

MANUAL
for the
ASA QUALITY & PRODUCTIVITY
RESEARCH CONFERENCE

Issue 5.0

October 9, 1996

Prepared by
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September 25, 1996

Prepared by
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A. Quality & Productivity Research Conference Manual

I. Statement of Purpose

The purpose of the Quality and Productivity Research Conference is to improve the quality of products and services and the productivity of industries by stimulating the research and development of better statistical methods for quality and productivity improvement. The conference will emphasize research and development of statistical methods driven by important applications, and will look to identify new application areas where statistics can have a significant impact. The conference will include topics such as case studies as well as non statistical topics such as writing, communication, and management that have an important influence on the effectiveness of statistical applications.

A. Publicizing the Purpose and History

It is recommended that the conference program advertisements contain some reference to the purpose and history of the conference. In 1995 the advertisements contained the statement:

In 1984, AT&T Bell Laboratories organized the first Quality and Productivity Research (Mohonk) Conference. This first conference, and others that followed, stimulated many statisticians to develop improved methods for product and process design, manufacturing, and other business processes. The goal of the 12th annual conference is to continue this tradition of influencing the future of statistical research in quality and productivity improvement.

I. Customers

A. Primary Customers

- Industrial statisticians
- Academic statisticians interested in the application of statistics in industry

A. Secondary Customers

- Quality professionals and quality managers
- Statisticians
- Engineers
- Statistics and engineering students
- Managers
- Technical managers

I. Conference Policies and Guidelines

A. Sponsorship

Joint sponsorship by a university and a business entity shall be the goal for all future conferences. Until 1992 the conference had only one sponsor, either a university or a business. For example, the 1994 Q&P conference was jointly sponsored by Kodak and the Rochester Institute of Technology and the 1995 Q&P conference was jointly sponsored by Motorola and Arizona State University.

One of the sponsors shall be the host sponsor with primary responsibility for organizing and hosting the conference.

Sponsors that are not the host sponsor contribute to the conference. This support can be in terms of speaker and student travel expenses, meals, local facilities, or a financial contribution. A typical financial contribution has been \$5,000. Upon selection as a conference sponsor, an empowered representative of the sponsor shall write a letter to the chair of the ASA Q&P Research Conference Steering Committee confirming their agreement to sponsor the conference, and confirming their understanding that a budget surplus is returned to the conference fund and a budget deficit is covered by the conference fund.

The sponsors shall be acknowledged in all conference materials.

For tax purposes all financial contributions must be formally acknowledged by a letter from the ASA office. See Appendix A.1 for specific information.

A. Responsibility of the Host Sponsor

The host sponsor shall have primary responsibility for the conference and its success. The conference is successful if:

- it fulfills the statement of purpose in Section 1
- the conference participants are satisfied
- it enhances the reputation of ASA and the sponsoring institutions
- it covers all conference costs

The host sponsor shall follow the financial guidelines in Section 3.4.

Upon selection as the host sponsor an empowered representative of the host sponsor shall write a letter to the chair of the ASA Quality and Productivity Research Conference Steering Committee confirming their agreement to be the host sponsor of the conference, and their understanding of the conference financial procedures.

A. Program

The program should appeal to the primary customers of the conference as described in Section 2.1.

A core group of participants has attended many Q&P Research Conferences. Care should be taken to have a program that continues to attract these frequent participants. It is recommended that the organizing committee contact some frequent participants to ensure the conference program appeals to them.

Organizers should be encouraged to organize the conference so there is ample time for discussions, i.e. fewer talks. This is a research conference. Interchange between the speakers and the audience is both desired and expected.

A. Funding

The conference should be organized to cover all expenses and produce a small surplus. In other words, the conference registration fees plus the sponsors' donations should exceed the conference expenses. Typical registration fees have been a bit less than \$200.00, and typical surpluses have been between \$3000 and \$5000.

The ASA Q&P Section manages the conference fund. This fund has grown over the years from the small surpluses in the conference budgets. The balance of this fund on December 31, 1994 was \$32,694. This fund is managed so that:

- A conference surplus is returned to the conference fund
- A conference deficit is covered by the conference fund
- If conference attendance is projected to be so poor that holding the conference would seriously deplete the conference fund, then the conference should be canceled.

A. Participant Support

1. Speaker and Session Organizer Support

As a rule all speakers and session organizers pay their own travel expenses. There are no honoraria.

The registration fee is usually waived for session organizers and speakers.

At the discretion of the conference organizing committee, prominent speakers may be reimbursed for travel expenses. However, this should only be done when it is necessary to attract a key speaker to the conference.

With the concurrence of the Q&PR Steering Committee Chair, the Q&PR Conference Fund can be used to support speakers and session organizers.

1. Student Support

Students shall receive a discounted registration fee. Typical student discounts have been between 50% and 75% of the full registration fee. Limited funding to subsidize student participation is available from the Q&P Section Mary Natrella Fund (see the Q&PR Steering Committee chair or the Q&P Section Operating Manual for further information).

Beginning in 1995, the Q&P Conference Fund contributed \$3,000 for student participation in the form of scholarships. This money would normally be used to pay the student registration fee for students from local universities. This also includes reimbursement for mileage and dorm fees if necessary. In 1995, the students were selected from ASU and the University of Arizona faculty based on interest and scholastic merit.

1. Sponsoring Organization Participant Support

A number of sponsoring organization participants may be charged a reduced fee or have their registration fee waived in return for working on the conference. As an example, 1993 University of Tennessee students were charged a conference registration fee of \$50.00. University of Tennessee Statistics faculty were charged no conference registration fee, while all other University of Tennessee faculty had a registration fee of \$100.00. This is a "like kind" exchange and must be reported as income and expense. For example, the amount of the fee forgiven must be treated as income and the same amount would be recorded as labor expenses. This information must be included as a footnote in the overall financial report to be submitted to Penny Young in the ASA office and to the Chair of the Q&PR Steering Committee.

An effort to fund women and minority students must be maintained, and should target support for women and minorities equal to their percentage in the programs at the supporting universities.

A. Speaker and Session Organizer Composition

The conference organizing committee should make every effort to have a balanced and diverse group of session organizers and speakers. In particular,

- Session organizers and speakers should come from industry, government, and academia, with no single group dominating the conference.
- Speaker guidelines should be included in letters to the speakers. This would include the submission of abstracts and presentation materials for the advertisements and proceedings.
- Careful Consideration should be given to having a reasonable number of Organizing Committee members, session organizers and speakers with diverse ethnic, geographic and cultural backgrounds. A conscientious effort to include women and minorities must be maintained, i.e. targeting their percentage of practicing engineers and statisticians.

A. Guidelines on the Management, Organization, and Format of the Joint ASA Q&P and SPES/IMS Research Conference

The ASA Q&P Quality and Productivity Research Conference and the ASA SPES/IMS Spring Research Conference on Statistics in Industry and Technology were held jointly for the first time in 1996 at the National Institute of Standards and Technology (NIST) in Gaithersburg, MD. This joint conference

is called the Joint Research Conference on Statistics in Quality, Industry and Technology. There were 210 participants at this conference. The attendees felt that a joint conference should be held periodically, perhaps every three years.

1. Coordination of the Joint Research Conference on Statistics in Quality, Industry and Technology

To address the issue of the coordination of the Q&P and SPES/IMS conferences, Jeff Hooper and Vijay Nair met in Toronto on August 16, 1994. The results of their discussions are as follows:

1. Liaison between the two conferences will be established and maintained by the Chair of the Q&P Research Conference Steering Committee (Jeff Hooper current chair) and the Chair of Management Committee for the Spring Research Conference on Statistics in Industry and Technology (Vijay Nair current chair).
2. Currently there is significant overlap in topics, speakers, and host organizations for the two conferences, although papers presented on the same topics at the two conferences would be quite different. This overlap is causing some confusion among the target audiences for the two conferences. Over time this overlap should diminish as each conference develops a clear focus on its mission and audience.
3. To minimize the impact of the overlap in topics, speakers, and host organizations joint conferences could be held every two to four years. The first possibility for holding a joint conference is 1996 with NIST as host. Jeff and Vijay will explore this possibility further with their respective committees.
4. For the near future we will try to separate the two conferences in time as much as possible. This will be accomplished through the liaison activity by coordinating the dates and locations of the two conferences. In 1995 the Q&P conference will be held in the middle of May in Arizona and the SPES/IMS conference will be held in the middle of June in Waterloo, Canada. The dates and locations of future conferences will be coordinated when the conference hosts have been selected.
5. The Q&P Research Conference Manual has been shared with Vijay. This manual contains the purpose and customers of the Q&P Research Conference. The Management Committee of the SPES/IMS conference will be developing their mission/purpose statement and clearly defining their target audience. Jeff and Vijay will coordinate these two purpose/target audience statements, and when they are ready, to explore the possibility of either coordinated or joint publication.

6. A future goal is to coordinate the publicity of the two conference so as to highlight the unique value of each conference and to minimize target audience confusion. Jeff and Vijay will develop practical ways to meet this goal.

- 1. Guidelines on the Management of the Joint Research Conference On Statistics in Quality, Industry, and Technology**

The Steering Committee of the ASA Quality and Productivity Research Conference (Q&PRC) and the Management Committee of the ASA SPES/IMS Spring Research Conference on Statistics in Industry and Technology (SPES/IMS SRC) have agreed to hold a joint conference in 1996. The National Institute of Standards and Technology (NIST) has agreed to be the host sponsor, and the DuPont Corporation has agreed to be an industrial sponsor. This document provides clear and simple guidelines on the management of this joint conference.

1. The framework for this joint conference is the August 16, 1994 agreement (see 3.7.3) of the coordination of Q&PRC and SPES/IMS SRC.
2. Raghu Kacker from NIST representing SPES/IMS SRC and Eric Lagergren from NIST representing Q&PRC will be co-chairs of the Organizing Committee of the 1996 joint conference. Tim Reed from DuPont will be a member of the Organizing Committee.
3. The Organizing Committee co-chairs can add additional members to the Organizing Committee as required to fulfill their responsibilities.
4. The Organizing Committee is responsible for:
 - Establishing dates for the conference
 - Establishing conference location and sponsorship
 - Establishing a conference budget and having it approved by Penny Young, the ASA Finance Director
 - Establishing the conference theme
 - Determining the conference program and obtaining speakers
 - Publicizing the conference
 - Conference registration
 - All conference operations and logistics
 - Final budget accounting including the return of surplus funds
 - Administering, analyzing, and reporting the results of a participants' satisfaction survey

- Developing improvement suggestions for future conferences
 - Returning archival information to the Steering Committee of the Q&PRC and the Management Committee of the SPES/IMS SRC
5. Vijay Nair will represent the Management Committee of the SPES/IMS SRC and Jeff Hooper will represent the Steering Committee of the Q&PRC on a Joint Conference Advisory Committee. The Joint Conference Advisory Committee is responsible for:
- Maintaining and improving joint conference policies and guidelines
 - Defining the responsibilities of the Organizing Committee
 - Developing, with the help of the Organizing Committee co-chairs, the joint conference format
 - Providing advice and approving the joint conference dates, location, theme, program, publicity, student participation, and budget
 - Obtaining the advice and approval of the Management Committee of the SPES/IMS SRC and the Steering Committee of the Q&PRC on important conference decisions and issues.
6. A budget surplus will be evenly divided between the Management Committee of the SPES/IMS SRC and the Steering Committee of the Q&PRC. A budget shortfall will be covered equally by these two committees.

1. Guidelines on Organization and Format of the Joint Research Conference On Statistics in Quality, Industry, and Technology

1. The joint conference will be an integrated conference rather than a joint meeting of the two conferences. Thus, the conference theme and program will be developed jointly by the co-chairs.
2. The theme and program will reflect, and be consistent with, the goals of the Q&PR and Spring Research Conferences. The primary focus of the conference will be on areas of joint interest. However, there could be a small number of invited sessions (maximum of one each) aimed at addressing the specific goals of the original conferences.
3. The conference will last two and a half days. To allow participants to take advantage of low air fares, it should either start on a Monday or end on a Friday.
4. It is recommended that there be a key-note speaker on each of the first two days and an after dinner speaker on one of the evenings. The conference will include contributed paper sessions, which will be held in parallel with invited paper sessions. However, there will be no more than one invited paper session at any given time. (The only exception to this will be any sessions that are organized to address individual goals of the Q&PR or Spring Research Conferences. These will be held in parallel.)
5. The conference should stimulate discussion among participants. As such, there should be adequate time for open discussion from the floor. Organized discussants and panel discussions are other avenues that should be explored.
6. There will be an organized dinner with an after-dinner speaker on one of the two evenings. The other evening will be left free. The registration fee should be kept reasonably low to make it affordable for participants from academia. The organizing committee should take this into consideration in deciding whether to include meals as part of the registration package.

I. Steering Committee

A. Steering Committee Members

The Quality and Productivity Research Conference Steering Committee is composed of eight members. The positions of these members, along with the current members and their terms of office are given below.

Position	Person	Term
Chair	Jeff Hooper	1993-1995, 1996-1998
Treasurer	D. Sharon Husch	1995-1997
Secretary	Vacant	1995-1997
Past Organizing Committee Chair	Doug Montgomery Dan McCarville	1994-1996
Current Organizing Committee Chair	Eric Lagergren	1995-1997
Future Organizing Committee Chair ('97)	Veronica Czitrom	1995-1998
Future Organizing Committee Chair ('98)	Ai-Chu Wu	1995-1999
Future Organizing Committee Chair ('99)	Vacant	1997-2000
Past Organizing Committee Chair	Nick Zaino	1993-1995
Past Steering Committee Member	John Heitmann Dennis Lin Veronica Czitrom Ramon Leon Nick Zaino	1991-1993 1991-1993 1993-1994 1992-1994 1993-1995

A. Steering Committee Responsibilities

The Steering Committee has the following responsibilities:

- Maintaining the conference statement of purpose
- Maintaining and improving the conference manual
- Maintaining and improving conference policies and guidelines
- Making offers to host the conference
- Defining the responsibilities of the organizing committee
- Managing the conference fund
- Maintaining a conference archive including conference programs, attendees, and budgets
- Approval and oversight of
 - Conference themes
 - Conference programs
 - Plan for student participation

- Plan for publicity
- Conference budgets and expenses

A. Responsibilities of Individual Committee Members

Chair:

- Overall responsibility for the Steering Committee.
- Calling Steering Committee meetings and establishing Steering Committee meeting agendas.
- Ensuring the Steering Committee fulfills its responsibilities.

Treasurer:

- Managing the conference fund and oversight of the conference budget and expenses.

Secretary:

- Producing minutes of the Steering Committee meetings and maintaining the conference archive.

Past Organizing Committee Chair:

- Mentoring and coaching the current organization committee chair.
- Documenting their successes and lessons learned and suggesting improvements to the conference manual. Penny Young, the Q&P liaison at ASA Headquarters, can arrange to produce the conference manual.
- Sending the conference mailing list to the Current Organizing Committee Chair.

Current Organizing Committee Chair:

- Overall responsibility for the conference including program, speakers, financing, publicity, registration, housing, and all conference operations.
- Updating the conference mailing list.
- Administering, analyzing, and reporting the results of the participant's satisfaction survey.

Future Organizing Committee Chairs:

- Learn from and assist the current organizing committee chair.

I. Organizing Committee

A. Responsibilities of the Organizing Committee

- Establish dates for the conference

- Establish location and sponsorship
- Establish a budget and have it approved by the Steering Committee and Penny Young, the ASA Finance Director
- Determine the program and obtain speakers and have them approved by the Steering Committee
- Return archival information to the Steering Committee
- Publicize the conference
- Conference registration
- Conference operations including all logistics
- Final budget accounting to the Steering Committee and to Penny Young, ASA Finance Director
- Conference Participants' satisfaction survey
- Critique of the conference for continuous improvement
- Develop a plan for student participation

A. Program

Ideally, the conference should have a theme that appeals to a broad audience and that can be used for publicity. For example, the 1993 conference had "The Future of Statistics in Quality and Productivity" as its theme.

The talks at the conference should be organized into sessions with a common theme. One or two "magnet speakers" who will attract participants and other speakers should always be included. Given the research nature of the conference, it may also be desirable to include a faculty member and their current or recently completed research student as speakers.

The program should leave plenty of time for floor discussion and participant involvement. Most programs have not planned enough time for floor discussion. Panel discussions, have been very effective. Some discussion time should be devoted to the future directions of statistical methods for quality and productivity improvement.

The conference should target around 20% of its time to non-statistical issues that are important to industrial statisticians working in quality and productivity. For example, the 1993 conference dedicated 20% of its time to "Writing Methods" and to "Re-engineering." The duration of the conference should be between 1.5 and 2.5 days.

A. Financing

The financing for the conference comes from participants' registration fees and sponsors' financial contributions. The conference should be targeted to produce a small budget surplus after all expenses have been paid. Conference registration fees should be kept as low as possible to encourage the maximum participation. Student registration fees should be reduced as much as possible (typically 50% to 70% of the full registration fee). Limited funding to subsidize student participation is available from the Q&P section Mary Natrella fund (see the Q&PR steering committee chair or Q&P section operating manual for further information). Also, with the concurrence of the Q&PR steering committee, the Q&PR conference fund will be used to support student involvement.

It is necessary to establish a clear payment policy regarding partial conference attendance. The advice is to make everyone pay the full registration fee regardless of how many days they are attending the conference.

Although the conference policy is not to provide speaker honoraria, it is sometimes necessary to cover speaker travel and living and to provide additional student support.

If the Q&P Research Conference fund provides funding for students, the organizing committee agrees to set the regular registration fees sufficiently high to recover at least 80% of the donated funds. The break-even point should be targeted at around 75 full fee registrants.

Since this is an ASA sponsored conference, ASA is liable for any financial shortfalls that may result from this conference. For this reason the ASA Finance Director and Executive Director review the conference program and budget prior to the release of any conference publicity. Before the ASA would incur any financial liability, the Q&P Research Conference fund would first be used to cover any shortfall. Any surpluses from the conference are also returned to the Q&P Research Conference Fund. The host organization incurs no financial liabilities as a result of this conference.

A. Publicity

Publicity using appropriate channels will be used to reach persons likely to attend the conference, namely industrial statisticians, academic statisticians interested in industrial statistics, quality professionals and quality managers, engineers, statistics and engineering students, technical managers and managers. It is recommended that conference announcements be included in key publications and that flyers be used with direct mail.

Flyers must be mailed at least three months in advance of the conference. Newsletter editors and AmStat News should be contacted approximately five

months before the date of the conference. Several newsletters are published only twice per year and the lead time to get the information in print may be lengthy.

Dates for the conference must be submitted to ASA, IMS, and the ASQC Statistics Division and Chemical & Process Industries Division Newsletters no later than nine months prior to the conference. The conference can be publicized in the following ways.

1. Publications

- AMSTAT NEWS . Free. Contact Allison Stern-Dunyak (703) 684-1221
- Q&P/SPES NEWSLETTER. Free. Contact Janet Buckingham (210) 522-2407
- Quality Progress
- ASQC “On Q” Newsletter

1. Mailing Lists

- The previous Q&PR conference participant list is available from the Current Organizing Committee Chair, and includes the participants from the last three conferences.
- ASA Q&P Section Membership. List Free. Contact Q&P Section Chair who contacts ASA office (703) 684-1221
- ASA SPES Section Membership. Free. Contact ASA office (703) 684-1221
- ASQC Statistics Division

1. Local Publicity

- Universities
- Consulting Firms
- Industry
- Government agencies
- Commercial newspapers
- School newspapers
- Company newspapers

1. Other Publicity Opportunities

- Personal contacts
- Other conferences with similar interests

- Statistics departments at universities
- Quality consulting firms
- Announcements at other conferences
- Internet - Specifically the Q&P Section and SPES Section Homepages

A. Registration

1. Registration Form Contents

- Date to be returned by
- Method(s) of payment - check, Visa/Mastercard
- Encourage early registration through discounts
- Include payment provisions for special events (including guests)
- Include payment provisions for banquet guests
- Provision for any special dietary requirements

1. Housing and Transportation Form Contents

- Registration/deposit for on-site housing (if available)
- Information on local preferred hotels including phone and FAX numbers, preferred room rates, and location
- Parking permit registration (if required)
- Local transportation availability between housing/hotels and conference
- Airport transportation availability and cost
- Airline group discounts

1. Registration Confirmation Form Contents

- Receipt for dollar amount
- Acknowledgment of attendance at special events/banquet
- Acknowledgment of housing registration/deposit
- Acknowledgment of special dietary requirements
- Include information packet with:
 - Local maps showing conference, parking, and hotel locations
 - Conference agenda
 - Clear directions to the conference registration desk
 - Local information that would be helpful for a visitor

A. Conference Operations

1. Registration Desk

- Have signs to help participants find the registration desk
- Check off names from the master list as people register
- Provide information packet with current agenda, speaker notes, and participant list (by person and by company)
- Provide preprinted badges
 - Should be substantial and color coded for speakers, organizing committee, guests, attendees
 - large names and company names
 - Put date on badges for re-certification credit
- Provide notebook (optional)

1. Information Desk (usually same as registration desk)

- Always staffed before and during sessions
- Message board
- Research Topics Board
 - Request for information about specific problems
 - References for solutions to problems
 - Soliciting interest in specific problems
- Local information
 - Maps
 - Restaurants
 - Tourist attractions

1. Speakers

- Speakers should use a good software package for producing their transparencies
- Speakers should provide some kind of handout. They should bring copies to the conference ready for distribution. Examples of handouts include a short summary of the presentation or copies of transparencies reduced to four per page.
- Gifts for speakers (if desired)
- Have breakfast for speakers and moderators on the day of their talk
- Determine any special audio/video or other arrangements

1. Audio/Video

- Make provisions for 35mm projector and two overhead projectors - Have spare bulbs on hand
- Make provisions for podium mike(s) and personal mikes (radio mikes are best)
 - Test and adjust sound levels before hand!
- Know how to adjust heat and air conditioning and who to call for problems
- Predetermine the best lighting configuration for presentations and don't forget about window shades
- Make arrangements for video playback if required
- TEST EVERYTHING BEFORE HAND!!

1. Communications

- Inform participants about the location of telephones and FAX machines
- Include the telephone number of the information desk in the conference handout so that people can obtain messages
- If it is not too difficult, arrange for email access for conference participants
- Establish a policy regarding intruding upon the conference sessions to deliver messages. Suggest it be done for emergency messages only.

1. Miscellaneous

- If you decide to video tape any of the speakers, be sure to obtain their permission before hand
- Still photographs of the speakers make a nice record of the conference
- A database maintaining funds received, date registration received, etc., should be used for preserving records of attendees as well as a prediction tool for estimating the enrollment to make hotel arrangements, etc. This tool will be transferred to the organizers of the following conference, improved upon, etc.

A. Local Arrangements

1. Food

- Breakfast - Serving some sort of continental breakfast has become something of a tradition - A nice one should include the following:
 - Coffee, Regular and Decaf
 - Make-it-yourself tea and hot chocolate
 - Healthy-type muffins
 - Unhealthy-type doughnuts and danish
 - Juices and fruits

- Breaks - Break food should be similar to breakfast in the morning and should be soft drinks, Snapple-type beverages, fruit and cookies in the afternoon. The so-called "continuous break", where beverages are available all of the time, works out very well

- Lunches - Can be either sit down or buffet style depending upon the facilities available. Sit down style encourages more interaction at the tables and avoids lines.

- Banquet - Traditionally, there has been a cash bar followed by a sit down dinner followed by a prestigious speaker. Dinner has often included wine, but be cognizant of local laws regarding liability if someone has an automobile accident after they have been drinking at the banquet. Guests have usually been encouraged to attend the banquet, especially guests from sponsoring organizations. Mixed seating is encouraged such that the students can interact with other participants.

1. Local Transportation

- If housing is being provided, such as in a dormitory, arrange for bus transportation to and from the conference location. Transportation to local hotels is optional but a nice touch, especially if there are parking problems.

- Transportation should be provided to and from any group outings and to and from the banquet

- Transportation to and from the airport can be arranged, but is not always done. If you do try to arrange for airport transportation, be sure to request flight numbers and times on the registration form

- Arrange for local parking at the conference site and parking permits if required

1. Accommodations

- Arrange with a local College or University (if available) for use of dormitory rooms or a campus hotel to provide low cost rooms.
- Arrange with a local hotel(s) (within walking distance of the Conference if possible) for a block of rooms at a special conference rate. It is best to let participants make their own hotel reservations.

1. Group Outings

- Traditionally, the night after the banquet is reserved for an optional group outing. Some previous activities have included:
 - Picnic and pool party at George Box's home
 - Stratford-on-Avon Shakespearean Theater
 - Riverboat Cruise
 - Tour of Dodge Mansion
 - Tour of Corning Glass Museum
 - Western Style Bar-B-Que

A. Conference Improvement

1. Evaluation Forms

- Suggested topics for conference evaluation forms
 - General
 - Local arrangements
 - Programs
 - Speakers
 - Entertainment
 - Suggestions for improvements
- Evaluation form for committee guests and invited members
 - Did the program fit the conference guidelines?
 - Suggestions on future directions, future audiences
- Evaluation form analysis
 - Basic statistics on programs and participants

1. Conference Reports

- Short report for AmStat News (for example)
- Internal report for Organizing Committee, Steering Committee, and Conference Archive
- Final financial report sent to chair of Q&PRC Steering Committee and ASA Finance Director Penny Young
- Suggestions for following years

I. Checklists and Timelines

A. Steering Committee Timeline

(Assuming the conference will be held in June)

June/July:

- Review just-held conference
- Develop suggestions for improving policies and schedules
- Develop suggestions for improving conference manual
- Review results of participant satisfaction survey
- Review final conference budget
- Select potential hosts for future conference(s)
- Make offers to host future conference(s)
- Review plans for student financial support
- Update conference archive

August/September

- Implement suggestions for improving conference manual
- Issue improved version of conference manual
- Obtain commitments to host future conference(s)
- Send final conference financial report to ASA Financial Director Penny Young
- Review initial plans for next year's conference
- Identify potential new Q&PR Steering Committee Members

October/November:

- Review theme, program, and expenses for next year's conference
- Make sure that program and budget for next year's conference sent to ASA Executive Director and Financial Director
- Invite new members to join Q&PR Steering Committee

December:

- Give names of recommended new Q&PR Steering Committee members to Q&PR Section Chair for official appointment
- Review publicity plans or next year's conference

January/February:

- Review theme, program, budget, and publicity for upcoming conference

March/April:

- Final review of theme, program, budget, and publicity for upcoming conference
- Review operations for upcoming conference

May:

- Arrange Annual Q&PR Steering Committee meeting at Q&PR conference

A. Steering Committee Checklist

Review just-held conference

Develop suggestions for improving conference policies and guidelines

Develop suggestions for improving conference manual

Review results of participant satisfaction survey

Review final conference budget

Select potential hosts for future conference(s)

Make offers to host future conference(s)

Review plans for student financial support

Update conference archive

Improve conference manual and issue improved version

Obtain commitments to host future conference(s)

Send final conference financial report to ASA Finance Director

Identify potential new Q&PR Steering Committee members

Review theme, program, budget, and publicity for next year's conference

Invite new members to join Q&PR Steering Committee members to Q&P

Section Chair for official appointment

Review operations for upcoming conference

Arrange annual Q&PR Steering Committee meeting at Q&PR conference.

A. Organizing Committee Timeline

(Assuming the conference will be held in June.)

July/August:

- Form organizing committee
- Set conference dates
- Get co-sponsoring organization(s)
- Select tentative conference theme(s)
- Get dates on calendar (AMSTAT NEWS)
- Contact key speakers (if any)

September:

- Arrange facilities
- Select housing arrangements
- Prepare and submit initial budget
- Prepare initial publicity and advertising plans
- Begin initial publicity and advertising

November:

- First draft of program (sessions identified)
- Plan group outing
- Ramp-up publicity and advertising

January:

- Program finalized
- Abstracts of talks
- Design registration forms
- Plan details of conference operations
- Update mailing list
- Continue publicity and advertising

February:

- Submit program/registration materials for publication (AMSTAT News, etc.)
- Continue publicity and advertising

March:

- Program/Registration material mailing
- Continue publicity and advertising

May:

- Deadline for hotel registration, receipt of registration material without late fee

June:

- Conference operations
- Conference evaluation/report/suggestions

A. Organizing Committee Checklist

Initial organization

Conference dates

Location

Co-Sponsorship

Program (5.2)

Theme(s)

Session organizers

Session chairpersons

Financing (5.3)

Initial budget

Budget approved

Publicity (5.4)

Publications (5.4.1)

Mailing List (5.4.2)

Local Publicity (5.4.3)

Other (5.4.4)

Registration (5.5)

Registration form (5.5.1)

Housing and transportation form (5.5.2)

Registration confirmation form (5.5.3)

Conference operations (5.6)

Registration desk (5.6.1)

Information desk (5.6.2)

Speaker arrangements (5.6.3)

Audiovisual (5.6.4)

Communications (5.6.5)

Local arrangements (5.7)

Food (5.7.1)

Local arrangements (5.7.2)

Accommodations (5.7.3)

Group outing (5.7.4)

Conference improvement (5.8)

Evaluation forms (5.8.1)

Conference reports (5.8.2)

I. Information on Previous Conferences

A. Previous Programs

1984 (May 23-24, AT&T, Mohonk, New York - First Conference)

- Discussion and Application of Taguchi Methods
- Taguchi Methods
- Study of Dispersion
- Computer Aided Design and Analysis of Experiments
- Importance of Randomization
- Error Transmission Studies
- Review of Experimental Techniques

1985 (May 23-24, AT&T, Mohonk, New York)

- Computer Aided Product Design Optimization
- Statistical Studies in Quality Improvement
- AT&T Bell Labs Research on Taguchi Methods
- Evolving Role of Statistics in Quality Improvement

1986 Ford (No Information Available)

1987 (June 2-5, Oakland University, Rochester, MI)

- An Engineer Looks at Bayes
- Bayes Estimation of Outgoing Quality Using QMP
- Problems in Multiple Tolerancing
- Maximum Entropy Sampling for Experimental Design and Simulation
- Graphical Analysis of Reliability Data
- Field and Follow-up Studies of Reliability Data
- Re-sampling for System Reliability Estimation

- Using Tool Wear Rates to Design Moving Average Compensators with Minimum Variance
- A Statistician's Experiences on the Production Floor

1988 Xerox (No Information Available)

1989 (June 5-7, University of Waterloo, Waterloo, Ontario, Canada)

- Experimental Design and Quality Improvement: Taguchi and Beyond
- Financial Methods for Assessing the Dollar Value of Product and Process Quality
- Challenges and New Directions for Statistical Processes Control
- Choosing a Monitoring Interval in Process Control
- Quality Function Deployment
- Computer Experiments for Quality Control
- Computer Experimentation in VLSI Process Design
Total Cost = \$18,147; Total income = \$24,143

1990 (June 13-15, University of Wisconsin-Madison, Madison, WI)

- What SPC is supposed to be
 - SPC vs. APC
 - SPC of Many Variables
 - CuScore Statistics
- Statistics-Aided Design and Development of Manufactured Products
 - Role for Statistics in the Design, Manufacture, and Assembly of Products
 - Use of Statistics in the Microelectronics Fabrication R&D
 - Statistics in the Design and Manufacture of Ball Bearings
- Developments in the Design of Experiments
 - Robust Product Design
 - Constrained Design of Experiments
 - What do Confirmatory Runs Confirm
- Quality and Environment
 - A Total Quality Approach to Environmental Improvement
 - The Chloroflourocarbon Ozone Issue and Related Quality Issues
- Managing the Quality Process
 - Clarity-Consistency-Capability: The Relationships Between Lead-time Reduction and Quality
 - Quality Architecture - A Concept for Quality Manufacturing
 - Adapting Quality Management to State and Local Government

1991 (June 5-7, Chrysler Technology Center, Auburn Hills, MI)

- Warranty Modeling
 - Practical Warranty Forecasting
 - Statistical and Game Theoretical Aspects of the Warranty Problem
 - Optimal Warranties Under Competition
-

Capability Indices

- Relationship Between Loss and Capability Indices
- Monitoring Process Capability on a Continuous Basis
- Confidence Bounds for Univariate Capability Indices
- Application of Multivariate Capability
- SPC and Time Series Analysis
 - Dynamic QC and Time Series Analyses
 - Fractal Concepts in the Analysis of Time Series
- Overcoming Resistance to Statistics
 - The Baldrige Award at Cadillac Engineering Statistical Perspectives
 - The Role of the Statistician in a Malcolm Baldrige Winning Company
- Perspectives on Economic Competitiveness
 - American Competitiveness
 - Creating the Competitive Organization

1992 (June 3-5, Corning Glass Company, Corning, New York)

- Customer Defined Targets: the First Step to Customer Satisfaction
- Determining the Unspoken Wants and Needs of the Customer
- Applications of Statistics in Research
- Training Engineers in Statistics
- Training Statisticians in Industry
- Utilization of Customer Satisfaction CQI (Care Quality Index)
- The Design and Implementation of a Computer Aided Software Reliability Estimation Tool
- Software Reliability Techniques
- Modeling Software Reliability and Fault Removal During Structure Based Testing
- Fractal Concepts in the Analysis of Time Series - Applications of the Phase Map

Total cost = \$12,205; Total Income = \$10,725

1993 (June 2-4, University of Tennessee & AT&T, Knoxville, Tennessee)

Theme: The Future of Statistics in Quality and Productivity

- Trends in TQM: Wild Predictions for the Next Ten Years
- Measurements of Quality: Statistical Methodology
 - Measurement Assurance in DNA Fingerprinting
 - BSI: A Novel Approach to Measurement Control
 - Statistical Issues and Problems in Geometric Tolerance Verification Using Coordinate Measures Machines

- Measurement of Quality: Surveying Your Customers and Employees on Quality
 - Identifying Customer Patterns in Satisfaction Data
 - Quality Improvement of a Large-Scale Customer Satisfaction Survey
- Non-Statistical Quality Methods: Writing as an Instrument of Change: What AT&T has Learned
 - Shaping and Sharing a Total Quality Approach
 - Managing Writing as a Process
- Non-Statistical Quality Methods: Process Reengineering
 - A Framework for Major Process Transformation
 - Robust Design in a Reengineering Context
- Statistical Methods in Quality: Design of Experiments from the Point of View of Deming's Analytic Studies
 - A Framework for the Application of Statistical Theory
 - The Practice of Experimental Design in Manufacturing
 - Planning Industrial Experiments: Extending the Boundaries
- Statistical Methods in Quality: Novel Applications of Statistical Methods to Quality Improvement
 - Quality Assurance and Spherical Regression
 - Quality Improvement in Integrated Circuit Fabrication Through Spatial Analysis of Wafer Maps
 - Cost Driven Parameter Design
- Applications of Statistics in industry: Statistics in the Semiconductor Industry
 - Statistics in the Semiconductor Industry: Challenges in Volume Manufacturing
 - Statistics in the Semiconductor Industry: Beyond Completely Randomized Designs and Regression
 - Applying Statistics in the Semiconductor Industry: The SEMATECH Qualification Plan
- Application of Statistics in Industry: Statistics in the Aluminum Industry
 - Statistical Process Monitoring for Aluminum Smelting
 - Improvement in the Aluminum Hot Rolling Preheat Furnaces Process Through the Integrated Use of Manufacturing Simulation and Statistical Response Surface Methodology
- The Future of Quality: What Part Will Statistics Play

1994 (June 1-3, Eastman Kodak Company and RIT, Rochester, NY)

Dedicated to the Memory of W. Edwards Deming

- Keynote speech: Remembering Deming - Brian Joiner
- Multivariate SPC -
 - A Review of Multivariate Control Charts
 - Statistical Quality Control of a Multivariable Spray Drying System
 - Identification and Quantification in Multivariate Quality Control Problems

Robust Design: An Engineering Perspective -

- Engineering Approach to Robust Design: Physical Modeling
- Engineering Approach to Robust Design: Empirical Modeling
- Chemical Kinetics as a Guide to Experimental Design: Two Case Studies in the Semiconductor Industry
- Developing Robust Neural Network Models
 - Introduction to Regression with Layered Feedforward Neural Networks
 - Comparison of Cascade Correlation Networked with Backpropagation Networks
 - Robust Optical Character Recognition Using Neural Networks
- Financial Data - Statistical and Quality Issues, Panel Discussion
- Developing Statistical Skills in Industry, Panel Discussion

1995 (May 17-19, Motorola and Arizona State University, Scottsdale, AZ)

- Keynote Speaker: Ron Iman, Sandi Laboratories, President of ASA
- Yield and Productivity Issues in Integrated Circuit Manufacturing
 - Strategies for Process and Productivity Improvement in Integrated Circuit Manufacturing
- Multivariate SPC
 - The Geometry of Multivariate Statistical Process Control
 - Applying Multivariate Statistical Methods to Electrical Class Probe Data
- Recent Advances in Design of Experiments
 - Recent Advances in Response Surface Design
 - Super Efficient Designs
- Recent Advances in Statistical methods
 - Confidence Interval Estimates of Variance Components
 - Short Run Statistical Process Control
- Exploring the Interaction between Industry and Centers for Statistical Expertise - A Panel Discussion

Total Cost = \$19,046.75; Total income = \$20,364.59

1996 (May 29-31, NIST, DuPont, ASA Q&P and SPES, and IMS, Gaithersburg, MD)

Plenary Speakers

- Vijayan N. Nair - Statistics in Industry: Research Opportunities & Challenges
- William A. Golomski - The Needs of Industry, Engineering & Science for Statistics in the Emerging Millennium

Invited Program

- Recent Advances in Design & Analysis of Experiments
 - Multipanel Conditioning: Modeling Data from Designed Experiments
 - Interaction Between Practical Experimentation & Design Theory

Probabilistic Methods in Image Analysis

- Image Understanding via Deformable Templates: From Representation to Inference
- Statistical Inference Problems in Computer Vision
- Statistical Monitoring of Autocorrelated Processes
 - Statistical Monitoring of Continuous Processes
 - Residual-Based Monitoring of Autocorrelated Processes
- Statistics in Information Technology
 - Network Traffic Self-Similarity & the World Wide Web
 - Lessons Learned in Developing & Applying Software Reliability & Metrics Models: NASA Space Shuttle Example
- Accelerated Testing
 - Operational Statistical Lifetime Models for Engineering Design & Accelerated Testing
 - Accelerated Degradation Test Modeling & Analysis
- Process Capability
 - Process Capability Indices in the Semiconductor Industry
 - Some Issues in Applications of Process Capability Indices
- Robust Design
 - Application of the Robust Method at Ford
- Statistics at SEMATECH
 - Identifying the Source of Light Point Defects
 - Deciding Among Competing Process Flows
- Response Surface Modeling
 - IC Quality as a High-Dimensional Response Surface
 - The Comparative Performances of New Wave Response Surface Analyses: An IC Example David Banks
- Measurement of Particle Size
 - Standardization for Particle Size Distribution Determination
 - Experimental Characterization of Optical Particle Counters
- Statistics in Chemical Engineering
 - Process Understanding & Control Using Multivariate Statistics
 - Prediction Intervals for Artificial Neural Networks
- Tutorial
 - Application of Exploratory Data Analysis in a Scientific & Engineering Environment
- Statistical Thinking for Business Improvement
 - Statistical Thinking for Business Improvement: Definition & Overview
 - Statistical Thinking for Business Improvement: Implementation

- Integrated Circuit Burn-In Issues
 - Problems Associated with Burn-in Tests
 - Some Models inburn-in
- Plenary Panel Session:
 - Computer Models & Data Interface: Development, Validation & Inference

A. Previous Budgets

A. Conference Announcements, Registration and Evaluation Forms

I. Formal Acknowledgments Required for Charitable Contributions Made to ASA

The 1993 Tax Act requires that donors be able to substantiate charitable contributions when declaring a tax deduction. The Act future provides that taxpayers will not be able to use canceled checks as documents that a charitable donation (in excess of \$250) has been made to a non-profit organization. Instead, taxpayers will be required to obtain written documentation as substantiation from the donee organization.

Additionally, the Act requires that 501 (c) (3) organizations receiving “quid pro quo contributions” in excess of \$75 disclose the value of the goods or services provided in exchange. For example, if ASA sends a member a \$10 T-shirt in exchange for a \$75 donation, ASA must disclose the value of that T-shirt in the acknowledgment of the \$75, and the taxpayer must reduce the charitable contribution declared on his/her tax return.

Accordingly, effective January 1, 1994, any donations/contributions made to to ASA are to be acknowledged by ASA via one of the form letters attached to this memorandum. The Accounting Department will generate the appropriate letter when payment is received and processed.

Specific examples of ongoing types of contributions currently received by ASA are:

- Member contributions to the Development Endowment Fund via renewal forms. (These come in through the Membership Department.)
- Corporate sponsorships of meetings, conferences, mixers, etc. (These come in through various departments such as Meetings, Executive Office, Education, etc.)

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