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### **SUMMARY AND CURRENT EXPERIENCE (1998-PRESENT)**

Joseph M. Firestone, Ph.D. is CKO of Executive Information Systems (EIS), Inc. Joe has varied experience in consulting, management, information technology, decision support, and social systems analysis. Currently, he focuses on product, methodology, architecture, and solutions development in Knowledge Management and Enterprise Information and Knowledge Portals, where he performs knowledge and knowledge management audits, training, and facilitative systems planning, requirements capture, analysis, and design.

Joe was the first to define and specify the Enterprise Knowledge Portal Concept, and is the leading writer, designer, commentator, and trainer in this area. Along with his colleague and frequent co-author, Mark W. McElroy, Joe is reconstructing the foundations of the discipline of Knowledge Management, and developing the prescriptive model of The Open Enterprise.

Joe is widely published in the areas of Decision Support (especially Enterprise Information and Knowledge Portals, Data Warehouses/Data Marts, and Data Mining), and Knowledge Management, has completed a full-length industry report entitled "Approaching Enterprise Information Portals". He is also the author of *Reducing Risk by Killing Your Worst Ideas* (forthcoming, 2006) *Enterprise Information Portals and Knowledge Management* (KMCI Press/Butterworth-Heinemann, 2003), and the co-author (with Mark W. McElroy) of *Key Issues in the New Knowledge Management* (KMCI Press/Butterworth-Heinemann, 2003), and *The Open Enterprise: Business Architectures for Openness and Sustainable Innovation* (Hartland Four Corners, VT: KMCI Online Press, 2003).

Joe is a founding member of the Knowledge Management Consortium International (KMCI), and is Managing Director and CEO of its parent company, the Center for the Open Enterprise, LLC. He is also the Director of the KMCI Knowledge and Innovation Manager Certificate (CKIM) Program (<http://www.kmci.org/ckimcertificateprogram.html>), and Director of the KMCI Research Center. Joe is a frequent speaker at national and

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local conferences on KM and Portals, and a trainer in the areas of Enterprise Information Portals, Enterprise Knowledge Portals and Knowledge Management (KM). He is also developer of the web site <http://www.dkms.com>, one of the most widely visited web sites in the Portal and KM fields, and of the KM Blog "All Life is Problem Solving" (<http://radio.weblogs.com/0135950>).

Dr. Firestone has experience as a Chief Executive Officer, Chief Knowledge Officer, Chief Scientist, Director, Project Manager, Trainer, Researcher/Author and Systems Integrator with skills in Enterprise Information and Knowledge Portal Development, Distributed Knowledge Management Systems (DKMS), Data Warehousing and Data Mining, Business Process Reengineering (BPR), Executive Information Systems (EIS)/Decision Support Systems (DSS), Statistical, Neural and Fuzzy Systems Modeling, Group Decision Process Design and Management (including Joint Application Design, Focus Group, Group Value Measurement Technique, and Delphi), Database Marketing, RFP response writing, and Sales.

In addition to his work in KM, Dr. Firestone has consulted and trained in the area of three-tier client/server based Decision Support Systems, including Portal Solutions Development, Data Warehouse and Data Mart development, Knowledge Discovery in Databases (KDD)/Data Mining, and Database Marketing Systems. Earlier in his career he performed strategic planning, design, development and implementation of hardware and software aspects of information systems. These activities included technical leadership of a major multi-year project in needs assessment for the Census Bureau and the Farmers Home Administration. Still earlier he completed a wide variety of consulting assignments in program evaluation, and policy analysis, performed as Vice-President of a management and policy analysis consulting organization he co-founded, and served as a Teacher and Researcher at a number of major universities and research centers.

### **ACCOMPLISHMENTS (1991-1997)**

As Director of Data Mining, Object-Oriented Data Warehousing, and Database Marketing at DMR, Dr. Firestone consulted on data warehousing, data mart, and data mining projects both internally and for clients of the data warehousing practice. Areas of consulting included distributed system architecture, data modeling, data warehouse/data mining use case analysis, database sizing for data marts, strategic product enhancement and development, data mining product review and evaluation, data mining analytic workbench requirements, design, and analysis, development of strategic alliances with vendors, data warehousing method and process development, and practice promotion activities. Clients included Fortune 500 telecommunications and insurance companies.

Earlier, as President of Firestone Associates, and Chief Scientist on Computer Business Methods, Inc.'s, U.S. Department of Education IRM Technical Support Contract, he designed the Trio Decision Support System (TDSS), a data mart for supporting program monitoring, impact measurement and evaluation in a \$600 million Grant Program. and also conducted Focus Groups and JADS in two Federal reengineering efforts. One of these, in which he also managed the project, involved development of a new client/server-based Customer Registry System (CRS). The other focused on selecting and implementing a uniform identifier for higher education databases. In the area of

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Database Marketing, Dr. Firestone developed an acquisition model for a major health insurance provider, and also developed retention models for an environmental association and a Fortune 500 prepared foods firm. He served as Project Manager in all three of these data mining projects. Methods used in his work as an independent consultant included Rapid Application Development (RAD), Joint Requirements Planning (JRP), Joint Requirements Modeling (JRM), and Joint Application Design (JAD), all user participation mechanisms for planning, requirements analysis and design.

Dr. Firestone's proposal work focused on client/server and software life cycle approaches to technical support work. Five winning RFP responses (in five attempts) dealt with new information technology and its introduction into U.S. agencies in the framework of generalized information systems support contracts.

As Director of Statistical Services for Xcel Computer Services, Inc., a full-service Direct Mail service bureau to Marketing Departments of Fortune 1000 Corporations, major associations and computer software firms, Dr. Firestone (a) performed design, systems configuration and specification of mainframe and client/server LAN and WAN-based Database Marketing Systems for Direct Marketing departments; (b) developed targeting and promotion models useful for augmenting Marketing Databases with forecasts of Sales, Net Profits and Lifetime Value of Customers, Members and Donors who are periodically the object of direct marketing promotions; (c) developed marketing materials including Corporate Position/Capability Statements and Brochures; (d) managed all modeling projects; and (e) played a key role in corporate presentation, bid and sales activities. Methods used in developing the targeting and promotion models were diverse and included various forms of regression (multiple, logistic, survival modeling), log-linear as well as neural network modeling.

### **ACCOMPLISHMENTS (1983-1991)**

As President and Chief Executive Officer, Dr. Firestone developed Responsive Computer Technology, (RCT) Corporation, a metropolitan area Systems Integrator from a Sales level of Zero to one of \$4.9 Million in Fiscal 1987 with 20 employees on the Staff. At its height in 1987 and 1988, the organization was widely known for its technical expertise in IBM PC Compatible hardware systems integration and microcomputer-based Novell local area networking .

### **ACCOMPLISHMENTS (1977-1982)**

Co-founded Center for Management and Policy Research (CMPR), Inc. a research and consulting organization. Sponsors included: U.S. Department of Justice, U.S. Department of Agriculture and U.S. Department of Defense. As Vice President and Senior Research Fellow, participated in all planning, budgeting, marketing and major presentations, and managed CMPR consulting engagements and projects.

Developed Strategic Evaluation and Planning System (STEPS) and Needs Assessment Capability (NAC) for U.S. Farmers Home Administration (FmHA). This four year project produced a computer-based targeted resource allocation and program evaluation system. The system was based on social indices measuring five types of need for FmHA program assistance at the state and county levels. These indices were derived from extensive multivariate statistical analysis employing both expert panel and census

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data. In connection with STEPS, NAC and other work performed for the U.S. Census Bureau, designed a new group decision technique (called Group Value Measurement Technique) and implemented it in 21 separate decision panels composed of high-level managerial, economic and political leaders.

As an independent consultant completed numerous planning, program evaluation and multivariate statistical modeling studies for such organizations as: U.S. Census Bureau, U.S. Department of State and the General Research Corporation. Author or co-author of numerous papers and reports. Co-author of paper presented at President's Conference on Balanced Growth (1978).

### **EXPERIENCE (prior to 1977)**

Extensive consulting, project management, proposal writing, research and university-level teaching in: design, management and implementation of multivariate statistical model building utilizing survey and census data, multiple regression and principal components, psychometric ratio scaling and reliability analysis; gaming and simulation; international and domestic conflict; and civil strife; foreign policy; value theory; and other areas. Employment at Center for Management & Policy Research, General Research Corporation, Cornell Aeronautical Laboratory (now Veridian), State University of New York at Binghamton (Associate Professor), Brandeis University, University of Hawaii, State University of New York at Buffalo and Michigan State University. Graduate School teaching experience: Graduate Seminars in Comparative Foreign Policy, and Theories of Influence Power and Authority (Department of Political Science, SUNY at Buffalo); Graduate Seminar in Introduction to Descriptive, Inferential, and Correlational Statistics (Department of Political Science, University of Hawaii); Graduate Seminars in Methodology and Political Statistics, and Urban Civil Strife (SUNY-Binghamton, Department of Political Science).

### **PUBLICATION**

Publication (over 150 items) in above areas in both the open literature and in research monographs and reports prepared for government agencies and private companies. Publications deal with such subjects as enterprise information portals, knowledge management, data warehousing, database marketing, resource allocation and targeting, needs assessment, program evaluation, measurement modeling, factor analysis applications, social indicators, civil strife, time series analysis and model validation. A listing of publications and reports follows.

- **Open Literature**

"From the Balanced Scorecard to the Adaptive Scorecard: An Adaptive Maturity Model" Business-IT Strategies Advisory Service, Executive Report, Vol. 9, no. 10, Cutter Consortium, Arlington, MA: 2006. Available at:  
<http://www.cutter.com/offers/adaptivescore.html>

"The Open Enterprise Software Template: An Analytic Hierarchy Framework for Measuring Aspects of Organizational Adaptive Functioning" (An Adaptive Metrics Center Industry Report Bundle), KMCI Online Press, 2006. Available at:  
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<http://www.adaptivemetricscenter.com/media/BSCdevelopmentsandchallenges.pdf>

"A Review of David Apgar's *Risk Intelligence: Learning to Manage What We Don't Know*." Available at:  
<http://www.adaptivemetricscenter.com/Review%20of%20Risk%20Intelligence.html>

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<http://www.adaptivemetricscenter.com/riskintelligencemetricsamcreport.html>

*Riskonomics: Reducing Risk by Killing Your Worst Ideas* (forthcoming, 2006)

"What Every Information Manager Should Know about Data Mining," *Information Management Journal*, **39**, no. 5 (September-October, 2005), 47-52

"The Partners HealthCare Case for Improved KM" (with Mark W. McElroy), *KM Review*, **8**, no. 1 (March - April, 2005), 6-7.

Guest Editor (with Mark W. McElroy), *The Learning Organization*, **12**, no. 2 (April, 2005).

"Has Knowledge Management Been Done?" (with Mark W. McElroy), *The Learning Organization*, **12**, no. 2 (April, 2005), 105-111.

"Doing Knowledge Management" (with Mark W. McElroy), *The Learning Organization*, **12**, no. 2 (April, 2005), 189-212 (**Winner of 2006 Emerald Literati Network Award for Excellence as the outstanding paper of 2005 published by *The Learning Organization Journal***).

"The Need to Know and the Need to Share", *All Life is Problem Solving*, July 23, 2004, available at: <http://radio.weblogs.com/0135950/>

"The Poverty of Communitarianism: Summing Up Act-KM", *All Life is Problem Solving*, July 18, 2004, available at: <http://radio.weblogs.com/0135950/>

"The Poverty of Communitarianism: Act-KM -- Incident Two", *All Life is Problem Solving*, July 15, 2004, available at: <http://radio.weblogs.com/0135950/>

"The Poverty of Communitarianism: Act-KM -- The Road to Incident Two: Part Three", *All Life is Problem Solving*, July 14, 2004, available at:  
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"The Poverty of Communitarianism: Act-KM -- The Road to Incident Two: Part Two", *All Life is Problem Solving*, July 09, 2004, available at: <http://radio.weblogs.com/0135950/>

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"The Poverty of Communitarianism: Act-KM -- Incident One: Part Two", *All Life is Problem Solving*, June 28, 2004, available at: <http://radio.weblogs.com/0135950/>

"The Poverty of Communitarianism: Act-KM -- Incident One: Part One", *All Life is Problem Solving*, June 25, 2004, available at: <http://radio.weblogs.com/0135950/>

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"Are There Core Tools and Techniques of Knowledge Management?" (With Mark W. McElroy) *All Life is Problem Solving*, May 12, 2004, available at: <http://radio.weblogs.com/0135950/>

"Knowledge Management: Taking It From the Top" *All Life is Problem Solving*, May 12, 2004, available at: <http://radio.weblogs.com/0135950/>

"The Importance of Knowledge Claim Evaluation" *All Life is Problem Solving*, May 9, 2004, available at: <http://radio.weblogs.com/0135950/>

"What About Knowledge Claim Evaluation?" *All Life is Problem Solving*, May 5, 2004, available at: <http://radio.weblogs.com/0135950/>

"Storytelling and Knowledge Management" *All Life is Problem Solving*, May 1, 2004, available at: <http://radio.weblogs.com/0135950/>

"A Governance-based Approach to Knowledge Management: A KMCI Position Paper" (With Mark W. McElroy) *All Life is Problem Solving*, May 1, 2004, available at: <http://radio.weblogs.com/0135950/>. Also available at: [http://www.kmci.org/media/KMCI\\_Governance\\_Based\\_KM.pdf](http://www.kmci.org/media/KMCI_Governance_Based_KM.pdf)

"Storytelling and Knowledge Integration" *All Life is Problem Solving*, April 22, 2004, available at: <http://radio.weblogs.com/0135950/>

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"All Life Is Problem Solving: Learning and Knowledge Making in an Evolutionary and Critical Perspective," *All Life is Problem Solving*, March 20, 2004, available at: <http://radio.weblogs.com/0135950/>

"Corporate Epistemology" (with Mark W. McElroy), November, 2003, available at: <http://www.dkms.com/papers/corporateepistemologyandkm.pdf>.

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"How Knowledge Management Can Help Identify and Bridge Knowledge Gaps," *An EIS Professional Paper*, Wilmington, DE: Executive Information Systems, Inc., 2003, available at: <http://www.dkms.com/professionalpapers.htm>.

"Knowledge Management and Information Technology: The Relationship," *Intelligent KM* (March, 2003) available at: <http://www.intelligentkm.com>.

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"Portal Progress and Knowledge Management: CA's CleverPath," *KMWorld*, **12, no. 2** (February, 2003), 20-21.

"Defining the Enterprise Information Portal" *Intranet Strategist*, **1, no. 4** (February 2003), available at: <http://www.intranetstrategist.com/xq/asp/sid.85EB0F25-E9CA-11D7-9D5B-00508B44AB3A/articleid.A54E30F9-71D1-4E6B-B552-EE45261C4C95/qx/display.htm>

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"Approaching Enterprise Information Portals," Industry Report Prepared for *Executive Information Systems, Inc.*, Wilmington, DE, November 1, 1999, 180 Pp. Available for purchase at: <http://www.dkms.com/EIPMarketing.htm>.

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Dr. Firestone received a B.A. Degree in Government with Honors from Cornell University in 1960. He also holds an M.A. (1963) and Ph.D. (1965) in Political Science, both received from Michigan State University, East Lansing, MI. He was awarded a rare Social Science Research Council Research Training Fellowship in support of his Ph.D. Dissertation "Political Conflict: A Theory and Comparative Analysis in Five Cultures".