Lessons from EuroPLoP: Two patterns for Shepherding
(EuroPLoP 2012)

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Figure 1 – Shepherding can be tiring

1 Introduction

EuroPLoP 2012 will mark this writers tenth EuroPLoP. During this time the author has learnt. This paper set out to capture some of the author's observations and learning on shepherding. Two patterns about shepherding are presented: ONE PATTERN and GROW YOUR AUTHOR.

2 Audience

The patterns in this paper are written for pattern shepherds and others attending pattern conference, e.g EuroPLoP or PLoP.

3 The Patterns

The patterns presented here build on, and extend the patterns of Neil Harrison (Harrison, 1999, Harrison, 2006). Figure 2 shows a simple sequence for combining these patterns and Table 1 provides thumbnails of the Harrison patterns.
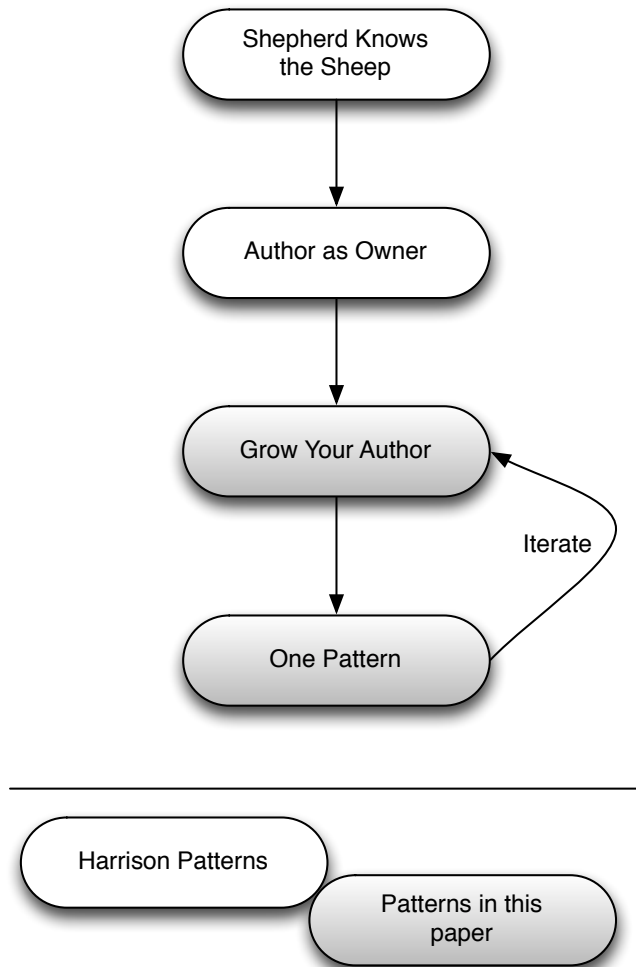
Figure 2 - Sequence combining Harrison & Kelly patterns

Pattern name	Description
THREE ITERATIONS	How to budget your time and effort to make shepherding effective.
THE SHEPHERD KNOWS THE SHEEP	How to establish a productive relationship between you and the author.
HALF A LOAF	How to make sure that shepherding continues to move forward.
BIG PICTURE	How to grasp the gist of the pattern right off the bat.
AUTHOR AS OWNER	How to keep from writing the pattern for the author.
MATCHING PROBLEM AND SOLUTION	How to ensure that the pattern really is pattern-ish.
CONVINCING SOLUTION	How to make the pattern believable.
FORCES DEFINE PROBLEM	How to understand the problem at a deeper level.
BALANCED CONTEXT	How to help get the pattern at the right scope.
WAR STORIES	How to help the pattern flow.
FORM FOLLOWS FUNCTION	How to put a new form into a pattern.
SMALL PATTERNS	How to keep patterns easily digestable.

Table 1 - Thumbnails of Harrison patterns

3.1 GROW YOUR AUTHOR

Figure 3 – Growing is the natural condition

You are a shepherd, you know about patterns. The author is the sheep, they know what they want to say and they own the patterns – see AUTHOR AS OWNER. **Your role is to help the author express themselves, to share their story and insights, and help the author become a better communicator in the process.**

Shepherds need to avoid imposing their sense of what the paper should look like, or what it would say; to do this they need to know what the author is trying to achieve and where the author feels the need for help.

Authors are most motivated when they are self-directed but it is a mistake for a shepherd to assume the author's motivations. Shepherds should remember that authors have varying motivations and reasons for writing.

Therefore, structure the shepherding process using the GROW model - Goal, Reality, Options, What - used by business coaches - described in (Whitmore, 2002) - to the pattern and the author. This model has four stages:

- Goal - what does the author want to achieve with this paper?

- Reality - where does the author think the pattern(s) needs most attention?

- Options - what can be done about the paper?

- What - what will the author do?

While true business coach will jettison any specialist knowledge they may have when using the model pattern Shepherds often need to help the author by explaining some elements of pattern form, e.g. forces. This imposes limitations on how far the GROW model can be applied.

A typical shepherding session starts with the shepherd introducing himself - as per SHEPHERD KNOWS THE SHEEP and asking the author to send him the

latest version of the pattern paper - this avoids any confusion about online systems and provides a first exchange.

Before reading the paper the shepherd begins the GROW by asking the author about his or her aims, *the goal*:

What is the author's objective in writing this pattern or pattern language? Is it to better their own personal understanding? - about the pattern content or patterns in general. Is it to obtain a publication? Or part of some other work? Maybe it is to share knowledge with colleagues.

Next comes reality:

Where does the author feel the pattern needs the most attention? Where would they like help most of all?

Usually these questions are asked by e-mail but once in a while the shepherd is treated to a face-to-face experience.

Sometimes the author is unaware of where the patterns need work, for example, when the author is new to patterns. The shepherd might then ask the author to read a few well-written patterns, or tell a story (like the intermission below), and then repeat the question. And sometimes the shepherd might just suggest where work is needed.

With an experienced author the shepherd advances to the options stage, asking the author what they might change. The idea here is for the author to propose changes they think would benefit the paper. Used for coaching the model has the coachee list options then select one or more to undertake. When used for shepherding patterns this stage is more likely to produce a list of changes most of which will be adopted. As such the "what" (i.e. selection between multiple options) stage tends to be a minor step.

The GROW model is easier to describe than apply. Application requires practice and more practice. Particularly in the later stages it can be difficult to stay true to the model.

While the GROW approach can help all authors it is probably most applicable when working with experienced authors, or at least authors who have written one or two patterns previously. Even with experienced authors the shepherd might want to break from this model to provide an outsiders perspective on the paper.

With an inexperienced author shepherds frequently need to switch soon to teaching mode - typically explaining some aspect of pattern lore. When this happens the shepherd is often the one who offers the options and lets the author decide which to accept and which to pass over.

With this information the shepherd can set about applying ONE PATTERN. With an experienced author the exchange may continue to follow the GROW model. More questions can help draw out of the author what they could do with the pattern.

Ultimately shepherding is a coaching exercise which, using the material of the patterns in hand, seeks to make a better writer and better person. The exercise is a growth opportunity for the shepherd too: giving feedback and coaching an author helps the shepherd grow and improve too. For an

individual these skills are not confined to shepherding, they are core management skills in any domain.

When applied in conjunction with ONE PATTERN the two patterns support one another. Because the GROW model encourages the author to internalise the lessons they are better able to apply them to other patterns in the language without the shepherd.

Thus it is not necessary to apply GROW to every pattern in the language explicitly. Rather, GROW is applied to the overall paper (*What is the author trying to achieve? Which pattern(s) does the author want to focus on first?*), then to the first pattern. As shepherding proceeds through the paper there is usually less need to apply the model explicitly to each pattern. The more experienced the author the more this non-directive model holds; with a less experienced author shepherding reverts to more directive approach sooner or later.

Intermission: A story for sheep

Think of a pattern as a detective story. There is an opening context….

The house stood on a bleak moor, the guests came from far and wide and few knew one another.

There is then problem….

The Master of the House was found dead in the wine cellar. A murder was on the loose.

There are forces which make this problem hard, forces are often written in "the but form" which juxtaposes two forces….

As Detective Smith continued his enquires it became clear everyone in the room had reason to want the Master dead but everyone had an alibi – although some alibis were better than others.

The Master had been shot at close range but there was no trace of a gun.

The problem and forces build tension, the reader is drawn in and wants to know the answer. If there were no forces complicating the problem then solving it would be easy and perhaps obvious, there would be no tension and no story worth telling.

Then, the solution….

It was the butler

A ha! The reader is enlightened.

The solution section then expands on how to build the apparatus of the solution. In some patterns this is included in the solution section, in others there is an explicit implementation section….

Charles the butler had set up a concealed hand-gun with a trip wire. He knew the Master would go to the wine cellar shortly before the meal was served. He knew that in the dark light of the cellar he would be able to remove the equipment before the police arrived. Still, a forensic examination had shown where the trip wire had cut into a wooden pillar.

Every solution has consequences, some good, some not so good, indeed, a pattern without any negative consequences usually means the author needs to think a bit harder.

The gun had been cunningly concealed under the floorboards.

Charles was sent to prison for life.

Ideally consequences should link back to the forces. Each force should be resolved. This might mean that for every force there is a corresponding consequence statement. But life isn't always that tidy.

The Masters niece, Mary, inherited the estate and all his assets.

Of course, some other consequences occur which the forces did not hint at.

The Masters former business partner Peter claimed he had been promised a share in the will and vowed to fight Mary in the courts.

Patterns don't always end with everything just right, indeed they shouldn't. Some consequences will be negative; some things will still be problematic.

Consequences are forces of a kind and in a pattern sequence one pattern's consequences form the basis for the next pattern's forces. The solution to one problem itself creates a problem, or problems, which following patterns can address. It is not one story but a series of stories.

3.2 ONE PATTERN

Figure 4 – Many small pieces make up large whole

You are starting to shepherd a patterns paper. The author has submitted a pattern language of several patterns. **Within a fixed schedule time you need to help the author improve their language but you don't know how much time, and focus, both the author and yourself can give to the work.**

Applying 3-rounds of shepherding would result in touching each pattern a little bit three times. As a result the patterns at the start of the paper get more attention than those at the end of the paper. Since time is limited this may result in surface level changes to many patterns.

Authors tend to write each pattern in a similar style. As a shepherd you may want to make similar comments about each pattern. The short term aim of shepherding is to improve the given paper, the long term aim is to improve the author's writing skills.

Therefore go deep rather than broad, work on one pattern at a time in sequence rather than work on the whole paper. Use the first pattern as an example of shepherding advice. Ignore any introduction or conclusion, treat each pattern as a stand alone entity. Do several short iterations on each pattern before moving onto the next.

Tell the author you will proceed one pattern at a time - they may have experienced other approaches. Also, at first contact tell them that they should think about how the comments about each pattern can be applied to the other patterns in the language.

Ask the author which order they would like to take the patterns in. They will probably suggest the order they are presented in but not always. When the author is new to pattern-writing working through one pattern, no matter how

short, in detail will create valuable learning that will can be applied to the rest of the collection.

Hopefully, with a little encouragement, authors will apply this learning without the shepherd needing to review the rest of the collection. Indeed, the shepherd may choose to ignore other patterns – save their time - until they become the focus of shepherding.

As authors improve one pattern they will get insights into how the other patterns could be improved - while each pattern has its own specifics the general points often apply to more than pattern. By making these connections themselves authors understand the concepts better, become better authors and use the shepherd's time more effectively.

Experience shows that as much as half the time available for shepherding may be used on the first pattern alone. If the author is taking the shepherding points to heart the other patterns will also be improving, albeit out of sight. The second, third and subsequent patterns to be shepherded will take a lot less time.

Individual patterns are brought to a "shepherding complete" state far earlier in the process. Shepherd and author see the end result in miniature sooner.

Success with this pattern depends on the willingness of the author to apply the lessons from one pattern to subsequent patterns. When an author is unwilling, or unable, to make this connection then similar comments are made about each pattern. This increases the workload for both shepherd and author. In these circumstances it may be unrealistic to expect the whole paper to be shepherded entirely.

Some conferences conduct half-way reviews of paper before final acceptance. This approach allows reviewers to see the progress, author willingness and quality more clearly.

Time allowing the shepherd will return to review any non-pattern text – introduction, abstract, etc. – and provide comments on the paper and language as a whole.

When time for shepherding is used up the author has the option to reduce the number of patterns in the language for final submission, or submit patterns which have not been explicitly shepherded.

When the author has submitted a pattern language there is usually not enough time to give each pattern THREE ITERATIONS (Harrison, 2006). Using ONE PATTERN each pattern receives its one iteration to itself; so the ultimate number of iterations may well be more than three.

This pattern continues the idea of withholding comments on a pattern as described in HALF A LOAF   (Harrison, 2006) however this pattern applies to a pattern languages rather than an individual pattern.

Pattern authors are invited to adopt this approach when writing patterns and pattern languages. This author frequently focuses on one pattern in a language, as the pattern developers and other patterns are identified these are noted with the barest details – perhaps name and an example. With the first

pattern completed the author reviews the candidates and repeats the process with the next pattern.

4 Acknowledgements

Many thanks to Claudius Link for shepherding this paper – one of my more difficult papers to shepherd I may say.

Figure 1: A shepherd and his sheep on the way to Hampta Pass in the Indian Himalayas of Himachal Pradesh by Raja Selvaraj under Creative Commons Attribution 2.0 Generic license from http://commons.wikimedia.org/wiki/File:Shepherd_on_the_way_to_Hampta_Pass.jpg

Figure 2: Authors own creation

Figure 3: Image from Mick Lobb under Creative Commons Attribution-Share Alike 2.0 Generic license; source Wiki commons, http://commons.wikimedia.org/wiki/File:%22It%27s_OK_son,_it%27s_just_a_human%22_-_geograph.org.uk_-_1204270.jpg

Figure 4: Court roof of the British Mueseum by Andrew Dunn under Creative Commons Attribution-Share Alike 2.0 Generic from http://commons.wikimedia.org/wiki/File:British_Museum_Great_Court_roof.jpg

5 History

Date	Event
December 2011	First draft
April 2012	Intermediate EuroPLoP review updates
June 2012	EuroPLoP conference draft
July 2012	Post conference revisions: paper split into two, one workshops and one of shepherding patterns.

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