

NEWSLETTER

Issue #3.4 • July 2006

PMB 197 San Justo Street 202A , San Juan, PR 00901 • Tel. 773-330-2064
email grush@mgrconsulting.com • Web Site: <http://www.mgrconsulting.com>

“The final test of a leader is that he leaves behind him in other men the conviction and the will to carry on.”

Walter Lippman

Gary is a Certified Professional Facilitator – CPF

On June 13, 2006, I was assessed by certified professional facilitator assessors of the International Association of Facilitators (IAF) and determined to be a certified professional facilitator – CPF. I have 23 years of experience facilitating and I taught numerous facilitators who have become CPF's and CPF assessors. Numerous people asked me why I decided to become a CPF. There are a number of reasons. First of all, it was a privilege to have my peers assess me and provide me with feedback. The experience was very good and helpful. I received valuable feedback. I also have been a supporter of the program since its inception and thought that I should “put my money where my mouth is.” Since I feel it is important to the industry and to me, I went through the assessment to become certified. I believe in the certification process – it helps facilitators be more professional and it helps clients know what they are getting. I have encountered many clients who had previously hired a “facilitator” only to find out that the

person didn't know what he or she was doing – because he or she had never been trained. That hurts all facilitators and the process of facilitation. All facilitators should go

Continued on page 2...

NEWSLETTER No. 3.4

This is a newsletter for email recipients. It is devoted to the IAF and the history of JAD.

- “IAF – Certified Professional Facilitator” – Pages 1 – 2
- “JAD – Its History and Evolution” – Pages 2 – 5
- “What is JAD” – Pages 6 - 7
- Our Public classes – Page 8.

Visit our web site
<http://www.mgrconsulting.com>

Contact Gary at:
grush@mgrconsulting.com
773-330-2064

Certified Professional Facilitator, Continued

through the assessment and all clients should hire only certified professional facilitators (the Canadian government has already made that determination). Facilitators who charge for their services should be properly trained. *The FAST Facilitator Workshop* covers the competencies required. Experience (more than 7 workshops) is all that is required to be able to be assessed. Effective, professional facilitators help legitimate facilitators and

provide better service to clients. There are currently fewer than 500 CPF's in the world. We need to make that number grow. The IAF is the only international organization for facilitators and its CPF program is effective and well thought out. You can check out their website – <http://www.iaf-world.org> - for more information about the organization and the CPF program. ☸

JAD – Its History and Evolution

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 1970's 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 1980's, JAD became a popular topic at IBM's user group sessions, called GUIDE. Chuck and Tony gave a number of

Continued on page 3...

JAD – Its History and Evolution, Continued

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.

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

Continued on page 4...

JAD – Its History and Evolution, Continued

by Ed Yourdon in the late 1960's and early 1970's. 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 1980's 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-1980's 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

Continued on page 5

JAD – Its History and Evolution, Continued

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. 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.

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.

Continued on page 7

What is JAD? Continued

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.

I teach the JAD agenda and the JAD-Plan agenda as part of *The FAST Facilitator Workshop*. If you have additional questions, please feel free to email me at grush@mgrconsulting.com. ☞



PUBLIC CLASSES

Class	The <i>FAST</i> Facilitator Workshop	Leadership Skills	Diversity – How Business Succeeds
Description	Our 5-day class that provides the finest and most comprehensive facilitation training available. The audience is candidate facilitators. This class confers 32 PDU's.	A 3-day class providing leadership skills and tools for the budding leader. This audience is anyone looking to become a leader. This class confers 18 PDU's.	Our newest class is a 2-day class that enables students to understand diversity and “inclusivity” as well as implement or support diversity programs. This class confers 12 PDU's.
Cost per student	\$2600	\$1890	\$760
Class Dates	September 18 – 22 October 16 – 20 December 4 – 8	August 14 – 16 November 6 – 8	August 17 – 18 November 9 – 10

Gary Rush teaches all classes.

All class fees cover training, materials, continental breakfast, lunch, and breaks. Hotel room reservations at the Majestic Hotel, 528 W. Brompton, Chicago, IL 60657 are made through MGR Consulting. Student pays own hotel and incidentals – a credit card is required to hold a room. Room rates and terms are listed on our web site (Public Classes). If you do not want to stay at the hotel, please let us know so that we don't make a reservation for you.

Facilitation & Consulting Services

**Classes
Newsletters
Articles**

See our web site.

**Call to register, discuss, or schedule a class.
Call Gary at (773) 330-2064 or email at grush@mgrconsulting.com
www.mgrconsulting.com**