirement analysis for a replacement and are currently considering alternatives, though we recognise this would be a major change and must be planned carefully to avoid losing members and subscribers to the mailing list.

As part of our retention strategy, we have canvassed departing members for their reasons for cancelling their subscriptions. A common thread was members departing to industry, but also to traditional academic roles. In order to try and address this, and prevent the Society becoming overly focused on Research Software Engineers rather than Engineering, the membership team will be hosting a discussion session on Who Does RSE? at the Annual RSE Conference.

“When the membership clock ticks over another 100 we present that lucky person with a small prize, usually a t-shirt or sweatshirt.”

RSE CONFERENCE

SeptembrSE - the online RSE Conference for 2021

SeptembrSE was a month-long online conference, with events happening every day from the 6th to the 30th of September. In total the conference consisted of 27 talks, 8 panel discussions, 8 workshops and 10 posters and was attended by approximately 230 people across the month. Thank you to all members of the community who contributed to the great conference content.

Several trustees sat on the conference committee; Claire Wyatt was the Sponsorship Chair and Mozghan Kabiri Chimeh was the Liaison Chair. In addition to the trustees the conference committee was chaired by Christopher Woods and Martin Callaghan and had other 18 members who all contributed to make SeptembrSE a success.

We received 70 feedback responses with 71% of responders giving the conference an overall rating of 4/5 or greater. A great response considering this was our first ever fully-online conference!

RSECon 2022 - Newcastle University 6th - 8th September

Although the conference itself falls out of the scope of this annual report, much hard work has already gone into making it a success from January 2022 onwards. Several trustees sit on the conference committee. Claire Wyatt is both the Logistics and Sponsorship Chair and has been working tirelessly to ensure our first in-person annual conference for 3 years is a success. Fergus Cooper is the conference Treasurer and has been keeping our spending in check to ensure that we can make enough of a profit from the conference to fund the Society's activities for the next year whilst also handling the higher risk from an in-person event while Covid is still an ongoing concern. Teri Forey is the Liaison Chair acting as the conduit between the conference committee and the trustee board. We cannot wait to see the RSE community in person again and to hear all the wonderful community content in September. A more detailed report will be included in next year's annual report.



RSECon
Newcastle
University **2022**

September 6 - 8, 2022



The Sixth Annual Conference for Research Software Engineering

OUR EVENTS

The Society events committee continued to meet every two weeks to plan a range of events, as well as the annual conference and the Events and Initiatives fund. In December we ran our annual Society of RSE feedback session, and although attendance was lower than previous years, we had a really interesting group discussion about the Society's activities and focus. There was a particularly helpful debate on how the Society should support researcher-developers versus central RSEs, which was great feedback for the role diversity working group. Of course, members can give feedback at any time via slack to any of the trustees or by email (info@society-rse.org).

This year we had a total of 13 requests for funding through the Events and Initiatives grant, the vast majority of which were successfully funded by the Society. These requests included access to Society licensed tools such as Zoom and Mentimeter. We have also helped to support RSE events and groups outside of the UK, such as RSE Asia and an R course in Nigeria. We have also helped to support regional groups here in the UK, sponsoring in-person events for RSE Midlands and RSLondonSouthEast. If you'd like support from the Society for an event or initiative, then please contact the events team at events@society-rse.org or complete the application form.

We also ran an RSE Feedback event online in December of 2021 - asking the community to discuss on Zoom common questions and themes identified in previous surveys and communications from the membership. Though attendance was low, attendees proposed community groups to collaborate with and outlined workshops that would be beneficial for the RSE Community. Unfortunately, due to the workload of the Trustees these suggestions have not yet been pursued.



MENTORING

The Society of RSE membership scheme organised by outgoing Trustee Ania Brown with Coach Mentoring has been underway since late 2021. 25 mentor-mentee pairs were arranged by the company, and have met regularly over the course of the year, whilst the mentees have been receiving additional sessions on career development from Coach Mentoring. Whilst attendance at these additional sessions has dropped off over the course of the mentoring scheme, the closing survey indicates a very strong appreciation of the mentoring program amongst both mentees and mentors, and many of the mentees are enthusiastic about continuing on to act as mentors in future years.

One issue raised was the low attendance at mentee development sessions run by Coach Mentoring - whilst they were sessions that the mentees themselves had expressed interest in, few could attend. Coach Mentoring suggest we instead run these sessions on a Society-wide basis, to avoid scheduling clashes. In addition, the timing was an issue - by starting the program in December, there was an immediate loss of momentum over the holiday period. Coach Mentoring recommend starting in either September or January, and given the constraints of the Society elections and conference organising January would be best going forward.





EQUALITY, DIVERSITY AND INCLUSION

Our EDIA subgroup has expanded over the past year to form a EDIA working group. What this means is that members of the RSE community who do not have the time and resources to commit to being a trustee can join efforts with the trustees on the important topic of improving equity, diversity, inclusion and accessibility in the RSE Society as well as the RSE community. More information on this working group, including its terms of reference and how to join, can be found at <https://society-rse.org/community/get-involved/edia-working-group/>. We are glad and thankful that Anika Cawthorn from UCL has joined our EDIA working group as a community volunteer!

The EDIA team has worked closely with the RSE Role Diversity working group to analyse the results of the community survey and write the RSE landscape review. The insights of this review have led directly into the EDIA strategy, which outlines the aims and ambitions, as well as an action plan for tackling EDIA issues in the RSE Society and community.

Our EDIA trustees were also involved in establishing DiveRSE as a place to promote and discuss diversity in the RSE community. We are proud that we hosted the keynote by Mary Ann Leung on “Normalizing inclusion by embracing difference” as well as Heather Turner’s talk about “EDI in the R Community”.

Further activities of the EDIA subgroup and working group included a website accessibility review and the implementation of a number of improvements and automatic checks, the creation of an events EDIA checklist and collaboration with the RSECon22 EDI chair on extending and improving this checklist, and EDI at RSECon22 in general, as well as to work with former SocRSE trustees on the terms of reference for the now established SocRSE Advisory group. These terms of reference now include the requirement that “[T]he advisory board should have at least one member that is specifically looking into advising on improving Equality, Diversity, Inclusion and Accessibility in the trustee board and the RSE community.”, and we are extremely grateful and pleased that Becca Wilson has agreed to join the Advisory board in this capacity.

As always, a lot needs to be done on EDIA, and the action plan in our strategy covers numerous interventions, activities and goals for the coming years. We welcome everyone who would like to join our working group and help tackle these challenges.

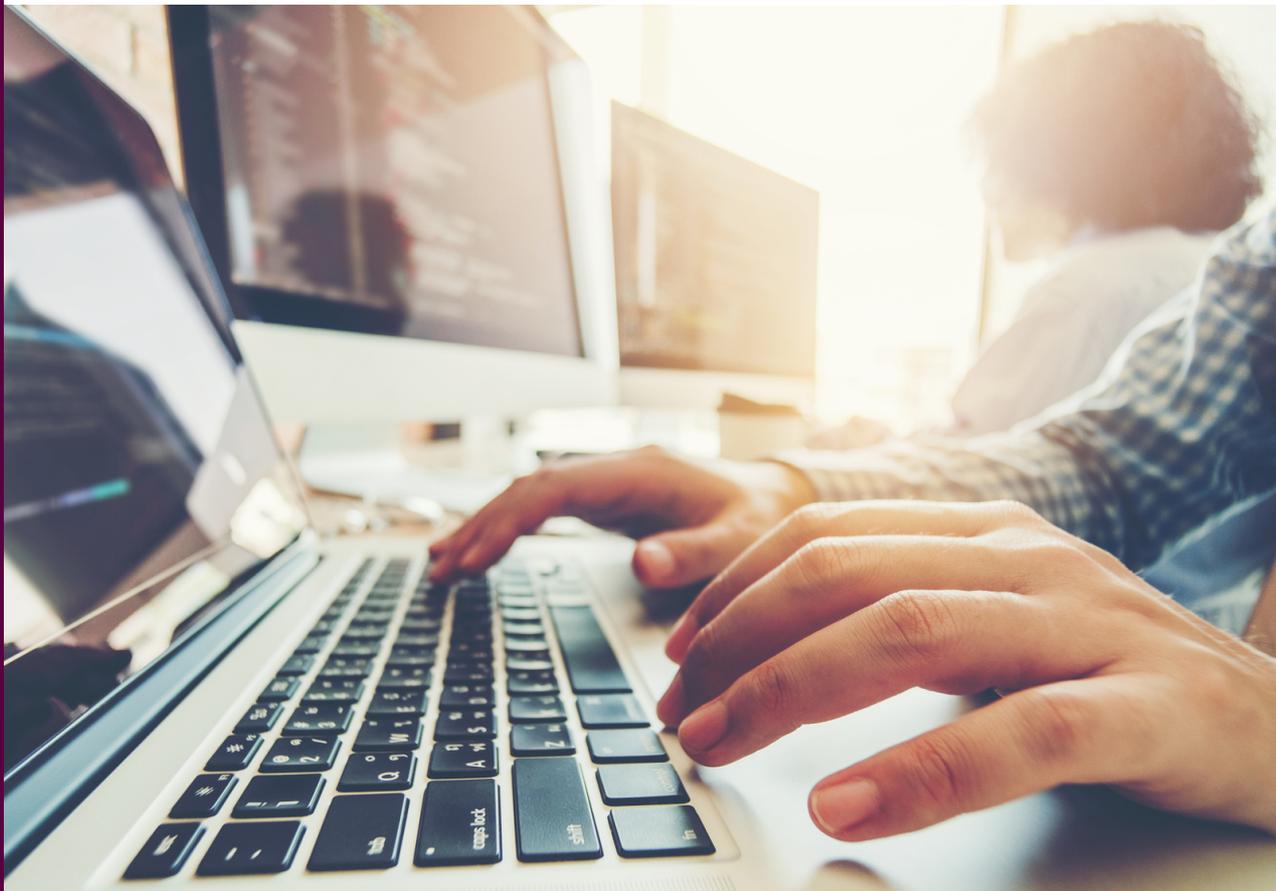
WEB AND INFRASTRUCTURE

This year we have undertaken work to reorganise and simplify our website to ensure that the important information is easily accessible. We have also performed an accessibility audit of the site to ensure that we have good contrast text, helpful hyperlinks and alt-text for images where appropriate. We have been working to ensure that our infrastructure is up-to-date and secure, a process which is expected to continue into next year.

During this reporting period we made the choice to explicitly allow for RSE job adverts to be allowed for anywhere internationally, rather than focusing on the UK. Following this, the number of job adverts for RSE and RSE-related roles posted has increased from 157 in the 2020-2021 period to 212 in this reporting period.

Now that our infrastructure is in a good place, we are able to offer support to SIGs and WGs for their own use, particularly in the case of the Regional RSE Groups SIG where we are offering mailing lists and websites to each group.

Finally, we shut down the legacy <https://rse.ac.uk> site and it is now fully archived at <https://socrse.github.io/legacy-website/> via GitHub Pages. The level of traffic had dropped sufficiently below the threshold making it worth keeping active and all the content is now available at society-rse.org.





FINANCIAL SUMMARY

"The Society's financial year ran from the 1st of July 2021 to the 30th of June 2022"

Opening Balance (July 2021)	£97,173
Income	£51,382
Expenses	£31,980
Closing Balance (June 2022)	£116,575



FINANCE

The Society's financial year ran from the 1st of July 2021 to the 30th of June 2022 (2021-22). Over this period we had a total income of £51,382 and a total expenditure of £31,980 leading to a total profit of £19,402. At the end of the period we held £116,575 in our bank account. This amount is an accumulation of profits from previous years, including profit from the 2016-2019 RSE conferences run by the RSE Association (which was transferred to the Society when we became a charity) and a small loss from the 2020-21 financial year which occurred because our operating expenses remained similar but we couldn't run a physical conference.

In the financial year 2021-22 we received £11,706 in membership fees from our (approximately) 550 members and £39,616 from conference income. Conference income came from SeptembRSE (ticket sales of £6,388 and sponsorship from Oracle £2,000 and Microsoft £1,500) and early ticket sales for RSECon22 (£24,810). Our main outgoings were the operating costs associated with the running of the Society (web infrastructure, insurance, professional subscriptions and accounting fees) which amounts to approximately £10,000 per year and the initial costs for RSECon22 (venue deposits etc, £10,000).

This year we have advertised our Events and Initiatives Grant more widely which, combined with the removal of COVID restrictions, has resulted in an increase in applications. Through this scheme we have given out £1,556 to our members to fund training, travel and events. This is an increase on last year, and we expect it to increase further in the future. For the first time this year the Society has run a mentoring programme, the scheme was run by Coach Mentoring (with help from trustees) at a cost of £4,020 the scheme has been well received and we expect to run it again in future years. Last financial year we made the decision to pay for an audit of our governance and working practices which was carried out by the NCVO, the total cost of this exercise was £4,500 half was paid the previous year and the rest was paid in this financial year.

Due to the much anticipated return of the RSE Conference, we expect our annual income for 2022-23 to be above the threshold required to register for VAT. In anticipation of this we became VAT registered on 1 June 2022. There were some expenses associated with registration as we worked closely with our accountants to understand which of our income streams are subject to VAT (ticket sales and conference sponsorship) and what is exempt (membership fees). VAT registration will mean that we will need to submit VAT returns and pay any VAT owed, although some of this will be recouped by reclaiming VAT we have spent.

Overall the Society is in good financial standing, we aim in the future to increase spending on the community through the Events and Initiatives sponsorship, the mentoring scheme and supporting community initiatives. We regularly review the financial risks facing the Society, we have a risk register that we review regularly.

RSE ROLE DIVERSITY

Our RSE Role Diversity working group has continued their work on the RSE case studies and was able to extend on the range of RSE roles they present. We added six new case studies to our website!

It is great to hear Sarah Gibson say in her case study:

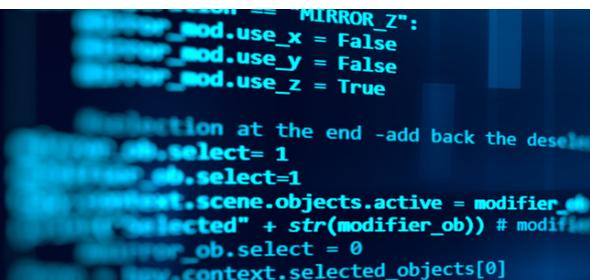
"I still feel the conversation around Research Software Engineering is still quite university-centric, hinging around whether your group is embedded in a department or is centralised in the institution. Throughout my career at The Turing and then moving to a non-profit, I never felt either of these narratives fit my scenario and I think overlooks the fact that great research doesn't only happen in academic institutions anymore. I'm glad to see this will be changing with the RSE Landscape work that has been ongoing at the Society though."

In January 2022, Vanessa Sochat published this RSE story in her podcast and wrote *"In this episode we talk with Chase Million, the CEO of Million Concepts, about doing research and having impact outside of academia. And yes, that's right! Research software engineering doesn't have to happen from a traditional academic path. This is an important story because it shows a less represented portion of our community."*

This indicates that there is a push towards making non-academic RSEs more visible, which is great! The next step will be adding case studies of RSE leaders, and embedded RSEs - so please let us know if you can contribute!

The RSE Role Diversity group has run a workshop on the RSE landscape at SeptembrSE, and afterwards sent the Mentimeter survey used in that workshop out over our Slack channel to gather more information on the diversity of roles the members of our community fulfil. The results have fed into the RSE Landscape Review, which is used to inform the Society work, and, for example, the EDIA strategy.

Upon request by the UK RSE leaders group, we have refactored the RSE career ladder Github repository which collates role descriptions for RSE jobs at various career levels, and is accessible for anyone who would like to contribute a new role description or seeks input for creating their own RSE roles in their institution.

A blurred image of a computer screen displaying code. The code is in a light blue/cyan color on a dark background. Some legible lines include: `MIRROR_Z:`, `mirror_mod.use_x = False`, `mirror_mod.use_y = False`, `mirror_mod.use_z = True`, `selection at the end -add back the deselection`, `mirror_ob.select= 1`, `mirror_ob.select=1`, `context.scene.objects.active = modifier_ob`, `mirror_ob.select = 0`, and `context.selected_objects[0]`.

REGIONAL RSE GROUPS

The Regional RSE Groups SIG was launched at SeptembRSE 2021. This SIG aims to support the forming of regional groups, and to give advice and guidance for the running of such a group. The SIG members can be contacted under regional-sig@society-rse.org. Financial support can be requested through the SocRSE Events and Initiatives grant. At the launch workshop, RSEs from various regions discussed and planned first steps to form regional groups.

The following Regional Groups formed or have started forming over the past year:

- RSE Midlands
- RSE South
- Northern England RSEs (work in progress)
- RSE Scotland (work in progress)
- RSE East England (work in progress)

At RSECon22, a lunch-time event as well as other activities to encourage regional groups to form are planned.





TRUSTEES

This is the third 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 2021 in which six new trustees were elected. Following that election the trustees appointed Matt Williams as the President to take over from Paul Richmond. The trustees appointed an additional trustee, Malvika Sharan in May 2022.

Current Trustees

Matt Williams (President, re-elected Sep '21)
Ian Cottam (Vice-President, elected Sep '20)
Kirsty Pringle (Treasurer, elected Sep '20)
Fergus Cooper (Vice-Treasurer, elected Sep '21)
Mark Turner (Secretary, elected Sep '20)
Claire Wyatt (re-elected Sep '20)
Teri Forey (elected Sep '20)
Marion Weinzierl (elected Sep '20)
Jamie Quinn (elected Sep '21)
Sam Mangham (elected Sep '21)
Malvika Sharan (appointed May '22)

Trustees (Term Ended)

Paul Richmond (Elected Sep '19)
Ania Brown (Elected Sep '19)
James Graham (Elected Sep '19)
Mozhgan Kabiri Chimeh (Elected Sep '19)
Fouzhan Hosseini (Elected Sep '20)
Joanna Leng (Elected Sep '19, trusteeship ceased July '20)
Holger Schulz (elected Sep '21, stepped down April '22)