



## The Passing of Time

By David A. Wayne, Ph.D., Past IAF Board Chair



The 2006 IAF North American conference was concluded June 17. From the review by participants, and in terms of the whole IAF international body, it was a real success combining learning and growth with networking and collegiality. Kudos to a wonderful planning team!

The conference marked the end of my term as Board Chair and now I have the luxury of assuming the Past Chair role on the Executive Team. It is amazing how the year flew by. With the help and leadership of a strong Board and an excellent staff, the IAF is on stronger footing than it has been in several years in terms of membership growth and balance, as well as finances. Our next challenges will include adding member benefits and strengthening and supporting existing programs. With Cameron Fraser as the new Board Chair, and Betty Kjellberg continuing as Executive Director, we can look forward to leadership excellence. I want to thank all the many people, mostly volunteers, who have in the past and continue now to make the IAF so successful. Special thanks go to our Regional Representatives who are the glue that

makes us who we are. I look forward to meeting new members at the end of August at the Asian conference in Singapore.

As I reflect back, I also want to acknowledge the passages that I and the IAF Board experienced. Last year our Board Regional Rep. for the Australia/New Zealand region, Carla Rogers, was unable to attend our North American Board meeting and sent, in her stead, a truly energetic, creative person, Roberta Mead. Roberta's presence was a gift to all of us, adding a real spark to our deliberations. Shortly after the conference we were shocked and saddened to learn that Roberta had been killed in a car accident. The Australia/New Zealand region established scholarships in her name. I also wanted to add my recollection of a remarkable facilitator whose presence will be missed locally and internationally and whose life should be celebrated.

Again thank you to all the IAF members who make our Association the foremost organization of its kind in the world.

### Also In This Issue

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- Thread: Brainstorming
- New Members

## ACT for 2006-2007

The new IAF Board of Directors was affirmed at the annual business meeting in Baltimore. Pictured here are the ACT members and proxies who participated in the June 18 ACT meeting: *back row, l to r:* David Wayne, Carol Good, Mark Pixley, Barbara MacKay, Tammy Adams, Jim Campbell, Keith Ryall, Cameron Fraser. *middle row:* Betty Kjellberg, Linda Mather Eunice Shankland, Audrey Goh, Ann Epps. *front row:* Remedios Ruiz, Ruth Siguenza, Michelle Golden, Dale Hunter. See page 7 for a complete list of the new Board



## The History of JAD

by Gary Rush, CPF



*In 2005, Gary R. Rush founded MGR Consulting to focus on facilitation, leadership, diversity, and strategic consulting services. Previously, Gary founded and managed MG Rush Systems from 1985 to 2004. MG Rush Systems was a training and management consulting firm.*

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JAD is an acronym for “Joint Application Design”. That’s what the original manuals have written on them. I know because I’ve had them since Chuck Morris of IBM trained me to be a JAD leader in May 1983. At the time, I was working for CNA Insurance and spent two days at a one-on-one class in Raleigh, North Carolina with Chuck. I ran my first JAD workshop for CNA at the end of June the same year and began my career as a facilitator. I have watched it evolve over the past 23 years and throughout I have either trained or worked with most of the individuals involved with JAD and its derivatives. Since then, the acronym “JAD” has come to be used in new ways. Understanding accurate history helps us better direct the future.

### The Beginnings

In 1978, Chuck Morris developed the concept of JAD while a system engineer for IBM in their Milwaukee office. Chuck originally created JAD to help implement a system IBM was selling called COPICS. This was an early Manufacturing Resource Planning (MRP) system. In the late 1970s systems were not widely accepted by end users (there were no PC’s or Macs). Chuck needed to gather requirements for screen design and process design from people who had little or no understanding of computers. JAD was created to fill that need. Chuck defined many of the roles for the JAD process based on a book written in 1976, *How to Make Meetings Work*, by Michael Doyle and David Straus.

Beginning in 1979, Tony Crawford, then of IBM Canada, helped Chuck Morris formalize the process. Chuck had moved to IBM’s Raleigh office in Research Triangle Park, North Carolina. Tony developed the JAD-Plan agenda – a workshop to help planning for the JAD workshops. Tony implemented JAD at the IBM Canada office in Toronto and really pushed to have it become a standard. He was more successful in Canada than in the US. In the early 1980s, JAD became a popular topic at IBM’s user group sessions, called GUIDE. Chuck and Tony gave a number of presentations at GUIDE conventions on JAD and a group of users, including myself, formed a committee within the GUIDE Development Center group to understand and implement JAD as part of Development Centers.

IBM developed numerous JAD leaders (as we were called rather than facilitators) in Canada and the US over the next few years. Unfortunately, if you went to a dozen IBM offices you would get a dozen different definitions of JAD, if you found anyone who knew what it was. At the time, IBM was better at selling hardware than ideas. Chuck Morris ended up retiring and Tony Crawford left IBM to form JAtch Designer Systems in Toronto.

I learned JAD because I was implementing a Development Center within CNA. My job was to help improve productivity in IT. In those days, we called it MIS (the initials change, but it’s still programmers and systems). I facilitated a dozen workshops by the end of the summer of 1983, hired two people to be special programmers and five people to become JAD facilitators. From what I had learned and my experiences, I wrote a “how to” manual and trained my people to facilitate JAD sessions. My first workshops were very successful and the company supported using more facilitated workshops because I had shown, using Function Points (a productivity metric), that using JAD had improved productivity by more than 25%. I wanted a more formal process that was repeatable for a variety of situations so in late 1983, I hired Dorine Andrews of Performance Resources Inc. (PRI) to come to CNA to help me develop a formal facilitation process for my team. PRI had experience with facilitated workshops that expanded on JAD and I wanted to blend what they did and what I was doing with JAD. I hosted a workshop, facilitated by one of my staff, in which Tony Crawford, Dorine Andrews, myself, a number of IBM facilitators, and my remaining staff participated to design a documentation tool for JAD workshops (remember, this is pre-PC’s when word processors were typewriters). The workshop lasted three days and produced a lot of stress – especially for the poor guy who facilitated the workshop. We had not agreed on a definition of “JAD”, so a documentation system was a long ways off. It did show me that JAD was bigger than originally designed. In 1984, another opportunity arose and I left CNA to work for Exxon in their IT department. Dorine with her company and the five facilitators I trained proceeded to develop a formal process. In late 1984 they completed development, calling it The Method.

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## The History of JAD...continued

While working for Exxon, I facilitated a couple of workshops and remained active in the GUIDE groups for the Development Center and JAD. In February 1985 I went on my own as an independent consultant. My first independent facilitation job was as a sub-contractor for Tony Crawford. I used the original JAD agenda for the workshop and struggled with it. The system we were developing didn't fit the agenda. I adjusted and developed a decision support process instead and the workshop went well. That's when I decided to search for or develop more agendas for different situations. I did some research and found Dr. Blair Burner. He had developed a similar process called WISDM. In his workshops, he facilitated a group of people to develop a narrative version of data flow diagrams as developed by Ed Yourdon in the late 1960s and early 1970s. Dr. Burner didn't like to develop the graphical versions with non-technical people so he built the narrative forms. His roles and process, except for the output, were very similar to Chuck Morris's JAD. By the spring of 1985, I had four agendas: JAD, JAD-Plan, the decision support process I developed, and an agenda to build narrative data flow diagrams. I still called what I did "JAD".

### The Formative Years

In the spring of 1985, I began to develop my own process. I began to write a facilitation "how to" manual and develop training for facilitators. While writing my manual, I also wrote an article describing the different variations of JAD. Rather than call them all "JAD", I created a title for the article – Facilitated Application Specification Techniques – FAST. I sent the article to ComputerWorld and they published it in the October 1985 edition. The title worked so well that I decided to call my process FAST with my FAST Session Leader Reference Manual and the FAST Session Leader Workshop. The ComputerWorld edition came out during the week in September 1985 when I taught my first FAST Session Leader Workshop. So, by the fall of 1985, we had JAD, The Method, WISDM, and FAST. My article caught the eye of an executive of the newly formed Corporate Information Management at General Motors (the combined EDS-GM group). They sent a number of students

to my second class in December 1985. As a result, they hired me to create an EDS version of FAST (which I was allowed to use as well). They wanted to include additional agendas – specifically data modeling. I looked through their project work, studied data modeling, studied strategic planning, and developed additional agendas for the process. We had now gone from JAD being a system design process to "JAD" covering the entire life cycle.

During this time, others in the industry were expanding the use of "JAD". I trained many facilitators who went on their own and developed versions based on what they learned. In the late 1980s James Martin began to discuss JAD relative to using CASE (Computer Aided Software Engineering) tools. IBM continued to train facilitators. Many of whom went on to develop versions of the process using different agendas, different tools (groupware tools, internet-based meetings, teleconferenced meetings, Joint Requirements Planning (JRP), Fusion, 4RAM, etc.). Companies around the US and Europe began using facilitators to enhance the systems development process. After all, it was proven that "JAD" improves productivity.

Looking at all of the processes, they all had similar elements: a neutral facilitator or session leader, participants from the business community, participants from the project team, a documentor (also called scribe or recorder – I dropped "scribe" in the mid-1980s because "scribe" reminds me of a medieval monk), and an executive sponsor. Most of these processes were focused on systems development. The JAD acronym moved from being a brand name (which it was originally) to an acronym describing an industry. The letters went from its original name of Joint Application Design to many others including the popular Joint Application Development.

### Maturity

In 1995, I learned about a group of people who had formed an association of facilitators – the IAF (International Association of Facilitators). This was the first time that "JAD" facilitators had encountered facilitators from other disciplines.

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## The History of JAD...continued

Our world of facilitation awareness and ideas had just doubled. The IAF had a conference planned in Denver with about 150 people registered. When I learned about this, I thought that this would be very informative so I registered and told my mailing list and everyone I knew about the conference. Two weeks before the conference was to start, 150 more people registered. In 1995, the IAF went from 150 members to 300 members overnight.

Over the next couple of years, the IAF continued to grow and a slight division grew as well – those who practiced a very structured facilitation process such as “JAD”, and those who practiced less structured techniques. That the division existed at all is interesting because there are more similarities than differences. However, it grew and because of it, presentations were divided into various tracks – “JAD” being one of them. “JAD” had now morphed into a generic term covering structured facilitation techniques – too often associated with system development. “JAD” may have begun with system design, but its basic structure is the same for strategic planning, analysis, organizational design, teambuilding, and decision-making. The only differences are the participants and the workshop agendas.

### Conclusion

“JAD” has become a generic name. It is important to understand the history if we are to use the name generically. As facilitators, it helps to know where our processes come from. It’s also important to acknowledge the pioneers who created these initial processes – people like: Chuck Morris, Tony Crawford, and others. The evolution has not reached conclusion. More changes lie ahead with different tools, more use of internet-based meetings, and more synergy between structured processes and less structured processes. For me, “It doesn’t matter what you call it as long as it is done well.”

## What is JAD?

Originally, JAD consisted of two workshops: JAD and JAD-Plan. JAD was designed to get a group of people to design screens, reports, and procedures for a business process. JAD-Plan was designed to help define the scope of the JAD workshops. A project would require one JAD-Plan workshop and one or many JAD workshops to complete the design.

### The Roles:

- Session Leader – the person who facilitated the workshop. There was one for each workshop.
- Executive Sponsor – the business client who paid for the workshop – the executive participated in the JAD-Plan workshop but seldom in the JAD workshops. There was one for each project.
- Project Manager – the technical manager who was responsible to have the system built. There was one for each project.
- Scribe – the person who documented the results of the workshop. Each workshop had one or two scribes.
- Participants – the clerical, supervisory, and managerial personnel who designed the solution – the end-users. Programmers and analysts from the technical team also participated. There were typically eight to ten participants in each workshop.

### The JAD Workshop

#### Preparation:

The session leader spent quite a bit of time doing preparation, more like an analyst, to gain some idea of what the results of the workshop would look like. IBM provided a manual that contained a workshop script and forms with specific questions to ask for preparation. The information gathered would be built into the workshop script during preparation so the session leader could, if needed, read the script during the workshop. Session leaders were not completely neutral because of the analyst work done in preparation. In doing the preparation, the session leader also would develop what was called “The Management Perspective”. This was the document that defined the scope of the workshop – defining the purpose, scope, objectives, and constraints of the workshop. It was agreed to by the executive sponsor and published ahead of time.

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## What is JAD?...continued

### *The Workshop:*

The session leader stepped the participants through the agenda to design the system. The agenda and various questions that the session leader would ask were in a set of 35mm slides that guided the participants through the process. Additional slides were made of sample screens to help the participants design new screens (most participants at that time had not seen computer screens or had seen only rudimentary mainframe screens). Visual aids were used heavily – we used vinyl magnetic shapes to represent data, screens, printers, network, and flows. Screens were drawn on an overhead projector using water-soluble markers. The scribe recorded the results. The agenda stepped participants through eight work phases from planning the work through evaluating the work and for each, the group would design the activity, data, screens, environment, and changes in detail. This would be repeated for each of the eight work phases.

### **The JAD-Plan Workshop**

The JAD-Plan workshop was less visual with fewer support materials. Its intent was to define the scope of work that the subsequent JAD workshops would design. The participants were more management than clerical. It focused on understanding the current environment, what problems existed, and what the group wanted to do about it. It generated JAD workshops.

### **Summary**

The elements of JAD are similar to today's structured workshops. The differences are in the agendas, the visual aids, how preparation was conducted, and how facilitators were trained. The number of agendas has grown. The visual aids are different due to changes in technology. Preparation is different in that facilitators are taught to remain neutral so analysts do the analysis instead of the facilitator. Early training did not teach basic facilitation skills and concepts. Session leaders learned through an apprentice type process: the process would be explained; you would watch a workshop; you would conduct one with an experienced session leader watching you; then you would be on your own.

## Wainhouse Research European Forum

Jon Jenkins, former IAF Communications and Publications Coordinator, made a presentation on the future of facilitation in the year 2020 to more than 200 participants attending the Wainhouse Research European Forum, held in Berlin from 19 – 21 April 2006.

Jon talked about the need for facilitation to clarify the boundary between the normal work of managers leading meetings and the specialized skills used by facilitators. He also discussed the issues of cross cultural and multicultural facilitation, a growing requirement of facilitators; the use of graphic and visual facilitation; and the increasing use of story-based facilitation.

From the perspective of online facilitation, Jon noted five areas that need to be addressed by those developing meeting technology. The virtual environment needs to be richer with a number of alternative formats, such as meeting rooms, play rooms, living room environment with fire places and leather chairs. Communication channels need to increase so that several forms of communications such as voice, written, drawing, music, etc. can be used at the same time.

Participants will need to be able to create their own identities in much richer ways than the avatar currently available for chat rooms. They should be able to select from a number of characteristics as memory aids to the identity of other participants. Creating and relating to an online persona is an important direction.

The online facilitator needs to be able to more effectively have personal contact with the group he or she is working with. For example it is not possible to have eye contact with an individual during a videoconference and yet this is an important aspect of face-to-face facilitation. Seeing and interpreting body language is difficult online.

Online systems need to have a much wider variety of facilitation methods available to them. Many have none and the few that have some are usually limited to one or two. From five to ten, icebreakers / energizers, idea generating such as brainwriting, organizing / clustering,



*Jon Jenkins, Past Communications & Publications Strategic Initiatives Coordinator, and presenter at the Wainhouse Research European Forum*

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## Wainhouse ... continued

prioritizing and closing methods each would be of great assistance to the online facilitator. Because many of these techniques have relatively short shelf lives, due to over exposure, regular updates will be needed.

Technology that assists in various levels of interventions: content, process, inferences, emotions and spirit would be helpful. Technology is currently available to identify individuals who make influential contributions, ideas that are picked up by others in the group. Dominant people can also be identified and suggestions made as to what kind of intervention would be appropriate.

Wainhouse Research analyzes the market trends, technologies/products, vendors, applications, and related services in the rich media conferencing & collaboration marketplace. The Forum is the second one, following on their 2005 conference. It focused on next generation technologies for meetings as well as current trends in enterprise collaboration deployment. It was attended by many of the major players in online collaboration and facilitation technology including: Philips, Cisco Systems, KPN, Ernst & Young, the European Commission, Microsoft, etc.

The primary sponsor was Augmented Multi-party Interaction (AMI), a multi-disciplinary 15-member consortium, dedicated to the research and development of technology that will augment communications between individuals and groups of people.

Partners in the AMI project conduct research focused on the use of advanced signal processing, machine learning models and social interaction dynamics to improve human-to-human communications, particularly during business meetings between co-located and remote (virtual) participants.

The conference was an important one especially from the perspective of those interested and working on technology. As online facilitation will continue to develop, facilitators need to be a part of these discussions.

## 2006 IAF Conferences

31 Aug-1 Sept 2006 - Asia  
Sailing the Seas of Facilitation  
Orchid Country Club  
Singapore

28-29 Sept 2006 - Africa  
Weaving People Into Performance  
Spier Conference Centre  
Cape Town, South Africa

6-8 October 2006 - Europe  
A Facilitator's Smorgasbord  
SAS Radisson Royal Park Hotel  
Stockholm, Sweden

29 Nov-1 Dec 2006 - Australia/New Zealand  
The Naked Facilitator Conference  
Deakin, University  
Geelong, Victoria, Australia

8-10 March 2007 – North America  
Hilton Portland  
Portland, Oregon, USA

*For registration information, go to [www.iaf-world.org](http://www.iaf-world.org) and click on the conference of interest.*

## A Warm Welcome to New Members!

We offer a warm welcome to our colleagues from around the world who joined or returned to IAF from mid-May through July 10th. (We are only listing those members who have chosen to be listed in our online membership directory. If you are concerned about having been included in this list, please contact the office via email at [office@iaf-world.org](mailto:office@iaf-world.org)).

### Canada

John Gelder, Gloucester, ON  
Ivan Guisao Henao, Toronto, ON  
Heather MacMillan, Charlottetown, PE  
Alice Strachan, Georgetown, ON  
Dan Wall, Edmonton, AB  
Rebecca Wilson-Mah, Victoria, BC

### India

Pallassana Krishnan, New Delhi  
Gregory Xavier, Chennai

### Malaysia

Jack Nan Tan, Kulim

### Saudi Arabia

Abdullah Turkistani, Jeddah

### Singapore

Michael Boey  
Geok Bee Chew  
Albert King  
Edward Lee  
Yong Kiat  
Peter Seah  
Peter Wong  
Anne Yeo

### South Africa

Chris Klopper, Secunda  
Michael Smith, Cape Town  
Lois Strachan, Cape Town  
Nico Van Der Neut, Secunda

### Sweden

Jerk Perés, Gothenburg  
Anna Ptasnik, Stockholm  
Cecilia Rosengren, Stockholm

### Trinidad

Zeynep Ozbil, Mersin

### Taiwan

Paulina Chu, Taipei

### United Kingdom

Angela Hayes, Nottingham  
Adriana Martini, Cobham  
Allan Mees, Edinburgh  
Bobby Moore, Newtownabbey

### United States

Carol Blaha, Longmont, CO  
Patricia Bradley, Baltimore, MD  
Julia Burns, Jacksonville, FL  
John Cavener, Fayetteville, NC  
Kathleen Conway, New Haven, CT  
Dawn DePasquale, Greensburg, PA  
Allison Fink, Fort Collins, CO  
Fred Flanders, Huntsville, AL  
Joseph Foran, Yarmouth, ME  
Laura Jones, Bethesda, MD  
Kathleen McGraw, Metairie, LA  
Barcy McNeal,  
Nancy Pavona, Virginia Beach, VA  
Karen Porterfield, Norwalk, CT  
Robert Silverstein, Washington, DC  
Nancy Starr, Dallas, TX  
Joan Steinkuller, Washington, DC  
Jana Telfer, Atlanta, GA  
Cynthia Todorich, Mountaintop, PA  
Valerie Tonus, Fairfax, VA  
Brian Underhill, Springfield, MO

## 2006-2007 Board of Directors (ACT)

The IAF Board of Directors (also known as the ACT or Association Coordinating Team) for 2006-2007 was affirmed by the membership at the annual membership meeting on June 17th in Baltimore, Maryland.

Cameron Fraser, Chair	Ruth Siguenza, Organization Futures Strategic Initiative Coordinator
Eunice Shankland, Chair Elect	Barbara MacKay, Professional Development Strategic Initiative Coordinator
David Wayne, Past Chair	Jerome Passmore, Africa Regional Representative
Dale Hunter, Vice Chair International	Prabu Naidu, Asia Regional Representative
Linda Mather, Treasurer	Carla Rogers, Australia/New Zealand Regional Representative
Remedios Ruiz, Secretary	Carol Good, Canada Jim Campbell, Europe Regional Representative
Tammy Adams, Communications & Publications Strategic Initiative Coordinator	Jim Campbell, Europe Regional Representative
Mary Sue McCarthy, Community Outreach Strategic Initiative Coordinator	Elias Dinzey, Latin America Regional Representative
Ann Epps, Conference Strategic Initiative Coordinator	Michelle Golden, USA Regional Representative
Mark Pixley, Membership & Affiliations Strategic Initiative Coordinator	