

Patterns for Organizing PLoP

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There are several recurring PLoP events happening around the world each year. Each event has its own distinct style, while at the same time being a variation on the main theme with workshops and games. Since PLoPs are non-profit events, they are organized by non-paid volunteers who take on the various roles for a specific conference only. The patterns in this paper are meant for PLoP event organizers.

Categories and Subject Descriptors: D.0 General

General Terms: Management

Additional Key Words and Phrases: Organize PLoP, PLoP conference

Chairing a PLoP conference involves a substantial workload on the individual, and it is rare that the same person is involved in more than two consecutive events. As the baton is handed over to the new chair, it comes with explicit and even more implicit knowledge on how to manage the logistics around a PLoP conference. The patterns in this paper are meant for PLoP event organizers, and are initially flavored by the author's experience from EuroPLoP. The hope is that this collection can grow over time with input from organizers of multiple PLoP events.

The logistics involved in organizing a PLoP event can be divided into the following knowledge (process) areas:

- Organization – Select people for supporting roles, set up the Program Committee, ensure communication within the organization.
- Paper Processing – Send out call for papers, gather submissions, assign PC members and shepherds, monitor the overall progress, select papers for the conference, and publish conference material.
- Shepherd Coordination – Maintain a list of shepherds, keep them informed, assign them to papers, thank them at end of shepherding, and select a shepherd for the shepherding prize (EuroPLoP).
- Conference Administration – Create the conference program, run common information sessions including welcome and goodbye sessions, decide on conference games and other events, coordinate with Hillside/Hillside Europe meeting, select chair(s) for next event.
- Venue – Select an appropriate location considering the profile of the anticipated author participation, possibly co-located with other related events, make reservations for meeting areas as well as accommodation for participants, pay for the venue.

Throughout these knowledge areas there are activities that reflect patterns community values like respect, mutual support, the wish to contribute and teach, and to progress the software field to the benefit of mankind. Not least, the practices are supporting the long time sustainability of the patterns community and the PLoP conferences. This paper does not try to explore this values system, but there is a recognition that it is there as a foundation.

An alternative view of organizing a PLoP event comes from looking at a timeline of events (figure 1). Combining a timeline view with the activities and responsibilities of the roles involved may bring a better understanding of the overall activities and their dependencies, as well as what role is doing what activity. Below is a high level (simplified view) of a PLoP event timeline. The following roles are identified: Author, Shepherd, Conference Chair, and Owner Organization (typically represented by an Advisory Board or Steering Committee). It may be necessary to break down into more refined roles for more details.

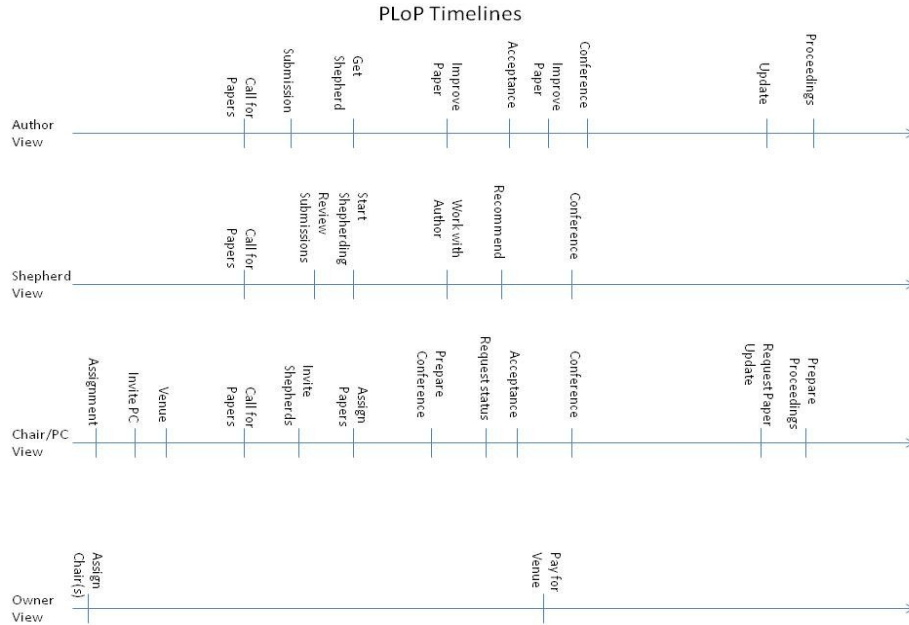


Figure 1: PLoP timelines

From an aggregated timeline, it is possible to build a matrix showing the impact of each activity on the areas of knowledge.

Table 1: Roles and activities

Activity/Role	Owner	Conference Chair(s)	PC	Shepherd	Author
Conference Organization	Select Chair(s)	Invite PC;			
Venue	Select venue; Pay;	Select venue; Collaborate w/ venue administration;	Select venue;		
Conference	Monitor;	Plan program; make workshops; prepare info sessions; execute;			Read WS papers; Participate;
Call for Papers	Monitor;	Compose and publish;	Compose and publish;		
Paper Submission/ Shepherding		Initial screening with PC; Assign Shepherds; Ask for recommendations; Send accept/reject;	Initial screening;	Sign up/select papers; Shepherd; Send recommendation;	Submit; Improve;
Proceedings		Request final papers; Publish;			Submit final;

It is not a given that all of the above material should be documented in a patterns format. A lot of it boils down to simple instructions and straightforward advice. But there are some established techniques that individual conferences are using that lend themselves to a patterns format, and that should be of use for multiple conferences. I think it could be worth the time to do an experiment of capturing some of these techniques as patterns, not least as a foundation for a discussion within the global patterns community on good practices that can be shared among conference organizers. So here is a start...

Organizers Toolbox

PLoP conferences are managed by volunteers from within the patterns community who typically are involved in one or maybe two conferences each. The conferences are recurring events usually on an annual basis.

To manage a successful PLoP event, there is a lot of planning ahead and careful execution of administrative work involved.

You are the lucky winner of the assignment as the chair of the next PLoP event, and the chances are that you feel kind of overwhelmed at the task. There are so many great events to follow up on, and the workload is immense. At least there is some time before the conference, and you know you will need it.

As you start your assignment, you realize the extent and diversity of the administrative work. Careful planning and some distribution of tasks are needed if this is going to work out. **When chairing a PLoP event, how do you know what needs to be done and when to do it?**

Although you have participated in several PLoP conferences, you do not have the complete picture of what a conference or program chair is actually doing. Some of the responsibilities require action long before the actual conference dates, like booking the venue and sending out the call for papers. If you are lucky, you have a co-chair who has been through an earlier conference. But many chairs do not have this luxury and have to find the way themselves. Depending on what you miss on doing, it can lead to last time efforts to put it right, or major problems in running the conference.

Therefore:

Maintain an Organizers Toolbox that is handed down from one conference chair to the next. A core element of this toolbox is a spreadsheet where you keep track of all the actions, when they need to be done, and who is doing them (like a light-weight project schedule). As you are using the spreadsheet, you update it so that it is correct and ready to use for the next chair person.

Other elements in the toolbox are templates for communication:

- Call for papers
- E-mails to program committee members
- E-mails for accepting and not least rejecting papers
- Any necessary forms (for instance to book a venue)
- Mailing lists (for participants, shepherds, CfP mailing lists)

The templates can be referred to in the checklist to make it clear which one is used. These templates must also be kept up to date throughout the organization of the conference.

Here are examples of what some chairs get from their predecessors:

- To do checklist with dates for conference administration (EuroPLoP)
- Conference preparation timeline (PLoP)
- Aggregated notes from earlier chairs and other resources (PLoP)
- Template communications (acceptance e-mails etc.) (PLoP and EuroPLoP)

The toolbox is handed over to the next chair as soon as one is appointed. This means that you will need to communicate any changes to a new chair for any activities that happen after the handover (mainly the proceedings). For conferences with an active long-term committee overseeing a succession of events, this hand-over can also be from this committee to a new chair. You will still want to have direct communication between the new and previous chairs if possible to make sure the hand-over is as smooth as possible.

There may of course be additional items to take care of that you did not find on the checklist. If they are not one-off incidents, you should update the checklist with these. And it is always a danger to rely too much on the checklist and not on your own creativity, so do not think that it is complete and takes away your need to think independently...

Another item you may want to create is a set of personal notes to be handed down from one chair to the next. These may include handling of delicate situations and need a level of confidentiality. It may be tempting not to document this, but the risk is that new chairs that are oblivious to the problems (for instance of a shepherding gone bad and you want to avoid this constellation in the future), they may end up in unnecessary situation that could have been avoided had they had some basic knowledge of the past history. This material must be handled with great care and should not be a part of the formal toolbox! If you have issues that you are concerned about putting in writing then at least talk to the next chair(s) about them.

Succession Pool

PLoP conferences are managed by volunteers from within the patterns community who are selected for the assignment by the entity that runs the conference.

Some PLoP conferences have separated the roles of Conference Chair and Program Chair, while others have all responsibilities centralized on a Conference Chair only.

The work to find the next Conference Chair and potentially the next Program Chair typically starts around the time of the current conference. The entity to assign chairs are the conference owners, which may be Hillside, or as for EuroPLoP be a committee consisting of the previous conference chairs.

Finding the right candidates is essential for the longevity of the patterns community as well as for the conferences. **How can the PLOP conference owners make sure they have individuals who are ready to chair a PLOP conference?**

The patterns community (or rather set of communities) is small. The core of experienced participants is even smaller, given the percentage of new participants at each conference. Participation is from both academia and the software industry/practitioners. A suitable chair person needs to have participated in a minimum of PLoP events, have submitted papers of good quality, support the balance of participation between academia and the software industry (practitioners), have social and organizational skills, and be able to commit the time necessary to organize and run the conference. This drastically narrows down the number of candidates.

Therefore:

Actively select and develop future candidates for chairing PLoP events to create a pool of suitable individuals.

The conference owners need to keep an eye open for individuals who match the above criteria, or who can get to that point with some help. They may even be newcomers to the conference, but with the right guidance and attention they can be able to run the event within a few years. Of course all participants are more than welcome (and usually feel it), but some special attention may be needed for individuals who may have the potential to be a future chair. This may be through some follow up after the conference to ensure that they submit papers again and stay in the patterns community.

Individuals who are close to being ready to chair should be pulled into the organization of current events. They clearly need to be on the Program Committee, as this will give more insight into the running of the conference. But they can have additional tasks like handling web pages for the conference, organizing student volunteers, or organizing some subset of the program.

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Some level of succession planning or development of future resources is needed for all roles in the patterns community – for authors and shepherds, for workshop moderators and Focus group leaders, for PC members, and for Hillside/Hillside Europe administration. It can be argued that this pattern in a generic form is implicitly embedded in the value system of the patterns community with a strong positive attitude for supporting and enabling individuals.

It is important to find the right balance when selecting individuals for possible future assignments. First, all participants in a PLoP are equally important and need to feel that. Second, it is dangerous to give people explicit or implicit promises of future commitments in case they do not happen. All in all, this is similar to succession planning in companies, and the same caution must be applied.

In a commercial setting, succession planning is a recognized activity especially for high ranking position, but also for areas of specific expertise. The activity consist of deciding the skills and personal characteristics needed for the position, developing several candidates through assignments and responsibilities leading up to the goal position, selecting the final candidate when the time is appropriate, and supporting this person into the position [0]. Companies typically have defined processes with forms/templates and development programs for this purpose. Still, it is a difficult endeavor challenged by many factors like the risk that candidates may leave for other opportunities in the middle of development, or not turn out to have the right potential after all.

For a non-profit organization as the patterns community there are even more unknowns, especially since the goals of the organization are less clear, and because the coupling between the organization and individuals is less strong. This leads to the need of building up a larger pool of candidates than in a corporate organization.

Location, Location

The qualities of a PLoP conference location have a big impact on the social networking and overall conference experience.

PLoP conferences may be run at conference centers, be co-located with other conferences, or be held in special locations like Irsee (EuroPLoP) or Allerton (PLoP).

As a PLoP Conference Chair and/or organizer, one of the major decisions you have to make is the selection of the conference venue. This happens many months before the conference, and it is usually a decision made in collaboration with the organization behind the conference.

Your choice will possibly have a big impact on conference participation, on the overall experience, and even on the participation at future PLoP events. **What is the best venue for a particular PLoP conference?**

Early PLoP conferences were usually held at small, often remote, locations with the PLoP conference as the only event. Some are still being held in such locations. In this setting, the participants have ample opportunity to communicate and socialize with each other, and normally get to know people from other workshops than their own.

By co-locating with other conferences, participation may increase as it may be easier to add the time and cost of the PLoP conference to an already approved trip to a major conference. The venue in these cases can be a challenge as the social aspects are significantly harder to manage. There is usually not a social area to meet in the evening so people will typically go out for dinner in smaller groups and mostly with people they already know or people from their own workshop. During the day, the workshops are typically taking place in multiple conference rooms and it is hard to get an overview of the whole event.

Another alternative is ambulating the conference like has been done with VikingPLoP. It is good for attracting participation from new locations, but with the drawback that it is less stable for repeated participation. It also seems to make the continuity of a chairing and organizing body less stable.

Therefore:

Make a choice of venue by listing the key qualities in a prioritized order for this specific PLoP conference. The core elements are participation (now and future), cost, possibilities for social interaction, other logistics like common meals and space for common gatherings and games, and atmosphere. The importance of each element for a particular event may differ, and so the priority of each must be defined by the organization behind the event.

Participation may be now and future. It may be that co-locating with a larger event draws more new participants, but at the same time loses some qualities on the social side so as to lose experienced writers with different expectations for later events.

Cost is always a major issue, and not least now with the current financial situation. A smaller venue may be cheaper, but travel cost may increase. A co-located event will make it cheaper for those participating in the major conference that PLoP is co-located with, but possibly more expensive for those participating in PLoP only.

The social interaction with possibilities for discussions and feedback, as well as networking for future collaboration, is a core element of a PLoP event, and should be high up on the priority list. The venue should preferably have a location for all participants to hang out in the evening, and common meals are likely another preferred setting.

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A successful PLoP event helps to keep and strengthen the patterns community. The outcome is of course the patterns papers with new input to improvements and growth of the content, but also the new friendships and teaming up for future patterns work.

Patterns events that are in a fixed location do not need to select the venue, but may still find value in this text as to the importance of keeping the (quality of) elements of their recurring events like common meals.

Finally a word of caution: Although participation is important and necessary for sustenance of the event series, it can be dangerous to lose the social qualities of small venues where people interact more easily.

Writing Group

Not all ideas and papers are ready for a workshop after the shepherding and need a different solution to move forward.

Novice pattern writers or new pattern ideas may be reasons pattern papers are not easy to mature in time for a conference.

As a PLoP conference organizer, you will most likely experience papers that at the end of the shepherding process are not quite ready for a workshop. They may be papers from authors who are new to patterns writing, or experienced writers who have ideas that have not matured enough in time for the current conference.

Some papers have good potential and value but are not of the quality needed for a workshop. **What can be done with papers that are not ready for a full workshop after shepherding?**

Novice authors may have a good grip on the subject matter, but not really have grasped the way of writing patterns papers. Although the material lends itself to a patterns format, it is a tough job for a shepherd to teach pattern writing through e-mails only, and the length of the shepherding may not be sufficient to help the authors getting the paper ready enough.

Experienced authors may also not get a paper ready in time because the ideas they have are not mature enough to be crisp and clear before the deadline.

Taking unfinished papers to the workshop can be very tough as there will be massive ideas for improvements. Novice authors may be scared away and lost to the patterns community, and even experienced authors may find the workshop hard to endure. For the workshop participants the experience may be felt like wasted time, and all in all it may ruin the workshop for all parties.

Papers that are not ready can be rejected, but this may turn writers away for future events. By bringing the papers to the PLoP event and getting feedback it can accelerate the improvements and lead to new papers.

Therefore:

Have a special track for on-site shepherding during the conference. At EuroPLoP this is called the Writing Group. An experienced patterns writer is doing on-site shepherding with author during the conference. If the paper improves enough, it gets invited to a workshop on the last day of the conference (decided by the PC the night before).

The conference program must allow for this shepherding without impacting the regular workshops. The workload for the on-site shepherd can be intense, and he or she should be prepared for the effort. The venue needs to have equipment to continue the writing and print new versions of the paper.

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It is only possible to accommodate a few papers in the Writing Group track, maximum is one per workshop. The availability of on-site shepherds also limits the number of papers.

Make sure the event organizers are not taking on on-site shepherding as this work is too much to add to other responsibilities.

It may be an issue for academics to be accepted for a writing group rather than a regular workshop if it means that their paper may not become part of conference proceedings.

The primary strength of on-site shepherding is the educational value of the activity. As a community, we have very few opportunities for actually teaching people about good patterns writing. This does show in the number of papers from new authors that struggle to master the patterns format. Except for limited patterns efforts at some universities, there are really no good opportunities for face-to-face teaching of the skill of patterns writing. We have the Boot Camp for Newcomers, but then lack a good path in developing aspiring pattern authors.

Acknowledgements

Deep-felt thanks to my shepherd and friend Klaus Marquardt who helped a lot in improving the paper through working on the thought process behind the content. Having a shepherd with personal experience as conference chair and with deep thoughts about the conference values was invaluable. I am also grateful to the whole succession of creative and dedicated conference organizers who are giving their learning on to the next chairs, and not least are creating these great opportunities for the patterns community to meet and to continue to evolve.

From PLoP 2010 I am grateful for the feedback and not the least encouragement from the workshop members Linda Rising, Karl Rehmer, Dave West, Rebecca Rikner, Christian Kohls, Bill Opdyke, and Raul Zevallos. I have incorporated the most direct comments in this version of the patterns. In addition, the insightful discussions over several topics gave me ideas for future work and will be very helpful in the necessary process of turning this from the work of one individual into knowledge owned by the patterns community.

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