

community

T_EX user groups worldwide – what’s cooking?

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abstract

This article is based on a presentation given at the UK TUG meeting in Oxford in October 2002. It describes some current problems that T_EX user groups face and it attempts to distill lessons learned and recommendations from almost 25 years of T_EX user groups history.

keywords

T_EX user groups, lugs, problems, volunteer work, history

Introduction

During discussions by email and at T_EX meetings in The Netherlands, Germany, Poland, the UK and the USA, it became clear that currently several T_EX user groups (local user groups, ‘lugs’ for short) are facing similar problems. These problems include constitutional crises, failures to produce journals, membership decline and financial difficulties.

We will point out and discuss some of these problems and we will attempt to provide recommendations for solving and/or preventing them.

History

Since the ‘birth’ of T_EX in 1978 many lugs were formed. In Table 1 we’ve listed some highlights in lugs history. It’s remarkable that most lugs were formed in the last decade. Undoubtedly the Internet has played a major role here by providing easy and cheap means of software distribution (FTP servers and World Wide Web servers) and personal contacts (Usenet News and email).

Gathering a historic overview of the founding (and dissolving) of lugs proved to be rather difficult. No one seems to be keeping track of the history of lugs. Even websites of existing user groups often provide little or no information on their history.

Analysis of the development of user groups over the years shows a distinct geographical bias:

- Europe: very many lugs were founded.
- North America: very few lugs were founded.
- Asia: only a few lugs were founded.

- South America: no lugs were founded.
- Africa: no lugs were founded.
- Other continents: neither.

The many European lugs can be explained by the need for support for their own language in T_EX (e.g. DANTE, NTG, GUTenberg, CSTUG). This also (partially) explains why there are so few in North America. The oldest lug (TUG) resides there, and by nature T_EX is English language oriented. Nevertheless, the vastness of the continent could have encouraged more local groups to start their own activities. In Asia T_EX seems to be much less known than in the western world. Although typesetting eastern languages with T_EX is possible, it’s hardly as easy as typesetting western (Latin based) languages. There may also be a cultural barrier here. South America and Africa (in fact, all continents on the southern hemisphere) lack lugs. We can only speculate on the reasons for this.

Ups and downs

Many lugs have had and/or are having their share of problems, but there are also successes to celebrate. In this section we will list some of them.

Internal problems

Running a lug is not a trivial task. Many things can go wrong. Some of the problems that have occurred are:

- Constitutional problems: bylaws and articles may prove to be extremely limiting or paralysing under difficult or un-

1978:	T _E X ‘final’ version released
1980:	TUG founded
1987:	UK TUG founded
1988:	NTG founded, GUTenberg founded
1989:	DANTE e.V. founded
1992:	GUST founded
1997:	19 lugs
2002:	25 lugs

Table 1. Highlights in user groups history

foreseen circumstances. E.g., constitutions may require a certain hard coded number of members to be present at a meeting for any decision to be taken. Sometimes nothing is specified about dissolving the lug which can lead to endless discussions.

□ Boards that don’t perform (well): struggle for power, incompatible personalities, poor discussion technique, poor management and hidden agendas are only a few of the problems that a lug (or any organization) may have to face. Part of the problem is that the goals of a lug are often unclear or too abstract (“promote usage of T_EX”).

□ Financial problems: fuzzy bookkeeping, insufficient insight and control, an amateurish approach and poor (independent) auditing are some the problems that have occurred. Big risks can be involved. Who can afford a big conference like EuroT_EX? What will happen if the tax man starts an inquiry?

□ CD-rom production problems: we’ve seen 4T_EX thrive for several year, but then it died because of internal conflicts. T_EXlive has been very successful but is very vulnerable because of the extremely small size of the team that produces it.

□ Journals: MAPS, Baskerville, TUGboat, T_EXnische Komödie are having problems acquiring enough articles and/or publishing on time.

□ Meetings: the organization and timing of meetings is often more or less random, cheap locations can be hard to find, conferences can be costly (risky), and some lugs opt for electronic only “meetings” (e.g., the Nordic group).

□ Volunteers: you can’t rely on them to live up to expectations (4T_EX, T_EXlive, journals, conferences, etc.). You can’t force them either, so you need a more subtle management style to encourage and support them.

International cooperation

Although all lugs have similar goals, their activities may interfere with each other and opportunities for cooperation and synergy may be missed.

□ Conferences: lack of coordination may cause dates of major meetings to clash; too often the organization depends on the same volunteers; financial risks are unclear and certainly not covered by the whole group of lugs.

□ Journals: distribution of journals to all lugs is still not in place; exchange of interesting articles and translation services are still poor; indexes of all journals or an index of all journals combined is lacking – better still would be a database, but that is definitely beyond reach; online availability of journals/articles and crossreferencing is very poor or non-existing.

□ Finance: banking costs are not (well) managed, resulting in loss of money; conference budgets and reports on financial results are not standardized or not available at all.

□ EuroT_EX & TUG Conference: coordination and selection of organizing parties is very obscure – nevertheless conferences are usually very successful.

□ pdfT_EX: international cooperation made this product flourish; NTS: many lessons were learned but this academic exercise doesn’t justify its costs; Omega: lack of cooperation repels users and volunteers and frustrates development.

The Good News

The gloomy list of internal problems above may give you the impression that lugs are doomed. Indeed there is lots of room for improvement, but let’s not forget what we’ve achieved. Here’s an overview of only a few successes in which lugs played an important role:

□ T_EXlive cd-rom: this product made T_EX easily accessible to users on all major operating systems, standardizing the way T_EX installations are configured.

□ CTAN and CTAN cd-roms: CTAN has been a valuable repository of all T_EX related software where countless users with Internet access have found the resources they needed. The cd-rom versions are very useful for those with no or limited access to the Internet. Though not intended to, the cd-roms also serve as historic snap shots by freezing archives at regular intervals.

□ 4T_EX: this product was the first to provide a true plug & play T_EX environment that could run completely from cd-rom (remember, disk space was expensive back then) and contained all tools usually found in commercial word processors.

□ pdfT_EX: this product instantly warped T_EX into the new era of PDF documents and all their extra features like hypertext and web links. pdfT_EX even made Adobe admit it had no software that could produce documents of the level of complexity that pdfT_EX could (easily) generate.

□ NTS: this ‘New Typesetting System’ was initially supposed to be the successor of T_EX as we know it, but eventually it turned out that for various reasons it could only be a complete rewrite of T_EX in a different programming language which should make the implementation of extensions much easier. This may or may not happen, but anyway this project proved that the T_EX community at large, represented by many lugs, is capable of (re)building a system as complex as T_EX. A true successor to T_EX will become essential soon enough as the world progresses...

□ Mailing lists and news groups: several of these have been very successful in providing support to T_EX users of all levels, and as a platform for discussions of various T_EXnical issues.

□ Conferences: every year there are at least a few successful meetings which last half a day up to a week, where progress is made by discussing T_EXniques and where representatives of lugs can gather to coordinate their efforts in a friendly environment.

□ International contacts during lug meetings: over the years some of the meetings of lugs which used to be ‘local’ have become more and more international (e.g., GUST, DANTE, UKTUG and NTG meetings).

□ New: Webcalendar is a web based system that all lugs can use to publish their meetings and other events to the whole world. Potential date clashes are easy to track because the Webcalendar can show all events of all lugs simultaneously.

□ New: a central ‘T_EX bank’ account should help in minimizing international money transfers which are always costly.

□ New: an attempt has been made to get European funding for the further development of T_EX. This is a joint effort of several European lugs.

Patterns or Lessons learned

Looking back at more than two decades of lugs at work, we can distinguish some recurring patterns, and there are several lessons to be learned:

□ Amateurs operating on (semi) professional levels can deliver astonishing products. But, reliability and consistency are weak.

□ There is no shortage of money, but not enough activities to spend it on. There are no established procedures for requesting support from lugs.

□ Volunteers are tough to manage, especially by volunteers :-). It’s not clear how the precious time and energy of volunteers can be managed and/or supported in a successful way.

□ New lugs are mostly oriented on ‘difficult’ languages (e.g., Indian, Chinese, Hungarian, Vietnamese), not on application, working field or computer system.

□ Formalities have frustrated many projects and activities. However, anarchy hasn’t done much better.

□ Many successes in the T_EX world can be attributed to individuals, with little or no involvement/support of lugs

(e.g., LaT_EX, emT_EX, CTAN, Web2c, ConT_EXt, Omega, fpT_EX, MikT_EX).

□ We don’t learn from each other’s mistakes. There is no sense of history. All too often a new lug board means that much knowledge and experience goes down the drain.

Do’s and Don’ts

From the experience gained by lugs we can extract the following recommendations to lugs:

□ Review your constitution (compare it to others) on a regular basis. Watch out for potential deadlocks (voting rules!) and unforeseen events such as dissolution of the lug.

□ Check your legal and financial position on a regular basis. Get independent professional advice before it’s too late (read: the tax man will strip you down...).

□ Find the right size of your board (not too big, not too small) so you can actually get things done.

□ Think twice before you hire personnel e.g. for running a lug office. This could generate more problems than it will solve.

□ In case of internal problems, talk to other lugs. Chances are your problems are not unique.

□ Cherish your volunteers! They are your most valuable assets.

Bold statements

Naturally we don’t have all the answers to all the problems. However, we do have several items we think would be useful for lugs to discuss among themselves or with other lugs. We list them here as ‘bold statements’. Note that we deliberately chose provocative expressions and that they do not necessarily represent our view on the issue. They are primarily meant to evoke discussions.

1. There is no good definition of a lug. There are no criteria for becoming a ‘formal’ lug. Or an ‘informal’ lug, whatever that is.

2. Vision and mission of lugs are poorly developed. Most, if not all, lugs have no long term strategy, which makes them vulnerable to lots of problems.

3. The model of user groups based on a common country or language no longer suffices.

4. Information and expertise is no longer hard to find because of the Internet. Therefore lugs have to find new reasons for being. A new lug model is needed.

5. Most lugs are clueless when it comes to promoting T_EX or even themselves. This is a threat for the entire T_EX community.
6. Lugs should be more involved in the process of defining and implementing a successor to T_EX and accompanying software.
7. Inter-lug communication depends only on a few persons who meet only a few times a year. Email communication among lugs is subminimal. Joint projects could help to improve this.
8. Intra-lug communication should be improved. Sending a cd-rom and a journal, and organizing one or two meetings a year is not enough. Members will not become involved, which is why it’s hard to find volunteers.
9. Lugs should not have professional staff members. This scenario is bound to lead to problems, as history has proven.
10. Lugs growing too big to handle (2000 members?) should split into smaller groups.

Conclusion

For already two decades lugs have been around to promote T_EX and support T_EX users. They have had their ups and downs, but most of them have survived in spite of the incredible advances and changes that the computer world has gone through and is still going through. We are sure that in the next decade lugs should play a major role in keeping T_EX and the whole T_EX community alive and kicking. So let’s redefine and revive lug activities!