



Capability Statement

iCohere, a privately-held Small Business S-Corporation with offices in California and Washington, D.C., is one of the pioneers in designing, implementing and supporting collaborative learning communities.

Since 2001, iCohere has actively engaged in creating, designing and maintaining an easy-to-use system that promotes transparency, participation, and collaboration, the three critical elements of President Obama's new Open Government Directive. iCohere's involvement with proven technology began with the development of custom, enterprise-wide applications for a variety of small and large organizations including AT&T, Bank of America, and the State of California. Since then, iCohere's clients have included federal agencies (e.g., US AID, the National Defense University, and the National Institutes of Health); nonprofit and professional associations with memberships ranging from 100 to 100,000 (World Vision, the National Association for the Education of Young Children, ASAE and The Center for Association Leadership, the Society of Healthcare Strategy and Market Development (a 4,500-member marketing branch of the American Hospital Association), and the Western Association of Schools and Colleges; as well as commercial organizations.

GSA IT 70 Schedule, GSA Contract No. GS-35F-0490U: SINs 132-32, 132-33

NAIC CODES:

511210 – Software Publishers
541511 – Custom Computer Programming
541512 – Computer Systems Design Services
518210 – Data Processing, Hosting, and Related Services
517410 – Professional Support Services

iCohere has a proven record of excellence in client services. For the performance evaluation conducted for our GSA contract awarded in July 2008, our Dun & Bradstreet Open Ratings placed iCohere in the 95th percentile in overall performance:

<http://www.icohere.com/openRatings.htm>

iCohere is a complete, cost-effective, integrated solution for online collaborative communities. A single software system provides a wide range of services:

- Online Conferences and Events
- Communities of Practice
- eLearning and Professional Development
- Webinars and Team Meetings
- Large-scale Organizational Change Initiatives using the Appreciative Inquiry Process

System Highlights

Flexible: Easily configured without programming or special technical expertise.

Feature-rich: A broad set of components.

Fully integrated: Integrates real-time (synchronous) and over-time (asynchronous) features into a single environment.

Friendly: Managed and used through simple templates; most users can begin participating in the environment without formal training.

Secure: Offers strong security as a standalone platform and can integrate with the security and authentication of your existing site.

iCohere Product Features

iCohere works with current Windows and Macintosh Operating Systems, plus many Linux distributions using 2.6 kernels with a Firefox browser. iCohere is available either as a fully-managed and secure hosted internet service or as a software package installed on your servers. In either setup, iCohere enables the client to control a private collaboration environment, backed by our training, consulting, and support. For the hosted model, the client's software is maintained by us. This means the client and their end-users require only computers with web browsers and Internet access to make use of iCohere features.

- **Announcements:** Broadcast timely information to all your site members or to designated groups and committees. Easily distribute polls and file attachments via external email.
- **Discussion Boards:** Host team, committee and community-wide discussions that allow members to add attachments, embed multi-media, and create photo albums.
- **Presentations, Chat and Live Meetings:** Support community-based webinars that integrate all the features of your online community, multi-day conference, or eLearning course.
- **Webinars** with desktop-sharing, webcam video and VoIP audio [not included in GSA pricing/license]
- **Calendars:** Create unlimited group calendars to generate notifications of meetings and events; forward reminders to external email, include RSVPs and polls and attach agendas, budgets, presentations or any other type of file.
- **Document Management:** Integrate a secure and comprehensive document management system.
- **Text chat** with file-sharing and transcripts
- **Profiles, Directory and Social Networking Tools:** Design personal and professional profiles with visible and private (administrator use only) fields. Download contact information into Outlook.
- **Web Forms for Data Gathering:** Format forms for any type of structured data, including polls and surveys, certification forms, best practice databases and digital story collections.
- **Content Search and Retrieval:** Search deep into your site's content—including posts, attachments, and all files that have been uploaded into your resource center.
- **Project Task Management:** Track the progress of your team's tasks and sub-tasks, assigning dependencies, responsibilities and due dates.
- **Blogs:** Empower community members to self-publish, articles, stories and strategies. Blogs can be public or restricted to pre-defined groups.
- **Multimedia files** embedded throughout your site: streaming podcasts, videos, and PowerPoint archives.
- **Multiple Languages:** Navigate your site(s) in your choice of English, Spanish, French, German, or Portuguese.
- **Blackberry & iPhone Support:** iCohere is cross-platform compatible for your Mac and PC users and will soon be accessible to your on-the-go members through their mobile PDA and Blackberry devices.

iCohere Services

Online community initiatives are new to many of our clients. That's why we work with you to ensure that you:

- Understand the process of launching a successful community of practice, webinar series, online conference, or eLearning course.
- Learn what works and what doesn't.
- Gain from our expertise on methods to engage your membership, stakeholders and staff.
- Learn how to sustain beneficial professional networks.
- Translate your goals and objectives into an effective site design.
- Configure your site to optimize the technical capabilities of iCohere.
- Benefit from our ongoing support as your online communities grow.

We don't simply provide a software platform—we provide the tools, strategies, and support you need to claim your online future.

Training. iCohere training includes: strategies for building and maintaining self-sustaining practice centers, identifying the roles of technical user and leaders, an introduction to key elements of the tool, and guidance on how to effectively use the platform to launch and host online professional learning and collaborative communities. We have training manuals for both users and administrators that cover all features of our product. The free training that comes with iCohere licenses and the variety and breadth of training materials are often all future administrators and managers need to implement their community site.

Support. iCohere offers multiple routes to continued online user support. These include:

- Telephone and email support for Site Administrators (2ND tier support)

- Telephone help desk support from 8 a.m. to 8 p.m. EST (optional 24-hour support available)
- Instant online quick meeting capability
- Online FAQ sheets on the features that are the most frequently queried
- An integrated help desk feature to send a question directly to the help desk
- Balloon pop-ups for each feature that is being used by the client
- Complete Online Administrator and User Guides; in-depth Help manuals

Consulting. iCohere provides a broad range of consulting and coaching services:

- Moderation and facilitation training, coaching, and assistance to help clients recruit key contributors; engage the audience; optimize lead time before events; and maximize outreach.
- Strategic consulting with leadership teams to define specific objectives for community initiatives; lay out project goals and budgets for program proposals; help secure approval for funding; assist with implementing programs as defined; and help create processes for obtaining quantitative and qualitative outcome measurements.
- Production services to assist in transforming live events into interactive online events, using audio and video recording, editing, and production.
- Advanced strategies to help you create a roadmap for designing, implementing, and facilitating an online environment and promote a successful collaborative community outcome.
- Fully managed community solutions for organizations to help design, facilitate and nurture their communities.

iCohere Key Personnel

Pascal Kaplan, Ph.D.

CEO and Founder

The co-founder, co-creator, and CEO of the integrated collaborative software program iCohere, Dr. Pascal Kaplan blends a background in education and organizational development with skills as a software designer. His special expertise is helping groups learn how to use innovative technology to support organizational and cultural change that will move the group towards collaborative knowledge sharing—internally and externally.

Dr. Kaplan has provided strategic consulting services to the federal government (Department of Defense, National Defense University, USAID, and the National Institutes of Health), large and small national and professional associations (ASAE and The Center for Association Leadership, the National Association for Education of Young Children, America's Promise Alliance), accrediting bodies (Western Association of Schools and Colleges), and commercial enterprises (AT&T, Phonak, Bank of America). Dr. Kaplan holds a Ph.D. from Harvard University.

Lance Simon

Vice President, Client Services

Mr. Simon manages sales programs for iCohere's association, nonprofit, corporate and government markets. He has held senior sales and marketing and positions for businesses in Silicon Valley, CA. Since moving to the D.C. area in 2001, he has focused on serving the association/nonprofit marketplace. He has served previously as Sales Team Leader at CommPartners LLC in Columbia MD and as interim Vice President of Marketing for Capitol Advantage in Fairfax, VA.

Jon McAdams, M.A.

Vice President, Client Solutions

Mr. McAdams manages marketing, customer support and iCohere's Information Technology infrastructure. He has more than 25 years of experience in managing customer satisfaction programs and marketing for Fortune 500 companies, including directing customer satisfaction research programs. Mr. McAdams is a Microsoft Certified Engineer, database administrator, and Security + professional who is certified by the Computer Technology Industry Association.

Robyn Moulding

Director of Training

As iCohere Director of Training, Ms. Moulding helps iCohere site administrators design, configure, and manage their online community, conference, or eLearning initiatives. She also provides coaching on how to build online community success through member engagement and special online events. Ms. Moulding also manages the iCohere User's Group site, a community of practice and training site for iCohere client site administrators, and prepares and presents training sessions for iCohere U.

Don Davenport

Senior Application Developer

A programmer analyst with 11 years of specialized experience in web application development and 20 years experience in database programming, Mr. Davenport is the lead programmer and technical designer of iCohere.

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iCohere Past Performance

The American Society of Association Executives. As the association of association professionals, ASAE & The Center for Association Leadership is committed to educating their members on association best practices and accrediting qualified members as CAEs (Certified Association Executives). Center U is ASAE & The Center's university offering dozens of classes each year for CAE training and continuing education for association professionals. To accommodate their widely dispersed membership, ASAE & The Center sought to make many of their classes available online in a secure and user-friendly virtual environment. Planning to provide the same quality content as in face-to-face classes, ASAE & The Center wanted the eLearning platform to come with a full suite of features to encourage a vibrant learning community.

ASAE & The Center enlisted iCohere to create an intuitive eLearning platform that used the full reach of the iCohere feature set, including:

- live and prerecorded webinars
- document and syllabi management tools
- multiple discussion areas
- instant messaging
- networking areas and member profiles

iCohere staff fully trained ASAE & The Center education experts and then worked closely with them to configure the platform to meet all design and branding requirements. In addition, iCohere and ASAE & The Center worked closely to ensure that the online learning environment matched a face-to-face learning experience as closely as possible by setting up networking and continued discussion areas. Once the basic class template was created, it was cloned for use in dozens of classes across many different topic areas.

National Defense University. The National Defense University provides graduate-level education for military officers and federal workers in all agencies of the U.S. government. NDU trains professionals so that they can provide effective leadership to help improve the functioning of government. In September 2008, iCohere won a competitively bid contract to set up a series of Communities of Practice that support NDU's educational mission around the globe. iCohere has also provided NDU with online community leader training, consulting services, and extended technical support.

YouthBuild USA. Through its existing cooperative agreements with the Department of Housing and Urban Development (HUD) and the Department of Labor (DOL), the YouthBuild program provides training and technical assistance on a national scope to Youthbuild grantee organizations. Youthbuild is a comprehensive youth and community development program that supports workforce development for out of school youth between the ages of 16-24 in the United States. Youthbuild grantees receive resources from HUD and DOL to tackle several key community issues at once, strengthening their capacity to build and manage housing for their residents, educate and inspire their youth, create leadership for the future and generally take responsibility for their neighborhoods. Training and technical assistance delivered to grantees by Partners includes grants management, program development, capacity building and organizational development. iCohere provides the platform for the YouthBuild community web site. iCohere also provides strategic consulting to the program's managers.

The National Institutes of Health Clinical Center. The NIH Clinical Center (CC) facilitates the development of diagnostic and therapeutic interventions, the training of clinical researchers, and the development of processes to ensure the safe, efficient, and ethical conduct of clinical research. As integral research team members, Clinical Research Nurses provide support for the design, coordination,

implementation, and dissemination of clinical research by NIH investigators, while simultaneously providing care for patients and their safety, continuity of care, and informed participation in a clinical study. The CC Intensive Care Unit (ICU) nursing staff wanted a way within a web environment to manage the learning process necessary to ensure that they maintain CC Nursing and Clinical Research competencies. In their search for a web platform that would support the flow of a wide range of information in a rapid-response environment, CC staff found that while most software had one or two of the capabilities they wanted, only iCohere had their required features in a single, integrated, secure platform. Working as a team, the nursing program manager, the nurse educator, and a nursing informatics specialist tailored the main features of iCohere to provide ongoing access to continuing education to all staff of the ICU. Resources, discussion boards, web links, and eLearning opportunities were made available on topics as wide-ranging as policies, equipment information, staff development, research, and peer reviews.

World Vision. In 2004, World Vision embarked on a strategic planning process to identify goals and priorities for guiding the organization into the future. With over 20,000 employees and offices in 100 countries, World Vision is one of the world's largest non-profit organizations and is the world's largest distributor of food, feeding seven million people each day. A seminal component of World Vision's planning process occurred in June 2004, when 150 of the organization's leaders, donors, and partners met in Bangkok for a strategic planning summit. World Vision went beyond simply involving its top leaders in the process—it engaged 5,000 employees, partners and stakeholders in a groundbreaking and highly successful “virtual summit” process using iCohere's platform. In 2008, World Vision once again contracted with iCohere to support a 1,000-member community of practice with both the licenses and strategic consulting for all phases of the CoP's development and maintenance.

America's Promise Alliance. Founded by former Secretary of State Colin Powell, America's Promise Alliance (APA) is the nation's largest multi-sector collaborative dedicated to the well-being of children and youth. In 2008, APA launched a series of summits across the country to connect member organization like the YMCA, United Way, Boys and Girls Clubs of America, and others working on the dropout prevention initiative. APA aims to help these organizations identify and share best practices, design action plans, and coordinate their efforts. APA enlisted iCohere as a strategic partner in merging face-to-face activities with continuing online work. Providing collaborative technology and strategy, iCohere built the APA Online Community Action Forum. In addition to comprehensive consulting, iCohere provides a team of experts who offer engaging online facilitation, full end-user support, APA staff training, and ongoing configuration strategies that allow the site to grow as the initiative matures. In addition to a contract for licenses, iCohere provides APA with support in (1) training core staff to be able to train subsequent community members as they join the project, (2) assisting with capacity building, and (3) providing supplementary help desk staff to meet the needs of an expanding collaborative action community.

References Available on Request

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What Do iCohere Clients Say?

iCohere has been an outstanding partner. Their software and support team are world-class—but what really sets them apart is their understanding of what it takes to build, grow and maintain a professional online community.

Andrew Scharlach, Ph.D.
Associate Dean
School of Social Welfare, UC Berkeley

My experiences with the iCohere team have exceeded my expectations—for their knowledge, innovation, and collaborative approach to supporting our goals.

Kathy Spangler, Ph.D.
COO and Executive VP
America's Promise Alliance

The people of iCohere are consummate professionals, impressive in their quick responses.

William O. Lowrey, Ph.D.
Director of Peacebuilding
World Vision International

You couldn't ask for a more reliable, responsive or capable team.

Mark Esfehani
Technical Director
AT&T

They are true partners in our endeavors. I hope that if you have any need for a company like iCohere—well, there is NO other company like iCohere!

Susan Sarfati
Former CEO of The Center for Association Leadership
and Executive VP, ASAE

The iCohere staff has been consistently responsive and enthusiastic in supporting our objectives.

Pam Nobles
Director of Education and Certification
Society of Cable Telecommunications Engineers

iCohere is about as easy to use as a pencil!

William A. Jesse,
Director of Information Services
Million Dollar Round Table