2005 Officers’ Nominees Selected

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Karen A. Brown, University of Washington at Bothell
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Southeast Regionally Elected Vice President
Stephanie S. Robbins, University of North Carolina at Charlotte
Brooke A. Saladin, Wake Forest University

Southwest Regionally-Elected Vice President
Mary L. Fischer, The University of Texas at Tyler
Robert J. Pavur, University of North Texas

Western Regionally-Elected Vice President
Krishna S. Dhir, Berry College

See NOMINATIONS, page 53

PRESIDENT’S LETTER

Prepare for a Change in Scenery—Boston!

Gary L. Ragatz, Michigan State University

This is that time of year when I find myself fully immersed (maybe “buried” is a more appropriate term) in the business of the fall academic term. Classes are in full swing, with mid-term exams not too far off. There seems to be a constant struggle for my time and attention among my teach-

See PRESIDENT’S LETTER, page 53
FROM THE EDITOR

G. Keong Leong, Management Department, University of Nevada, Las Vegas

I am sure that many of you will be looking forward to the Institute’s annual meeting in Boston. This issue of Decision Line provides information about the conference as well as several interesting articles. In the President’s letter, Professor Gary Ragatz, Michigan State University, expresses his appreciation to the annual meeting program committee headed by Ken Kendall (Rutgers University) for a job well done. He also notes there will be a comedy show by the Improv Asylum following the President’s Reception on Monday evening.

In the International Issues column, Professor Honggeng Zhou, University of New Hampshire, and Professor M. Johnny Rungtusanatham, Arizona State University, present the challenges that non-U.S. citizens with U.S. doctoral degrees face as they look for academic employment in the U.S. The article suggests that Optional Practical Training (OPT) can be used as an option to be legally employed while waiting for the work permit (H1-B) to be approved. OPT is a work training program that allows foreign students, upon completion of a U.S. educational degree (bachelors, masters, or doctorates), to work in the U.S. for up to one year.

Professor Ajay Das, Baruch College, examines research opportunities in offshoring—outsourcing of manufacturing and service jobs to overseas locations. Trends, risk evaluation, and implementable metrics for performance evaluation in offshoring are discussed. Outsourcing is a hotly discussed topic today and research in this area is greatly needed.

Professor Rick Hesse, Pepperdine University, provides a tutorial on how to apply array formulas and range functions in Excel. The tutorial will enable students and faculty to broaden their knowledge of Excel and effectively use spreadsheets in their work. The Excel file is available in the online version of Decision Line article on the DSI Web site.

In his article on Ecommerce, Professor Kenneth E. Kendall, Rutgers University, reflects on the use of the conference management system developed by Professor Scott Sampson (Brigham Young University) to electronically manage the 2004 DSI annual meeting. The conference management system is the result of extreme programming, a “development process that is more similar to prototyping than it is to the systems development life cycle (SDLC) or to object-oriented programming.”

In the feature article on information technology, Professor Samir Chatterjee, Claremont Graduate University, cautions us that the Information Systems discipline is at a crossroad. He notes that e-Science will play an important role in determining the future of information technology. According to Hey and Trefethen (2004), “e-Science is about global collaboration in key areas of science, and the next generation of infrastructure that will enable it.” Information systems faculty can play an important role in the evolution of e-Science both in shaping the research agenda and teaching curricula.

Professor Doyle Z. Williams, dean of the Sam M. Walton College of Business, University of Arkansas, shares his perspective on being a dean. He ob-
The Road to Legal Employment in the U.S.: Through the Eyes of a U.S.-Educated PhD with Non-U.S. Citizenship

by Honggeng Zhou, University of New Hampshire; and M. Johnny Rungtusanatham, Arizona State University

E ach year, many individuals who hail from outside the U.S. receive their doctorates from U.S. institutions of higher education. In many instances, these U.S.-educated foreign PhDs also seek to begin their academic careers in the U.S. In this commentary, we provide a first-hand perspective on the extra hurdles that confront U.S.-educated PhDs with non-U.S. citizenship (henceforth referred to as foreign PhD’s) before graduating with their degrees in hand and after being hired and arriving on the campus of an academic institution. These hurdles have to be overcome for individuals such as ourselves to be, and to remain, legally employable. We trust that this commentary will be informative not only for foreign PhD’s but also to potential academic employers.

Before Graduation . . . Apply for Optional Practical Training

Generally speaking, the route to legal academic employment for PhDs with U.S. citizenship is relatively simple. One seeks an academic position, receives a job offer, defends his or her dissertation, moves to campus, files the necessary paperwork with human resources, and begins his or her transition from being a student to being a faculty.

For foreign PhD’s, this route is more complicated. The challenge stems from the necessary paperwork that academic institutions must file with the Department of Justice and with U.S. Citizenship and Immigration Services (USCIS) to seek approval to hire a non-U.S. employee under what is referred to as the H1-B. This is a legal status for non-U.S. citizens to be employed with a specific employer in the U.S. Because the H1-B approval process involves multiple stages and takes time, the process can last longer than the time between when a job offer is made to a foreign PhD and when the fortunate recipient arrives on campus. Without such approval, a foreign PhD will not be able to be legally placed on payroll and, hence, cannot begin his or her employment.

Optional Practical Training Guidelines and Requirements

There is, however, a legally viable option. A foreign PhD can pursue Optional Practical Training (OPT) to be legally employed while waiting for the H1-B. OPT is a work training program designed specifically to give foreign students pursuing a U.S. educational degree—bachelors, masters, or doctorates—an opportunity to work in the U.S. However, there are certain guidelines and requirements that are important to remember and to follow.

First, OPT must be applied for before a foreign student (irrespective of degree level) formally graduates with an academic degree. Therefore, a foreign PhD should apply for OPT before finishing the dissertation and scheduling the final defense (assuming the OPT
option is still available—see the discussion to follow). Because the approval process for OPT takes an average of 90 days, the application for OPT should be filed 90-120 days before the expected graduate date.

Second, to be eligible to even apply for OPT, a foreign student must have completed all coursework related to his or her degree. In addition, both the academic advisor and the international student advisor must sign the OPT application. A foreign PhD, as such, would not be able to apply for OPT until after all PhD coursework has been completed, and very likely, not before having successfully passed comprehensive exams and/or the dissertation proposal defense.

Third, OPT is intended to provide work experience directly relevant to a foreign student’s area of study and education degree. A foreign student majoring in computer science would, therefore, not be able to receive OPT approval to work as a waiter in a restaurant. A foreign PhD in operations management, likewise, would not likely receive OPT approval to accept a faculty position in biology at another institution. In fact, such a request would most likely not be approved by either the dissertation advisor and/or the international student advisor.

Fourth, until recently, each foreign student had one and only one year of OPT time, regardless of the number of degrees he or she obtains during the period in the U.S. What this meant was that if a foreign PhD had previously applied and received authorization for OPT to work after a bachelor’s or a master’s degree, OPT will no longer be an available option for him or her to use during the transition from being a PhD student to being a faculty. In such a case, a foreign PhD can legally remain in the U.S. for no more than 60 days from the date of graduation, during which he or she will not be able to accept employment because an H-1B visa would be required. A recent and very favorable change to immigration law, however, now allows for one year of OPT for each degree level, as long as the request for OPT beyond the previous request is tied to a degree that is higher than the highest and previously-obtained degree. For example, a foreign student working on a PhD degree can apply for OPT even though he had successfully applied for and received OPT for his MS or MBA degree. It is important to remember that if a foreign student receives approval for a one-year OPT but does not use the entire year (e.g., six months), the remaining OPT time is considered awarded and wasted.

In any case, a foreign PhD should carefully choose the start date of the OPT period. We advise having the start date on the job offer letter be the start of the OPT period. However, students should keep in mind that during the OPT period, a foreign PhD has an F-1 student visa and needs to continue reporting to the academic institution that granted the F-1 visa, that is, the institution where the doctorate is being obtained. For example, if travel outside the U.S. is required during the OPT time period, the foreign PhD would need to obtain relevant signatures from the doctorate degree-granting institution before travel can commence.

**OPT Approval**

To apply for OPT, Form I-765 (Application for Employment Authorization) needs to be completed and properly filed with necessary supporting documents. While Form I-765 can now be completed and filed electronically via the USCIS website at http://uscis.gov, all supporting documents will still have to be mailed to an appropriate USCIS service center, preferably via certified mail or with a return-receipt request.

In our cases, the e-filing option was not available at the time. Since the degree-granting institution for us was Ohio State University (Zhou) and University of Minnesota (Rungtusanatham), our OPT applications were mailed to the service center in Lincoln, Nebraska.

Once received, the processing service center will issue a receipt notice to the applicant. This receipt notice, typically arriving within two weeks and containing important tracking information such as a case number and the date that USCIS received the OPT employment authorization application, should be kept in a safe place in case it is needed later. Using the case number, an applicant can track the progress of his or her application status online.

**Temporary OPT Employment Authorization**

As with any process, the OPT employment authorization application approval process has variability. While the request for OPT is rarely denied when the guidelines and requirements above have been followed, the actual time to receive such approval notification may well exceed the average of 90 days (hence, the advice to begin as early as 120 days before the expected graduation date). It is important to note that the 90 days is not 90 days from when an applicant sends in his or her OPT employment authorization application but 90 days from the date that the USCIS receives the actual application.

Should the wait time exceed this 90 day response, an applicant has the right to apply for temporary employment authorization so as to begin his or her OPT. This temporary OPT employment authorization is valid for 240 days and is automatically void once the actual OPT approval notice has been received by the applicant. To apply for temporary OPT employment authorization, one simply has to apply in person at a local USCIS office. The application itself takes only a few hours to process onsite. Note, however, that if OPT approval notification has already been sent by the appropriate processing center, then the local USCIS office will not issue temporary OPT employment authorization and will ask an applicant to wait instead.

**After Arrival at Employing Academic Institution**

Assuming that the OPT request has been approved and that the necessary document authorizing employment is in hand, a foreign PhD is now ready to begin his transition from being a student to being a faculty at the employing
academic institution. By the time a foreign PhD reaches campus, he or she should either have graduated or should have filed for graduation. Once on campus, there are several immediate business items to attend to before even worrying about applying for the H1-B.

Immediate Issues

One such business item is to file “change of address” notifications with the appropriate parties, notably the USCIS and the doctorate degree-granting academic institution. By law, a foreign PhD has to notify the USCIS of an address change within 10 days of relocation.

A second issue is to work with the human resources and/or payroll departments to fill out appropriate tax forms. Please be aware that the tax deduction issue for a foreign PhD, irrespective of whether the PhD is obtained in the U.S. or outside the U.S., is rather complicated and is closely tied to an individual’s immigration status. Ultimately, the responsibility for ensuring that appropriate taxes are being deducted from one’s paycheck resides with the individual and not the employing academic institution.

For example, during the authorized OPT period, Social Security and Medicare taxes (~5-10 percent) need not be deducted from the paycheck. If such taxes were deducted, then a refund can be requested. Note, however, that such taxes have to be deducted once the foreign PhD obtains his or her H1-B. Failure of the academic employer to do so could result in financial penalties, especially if a foreign PhD owes the Internal Revenue Service more than $1,000 in taxes at the end of the calendar year.

Third, regardless of whether or not it is part of the employment orientation, a foreign PhD should meet with the international scholar advisor of the employing academic institution. During this meeting, the OPT employment authorization has to be verified and relevant documents copied for the personnel file. Furthermore, if the PhD degree has already been conferred, then a copy should also be provided.

H1-B Status and Visa

More importantly, since the maximum length of the OPT period is one year, a foreign PhD should get as much information as possible from the international scholar advisor as to how and when to apply for the H1-B, as well as who has what responsibilities. At the very least, the application for the H1-B should start no later than six months before the expiration of the OPT period, with the employing academic institution having the responsibility to apply on behalf of a foreign PhD.

To do so, the academic institution has to go through several steps in order to meet the requirements to petition for an H1-B status on behalf of the foreign PhD. First, the academic institution has to post the faculty position in a public bulletin for at least 10 working days. Second, the academic institution has to verify the Department of Labor to ensure that the salary offered exceeds the prevailing wage, which differs across different disciplines. This step is necessary to ensure that the hiring of a non-U.S. citizen into a faculty position is truly due to the inability to fill the faculty slot with an appropriate U.S. citizen. Only after the verification of prevailing wage can an application for the H1-B be forwarded to the immigration centers.

As with the OPT employment authorization, once the immigration center receives the H1-B application, a receipt will be sent to the international scholar advisor with a case number. The entire approval process for the H1-B status, once submitted, takes approximately three to four months. Fortunately, in case of an emergency where the H1-B is needed quicker, the academic institution can pay $1,000 extra for “premium” processing of the H1-B petition.

When an individual has been approved for the H1-B, this simply means that the foreign PhD can work for the sponsoring academic institution only. Legally, the status of the foreign PhD has been “adjusted” from that of an international student under an F-1 visa to that of an H1-B status. The original H1-B status approval notice will be forwarded to the appropriate office at the academic institution, while a copy will be sent to the individual. As long as the individual does not leave the country, no additional steps are needed, and the foreign PhD can be legally employed for up to a total of six years. Please note that the H1-B is approved for three years but can be extended for another three years, hence the total of six years. The six-year period provides sufficient time for an individual to apply for permanent residency status (i.e., green card). Once an individual becomes a permanent resident, he or she can work legally anywhere in the U.S. with any organization. As such, the application of permanent residency is typically the responsibility of the individual and not the academic institutional employer.

Should a foreign PhD with an approved H1-B leave the U.S. (e.g., to visit home country), there is additional complexity involved. Before exiting the U.S., it is important that the individual obtain the original notice that was sent to the academic institution. This original notice is required in order for the individual to apply for the H1-B visa to re-enter the U.S. To apply for the H1-B visa, the individual must do so at the U.S. embassy or consulate in the country that he or she is visiting. There is, however, no guarantee that an H1-B visa will be granted. In fact, the embassy or consulate has the rights to review the entire H1-B petition and to grant or deny the H1-B visa, even if an individual has been approved for the H1-B status.

Disclaimer

This article provides the authors’ personal understanding and first-hand perspective on the immigration-related issues pertaining to academic employment. Because the authors are not legal or immigration experts, please be sure to verify the information provided in this article.

Related Links

Research Opportunities in Offshoring

by Ajay Das, Baruch College

Our medical scans are interpreted in Bangalore, our service calls are answered in Delhi, our garments are made in Indonesia, our coding is done in Russia, and our chairs come from China. This paper addresses the trend of offshoring from a research perspective. We define offshoring as the outsourcing of manufacturing and service jobs, tasks, and business processes to overseas locations, both third party and self-owned. We first offer brief overview trends in offshoring. Next we identify and discuss specific offshoring concerns that have potential for scholarly investigation.

Some Facts About Offshoring

Table 1 lists some of the occupations and anticipated numbers underlying Forrester Research Inc.’s oft-quoted estimate of 3.3 million jobs moving abroad in the next 10 years (Engardio, Bernstein & Kripalani, 2003).

Industry statements reinforce the message. “There is no job that is America’s god given right anymore,” said H-P CEO Carly Fiorina (Wall Street Journal, 2004). Erstwhile ‘safe’ occupations such as surgery, dental, diagnostic, legal, 3-D animation, publishing and printing, and journalism are now under threat (Wall Street Journal, 2004; Outsource2india.com). These trends provoke friction, debate, and reaction. Academia has a central and useful role to play in understanding and interpreting these unfolding events—and below we identify several areas in which operations researchers can make valuable contributions.

Research Opportunities: Offshoring and the Job Economy

Evaluating the true and real impact of offshoring is a challenge. The benefits to corporations are obvious and center on cost, quality, and time gains. Less

<table>
<thead>
<tr>
<th>Job</th>
<th>2005</th>
<th>2010</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Office support</td>
<td>295,000</td>
<td>791,000</td>
<td>1,700,000</td>
</tr>
<tr>
<td>Computer</td>
<td>109,000</td>
<td>277,000</td>
<td>473,000</td>
</tr>
<tr>
<td>Business operation</td>
<td>61,000</td>
<td>162,000</td>
<td>348,000</td>
</tr>
<tr>
<td>Management</td>
<td>37,000</td>
<td>118,000</td>
<td>288,000</td>
</tr>
<tr>
<td>Sales</td>
<td>29,000</td>
<td>97,000</td>
<td>227,000</td>
</tr>
<tr>
<td>Architecture</td>
<td>32,000</td>
<td>83,000</td>
<td>184,000</td>
</tr>
<tr>
<td>Legal</td>
<td>14,000</td>
<td>35,000</td>
<td>75,000</td>
</tr>
<tr>
<td>Life sciences</td>
<td>3,700</td>
<td>14,000</td>
<td>37,000</td>
</tr>
<tr>
<td>Art, design</td>
<td>6,000</td>
<td>14,000</td>
<td>30,000</td>
</tr>
<tr>
<td>TOTAL</td>
<td>588,000</td>
<td>1,591,000</td>
<td>3,300,000</td>
</tr>
</tbody>
</table>

Data: U.S. Dept. of Labor, Forrester Research Inc. All numbers have been rounded off.

Table 1: U.S. jobs moving offshore to low-cost countries.
offshoring on the U.S. job economy. The job churn in this economy of about 130 million full-time jobs is about 15 million; in other word, about 15 million jobs are eliminated annually (Bernanke, 2004). In previous years, new job creation balanced the loss. But currently there is an imbalance in the job loss and job creation numbers. Much of the blame for the imbalance is being attributed to offshoring. However, several factors are known to have contributed to this state of affairs. The end of the technology boom has seen companies continue to shed excess fat from the overhiring of the past few years. Low interest rates also account for some of the lag in new hiring. With practically zero percent borrowing rates, businesses that expand operations prefer to invest in capital rather than labor. Another reason for slow job creation is increasing worker productivity and, consequently, a reduced need for workers. The U.S. steel industry produced 102 MT of steel in 2003 compared to 75MT in 1982, with 75 percent fewer workers (Zuckerman, 2004). Systems integration eliminates intermediaries. Companies such as Home Depot are seeking total integration with their supply chains, with stores ultimately being able to talk directly to production machinery at supplier plants. Such initiatives, and recent innovations such as e-tailing, would remove or diminish entire mediating layers from the order fulfillment process, most notably the need for middlemen, wholesalers, and inventory managers. The combined effect of these factors on job loss would be considerable, and surely has not gone unnoticed. Figures indicate that of the one, the gradient of the offshoring trend has climbed steeper in a short period of time. Manufacturing losses were distributed over the 1980s and 1990s. The pace of offshoring has picked up dramatically over the past two years, and, as a result, has left little time and room for social, financial, or psychological absorption and adjustment. Also, recent job offshoring has occurred in the high knowledge, high-skilled white-collar worker segment, which is a much more visible and politically vocal group relative to manufacturing workers. Add to that the reality of job quality degradation and the lack of alternative employment, especially compared to laid-off manufacturing workers who found alternative employment in the service sector in earlier times, albeit at reduced pay and benefits. Unemployed service workers have no alternative destination. These days, it is not uncommon to hear stories about computer systems analysts who are seeking work in department stores. Increasingly, for the unemployed white collar worker, there is seemingly no feasible place in which to make a transition. The cumulative influence of these factors has clouded perceptions of the true impact of offshoring on the U.S. job economy. Separating fact from fiction would allow us to evaluate the precise impact of offshoring on national employment, identify affected skills and areas of expertise, and make informed decisions about operational issues such as future hiring, business process location, capability sourcing, worker re-training, and value-partitioning. Thus, we recognize the following opportunity:

Research Opportunity #1: Isolate and quantify the impact of offshoring on U.S. manufacturing and service job losses, on a product and industry specific basis.

The Offshoring Value Proposition

The economic value proposition of offshoring builds mainly from labor cost arbitrage, with gains up to 70 percent (Forrester Research, 2004). Longer term continuities in job prospects and perceptions also contribute to the proposition. Tax preparation in the U.S., for example, is a highly seasonal hirer, with bulk hires of temps during tax peak season. In contrast, tax preparation in India engages mostly graduates that are able to accumulate experience and expertise because they are not subjected to the hire-fire-hire-fire-train cycle of the U.S. tax industry. Good career prospects attract quality staff with excellent absorptive capacity, and high-volume business allows leveraging the experience curve. Technical knowledge is shared across multiple project teams, and the customer benefits by accessing a single source of knowledge base. Faster turnaround time utilizing time zone differences allows 24x7 services and accelerates design/ manufacturing projects. Productivity rises, quality improves, and costs decline. However, initial infrastructural costs and offshoring specific maintenance costs, such as additional security and monitoring measures, can dilute the offshoring value proposition substantially. Offshoring value is also created by the option to “pay by the drink” in contracts with third-party providers. Some immediate gains include flexibility in adjusting volume without disrupting operations or home morale, and the absence of technology lock-ins.

In addition, strong non-economic factors strengthen the offshoring value proposition. The positive press on offshoring’s economic value added to the corporation has developed expectations in the business community. Firms without a visible offshoring strategy are unlikely to attract serious investment (Thottam, 2004). Wall Street analyst expectations and shareholder value are closely tied to productivity and cost gains, pushing companies to increase offshoring initiatives. From a strategic perspective, companies want a presence in emerging markets, establishing roots and visibility, with some biding their time until purchasing power increases in new markets.

The offshoring value proposition is thus a complex function of factors and develops differently for different prod-
ucts and industries. For the medical scanning industry, for example, obtaining quicker turnarounds on routine X-rays can be as important a source of competitive advantage as low costs. Tax preparation, on the other hand, may tolerate longer task times. Industries need to understand and prepare industry-specific offshoring value propositions from a total cost perspective. The offshoring value proposition dynamic also merits attention. Speculations have been made about “natural limits to offshore outsourcing” (Baldo, 2004). Security concerns, potential for intellectual property loss, capability hollowing out fears, and future wage and exchange rate movements are some factors that could impose limits to the evolution of the offshoring trend. Research can anticipate the shape and natural limits of the trend (similar to technology ‘S’ curves).

Research Opportunity #2: Develop industry and product specific comprehensive offshoring value propositions.

Risk Evaluation in Offshoring

Offshoring creates additional risks. The macro threats include geo-political instability or military risks in host countries, hostile government legislation in both host and domestic countries, weak intellectual property laws and lax execution of such laws that exist, foreign exchange volatility and flow restrictions, weak legal climate, ethical challenges, and varied infrastructural, temporal, and cultural issues (Gartner Research Inc., US News & World Report, 2004). Significant concerns at the micro level include the danger of leakage of sensitive technology and process development and management capabilities, the gradual loss of technical and tacit process know-how, security and privacy of data issues, integration frictions with home operations, fragmented use of IT/MIS systems, lack of cost transparency, uneven quality standards, and the possibility of forward integration by the offshore party (Engardio et al., 2003; Busch, Connell & Lee, 2003).

Quantification of risks is a promising area. Risks could be accumulated into a single or a few broad composite risk indices with predictive value. A discriminant function or similar methodology could be explored. Opportunity also exists for developing risk-based products. Risks can be categorized and bundled into packages that can be structured and priced as a marketable commodity in the insurance business. Reliable qualitative assessment methods for risks of the more tacit kind, such as supplier opportunism and geo-political risk, are also needed. In addition, risk evaluation can play an important role in effective supply chain design and balancing, with alternative sources and back-ups in separate locations.

Interesting possibilities exist for studies of cultural risk. Attitudes towards time, authority, and conflict carry managerial risks. Indians are conditioned to a lower level of conflict than Americans, which makes Indian call center workers more inclined to offer credits to customers (Knowledge@Wharton, 2002). Given that cultural factors can affect performance, opportunity exists to operationalize and examine the effects of culture on relevant aspects of offshoring operations. Research can provide guidance not only on the extent of country culture fit with U.S. home operations but also suggest culture-task pairings. Collection of overdue accounts may perhaps not be a good fit for Indian workers, but entrusting the same people with technical desk support responsibilities would be eminently appropriate. Such distinctions have been recognized and actioned by some companies.

Research Opportunity #3: Identify and quantify the incremental risks of offshoring, and develop appropriate response mechanisms.

Metrics for Offshoring

Currently, offshoring faces the need to develop reliable and implementable metrics for performance evaluation. The outputs of some processes are quantifiable. Ravi Aron of Wharton (Knowledge@Wharton, 2003) reports that process outcomes in medical transcription, in-bound call support, and data transformation (from paper to digitized data stored in a database) can be measured clearly and definitively. However, he adds, processes such as customer analytics, MIS reporting, or yield analysis do not lend themselves well to measurement of output quality or productivity. For example, market analysis calls for reports to track and interpret customer pricing and product information for management. Should the offshore provider’s performance be considered a function of the number of reports produced, or the timeliness of reporting, or the utility of the information presented? The first metric may be clearly inappropriate since frequency of reporting is no guarantee of quality, or may, in fact, reflect an inability to synthesize information. Similarly, measuring report timeliness will not provide any information on the accuracy or utility of the reports. As Aron observes, a report may be both accurate and timely, but fail to provide the specific information required by current conditions.

Designing comprehensive service level agreements (SLA’s) is only possible when metrics are developed to pre-warn, flag, and provide an audit trail for performance-related items. Metrics are also required in less tangible areas such as ethical compliance and customer interaction quality.

Research Opportunity #4: Develop reliable and actionable metrics and measurement processes for evaluating offshore provider performance.

Besides the research opportunities identified above, issues such as organizational structure, transitioning from home to offshore operations, ethical concerns such as child labor and workforce exploitation, environmental compliance, logistics organization, and
Useful Excel Array Formulas and Range Functions

by Rick Hesse, Feature Editor

Excel has a set of array formulas and range functions that may not be known by many users which can be intimidating but very useful. The array functions are recognized by the curly brackets surrounding their formulas. Users may be familiar with these from One-way and Two-Way Data Tables, which allow users to do "what-if" analysis for one or two parameters. The range functions use common Excel functions in a range.

Frequency Function

The FREQUENCY function is an Excel array function, and the template shown in Figure 1 allows up to 160 data values in cells D22:K41 to be classified into categories or bins. In this case, the data are ages of 80 employees of a company. The entire range from C7:C18 must first be highlighted and then type:

\[ \text{=FREQUENCY($D$22:$K$41,A7:A18)} \]

Then hold the <Shift>+<Ctrl> keys down and then press <Enter>. When you enter an array formula, Microsoft Excel automatically inserts the formula between \{ \} (braces). When you click inside a cell containing braces, they disappear, and you are not allowed to delete just a single cell in the array.

The data range is D22:K41, while the bins for the range for frequency is A7:A18. The first bin (C7) counts all the data values < 15, and there should be no values for that bin. The second bin (C8) counts the number of data values greater than 15 and < 20, and the last bin (C18) counts the number of values greater than 65 and < 70. The template with column graph is shown in Figure 1.

Row 4 shows 11 measurements of the data, and of special interest might be the calculation of the mean from the frequency data, which should approximate the actual mean. It uses the SUMPRODUCT formula for the counts times the midpoint values.

\[ \text{B4: SUMPRODUCT(B8:B18,C8:C18)/C4} \]

Because the array function is live (like a data table), we can change the values of the frequency bins and increase in steps of 10 years instead of five, as shown in Figure 2. Then, if we click on the column graph, the graph data is outlined, and we can grab the bottom right corner and drag it up to the first nonzero value and resize the graph. Note that the Frequency Average has changed from 35.563 to 35.000 and the true average remains 36.013.

The new graph then looks as shown in Figure 3. You now have a template that can give a frequency table and graph of up to 150 data points using up to 11 equal-sized bins (you need to make sure they are equal sized). This is an improvement on Excel’s Data Analysis Tool because the data is allowed to be live and not restricted to one column.

Transpose Array Function

The TRANSPOSE function is a very handy array function that will transpose data from rows to columns, and vice versa. It is a live function, so that if the original data is changed (values, labels), the data is immediately transposed on the spreadsheet. There are times when it is impossible to get the correct orientation for data. Let us look at a simple example involving a 3-state Markov process, with the transition matrix and first five periods, as shown in Figure 4. The transition matrix is in cells B5:D7, and the initial conditions...
of market share are in B10:D10. The annual brand loyalty probabilities are on the major diagonal, and the brand switching probabilities are off the diagonal (the probability of switching from Nokia to Ericsson the next year is 2.2%).

The labels for the three digital cell phone manufacturers are typed into cells B4:D4, and then cells A5:A7 are highlighted and the following formula is typed: =TRANSPOSE(B4:D4). Then hold the <Shift>+<Ctrl> keys down and press <Enter>. The labels in row 4 are transposed to the column A. This array function works for the range A5:A7 and will not allow just one cell (like A5) to be deleted.

To do the calculations for years 1 → 10, it would be nice if Excel would allow the SUMPRODUCT function to have cell ranges with different orientation, so that SUMPRODUCT(B$5:B$7, $B10:$D10) in B11 would compute Year1 market share for Nokia, and then could be copied over and down. But Excel will give a message #VALUE!, meaning the formula cannot be evaluated. Frontline Systems, which provides the Educational Premium Solver with many texts that use the Excel Solver, also supplies a revised SUMPRODUCT add-in which would allow different orientation. I don’t give it to my students for the reason that when they share templates at work, most people don’t have this add-in and then the template won’t work. Of course, a solution could be to reorient the transition table (matrix), but since it reads better as FROM → TO, I wanted to keep that orientation. Another solution is to write the gruesome formula:

B11:=B$5*B$10+B$6*C$10+B$7*D$10 and drag over to D11 and down.

However, one of my students, Elizabeth Cousain, found the TRANSPOSE function in Excel and figured out how
to make it work as an array function for this situation, as shown below:

\[
B11:=\text{SUMPRODUCT (B5:B7,TRANSPOSE ($B10:$D10))}
\]

Then hold the <Shift>+<Ctrl> keys down and then press <Enter>.

You can then copy B11 over to C11:D11 and then copy B11:D11 down as many rows as you want. After year 13, steady state is achieved (to 3 decimals). Since this array formula was written in one cell, you can erase any single cell or group of cells.

### Range Functions

A former MBA student e-mailed me asking if there was a way to pull out the average for certain items in an unsorted list, and I could not figure it out. About two days later he emailed with the solution using the SUMIF and COUNTIF functions to determine the average of a range of numbers in one column that match a criteria in another column. I use this for my grade book to show the group averages on tests, cases, and homework as an incentive and friendly competition in my MBA classes. Shown in Figure 5 is the worksheet Totals which gets data from the worksheet Grades (Figure 6).

Cell B2 on the Totals worksheet illustrates these two range commands.

\[
B2:=\text{SUMIF(Grades!$A$4:$A$17,Totals!$A2,Grades!C$4:$C$17)/COUNTIF(Grades!$A$4:$A$17,Totals!$A2)}
\]

This is then divided by the number of group Excelists to determine their homework average of 91.8 percent using the COUNTIF formula. The great thing about using this function is that it works between spreadsheets within the workbook, the list

\[
B2:=\text{SUMIF(Grades!$A$4:$A$17,Totals!$A2,Grades!C$4:$C$17)/COUNTIF(Grades!$A$4:$A$17,Totals!$A2)}
\]

and copied to B2:F5.

SUMIF(Range1, criterion, Range2) looks at the list in Range1 (Group Names on sheet Grades shown in Figure 6) that match the criterion (Group Name on the Total sheet) and sums up the corresponding homework scores in Range2 on the Grades sheet. This is then divided by the number of group members in the group Excelists to determine their homework average of 91.8 percent using the COUNTIF formula. The great thing about using this function is that it works between spreadsheets within the workbook, the list.

**Figure 3: Resized graph.**

**Figure 4: Markov brand switching model.**

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>MARKOV BRAND SWITCHING MODEL</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>CELL</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Cell Phone Manufacturer</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>FROM TO</td>
<td>Nokia</td>
<td>Ericsson</td>
<td>Motorola</td>
</tr>
<tr>
<td>5</td>
<td>Nokia</td>
<td>87.5%</td>
<td>2.8%</td>
<td>10.3%</td>
</tr>
<tr>
<td>6</td>
<td>Ericsson</td>
<td>11.8%</td>
<td>73.7%</td>
<td>14.5%</td>
</tr>
<tr>
<td>7</td>
<td>Motorola</td>
<td>15.9%</td>
<td>3.8%</td>
<td>80.3%</td>
</tr>
</tbody>
</table>

**Figure 5: Summary grade sheet by group.**

<table>
<thead>
<tr>
<th>1</th>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
<th>G</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Group</td>
<td>HwK</td>
<td>Test1</td>
<td>Test2</td>
<td>Cases</td>
<td>Semester</td>
<td>Rank</td>
</tr>
<tr>
<td>2</td>
<td>Excelists</td>
<td>91.6%</td>
<td>90.8%</td>
<td>95.3%</td>
<td>86.0%</td>
<td>92.4%</td>
<td>1</td>
</tr>
<tr>
<td>3</td>
<td>Optimists</td>
<td>82.3%</td>
<td>85.0%</td>
<td>87.5%</td>
<td>82.0%</td>
<td>85.8%</td>
<td>4</td>
</tr>
<tr>
<td>4</td>
<td>Quantifiers</td>
<td>93.9%</td>
<td>86.3%</td>
<td>83.7%</td>
<td>100.0%</td>
<td>87.6%</td>
<td>2</td>
</tr>
<tr>
<td>5</td>
<td>Spreadheads</td>
<td>84.1%</td>
<td>84.7%</td>
<td>86.3%</td>
<td>100.0%</td>
<td>87.1%</td>
<td>3</td>
</tr>
</tbody>
</table>
doesn’t have to be sorted by Group Name, and the individual scores are kept confidential when showing the group averages.

Using these functions also averts having to use the more clumsy DATA-BASE functions for lists (DAVERAGE) or Pivot Tables. I have used SUMIF and COUNTIF formulas before for simpler situations, but with just two arguments rather than three. For instance, =COUNTIF(A4:A17,”Quantinators”) returns the value 3 for the number of students in that group.

**Conclusion**

The functions demonstrated in this short tutorial should open up some new vistas for students as they apply spreadsheet formulas to their jobs and companies. As always, the Excel file for this column is on the Decision Line website.

**Related Link**

Excel file for this column at http://www.decisionsciences.org/DecisionLine/Vol35/35_5/35_5classroom.xls

---

Table: Grade sheet by group.

<table>
<thead>
<tr>
<th>Group Name</th>
<th>Student</th>
<th>HWk</th>
<th>Test1</th>
<th>Test2</th>
<th>Case</th>
<th>SEM</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quantinators</td>
<td>Adriano</td>
<td>90.3</td>
<td>81.0</td>
<td>84.0</td>
<td>100</td>
<td>85.2</td>
</tr>
<tr>
<td>Excelists</td>
<td>Brian</td>
<td>89.9</td>
<td>92.0</td>
<td>93.0</td>
<td>86</td>
<td>91.6</td>
</tr>
<tr>
<td>Excelists</td>
<td>Jose</td>
<td>95.4</td>
<td>94.5</td>
<td>99.0</td>
<td>86</td>
<td>95.8</td>
</tr>
<tr>
<td>Spreadheads</td>
<td>Kavita</td>
<td>83.2</td>
<td>90.0</td>
<td>84.0</td>
<td>100</td>
<td>88.2</td>
</tr>
<tr>
<td>Optimists</td>
<td>Mark</td>
<td>82.1</td>
<td>80.0</td>
<td>89.0</td>
<td>82</td>
<td>84.5</td>
</tr>
<tr>
<td>Spreadheads</td>
<td>Monica</td>
<td>82.9</td>
<td>79.0</td>
<td>81.0</td>
<td>100</td>
<td>82.6</td>
</tr>
<tr>
<td>Spreadheads</td>
<td>Rachelle</td>
<td>86.2</td>
<td>85.0</td>
<td>94.0</td>
<td>100</td>
<td>90.7</td>
</tr>
<tr>
<td>Optimists</td>
<td>Sara</td>
<td>82.4</td>
<td>84.0</td>
<td>93.0</td>
<td>82</td>
<td>87.7</td>
</tr>
<tr>
<td>Optimists</td>
<td>Scott</td>
<td>82.0</td>
<td>88.0</td>
<td>84.0</td>
<td>82</td>
<td>85.4</td>
</tr>
<tr>
<td>Excelists</td>
<td>Sol</td>
<td>93.9</td>
<td>89.0</td>
<td>96.0</td>
<td>86</td>
<td>92.3</td>
</tr>
<tr>
<td>Quantinators</td>
<td>Sophia</td>
<td>91.2</td>
<td>82.0</td>
<td>76.0</td>
<td>100</td>
<td>82.6</td>
</tr>
<tr>
<td>Quantinators</td>
<td>Sylvia</td>
<td>100.0</td>
<td>96.0</td>
<td>91.0</td>
<td>100</td>
<td>95.1</td>
</tr>
<tr>
<td>Excelists</td>
<td>Wade</td>
<td>88.1</td>
<td>87.5</td>
<td>93.0</td>
<td>86</td>
<td>89.9</td>
</tr>
<tr>
<td>Optimists</td>
<td>Wren</td>
<td>82.8</td>
<td>88.0</td>
<td>84.0</td>
<td>82</td>
<td>85.5</td>
</tr>
</tbody>
</table>

**Figure 6: Grade sheet by group.**
Extreme Programming in Practice: A Human-Valued Approach to the 
DSI Conference Management System

by Kenneth E. Kendall, Feature Editor

I am a strong believer that ‘there are no bad people, just bad systems.’ Rarely am I proven wrong in that belief. [Scott Sampson, Brigham Young University, 2004]

In the last few years, ecommerce entered the DSI world. Everything involving the DSI annual meeting is now done electronically. Paper submission, reviewing, tracking, notification of results, scheduling, submission to the Proceedings, you name it. It’s all done without passing a paper from person to person. This month’s column is about extreme programming (XP). Extreme programming is a development process that is more similar to prototyping than it is to the systems development life cycle (SDLC) or to object-oriented programming. As a methodology well-suited for building dynamic, Web-based ecommerce systems, XP is differentiated from other systems analysis and design methodologies because of its activities, practices, and values. The examples used here are drawn from my experiences interacting with the DSI conference management system which was conceived, developed, and implemented by Scott Sampson. I share this overview with you.

Scott Sampson may not have realized it, but his conference management system was developed using the principles and values of extreme programming. As I am writing this article, I am getting ready to send the DSI annual meeting schedule to the printers, and I have an opportunity to reflect on using the conference management system: what it looked like at this time last year, how well it worked, and how it can be improved. I won’t elaborate on any of the problems that arose because the conference management system wasn’t developed using traditional SDLC or waterfall approaches. Instead, we’ll look at some of the successes.

Extreme Programming (often abbreviated as XP, perhaps to confuse all of us who use Microsoft Windows XP) is the practice of developing systems using good principles taken to the extreme. This can mean not only asking the customer to state requirements, but getting the customer to help develop the system.

Four Basic Activities in Extreme Programming

Extreme programming involves four basic activities: coding, testing, listening, and designing. Obviously, coding and testing need to be done no matter how you develop a system, but listening is very important in XP. I have worked with many developers and network administrators over the years. Although talented in other regards, some were just not good listeners.

My experiences with Scott demonstrated beyond a doubt that he was a wonderful listener. He assumed that if a user was taking the time to ask a question about a potential bug in the program, there was a significant probability that that person was correct. Not every developer has the ability or in-
sight to listen, which means that XP may work for some but not others.

Another basic activity of XP is designing. Those of you who submitted papers to the 2002 DSI Annual Meeting will realize how the process evolved. A front end (paper submission process) was written at Wake Forest University by some of their capable systems developers, but it became apparent that separate parts of the system could not pass data between the front end and the preference-based scheduling system due to the manner in which the front end allowed authors to identify themselves. There was no way to uniquely identify an author at that time.

So an integrated system was developed in 2003 by Scott Sampson, who worked with 2003 Program Chair Mark Davis of Bentley College to add many features to the system including a manuscript review tool, Web-based proceedings submission, and a number of data management tools to allow adding authors, changing titles and abstracts, and reporting corrections.

In 2004, I worked with Scott as he improved the system further by correcting minor problems and adding new features. Several of these features are not evident to you because they involve the report and conference management tools required to balance the paper presentation sessions and to keep the entire project on schedule.

**Four Core Practices of XP**

Four core practices differentiate XP from other approaches. They are short releases, the 40-hour work week, on-site customer; and pair programming. Let’s use these practices to evaluate the conference management systems from an XP perspective.

Short releases means that the development team compresses the time between releases of their product. Whenever I asked Scott to add a feature, it was taken care of quickly. There was continual improvement. If a feature was added and I wanted it modified, Scott would turn it around in no time.

Forty-hour work week means that XP development teams purposely endorse a cultural core practice where the team works intensely together during a typical 40-hour work week. While I certainly don’t want to compute the time it actually took to run the meeting, I must admit that we did take breaks, especially on Sunday. A day of rest got everyone reconnected with their families and gave a fresh perspective on any system challenges we were facing.

On-site customer means that a user who is an expert in the business aspect of the systems development work is on-site during the development process. While we didn’t meet in the same room, we did meet virtually a lot. We used email, phone, and fax (sometimes all at the same time). How did they ever do this without the benefit of cell phones? I should add that working with Scott, in any medium, was always a pleasure.

Pair programming is an important core practice. It means that you work with another programmer of your own choosing. Well, I guess the lack of following this practice was an exception that proved the rule. Scott did all the Perl coding himself. While I didn’t write any code, there were several times when I lapsed into computer lingo. I was often eager to just jump in and create my own reports, but I did not. Scott will tell you whether my natural bent toward computer-geekiness helped or hindered the process.

**Four Values of XP**

Most importantly, extreme programming contains the four values of communication, simplicity, feedback, and courage. Taken together, these values work to create an environment where both developers and businesses can be adequately served.

Let’s begin with communication. Systems projects that require constant updating and technical design are especially prone to communication errors, breakdowns, or misunderstandings. We worked to communicate as much as possible as quickly as possible so that problems would be resolved rapidly, accurately, and to everyone’s satisfaction. At times, the Associate Program Chair, Sameer Verma, or the Proceedings Coordinator would jump in and offer an opinion in their areas of expertise. Christine Roundy at BYU was a critical part of the system because she could interpret human requests and take the necessary actions.

Simplicity is the second value of XP. Whenever a report was needed we tried to keep it simple. Whenever a human request was made, we attempted to adhere to a set of policies so that any one of us would be able to offer the same advice. Consistency and simplicity worked hand-in-hand here.

Feedback is the third basic value. Good, specific feedback that is useful to the programmer, analyst, and customer (in our case, the authors) can occur within seconds, minutes, or days. I hope we accomplished this, but I often noticed that people who requested changes (for example, asking that an author be added to a paper) expected the change to occur instantaneously as if the system were an OLAP implementation. When authors and track chairs took the time to imagine the possibilities, they soon realized that all requests took time to be verified for accuracy before we could post them to the schedule.

Courage is the fourth value enunciated in extreme programming. The value of courage has to do with a level of trust and comfort that must exist in the development team. I can safely say that I had the very best team any program chair could have in running this meeting, and, yes, it does take courage.

As you can see, extreme programming is a human-valued approach that stands in sharp contrast to an object-oriented approach to development. It has its flaws, but XP has its advantages as well. I hope this discussion about the development of the conference management system helps deepen your understanding of extreme programming and how it can be particularly useful in the development of Web-based systems.
In this article, Samir Chatterjee reports how the modes and speed of scientific investigations have changed in recent times due to developments in IT. He points out that e-Science places very different demands on IT academics and practitioners, and he highlights new roles that IT research and education should play to cope with such demand. I welcome comments from readers.

The New Scale and Scope of e-Science: Can IS Play a Role?

by Samir Chatterjee, School of Information & Director, Network Convergence Laboratory, Claremont Graduate University

The discipline of Information Systems is at a crossroad. The community is vigorously debating the research paradigms [behavioral versus design science (Hevner et al., 2004)], rigor versus relevance (Communications of AIS, 2001), theoretical versus practice-oriented research (Lyytinen & King, 2004). The business of IT is changing with trends of IT outsourcing (Lacity & Hirschheim, 1993), which can have significant impact on teaching institutions as they figure out what to teach and what is the best model to adapt that can attract students to this field. Added to this is the sure decline in IT enrollments across the U.S. (Kumagai, online), which can perhaps be attributed to the post-bubble era, post-911 security climate and certain Visa restrictions that are forcing potential foreign graduate students to pursue higher studies elsewhere. I cannot claim that I have a magic bullet that can solve all these problems, but the purpose of this article is to introduce the readers to a calm, steady, and quiet revolution that has been happening for the past decade—called e-science—which will play a significant role towards shaping the future of IT, and in which the IS community must be prepared to play a role.

e-Science—New Modes of Scientific Inquiry

Moore’s law has continued to give us exponential technological (hardware) improvements that, coupled with dramatic advances in networking and collaboration modalities over the almost-ubiquitous Internet, has now made it possible to explore ever increasingly complex problems. This, in turn, has fueled a revolution in science and engineering. Today’s science is very different from those in the past where one scientist and a few students would experiment and develop theory in the lab corner. Today’s science is based on access to large-scale facilities, mega-scale collaboration, and creation of new knowledge by jointly working together. If one were to ask what the three essential ingredients of e-Science are, it would be information and technology, management of organizations (albeit virtual), and people. What I find amazing is that these three have always been the core pillars of MIS, and yet this revolution in e-Science has gone on largely without any contribution or intervention by the IS community.

John Taylor, director general of the U.K.’s Office of Science and Technology, was an early proponent of this idea,
coining in 1999 the term e-Science to denote a new field of endeavor. He wrote that "e-Science is about global collaboration in key areas of science and the next generation of infrastructure that will enable it" (Hey & Trefethen, 2002). The U.K. program has garnered significant R&D investment along with industry participation to charter a roadmap for e-Science initiatives. In the U.S., e-Science is perhaps best known as the "Grid" (Foster & Kesselman, 2004). In a recent National Science Foundation panel chaired by Professor Dan Atkins [now called the Atkins Report (Atkins et. al., 2003)], the panel observed that digital computation, data, information, and networks are now increasingly replacing and extending traditional methods of science and engineering research. The panel states that "a new age has dawned in scientific research, pushed by continuing progress in computing, information and communication technology, and pulled by the expanding complexity, scope, and scale of today’s challenges”. The Report concludes with the vision of creating the global "cyberinfrastructure," and NSF should lead a large ($1 billion per year) program towards this effort for the next 10 years.

Large Scale and Bigger Scope

The fast computing power and vast storage capacity of systems and networks today are enabling creation of data archives of enormous size and value. Multipetabyte (10^15 byes) archives are being built in fields as diverse as biology, astronomy, medicine, environment, and high-energy physics (Foster & Kesselman, 2004). For example, the world-wide physics community is planning an ambitious set of experiments at the Large Hadron Collider (LHC) facility at CERN in Geneva (Foster & Kesselman, 2004, chapter 10). The goal of this work is to find signs of the Higgs boson and any indications of new types of matter—such as supersymmetric particles—that may shed light on the “dark matter” problem of cosmology. The LHC experiment has a scale and scope never seen before in physics: 5,000 physicists at more than 150 universities and laboratories in 34 countries worldwide will work on the data from LHC that is generating petabytes/sec from millions of events happening every nanosecs. Similar archives are being created for the U.S. National Virtual Observatory project (National Virtual Observatory, online), National Earthquake Engineering Simulation Project (NEESGrid, online), and the U.K. Distributed Aircraft Maintenance Project (DAME project, online) led by Rolls Royce.

Over the past decade, major advances in genomics and proteomics have led to an explosive growth of biological information generated by the scientific community. The evolution toward high throughput methods in genomics and proteomics requires fast access and screening of large amount of experimental data. The analysis tools must handle reliably a rapidly growing volume of heterogeneous data from remote sources. Researchers are faced with the complex task of mining data from public databases and organizing experimental results for archival and publication. Gene expression analysis using micro-array technologies, in particular, has become a complex process requiring increasingly complex tools. Gene expression analysis using microarrays technologies will eventually provide biologists with better insights into solving major health problems such as cancer or heart diseases. Microarrays allow scientists to analyze expression of many genes in a single experiment quickly and efficiently and are now employed in all domains of life sciences. High-density microarray experiments use a variety of advanced software tools at each step of the process, from image scanning to normalization and data analysis. There is a need to facilitate the collaboration of multidisciplinary specialists on microarray experiments and to provide easy access to the software, computing, and storage resources required.

Biology is emerging from its sequencing to its post-genomics period. Instead of studying one gene, we study the whole genome. (Biologists used to joke “one gene, one research career.” No more.) Instead of one cell cycle, we study the whole organism. Instead of one organism, we compare organisms. This new “Systems Biology” approach depends on Information Technology at its core (Institute for Systems Biology, online). The post-genomic era is all about crossing communities and collaboration. It is all about collecting data, comparing and analyzing them, and creating new knowledge that needs to be disseminated back to the knowledge pool by effective medical publications.

It is quite clear to the engaged scientific community that the data archives are important, but the real opportunity is the ability to work with the shared data together. Hence collaboration technologies that support real-time audio and video exchanges among diverse groups of researchers are being designed today. The Access Grid project out of Argonne’s Futures Laboratory is a media-rich collaborative environment that can connect almost thousands of researchers with audio and video (Access Grid, online). It uses a spatial metaphor of “rooms” that researchers can join and engage in virtual discussions. It provides secured channels and the ability to record all synchronous and asynchronous sessions.

Can IS Play a Role?

The School of Information Science at Claremont Graduate University, one of the oldest stand-alone schools of IS, is just celebrating its 20th year. The School has created a transdisciplinary environment for research where challenging and complex problems in IT are being tackled by diverse multidisciplinary teams of researchers. The School realizes that this is a sharp departure from the past on what used to be IS research. We view IT not to be central anymore, but much more pervasive. Its use and application transcends those traditional enterprise domains and is now becoming the key enabler of e-Science. The School is composed of four major
labs: Network Convergence Lab (NCL), Claremont Information Technology Institute (CITII), Intelligent Systems Lab (ISL) and Social Learning Software Lab (SL²). These labs work closely with leading industry partners and are funded by federal (NSF, Homeland Security, NIH) and private funds. A key focus is on building real systems and prototypes using design science paradigm.

Faculty and student teams in the labs are engaged in several different types of projects. NCL plays a central role in the NSF National Middleware Initiative (NMI) in which the lab focuses on developing collaboration tools that are secured and has federated authentication and authorization policies in place. It has brought together computer scientists, biologists, IT managers, and knowledge management researchers in their ClareGrid™ project, which is building flexible collaboration and data management tools for microarrays genomics researchers. Participating institutions include Keck Graduate Institute, University of Southern California, City of Hope, Hewlett Packard, and Georgia State University. In another project dealing with the creation of secured ad hoc collaboration tools, security experts, networking specialists, and user interface researchers from Claremont, Caltech, and Lawrence Berkeley Labs have come together to explore the challenges.

ISL is focused on medical and bioinformatics projects. Researchers are developing a natural language parser that automatically finds important and interesting information in text. This parser can be used to restructure free text in relationships, which are then suitable for text mining applications. The Visual Summaries project focuses on the representation of documents as conceptual graphs. Natural language processing is used to restructure the text for visual representation. The focus is on medical Web sites for consumer health. CITII has put together multidisciplinary researchers in several projects ranging from digital infrastructures for cities and towns, e-government, to health-care. A current project is to do a spatial and visual mapping of the broadband ICT infrastructure for the “New Orange County” funded by CEDS. The SL² lab, in collaboration with Harvey Mudd researchers, is creating new extreme learning software by which users could acquire new knowledge and be trained to effectively use that knowledge in diverse scenarios as statistical quality control, bio-terrorism, and strategic management. The collective result of these activities have been increased extramural funding, attracting companies from across the globe to engage in our lab activities, and presenting students with a unique opportunity to experience a true transdisciplinary research environment.

What goes on in the labs gets reflected in the classroom, and students are challenged to think in a transdisciplinary way to solve critical problems of society. Students engage in real-world problems through practicums or clinics that are sponsored by industry. Recent clinics have dealt with large-scale software development for defense, network-centric warfare approaches, implementation of digital signatures, effects of Health Insurance Portability and Accountability Act (HIPAA) on health-care, and many more. Our students develop collaboration, management, and leadership capabilities to lead the new age of e-Science.

As e-Science progresses, IS researchers can and have a vital role to play in its evolution. E-science is as much about technology as it is about organizations, management, and people. IS research can contribute towards that. However, it is becoming clear that IS researchers have to dig deeper in these domain areas and work closely with other disciplines (such as medicine, biology, user interface) to make an effective impact. IT is becoming very specialized, and graduate research schools have to immerse themselves in the new areas to make meaningful contributions (Professional Science Masters Degree Programs, online). There is much to learn from other interacting disciplines. But one unfortunate fact is that mainstream IS publication outlets have still not embraced such work. It is my opinion that they will sooner or later have to embrace these types of transdisciplinary research or they will have difficulty in sustaining themselves. This acceptance of new modes of research and inquiry is important since faculty do get evaluated for promotion and tenure. However, schools such as CGU and many other schools in IS have already gone past the traditional journal outlets and have started to value publications in other disciplines.

In order for the IS community to play an effective role in the ongoing evolution of e-Science, changes have to be made both in the way research is conducted and in teaching curriculums. In research, most of e-Science today is about design science (Hevner et al., 2004), that of building prototypes and new systems that can perform various new functions at the infrastructure and application level. Much of the latest ideas about these new ways of designing things are being exchanged at various working groups (see globus.org) and leading technical conferences. Understanding the domain is critical. So if the IS research group lacks fundamental domain knowledge, then it is imperative to team up with domain specialists. Use of hands-on tools for testing and experimentation becomes equally desirable. Access to labs is critical. Even from a management standpoint, understanding the technology and its power will be crucial for solving and making decisions in e-Science. IT no longer exists in an MIS division of a company. Instead IT is driving new growth areas such as sensor networks, pharmacogenomics, personalized medicine, and nano-technology where a manager will have to have a firm grasp of the technology. This is evident from the growth of professional masters programs across the U.S., which is nurturing managers for scientific areas [15]. Quantitative analysis techniques using survey method would be equally vital to understanding what e-Science users are doing and what they require. Courses that are being taught in IS
to increase the systems building and programming skills in students. Hands-on lab, practical exercises using measurement, and monitoring tools (such as globus for Grid) will be essential towards a deep understanding of e-Science.

The scientific community and, increasingly, the business world are welcoming e-Science and Grid technologies with the sort of excitement inspired by the Internet not long ago when the TCP/IP standards created universal connectivity, hyperlinked access to incredible content, and new e-business models for generating revenue. The recent past developments have been breath-taking and remarkable. Today, IT has engrossed itself into our daily lives to the extent that we take it for granted. Some have even gone on to propose that “IT does not matter” (Carr, online). As e-Science heads towards mass adoption, what an incredible world it would be. Arthur Clarke once said that as technology advances, its complexity gets hidden from its users, and it seems like magic. Let us all work together to be a part of this magic.

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**Concluding Remarks**

Every industry may eventually face a compelling case for offshoring. Success at home and abroad depends on the skilful management of a mosaic of domestic and foreign factors. Operations management researchers can provide valuable insights and guidance to companies engaged in this difficult process of transition, adjustment, and progress. Research in offshoring will also serve to direct OM research to frontline issues, enhancing our discipline’s scholarly visibility and business reach in the coming years.

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THE DEANS’ PERSPECTIVE

KRISHNA S. DHIR, Feature Editor, Campbell School of Business, Berry College

The challenges facing any dean are complex. One rarely starts a career wanting to be a dean. Even the basic task of defining the responsibilities of a dean on an organizational chart is not as simple as it may appear. One seeks metaphors to understand what these responsibilities are. While it has long been concluded that deans are neither fish nor fowl, they nevertheless are regarded as fair game. Yet, the making of a dean is what friends do to friends. The substance and essence of deaning are best captured through personal narratives on its nature. In this essay Dean Doyle Williams of the University of Arkansas describes his perspective.

A Personal Perspective

“On Deaning”

by Dean Doyle Z. Williams, Sam M. Walton College of Business, University of Arkansas

I am honored to have the best job on the campus of the University of Arkansas—serving as dean of the Sam M. Walton College of Business. I have been asked over the years by many faculty members, “How does one become a dean?” Others have inquired about what motivates one to become a dean. Some individuals have expressed their desire to be business dean and have inquired about what a dean does. Still others have inquired about the attributes of a successful dean. In response to these inquiries, I was pleased to accept this invitation to offer a short commentary on my perspective on “deaning.”

How Does One Become a Dean

For context, I completed in August 2004 my eleventh year as dean of the Walton College of Business. Previously I served as the founding dean of the School of Accounting at the University of Southern California for eight years and as interim dean of the School of Business and Graduate School of Business at USC for two years prior to serving as founding chair of the Accounting Education Change Commission for four years. Prior to my 15 years at USC, I was on the faculty at Texas Tech University serving the last five years as the coordinator for the Area of Accounting.

Like the vast majority of deans, I did not begin my academic career with the desire to become a dean. I started on an administrative path largely at the urging of others. My first administrative role came early in my career, probably too early, when in 1973 my colleagues in the Area of Accounting at Texas Tech urged me to consider being a candidate for election to be Area Coordinator. I truly had no ambition to be an administrator and was ill-equipped for such a role. On-the-job training was a brutal teacher. Fortunately, my colleagues were understanding and patient. In those early days of administrative life, emotionally I was on a constant roller coaster—extreme highs and extreme lows. I learned to develop emotional strength much like one develops physical strength.

I began to realize that as an administrator, one can make a difference far beyond just the students in one’s classes. After all, I had become an educator because of the desire to make a difference in the lives of young people. I believed that I could be a difference maker, and the accounting program at Texas Tech gained regional recognition...
Personal Humility
Demonstrates a compelling modesty, shunning public adulation; never boastful.
Acts with quiet, calm determination; relies principally on inspired standards, not inspiring charisma, to motivate.
Channels ambition into the company, not the self; sets up successors for even more greatness in the next generation.
Looks in the mirror, not out the window, to apportion responsibility for poor results, never blaming other people, external factors, or bad luck.

Professional Will
Creates superb results, a clear catalyst in the transition from good to great.
Demonstrates an unswerving resolve to do whatever must be done to produce the best long-term results, no matter how difficult.
Sets the standard of building an enduring great company; will settle for nothing less. Looks out the window, not in the mirror, to apportion credit for the success of the company—to other people, external factors, and good luck.

Table 1: Depiction of paradoxical combination of personal humility and professional will (Collins, 2001).

A third characteristic for success is the willingness to risk failure. Change entails risk taking. Change will never occur if we wait for a risk-free opportunity.

A fourth attribute for success as a business dean is to have patience. The timing of a good idea is as important as the quality of the idea for its success. Every change, or new idea, is foreign to the status quo. New ideas and change require time for assimilation and processing before being embraced. Good listening will signal the timing for change.

Trust is critical for success as a business dean. Members of any organization tend to be skeptical of a new leader. Trust must be earned through acting with integrity, empowering others, doing the right thing, and being open to input and even admitting mistakes.

Another attribute is leading by example. A dean should not ask others to do what he/she is not willing to do themselves. A dean should be prepared to work harder than any faculty or staff member and give credit to others where it is usually due.

Successful deans lead with vision. They engage others in exploring the possibilities. They expand the horizon for thinking. They foster innovation and a spirit of entrepreneurship channeled by the unit’s mission.

Conclusion
Success as a dean has many variables. Hence, assuming a deanship is laden with risks. But it has the possibilities of even greater rewards. The individuals with whom you are engaged have self selected to join in the enterprise. There is a shared commitment of making a difference in a most noble undertaking. Collectively, when the faculty, staff, students, and alumni join together, great things can happen. I’ve been blessed to be part of enormous advancements at three institutions. I will eternally be grateful for the faith others have shown...
A Rough Model for Success in Doctoral Study

by Varun Grover, Department of Management, Clemson University

What makes a doctoral student tick? After having had numerous delightful experiences with doctoral students, I still find the answer to that question somewhat elusive. I can recall the case of a doctoral candidate who applied for admission to a premier doctoral program. The candidate came across well in the interview, but the review board voted against financial aid (which is tantamount to denying admission for doctoral programs). The reason given was the candidate did not pass the litmus test for GMAT scores. Furthermore, that year’s applicant pool was stronger—relegating this candidate to the bottom of the list. One committee member who voted for the candidate did so because he saw something during the interview process that gave him a “good feeling.” Unfortunately good feelings are not good enough for bureaucratic committees. After all, standards and metrics are established to sustain quality. The outlying committee member in this case decided to be vociferous and champion the student. Grudgingly, the committee decided to give the candidate admission without aid. After one year in the program the candidate wowed everyone with top-notch grades, diligence, and quality of interaction with both faculty and peers. The student then turned out to be one of the best students in the program and has since gone on to write seminal papers and a highly productive academic career. If this committee member had failed to intervene, the institution would have lost its best student; and if the student had given up on trying for a doctorate, the field would have been intellectually poorer. So, that brings me back to the original question. What makes a doctoral student tick?

Many times during my job, the issue of success in the doctoral program comes up. Sometimes it is at the input stage, when we evaluate applications and interview candidates. At other times it’s during the process of interacting with students during coursework, comprehensive examinations, or dissertation and research projects. And sometimes it is at the output stage when we are evaluating how to better place our candidates or recruit from good programs. In general, I find that our measurement instruments are fairly blunt when it comes to evaluating candidates at the input stage. We might be able to get a general feel for competence (GMAT scores, GPA, achievements, communication skills) and make broad assessments of personality (outgoingness, conscientiousness, awareness)—but we can never really predict with tremendous confidence how successful the student is going to be in the program and later on in his/her academic career. Doctoral study is different from other levels. It requires a special kind of person who has the motivation to work hard, going beyond mere coursework, and pursue the unstructured process of knowledge creation even though it is replete with dead-end paths and frustrations. And it requires competence to absorb and integrate knowledge, apply tools, and communicate knowledge effectively. While a minimum threshold of motivation and competency is needed, there is one more ingredient—
the ability to manage one’s program. In an earlier article in Decision Line (10 Mistakes Students Make in Managing their Program, May 2001), I argued that students often do a poor job in managing their resources including their time, competency, projects, peers, faculty, and even their advisor.

This brings me to the issue of “success” in the doctoral program. At the simplest level, I believe that motivation and competence work synergistically and, when complemented with good management, students could be well on their way to a successful program and career. To formalize this, I propose below a rough model of success in doctoral study. I call it rough because it probably will not withstand (at least at this stage) rigorous academic scrutiny. However, I believe that it does reflect the core components of a successful student. The only caveat here, is that this model focuses on the success of research/dissertation aspects—core attributes of all doctoral programs, but more important for some than others.

At the initial stages I believe that competence and certain kinds of personalities are more likely to develop the research abilities that we try to nurture. Competence refers to knowledge and communication skills that we broadly assess through the application process. Personality traits such as “reflective observation” and “conscientiousness” are also desirable traits, but they are much harder to assess a-priori. These characteristics are related to motivation with respect to the program. Ideally, we’d like motivation to be intrinsic; that is, students involved in research for the innate excitement of creating and exchanging ideas and the possibility of the eureka moment. However, in some cases extrinsic motivations (stamp of credibility or hope of financial rewards) are the primary driver. The support infrastructure at the institution, including the faculty and other resources, could inculcate both the intrinsic (excitement about research) motivation and extrinsic (prestige of institution, financial support, infrastructure) motivation for the student.

In turn, highly motivated students manifest that attribute into efforts towards managing their work as well as their doctoral program. I see the level of effort and quality of program management as moderating the relationship between competence/personality and research ability. Competent students with the right personality will translate those attributes into research ability, but effort and management will strengthen that relationship. Research ability is also influenced by the institutional resources, particularly the faculty. Transfer of research skills through apprenticeship-like processes and student supervision can greatly enhance a student’s ability to do research, particularly if the student has the desirable innate characteristics. This research ability will translate into process success, (i.e., completion of program requirements) and outcome success (i.e., publications, placement). Of course, the
outcome metrics will also be influenced by institutional resources (e.g., faculty assistance in placement). Finally, both types of success boxes are directly influenced by the student’s effort and management of the program. For instance, networking and time management could directly influence placements. Needless to say, other attributes (e.g., luck, marketplace) could influence the ability to publish or find a position in a higher-level institution.

In looking at the model, we can see the main issues. At the input stage, we do a coarse assessment of competence and within this, a very coarse assessment of communication skills—usually in the form of an oral interview or admission essay. Other attributes like desirable personality aspects, motivation, and program management ability are left unassessed. However, those factors are the ones that manifest themselves during the program and are often the case of low success or even failure. To offset this issue, most institutions have a trial period (qualifier) after which doctoral students that don’t make the grade can be asked to leave the program. Such students cause frustration and dissipation of tremendous energy and faculty resources. Ideally, we should try to develop more structured forms of a-priori assessments. At the minimum, questions that try to root out whether the student has certain traits for doctoral study should be assessed such as the following:

Do you enjoy reading . . . discussion . . . debate . . . thinking about areas in the field . . . writing? How are your organizational skills . . . time management skills? How would you handle unstructured situations . . . the following scenario?

These questions are not uncommon (e.g., situation analysis) in corporate interviews, and they could prove useful for doctoral study as well. However, I suspect that these questions are not an integral part of many admission processes.

While the model is not very profound, it does offer a rough structure for examining doctoral success. Adding more granularity to each of the boxes might be useful in creating diagnostic/prescriptive tools for doctoral study or, at the minimum, stimulating more debate. These programs usually have high resource inputs including tremendous investments of faculty time and few students. The payoffs can also be significant. A good doctoral student can be a tremendous asset to the faculty and institution, and create a positive multiplier effect when he/she becomes a top notch researcher. On the other hand, a poor choice can be a liability—-consuming time and opportunities from faculty. Therefore, errors of admission (both type I and II) can be far more expensive than, say, the case of an MBA student. I think we need more vigilance. The model presented above is just a start.

Tips for Doctoral Students—Getting the Most from the Annual Meeting

The Decision Sciences Institute Annual Meeting provides an opportunity for doctoral students to network, develop professional skills, interview for faculty positions—and have a good time!

For student who want to know how to get the most out of the Annual Meeting, see “Tips for Doctoral Students” on the DSI Web site at

http://www.decisionsciences.org/doc_tips.htm

Placement Services Coordinator Vacancy Announced

The Decision Sciences Institute is seeking a new Placement Services Coordinator for a three-year term beginning after the 2005 Annual Meeting in November.

The Institute operates a placement services Web site at http://www.decisionsciences.org, which includes a database that provides listings of academic positions and applicants. The coordinator is responsible for the content and smooth operation of this site. This includes working with DSI staff to refine the design and layout of the site, updating instructions for its use, and responding to questions from users. Although the coordinator is not directly concerned with the technical aspects of the Web site or the database, it would be helpful for him or her to have some knowledge of databases and Web-based information systems.

In addition to overseeing the Web site, the Placement Services Coordinator also plays a critical role in planning and running placement activities at annual meetings. Therefore, the coordinator’s presence at November annual meetings is absolutely essential.

Questions about the position may be directed to the current coordinator, Gerard Campbell of Fairfield University, at (203) 254-4000, x-3118 or gcampbell@mail.fairfield.edu. All interested parties should submit the following to Carol Latta at the Decision Sciences Institute, College of Business, Georgia State University, 35 Broad Street, Atlanta, GA 30303, by no later than April 1, 2005:

1. Curriculum vita
2. Statement of activities and service provided to the institute
3. Statement of interest and availability to serve a three-year term
4. Statement of qualifications and experience related to the position
5. Description of institutional commitment for the support of the coordinator’s job functions for a three-year period.
IN THIS ARTICLE, MIRANDA LAM considers texts that are suitable for an undergraduate course in Financial Modeling using Excel.

Financial Modeling
by Miranda Lam, Salem State College, Salem, Massachusetts

The advance of personal computers and software, especially spreadsheet applications, has revolutionized financial analysis. But, until recently, Financial Modeling was taught only as an advanced graduate topic. Even though computer applications, including spreadsheets, are basic elements in business core curriculum and assignments requiring the use of computers have become routine, many undergraduate students fail to fully utilize the analytical power of spreadsheets. A few students actually solve problems using calculators and enter the results as numbers, using the spreadsheet only as a formatting tool. Some use the spreadsheet as a glorified calculator. Many students create spreadsheets in an ad hoc manner, making analysis difficult, often inaccurate, and sometimes impossible. Such misuses are common because the concept of financial modeling is seldom taught at the undergraduate level. When the author first taught Financial Modeling in 1994, there was no textbook available and only a handful of universities offered such a course. Instructors typically use computer reference books for spreadsheet software such as Excel and mainframe software such as Interactive Financial Planning System (IFPS) supplemented by their own handouts and exercises. Today, Financial Modeling is typically taught as an elective course after students have taken an introductory finance course, which covers basic finance concepts such as the time value of money, risk and return, stock and bond valuations, capital budgeting, and working capital management. Within such a curriculum, the Financial Modeling course focuses more on the applications and implementations of financial theories. A few years ago, while developing a new graduate Financial Modeling course, the author revisited a long debate in teaching Financial Modeling: Are we teaching Excel or are we teaching finance? The truth is that the computing power of spreadsheets significantly changes the way financial analysis is conducted, and for students to fully capitalize on such power requires mastery of both finance and modeling theories as well as technical aspects of the software. Some spreadsheet enthusiasts envision that finance will be taught using spreadsheets as the primary computational tool in the future, making financial calculators obsolete in the same way that financial calculators have replaced annuity tables. The hurdles and merits of a spreadsheet-modeling-based pedagogy are numerous and beyond the scope of this article. As of today, spreadsheet software has not replaced the financial

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USING EXCEL AND VBA in a finance curriculum is still in its early stage of development. The challenge is to balance between theories and software specific technical details, focusing on analytical abilities provided by technology. The diversity of topics and approaches exhibited by the textbooks reviewed reflects this challenge and underscores the fact that the role of Financial Modeling in a finance curriculum is still in its early stage of development.

Financial Modeling Using Excel and VBA
by Chandan Sengupta
Wiley, 2004, 657 pages
http://www.wiley.com

Sengupta is the only text that includes a formal introduction to modeling concepts and devotes an entire chapter to explaining how to build good spreadsheet models. Concepts of modeling are first presented in Chapter 1 and expounded in Chapter 5. Of these texts, Sengupta contains the most Excel “tips” and its discussions of Excel features and functions in Chapters 2, 3, and 4 of Part I contain useful details seldom covered in introductory computer classes. Students need to possess a good working knowledge of Excel in order to follow the examples and discussions. Part II is the main part of the text for an undergraduate course. The chapters cover the following finance topics: financial statements forecasting, time value of money, financial planning, analyzing market history, bond pricing and duration, simulating stock prices, and option pricing. Each chapter begins with a review of the relevant financial theories followed by a number of examples. Each example contains a description of the problem, modeling strategy, step-by-step guide to building and testing the model, uses of the model, and limitations. These examples are the gems of the book. They are well-designed, rigorous, and great learning tools. The reviews of financial theories are very succinct and assume students have already mastered the underlying theories.

Sengupta comes with a CD-ROM containing all the completed models, a VBA quick reference, and a selected list of Excel and VBA functions. The book itself comes in e-book format. The author designed this book for “self-study, classroom use, and reference,” and the style has more resemblance to a computer reference book than a finance textbook. The writing assumes a conversational manner, which is a friendly change from standard textbook language, but can be long-winded at times. The weakness of Sengupta is that there are no instructional support materials. Instructors will need to develop assessment tools independently since the CD-ROM provides all the models already completed. Excel and modeling are the strength of the Sengupta book, and the modeling and Excel concepts discussed are typically not covered in other finance and computer classes. This book is best suited for students who have a solid understanding of basic finance theories and a good working knowledge of Excel.

Excel Modeling in the Fundamentals of Corporate Finance (2nd ed.)
by Craig W. Holden
Prentice Hall, 2004
http://www.prenticehall.com/

Excel Modeling in the Fundamentals of Investments (2nd ed.)
by Craig W. Holden
Prentice Hall, 2004, 135 pages
http://www.prenticehall.com/
tions for building the Excel model. There are many what-if questions, and by answering these questions students experience the analytical power of a well-designed model. At the end of each chapter are skill-building problems. Students use the models from the chapter to answer these problems. These skill-building problems and what-if questions provide a self-check for students because errors in their models will result in incorrect answers. The live in-class problems are great teaching tools. Instructors can download partially completed models from the publisher’s Web site and complete the models in class as demonstrations or have students complete the models in class. The partially completed models save valuable class time and allow students and instructors to move directly to the challenging parts of the models. Some chapters contain skill-extending problems, which require changes or additions to the models in the chapter.

Of these texts, the Holden books provide the broadest coverage of finance concepts. It is unlikely and not recommended to include all 25 chapters in a one-semester course. Some topics such as option pricing, bond convexity, and futures parity, are often considered advanced and may be excluded. The step-by-step instructions for creating the models are clear and easy to follow. The weakness of the Holden books is inadequate discussion of modeling concepts. For example, the models use “inputs,” “choice variables,” and “output variables,” but there is no discussion of how to classify variables into these respective categories. Some instructors may be surprised to find no discussion of finance theories in the Holden books. In the author’s experience, this omission is not a negative factor when an introductory finance course is a pre-requisite for the Financial Modeling course. It is also the only book that covers financial statement analysis, cash budget, financial forecasting, break-even and leverage analysis, time-value-of-money, stock and bond valuation, cost of capital, capital budgeting, risk, and diversification. Each chapter begins with a list of learning objectives, followed by detailed discussions of finance theories, including all relevant formulas along with numerical examples. An Excel problem is presented after each key finance concept, along with instructions including key formulas, for creating the model. Advanced Excel functions/commands and some modeling concepts are introduced as part of the instructions. The conclusion contains a list of new Excel functions and commands presented within each chapter. Mayes and Shank is the only book reviewed that includes end-of-chapter problems, which are quite complex and require students to build the models from scratch.

Compared to Sengupta and Holden, the writing style and layout of Mayes and Shank most resembles a typical textbook and contains the most in-depth discussion of finance theories, similar to an introductory level finance textbook. On the other hand, these materials may be redundant if an introductory finance course is a pre-requisite for the Financial Modeling course. It is also the only book that covers financial statement analysis and cash budget. Given that Mayes and Shank is in its third edition, it is perhaps not surprising that it has good instructional support materials. The instructor’s resource CD-ROM contains additional Excel problems and solutions to all problems in the textbook. It also contains add-in programs that perform complex calculations, such as 2-stage stock valuation models and

**Financial Analysis with Excel** by Mayes and Shank was the first textbook on Financial Modeling and is currently in its third edition. The book contains 11 chapters, which fit easily into a one-semester course with potential time for term projects or presentations. The first chapter introduces basic Excel functionalities, which are typically covered in an introductory computer class, and students can review on their own if needed. The remaining chapters cover the following finance topics: financial statement analysis, cash budget, financial forecasting, break-even and leverage analysis, time-value-of-money, stock and bond valuation, cost of capital, capital budgeting, risk, and diversification. Each chapter begins with a list of learning objectives, followed by detailed discussions of finance theories, including all relevant formulas along with numerical examples. An Excel problem is presented after each key finance concept, along with instructions including key formulas, for creating the model. Advanced Excel functions/commands and some modeling concepts are introduced as part of the instructions. The conclusion contains a list of new Excel functions and commands presented within each chapter. Mayes and Shank is the only book reviewed that includes end-of-chapter problems, which are quite complex and require students to build the models from scratch.

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**DSINFO**

DSINFO, a listproc maintained by the Decision Sciences Institute, broadcasts emails on news and announcements relating to DSI and the decision sciences community. The listproc can be used for announcing calls for papers and for updating news on meeting and other events. (We ask that you support the Institute by using the DSI Job Placement Service or online Marketplace to list job positions.)

DSINFO subscribers also receive notice from DSI when Decision Line articles and Decision Sciences abstracts are made available on the DSI website. Because this content is placed on the website prior to printing the hard-copy, the articles/abstracts are available on the Internet weeks before the publications arrive in the mail.

For more information on joining DSINFO or to subscribe, visit

http://mailbox.gsu.edu/mailman/listinfo/dsinfo
simulations. One of the features I like in Mayes and Shank is that an advanced Excel concept is used more than once and prior applications are specifically referenced. For example, Scenario Manager is used in three different chapters. Repeat exposure helps students solidify their mastery of the technique and understand when an Excel tool is applicable. Similar to Holden, Mayes and Shank is also deficient in formal discussions of modeling concepts. Instructions for creating the models are not laid out in a step-by-step manner because explanations of Excel functions and commands are embedded with instructions and formulas for creating the models. On one hand, this arrangement makes the instructions more difficult to follow. On the other hand, students have to discover each step, instead of simply going through a list of steps. The discovery process may help some students better understand the model they are creating, making it easier for them to create models on their own, which is the ultimate objective of the course.

Concluding Comments
The textbooks reviewed differ vastly in style and pedagogical approach, and each has unique merits and weaknesses. Sengupta resembles a computer reference book, whereas Mayes and Shank looks much like a fundamental finance textbook, and Holden is a vast collection of problems. Nevertheless, fundamental finance concepts such as time value of money, stock and bond valuation, capital budgeting, risk and return, and financial statement forecasting are covered in all of the books. A nice feature in all of these texts is a picture for each completed model, which is a great visual aid for students. Excel commands and functions that are pertinent to financial analysis, such as Scenario Manager, Solver, and Regression are also included in all of the texts. In addition, Sengupta and Mayes and Shank include models using simulations. In terms of Excel techniques, Sengupta is the most advanced. Both Holden and Mayes/Shank use mostly “plain vanilla” Excel. Sengupta is the only book that includes formal exposition on modeling theories and concepts. In terms of finance theories, Mayes and Shank provides the most detailed discussions, while Sengupta provides only concise reviews, and the subject is absent in Holden. Both Sengupta and Holden will work well in a Financial Modeling course that requires an introductory finance course as prerequisites. Mayes and Shank is most suitable if students have no prior knowledge of finance. Alternatively, Holden will also work for these students if supplemented by an introductory finance textbook. In terms of pedagogy, Sengupta and Holden provide clear step-by-step instructions for creating the models. Mayes and Shank requires more effort from students. In terms of instructional support, Mayes/Shank and Holden offer more resources than Sengupta. It is exciting to see new textbooks for Financial Modeling being developed. I applaud the authors for their efforts and success. The diversity of the texts reviewed here mirrors the variety of roles a Financial Modeling course may take in the curriculum.

Errata
The print version of the last Bookshelf column, “Boomer Decisions” (v35, n4, July 2004), shows an incorrect date for a change in the taxation of Social Security benefits that was made during the Clinton Administration. The incorrect date of 1991 is in the last paragraph of page 19. The correct date is 1993. The change provides that you may need to shift $850 of Social Security income to the taxable column of your tax return for each $1000 in taxable income that you take from your pension plan. The online version of Decision Line has been corrected.


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DEANS’ PERSPECTIVE, from page 22

in me and for those who have given so uncommonly of themselves.

In Arkansas, we often remind students that we drink from wells we did not dig, live in houses that we did not build, and are warmed by fires we did not start. Every dean needs to recognize that others laid the foundation for any success he or she may enjoy.

References


Robert J. Mockler, St. John’s University, is co-author (with Marc E. Gartenfeld and Leor Sillman) of Cases in Multinational Strategic Management: Latin American Companies, which was published by Strategic Management Research Group in September 2004. The book is used to supplement cases in Mockler’s strategic management texts. The cases were developed at St. John’s University’s Center for Case Study Development at its New York and Rome MBA campuses. Many of its cases have received international awards and been published in other authors’ textbooks. Also, in May 2004, Mockler presented “How the Treatment of Business Subjects in Drama Provides Lessons Useful in Business Management Training,” at the 28th Annual Comparative Drama Conference in Columbus, Ohio.

mockler@stjohns.edu

Lawrence Schkade, Regents Garrett Professor Emeritus at the University of Texas at Arlington, recently received the 2004 Distinguished Research Publication Award from the College of Business Administration. His winning article, “Estimating the Number of Potential Organ Donors in the United States,” appeared in the New England Journal of Medicine (August 14, 2003). In the article, Schkade and his co-authors studied the size and composition of the national pool of brain-dead organ donors during a three-year period and, on the basis of these data, considered ways to increase the rate of donation.

schkade01@comcast.net

George Summers (University of Arizona, retired), who served the Decision Sciences Institute as its second president, passed away on June 6, 2004, due to complications from leukemia.

“When I think of him, I recall his easy smile and the sparkle in his eyes,” says Lawrence Schkade, who served as president from 1976 to 1977.

“George was a founding father of DSI, who help to craft the philosophy of DSI, and he exemplified the ideals of the Institute in his professional life,” writes Schkade. “In part, it was his genial manner, academic stature, and commitment to quality teaching that inspired me early on to become more involved in the Institute. Later, it was my great pleasure to participate in awarding the certificate that named him a Fellow of DSI. George was among the first group of distinguished members to named DSI Fellows. I know that many thousands of students, colleagues and readers of his works have benefited from his many substantial academic contributions and leadership throughout his career. I think of the expression, ‘Well done, good and faithful servant,’ as a fitting epitaph for his life.”

In addition to serving DSI as president (1971-1972), George also served as program chair (1970), council member (1969-1970, 1974-1975), president of Alpha Iota Delta (1975-76), and was named a Fellow in 1977.

Condolences may be sent to Susan Summers (George’s daughter) at 9162 Lost Trail Drive, Tucson, AZ, 85715.

Carol Latta, Feature Editor
Executive Director
Decision Sciences Institute
clatta@gsu.edu

In 2005, the Decision Sciences Institute will be using a new in-house conference management system developed and maintained by Andrea Williams, so this will be the last year DSI will use Scott Sampson’s program. It was a great system to use, and Scott was wonderful to work with. The lessons learned are invaluable. We all appreciate you, Scott, and the contribution you have made to the Institute.

References
email communication, Tue, 3 Aug 2004 23:44:27 UT.
2004 Program Chair’s Message
Kenneth E. Kendall, Rutgers University

A heartfelt thanks to all of the DSI authors and session facilitators for your overwhelmingly positive messages about this year’s DSI Meeting to be held in Boston, November 20-23. Many of you expressed your appreciation that the preliminary program was online on July 3 so you could find inexpensive airfares this year. Your cooperation made it possible.

Here’s some information about this year’s meeting.

Program Schedule Overview
This year’s Annual Meeting is bound to be a success. Since this year’s meeting will have considerably more sessions than the last few years, we’ll begin at 8:00 a.m. Saturday morning and continue until 4:30 p.m. on Tuesday. In addition to the 1000+ regular paper presentations, there are numerous invited sessions and other special high-profile sessions including 45 workshops, 12 tutorials, 50 panels, and 25 symposia and colloquia.

The program also includes a Curriculum Issues Miniconference, a Doctoral Student Consortium, a New Faculty Development Program, and a Technology in the Classroom Miniconference. Professional Development sessions will occur throughout the conference. You won’t want to miss the official DSI Fellows session “Operations Management History for Dummies: Some Key Developments in the Evolution of the Field.”

Our first keynote speaker, Cormac O’Reilly, has been the CIO for Digital and CTO Wang Global. Cormac will speak to DSI about resetting corporate IT on Sunday at 10:00 a.m.

Our second keynote speaker, Ron Swift, the VP of Strategic Customer Relationships for Teradata, will explain “How World-Class Companies Use Customer Knowledge and Analytic Business Intelligence for Increasing Profitability” on Monday at 10:00 a.m.

Our final keynoter is James Womack, the co-author of two well-known and influential books: The Machine that Changed the World: The Story of Lean Production, and Lean Thinking: Banish Waste and Create Wealth in Your Corporation. Jim will be speaking on Monday at 3:00 p.m.

Social Events
The Welcome Reception will still be held on Saturday evening, even though there will be 26 parallel sessions and meetings all day long. The Welcome Reception is one of the events that allow you an opportunity to network with colleagues old and new early in the Annual Meeting. Another social event everyone looks forward to is the networking lunch on Sunday.

The President’s Reception will be held Monday evening, followed immediately by entertainment provided by Improv Asylum, voted “Best Comedy Club in Boston.” Their critically acclaimed performances develop comedic scenes on the spot. Every show is different, since the cast creates each show through audience input and suggestions.

There will be great anticipation and some suspense on Tuesday when, during the President’s Luncheon, the winners of the Instructional Award Competition and the Best Case Studies Award are announced. (The Instructional Award Competition is scheduled for Sunday from 10:00 a.m. until noon and the Best Case Studies Award is scheduled on Monday from 10:00 a.m. until noon.) The 2004 Elwood S. Buffa Doctoral Dissertation Award will also be presented at the luncheon.

Three awards will also be given for the Best Application Paper, the Best Theoretical/Empirical Paper, and the Best Interdisciplinary Paper. For the first time in DSI history, awards will also be given for the distinguished paper in each track.

There will be an extensive area reserved for exhibitors from publishing and software companies, and the excellent placement system will be available throughout the conference.

For more detailed information about all of these events, you can check the conference Web site at: http://www.bus.ucf.edu/dsi2004/index.html

A Major Sponsor
In addition to the generosity of numerous program sponsors, this year, for the third time, we also obtained the support of the SAP University Alliances and Innovation Institute. With SAP’s generous contribution to this year’s meeting, we again have LCD projectors available in every presentation room throughout the conference. As a result, presenters do not need to make prior reservations for the equipment. All you need to do is to bring your laptop, plug it in, and you are ready to go.

Thanks to All of You
I want to thank all of the individuals who wrote and will present their research papers; who created and will present the workshops and panels; who have served as paper reviewers and who will serve as session facilitators at the Annual Meeting. In the end it is your efforts and contributions that determine the quality of the meeting.
Scott Sampson has once again done a great job in serving as program scheduling coordinator. This will be Scott’s last year in this capacity, so please join me in a round of applause for Scott. Christine Rouny, Scott’s able assistant, has also worked tirelessly to assist many Annual Meeting participants and to make sure that the schedule is accurate.

Some of you have already taken the opportunity to thank Julie E. Kendall for editing the Proceedings. Julie has worked late into the early morning hours, examining each of the refereed papers you submitted, so that this year’s Proceedings would be consistent and accurate in appearance. Julie also served as coordinator for the Best Paper Awards. The judges were a committee of 20 DSI Fellows.

The track chairs we had for this year’s meeting really came through. Some of them are experienced (including DSI Fellows and DSI past presidents), while others are relatively junior faculty who are destined for success in their respective fields. All are my friends. They are the greatest.

Associate Program Chair Sameer Verma helped solve many problems when I was out of the country and Mihir A. Parikh, our Web site coordinator, has helped promote the meeting electronically. Hal Jacobs helped immensely by coordinating the information for Decision Line and for preparing the final program. I also want to thank Past President Barbara Flynn for appointing me to my position as annual meeting program chair.

Most of all I want to thank the home office staff, especially Executive Director Carol Latta, without whose help there wouldn’t be an annual meeting.

See You in Boston

Please plan on joining friends and colleagues at the 2004 Annual Meeting of the Decision Sciences Institute at the Marriott Copley Place. With more than 400 sessions addressing a wide variety of topics in virtually every business discipline, it will be both an exciting and educational experience. We’ll make sure you have some fun there, too!

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2004 DSI Best Paper Awards

Co-sponsored by CUBICORP (www.cubicorp.com), Ft. Lauderdale, Fla.

The results of the Best Paper Awards are now final. A special committee made up of our Proceedings Coordinator, Julie Kendall, and no less than 20 DSI Fellows chose the following papers to receive the awards. Congratulations to the winners and thanks to the high-powered committee.

**Best Theoretical/Empirical Paper**

The Influence of Intellectual Capital on the Types of Innovative Capabilities

Mohan Subramaniam, Boston College
Mark A Youndt, Skidmore College

Small Business View of the Baldridge Criteria for Performance Excellence

Paul Stephens, Bradley University
James R. Evans, University of Cincinnati
Charles H. Matthews, University of Cincinnati

**Best Application Paper**

Best Paper Awards Committee

Charles P. Bonini
Norman L. Chervany
K. Roscoe Davis
Lester A. Digman
James R. Evans
Ira Horowitz
F. Robert Jacobs
Kenneth E. Kendall
Basheer M. Khumawala
Lee J. Krajewski

Vincent A. Mabert
Robert E. Markland
Herbert Moskowitz
Paul C. Nutt
William C. Perkins
Marion G. Sobol
Linda G. Sprague
Marvin D. Troutt
Urban Wemmerlöv
Robert W. Zmud

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2004 Annual Meeting Coordinators

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2004 Competitions
For a listing of past DSI award winners, see www.decisionsciences.org/hallfame.htm.

Best Paper Awards Competition
Best Paper Awards will be presented at the 2004 Annual Meeting. Categories include Best Theoretical/Empirical Research Paper, Best Application Paper, Best Interdisciplinary Paper. In addition, this year for the first time, there will be a Distinguished Paper Award for outstanding papers within each track. Reviewers will be asked to nominate competitive paper submissions for these awards. Nominations will then be reviewed by a best paper review committee, which will make award recommendations.

Elwood S. Buffa Doctoral Dissertation Award Competition
The purpose of the Doctoral Dissertation Award Competition is to encourage and publicize outstanding dissertation research by selecting and recognizing the best dissertations written in the past year in the decision sciences. The Elwood S. Buffa Dissertation Award, accompanied by a $1,500 stipend, will be presented at the annual meeting. Applicants for this award should submit three (3) hardcopies of their dissertation in the required format directly to the Doctoral Dissertation Award Competition Coordinator by April 1, 2004. For more information concerning this competition, please contact the coordinator.

Marc J. Schniederjans
University of Nebraska-Lincoln
mschniederjans1@unl.edu

Instructional Innovation Award Competition
The Instructional Innovation Award Competition seeks to recognize outstanding contributions that advance instructional approaches within the decision sciences. The focus of this award is innovation in college- or university-level teaching. Three finalists will be chosen to make presentations at the conference competition. The winning entry receives an award of $1,500 and $750 will be divided among each of the other finalists. Applicants are required to submit all contributions electronically using instructions on the conference Web sites. The due date for submissions was April 8, 2004. For more information concerning this competition, please contact the coordinator.

Karen E. Papke-Shields
Salisbury University
kepapke-shields@salisbury.edu

2004 Professional Activities

Curricular Issues Miniconference
Is your curriculum getting stale? Have you struggled unsuccessfully with program restructuring? Would you like an opportunity to benchmark world-class curricula? If so, the Curricular Issues Miniconference may be just what you need. This year’s conference will provide a forum for exchanging ideas and discussing curricular challenges and opportunities in degree-granting business education. Separate tracks will explore issues of interest to those who design, run, and contribute to programs at the undergraduate, MBA, and Ph.D. levels.

Barbara A. Price
Georgia Southern University
baprice@GaSoU.edu

Doctoral Student Consortium
The Doctoral Student Consortium provides a unique opportunity for doctoral students from across the nation and around the world to interact with one another and with distinguished scholars in a one-day program devoted to career development. Attendance at this consortium is by invitation based on application. All students who meet the criteria will be accepted.

Robert J. Mockler
St. John’s University
mockler@stjohns.edu
and
Dorothy G. Dologite
Baruch University
Dorothy_Dologite@baruch.cuny.edu

New Faculty Development Consortium
The New Faculty Development Consortium deals with research, teaching, publishing, and other professional development issues for faculty who are beginning their academic careers. Attendance at this consortium is by application and is open to faculty members who have Ph.D. degree and are in the first two years of their teaching career.

Nancy C. Weida
Bucknell University
nweida@bucknell.edu
and
Christine T. Kydd
University of Delaware
kyddc@lerner.udel.edu

See Professional Activities, page 38
New Faculty Development Consortium

The New Faculty Development Consortium will last a full day on Saturday, November 20, 2004. It will include interactive and panel sessions, along with networking among peers and more experienced colleagues. The content of the sessions offered is designed to provide insight into the challenges and opportunities in today’s rapidly changing academic and business environments. Topics include publishing strategies, obtaining grants, improving teaching, balance, service, and tenure policies.

Faculty in all business disciplines who have finished their doctorate and are in the first three years of their post-doctoral teaching career are encouraged to participate. Participation is limited to the first 50 qualified applicants. Applications are due October 22, 2004.

More information and the application can be found at the annual meeting Web site (http://www.bus.ucf.edu/dsi2004/) or by contacting one of the coordinators.

Each participant will be expected to register for the Institute’s 2004 Annual Meeting in Boston. No additional fees are charged for the consortium. 

Direct all inquiries and applications to either coordinator:

Nancy C. Weida
Department of Management
Bucknell University
Lewisburg, PA 17837
Phone: 570-577-1399 or 570-577-1337
Fax: 570-577-1338
nweida@bucknell.edu

or

Christine T. Kydd
Dept of Business Administration
223 MBNA America Hall
University of Delaware
Newark, DE 19716
Phone: 302-831-1783/Fax: 302-831-4196
kyddc@lerner.udel.edu

Application for
New Faculty Development Consortium
November 20, 2004 • Boston, Massachusetts

Send in this form and a current copy of your vita to either one of the consortium coordinators (see above) by October 22, 2004.

Name: ____________________________

Teaching interests: ____________________________

Current institution and year of appointment: ____________________________

Major concerns as a new faculty member:

Mailing address: ____________________________

__________________________________________

Year doctorate earned: ____________________________

Phone: ____________________________

Have you attended a previous DSI Doctoral Student Consortium?

Fax: ____________________________

_____ yes _____ no

E-mail: ____________________________

If so, when? ____________________________

Research interests: ____________________________

Decision Line, October 2004
Professional and Faculty Development Program

The Professional and Faculty Development Program, coordinated by Soumen Ghosh (Georgia Tech) in consultation with the Institute’s Professional Development Program Director Robert E. Markland (University of South Carolina), is for the Institute’s members in all stages of their careers, with the goal of keeping them current in their fields. The content of the sessions offered is designed to provide insight into the challenges and opportunities in today’s rapidly changing environment. Topics include, but are not constrained to, the following:

- New instructional and research methodologies
- Professional service and counseling
- Balancing the needs of different stakeholders (students, corporations, alumni, etc.) in the educational process
- Globalization of business education
- Role of grading and assessment
- Obtaining research funding
- Career path strategies
- Meeting increasing demands in teaching, service, and research
- Challenge and opportunities of new technologies.

In addition, the program will include a series of sessions related to research, teaching, publishing, and other professional development issues for faculty who are beginning their academic careers. Deadline for proposals for workshops, tutorials, and other special sessions was May 1, 2004.

Soumen Ghosh
Georgia Institute of Technology
sgosh@pop.mgt.gatech.edu

Technology in the Classroom Miniconference

The Technology in the Classroom Miniconference provides a forum for participants to share novel or innovative applications of technology in the classroom that enhance the student’s learning experience. Submissions should be limited to creative approaches and best practices for using course support software, multimedia, spreadsheet software, simulation software, online tutorials, or other applications of technology, and be capable of being demonstrated and discussed within a 20-30 minute timeframe.

Submissions will be competitively reviewed and selected for their creativity, novelty, and contribution to pedagogy, and should not be duplications of material found in existing textbooks. Submission (following the “Instruction for Electronic Submissions”) were due by May 1, 2004.

Tom L. Roberts
University of Kansas
troberts@ku.edu

Cormac O’Reilly Gives Conference Keynote Address on Sunday, Nov. 21, at 10:00 a.m.

Our first keynote speaker, Cormac O’Reilly, is no stranger to change, having worked in a number of key IT positions over the last 20 years, most recently helping organizations to effectively reset their IT agendas and delivery mechanisms. Moving between business management and providing IT services, he experienced first hand the frustration of the management teams he often advises. And demonstrated that IT has forever changed. Cormac, a Fellow of the British Computer Society, was awarded an Industrial Fellowship at Kingston University. Here is a brief glimpse of his DSI presentation.

“When our personal computers don’t do what we think they should, most of us hit the reset button, albeit a last resort. An impatient few of us pull the power to achieve the same effect, arguing that action is better than inaction. We have learned intolerance of frustrating technology, and our self-confidence is high.

“Resetting corporate IT is now in my opinion, a key priority. Especially as many historic IT investments (like ERP) are starting to work against new (like supply chain) business imperatives. And with 20+ years of using IT and wide standardization, increasingly individuals and teams within the businesses are quite capable of managing their own IT affairs.

“Especially as, over the past five years common and sensible IT management blueprints have emerged that take advantage of IT commoditization, address historic IT productivity leakage and lay the common foundations for companies to electronically work together. Combined, these sound the death knell for traditional IT values, organizations and practices.

“In this address I will explain the pressure to reset IT in more detail, and identify new options for corporate IT, and key priorities for change—all highly sensitive IT management issues.”
Doctoral Student Consortium
Creating successful career paths for students
All PhD candidates are encouraged to participate!

DSI’s 22nd annual Doctoral Student Consortium will provide participants with an engaging, interactive professional experience that is designed to get them off to a strong start in their careers. We are pleased to have the sponsorship of McGraw Hill/Irwin, Baruch College (CUNY), Beta Gamma Sigma, and St. John’s University for this important event. The Consortium will take place on Saturday, November 20, 2004, at the 2004 DSI Annual Meeting in Boston, Massachusetts.

Who Should Attend?
The Doctoral Consortium is offered to individuals who are well into their doctoral studies. Because of DSI’s interdisciplinary constituency, the Consortium welcomes students from all subject areas within the decision sciences—operations management, management information systems, management science, strategy, organizational behavior, marketing, accounting, and other areas. The program will focus on career goals, job search issues, placement services, research strategies, teaching effectiveness, manuscript reviewing, and promotion and tenure.

Program Content
The Doctoral Student Consortium involves seasoned, world-class research faculty from several schools, junior faculty just beginning their careers, and key journal editors. All will help guide student discussions in the following sessions.

Teaching Effectiveness. Harvey Brightman hopes to return to the Doctoral Consortium for another post-retirement workshop in 2004. His sessions are simply not to be missed—even experienced faculty members will sit in on this session to learn at the feet of the master. If Harvey’s schedule does not allow him to be with us, participants can be assured that we will find a high-caliber substitute.

Research Strategy Workshop. This unique hands-on workshop provides students with the help of tenured faculty mentors in developing a strategic research plan. This plan will help students move from their dissertation into a research program that will see them through tenure. Working in a small breakout group, each student will receive a mentor’s help in identifying their areas of expertise, targeting appropriate journals, finding suitable co-authors, and planning a mix of publications.

Meet the Editors and Academic Reviewing. Editors from journals in the decision sciences and related fields will give overviews of the missions of their publications. In addition they will discuss what components make for strong manuscript submissions, how to improve your chances of getting a journal article accepted, and how to respond to reviews.

Job Search Seminar. Should I target my job search on “research” schools? Teaching schools? Private? Public? What’s the best way to sell myself? What are the ingredients of a good job interview? This session will help students to answer these questions through insights drawn from a panel of faculty experts.

Join Us
The Doctoral Consortium does more than prepare individual students—it creates a community of colleagues who you will know throughout your entire career. Please plan to attend the Consortium and also encourage students you know to participate in this important program.

Application Process
Students in all areas of the decision sciences are encouraged to apply for the DSI Doctoral Consortium. Those wishing to be included should submit:
1. A current curriculum vita, including contact information (e-mail in particular), your major field (operations management, MIS, management science, strategy, and so on), the title of your dissertation proposal or the title of a current research paper.
2. A letter of recommendation from your dean, doctoral program director, department chair, or dissertation chair. The letter should attest to the applicant’s qualifications and good progress in the doctoral program.

Interested students are encouraged to apply early if they wish to ensure themselves space in the Consortium. Materials should be sent to Dorothy Dologite, Doctoral Consortium Co-Coordinator.

DOCTORAL CONSORTIUM, see page 38

Decision Line, October 2004 39
Instructional Innovation Award Competition Finalists Announced

Three finalists (in the order of presentations, based on paper number) have been chosen for this year’s Instructional Innovation Award competition. From a total of 15 submissions, the list was narrowed to six after the first round of reviews. The finalists’ presentations will be held at the 2004 DSI Annual Meeting on Sunday, November 21, from 10:00 a.m. - 12:00 p.m.

The marketing carnival
 Sethna Beheruz, State University of West Georgia

Abstract: Student teams set up booths representing new product concepts. Respondents go to each booth and play games of skill or chance. In that way, they knowingly reveal information about their preferences. Statistical analysis is performed on the data, and oral and written reports are presented to the class and client.

Educational automation: Creating case study challenges for large enrollment classes
 Natalie Simpson, University at Buffalo

Abstract: Presented are two case studies designed specifically for assignment to hundreds of undergraduate students simultaneously. Completed by more than 2,000 students, use of these assignments is associated with a significant increase in both student opinion of the usefulness of assignments and overall opinion of learning in a very large class.

Six sigma: An animated computer simulation, case-based, active and self-learning team approach for improving and optimizing processes
 Herbert Moskowitz and Steven Shade, Purdue University

Abstract: We have developed a simulation- and case-based, active- and self-learning model for understanding and applying Six Sigma principles and tools for improving and optimizing processes. The model components include company-specific case studies, a computer animated simulation, database and analysis tools, and supporting reading and reference materials.

2004 Track Chairs

Accounting: Theory, Applications and Practice
 Cynthia Jackson, Northeastern University
c.jackson@nunet.neu.edu
 Cynthia Jackson, Northeastern University, USA
c.jackson@neu.edu

Case Studies
 Michael McGrath, Victoria University, Australia
 Michael.McGrath@vu.edu.au

DSS/AI/Expert Systems
 André M. Everett, University of Otago, New Zealand
 aeverett@business.otago.ac.nz
 James Teng, University of Texas at Arlington jtteng@uta.edu

Ecommerce
 Vijay Sugumaran, Oakland University
 sugumara@oakland.edu

Emerging Information Technologies
 Pamela E. Carter, University of Oklahoma
 pcarter@ou.edu

Finance/Financial Management
 Gemma M. Welsch, DePaul University
 gwelsch@condor.depaul.edu

Information Systems
 Sue Brown, Indiana University
 suebrown@indiana.edu
 Fay Cobb Payton, North Carolina State University
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Innovative Education
 Peter R. Newsted, Athabasca University
 peter@athabascau.ca

International Business
 Krishna S. Dhir, Berry College
 kdhir@campbell.berry.edu

Manufacturing Management
 Steven A. Melnyk, Michigan State University
 melnyk@msu.edu
 David Denzler, San Jose State University
 denzler@clubpom.com

Marketing: Theory, Models and Applications
 James M. Clapper, Pacific Lutheran University
 clapperj@plu.edu
 Lisa Spiller, Christopher Newport University, USA
 lspiller@cnu.edu

MS/OR: Techniques, Models and Applications
 Miles G. Nicholls, Swinburne University of Technology
 mnicollisswin.edu.au

Organizational Behavior/Organizational Theory
 B. Thomas Mayes, California State University, Fullerton
 mayes@fullerton.edu

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 Roger G. Schroeder, University of Minnesota-Twin Cities
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Service Management
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Statistics and Decision Analysis
 Robert L. Andrews, Virginia Commonwealth University
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Strategy and Policy
 Shaker A. Zahra, Babson College
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Supply Chain Management
 Aryya Gangopadhyay, University of Maryland - Baltimore County
 gangopad@umbc.edu
24th Annual Workshop for New Case Writers: The Art of Case Writing

The Case Studies Workshop serves an active role in the dissemination of new ideas with respect to case studies topics. The Best Case Studies Award (see below) will be presented in conjunction with the 30th annual DSI Case Studies Workshop on “Case Techniques in the Decision Sciences.”

Time: Sunday, Nov. 21, 8:00-9:30am

CS-1: Workshop for New Case Writers: The Art of Case-Writing
Session Chair: Jeffrey S. Harper (Indiana State University)
Presenters: Margaret J. Naumes (University of New Hampshire), William Naumes (University of New Hampshire)

Abstract: The 24th annual workshop’s subject will be the process of case writing. Discussion will cover the process of identifying potential case subjects, the development of teaching objectives to be achieved through the case writing process, how to gain access to information as well as how to organize the material needed to complete the case, and the preparation of an effective instructor’s note to accompany the case.

Time: Sunday, Nov. 21, 10:00-11:30am

CS-2: Human Resource Management
Session Chair: John Davies (Victoria University of Wellington)

Case Competition Award Finalists

Three finalists cases for the DSI 2004 Case Studies Award Competition have been determined. Authors of these cases will make pedagogical presentation to a panel of judges on Monday, Nov. 22, from 10:00 a.m. - 11:30 a.m. Finalist cases, authors, and their affiliations are listed below.

Session Chair: Powell Robinson (Texas A&M University)

Why Giants Change Their Minds?
Bin Jiang, DePaul University

Integrated supply chain management is becoming recognized as a core competitive strategy. As organizations continuously seek to provide their products and services to customers faster, cheaper, and better than their competitors, managers have come to realize that they cannot do it alone; rather, they must work on a cooperative basis along an optimized supply chain in order to succeed.

Electrosteel Castings Limited
Robert Klassen, University of Western Ontario

As India’s largest manufacturer of iron pipe, Electrosteel was under increasing competitive pressure as domestic demand slowed, tariffs fell and new competitors entered. The CEO believed that international expansion was critical to the firm’s future growth and investment in new technology. After extensive study, management had narrowed the options to Europe or Southeast Asia. Given limited resources, only one market could be entered, either with a new marketing office or manufacturing plant.

Lean Implementation and Supply Chain Development at Oak Hills
John K. Visich, Bryant College, and Angela M. Wicks, Bryant College

A project team of students has been assigned the task of assisting the Oak Hills manufacturing facility improve production operations. Due to industry conditions, the facility is under pressure from headquarters to reduce cost. Management has decided the best way to accomplish this is to implement lean manufacturing and to coordinate lean efforts with supply chain partners. The team must consider the feasibility of implementing a lean system and how the company should develop its supply chain.
Edification: A New Philosophy for Case and Field Studies
Authors/Presenters: Chen H. Chung (University of Kentucky)
Abstract: Most of the existing case and field studies have emphasized too much on theorizing and the so-called “scientific rigor.” We suggest an “edification” philosophy which aims at enhancing understanding by continuing redescriptions of cases and continuing conversations with practitioners. Such a philosophy makes case and field studies more valuable for research and education.

On The Use of Self Organizing Maps: Market Analysis of a Newly Launched Product
Authors/Presenters: Illya Mowerman (University of Rhode Island)
Abstract: This paper is a case study of a newly launched ethical drug where the use of self organizing maps is utilized to detect where potential problems may lie. As is the search for unthought-of relationships a part of data mining, this research demonstrates how self organizing maps can be executed to find those relationships.

Case and Teaching Note: Northern State College
Authors/Presenters: T.J. Wharton (Oakland University), Jean M. Wharton (Oakland University)
Abstract: Students are introduced to the concept of the Cost of Quality. They will learn to identify the costs of quality and general TQM issues as they relate to the School of Management at Northern State College. The case provides financial and statistical data that can be analyzed to undertake a cost of quality study.

Structural Buildings, Ltd.
Authors/Presenters: Jeff E. Heyl (Lincoln University)
Abstract: Structural Buildings is a maker of kit set garages and homes. They are experiencing capacity problems and changes to the production process and layout are likely candidates to improve the situation. Data is provided to drive an analysis of the layout and recommend process improvements.

Two into One: A Case Study on the Impact of a Company Merger on IT Management
Authors/Presenters: Patricia Y Logan (Marshall University), Allen Clarkson (Marshall University)
Abstract: Company mergers present a unique challenge to information technology departments. CIOs are required to assess the tasks necessary to implement the organizational integration as well as to meet the business goals of the merger. This is a case study involving a typical company merger that requires students to articulate a technical solution based on the circumstances of vastly disparate infrastructures.

Enterprise Resource Planning and Activity Based Costing in a Local Government Setting: The El Paso, Texas Case
Authors/Presenters: Adriano O. Solis (The University of Texas at El Paso), Karl B. Putnam (The University of Texas at El Paso), David Almonte (The City of El Paso), Leopoldo L. Gemoets (University of Texas at El Paso)
Abstract: This study assesses opportunities and benefits presented by ERP in terms of leveraging technology to improve the business of government in the City of El Paso, specifically with respect to activity based costing (ABC) within its ERP system. ABC and ERP, in tandem, can provide reasonably accurate and useful government services cost information for planning and decision making. ABC analyses—e.g., for Fire Medical Services and Animal Control—have been undertaken, and some ABC data are revealed.

2004 Elwood S. Buffa Doctoral Dissertation Competition

The DSI Doctoral Dissertation Award Competition is named in honor of Professor Elwood S. Buffa, UCLA, for his many contributions to the decision sciences. The purpose of the competition is to identify and recognize outstanding doctoral research in the development of theory or applications of the decision sciences completed during 2003.

WINNER
Anand Nair, Auburn University

Factors Influencing the Adoption of Electronic Business in the Purchasing Activities within a Business Organization Using an Extended Technology Acceptance Model
Advisor: Ram Narasimhan, Michigan State University

HONORABLE MENTION
Kenneth J. Sousa, Bryant College

Dissertation Reviewers
Prabir Bagchi, The George Washington University
Eyoung B. Kim, University of Massachusetts at Hartford
Salvatore T. March, Vanderbilt University
William C. Perkins, Indiana University
Aarkalug Rampsasad, University of Illinois at Chicago
Cheryl L. Speier, Michigan State University
Shawnnee K. Vickery, Michigan State University

2004 DSI Annual Meeting
Time: Sunday, Nov. 21, 1:00-2:30pm

CS-3: Research Methods
Session Chair: Jeffrey S. Harper (Indiana State University)

Edification: A New Philosophy for Case and Field Studies
Authors/Presenters: Chen H. Chung (University of Kentucky)

On The Use of Self Organizing Maps: Market Analysis of a Newly Launched Product
Authors/Presenters: Illya Mowerman (University of Rhode Island)

Case and Teaching Note: Northern State College
Authors/Presenters: T.J. Wharton (Oakland University), Jean M. Wharton (Oakland University)

Structural Buildings, Ltd.
Authors/Presenters: Jeff E. Heyl (Lincoln University)

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during the conduct of a major recreational and charity event. The case describes the behaviour of various actors before, during and after criminal proceedings were filed against the event organiser. The case also allows for the examination of the value of risk management within the event industry; and of the nature of moral behaviour exhibited by different actors.

**Birth and Death of a Market: Lessons from NASDAQ-Japan**

Authors/Presenters: Mark M. Lennon
(University of Rhode Island)

Abstract: This paper explores the development and ultimate failure of a new Japanese stock market, NASDAQ-Japan, a joint venture between the American stock market NASDAQ and SoftBank Holdings, a Japanese high technology conglomerate founded by the flamboyant self-made Japanese billionaire, Son Masayoshi.

**Just Cork It**

Authors/Presenters: Thomas S. Atkin
(Sonoma State University), Duane Dove
(Sonoma State University)

Abstract: This case presents an intriguing product quality dilemma. Laura Kirk, the Brand Director at Pepi Winery had to resolve the issue of defective wine caused by cork taint, a widespread problem that ruins some 5% of all wine bottled. Screw caps prevent the taint but consumers react negatively to them.

**Outsourcing for Better Benefits**

Authors/Presenters: Joseph G. Ormsby
(Stephen F. Austin State University), William E. Pinney (Alcorn State University), Joyce M. Hoffman (Stephen F. Austin State University)

Abstract: Businesses in the United States have or are currently experiencing the financial strain of providing ever increasing health insurance for its employees. This problem is even more acute for the small business. This case concerns evaluating the economic benefits of outsourcing payroll of a small business in order to lower the cost of group health insurance.

Time: Monday, Nov. 22, 1:00-2:30pm

**CS-6: Strategic and Business Planning (II)**

Session Chair: Chen H. Chung (University of Kentucky)

**System Dynamics as a Decision Support Aid: A Comparison of Two Field Applications**

Authors/Presenters: Michael McGrath
(Victoria University, Australia), Elizabeth More (University of Canberra, ACT, Australia)

Abstract: Experiences with two field applications of system dynamics (SD) are detailed. While many of the benefits claimed by proponents of the paradigm were experienced, recommendations flowing from modelling exercises were not implemented in many cases. Moreover, simplistic prescriptions found in the SD literature (such as ensure key stakeholders are involved) were found to be impractical in various real-world situations.

**How to Improve Profitability and Stay Competitive Utilizing New Technology in Healthcare Environment**

Authors/Presenters: Mehmet C. Kocakulah
(University of Southern Indiana), Abbas Foroughi (University of Southern Indiana), Shawn McCoy (Deaconess Hospital)

Abstract: Through the use of management accounting, Crandon is able to determine the benefit of new technology. Identified in the analysis, the success or failure of an investment is based on assumptions about volume, price, and costs. If any of these assumptions are grossly inaccurate, the conclusions reached may be in error. This analysis also points out other factors to consider when determining benefit to an organization. Non-tangible benefits are an important component of decision making process.

**Data Mining For A Newly Launched Ethical Drug**

Authors/Presenters: Illya Mowerman
(University of Rhode Island), Paul M. Mangiameli (University of Rhode Island)

Abstract: This is a case study of a newly launched ethical drug where after six weeks from initial launch the forecasts were far below expected from a pre-launch forecast. This created great concern giving way to a data mining exercise in order to uncover the reasons why the goals were not being met. In studying the occurrences of the market through data mining techniques, marketing theories are confirmed and built upon concerning the importance of potential for targeting purposes.

**Outsourcing IT - A Study of a Software Developer**

Authors/Presenters: Ken Trimmer (Idaho State University), Dennis Krumwiede (Idaho State University)

Abstract: The creation of a joint venture between a client and software developer is presented. The case discusses a small business that was created with the intent of providing information technology services back to one of its founders. A brief set of teaching notes are included with the case.

Time: Monday, Nov. 22, 3:00-4:30pm

**CS-7: Workshop: Applebee’s International Inc.: The Full Service Casual Dinner House Industry**

Authors/Presenters: Greg Holmes (St. John’s University), Robert J. Mockler (St. John’s University), Marc E. Gartenfeld (St. John’s University), Mary Elizabeth Moran (St. John’s University,Tobin College of Business)

Abstract: Applebee’s International, Inc. and Weight Watchers International, Inc. entered into an industry first exclusive and comprehensive licensing agreement to offer healthy Applebee’s menu items bearing the weight watcher’s name. In light of this alliance, the main question to be resolved was how to differentiate Applebee’s from its competition and so achieve a winning edge over competitors within intensely competitive, rapidly changing, immediate, intermediate, and long-term time frames.

**2004 DSI Annual Meeting Website Links**

Online Conference Registration: https://www.decisionsciences.org/annualmeeting/

Online Hotel Reservations: http://www.marriotthotels.com

For more information & links on the annual meeting: www.bus.ucf.edu/dsi2004/

CPE Credit Available at the 2004 Annual Meeting of the Decision Sciences Institute

Continuing Professional Education (CPE) credit will be available to all CPAs attending the 2004 Annual Meeting. CPE forms will be available at the conference registration desk in Boston. The forms will be similar to those used at AAA national and regional meetings.
The 2004 Curricular Issues sessions will be held on Saturday and Sunday, November 20-21. The eight sessions offer a variety of interesting and, possibly, controversial opportunities for planning/implementing undergraduate, masters, and doctoral curricula. The committee has done an excellent job of attracting top-notch, informed panelists in all areas.

Here are sessions that are planned (see write-ups on following pages), in chronological order.

- Online MBA: A SWOT Perspective
- Integrating Ethics into the Curriculum
- Operations Management in the Curriculum – Emerging Issues and New Directions: A Forum Workshop on Course Topic Coverage
- Operations Management in the Curriculum – Emerging Issues and New Directions: A Brainstorming Session on Course Curriculum Development
- The PhD Process: How Should We Train Our Students?
- Integrating ERP into the Curriculum
- Assessment: A Necessary Evil (Reward) for Accreditation
- Creating University Partnerships with Industry

As you can see, there are sessions for everyone. The assessment/accreditation panel will have experienced team chairs and evaluators from AACSB and ABET/CAC (information systems). The ethics issue continues to be a topic of prime importance for our students, programs, and society. With financial support continuing as a concern, opportunities for university-industry partnerships offer an alternative. And, the MBA and PhD sessions should offer an opportunity to obtain new insights and contribute.

Operations Management in the Curriculum – Emerging Issues and New Directions

Operations management is typically a three-credit required course offered to upper juniors and seniors who have already completed the basic courses in the functional area business disciplines. Given that the operations management course must meet the needs of the functional area business disciplines it supports, one may expect limited flexibility in topic coverage. However, there seems to be a wide range of opinion regarding the particular topics to be selected and the depth and breadth in which they are covered, leading to a variety of pedagogical approaches in course instruction. Two questions arise: (1) Is such diversity in the operations management course within the overall business curriculum structure appropriate? (2) Can consensus be reached with respect to what specific topics should be included in all operations management courses?

Open Invitation to All DSI Members: Call for Participants to Give “Topic Coverage Testimony”

In the first workshop, DSI members are invited to give five-minute “testimony” before a panel of discussants, proposing and defending a topic that must be included in the operations management course curriculum. If you wish to speak and give five-minute “testimony” on a particular topic, please contact Mark Berenson, Department of Information & Decision Sciences, Montclair State University, at berensonm@mail.montclair.edu.

The panel, chaired by Nicole Koppel, Department of Information & Decision Sciences, Montclair State University, consists of SBUS administrators and text authors, will evaluate the “testimony” given on the operations management course curriculum.

Brainstorming to Improve Curriculum

Following the “testimony” of participants and the discussion from the panelists and comments from the audience, the second session will feature a brainstorming exercise facilitated by Rosa Oppenheim, Associate Dean for Faculty and Research – School of Business, Rutgers University, in an effort to improve the curriculum for the operations management course. All attendees of the session are invited to participate in this brainstorming exercise along with the panelists and those DSI faculty members who gave “testimony” in the earlier workshop.

We look forward to this set of back-to-back sessions as we evaluate this important curriculum issue.

Curricular Issues Miniconference Coordinator
Barbara A. Price
baprice@georgiasouthern.edu

Curricular Issues Miniconference Sessions

Time: Saturday, Nov. 20, 8:00-9:30am
CI-1: Online MBA: A SWOT Perspective
Session Chair: Johnny Rungtusanatham (Arizona State University)
Authors/Presenters: M. A. Venkataramanan (Indiana University), Diane H. Parente (Pennsylvania State University - Erie), Asoo Vakharia (University of Florida)
Abstract: Diverse forces are contributing to the proliferation of online MBA degree offerings. Leading the pack is the for-profit University of Phoenix, although other institutions have also embraced this trend. The purpose of this panel is to draw attention to the growing opportunity and threat of online MBA degree offerings.
CI-2: Integrating Ethics into the Curriculum
Session Chair: Timothy P. Cronan (University of Arkansas)
Authors/Presenters: Anil Aggarwal (University of Baltimore), Vijay R. Kannan (Utah State University), Cliff T. Ragsdale (Virginia Tech), Kathryn M. Kimery (Saint Mary’s University), Max Burns (U.S. Congress)
Abstract: The panel will explore how their institutions are injecting ethics into the curriculum. In a single course dedicated to ethics? Or in multiple courses across a degree program? What approach work best to deliver content? Discussions of professional societies’ codes of ethics? Case studies? Small group exercises? Are there other approaches that might be more effective? What can we as professors do to encourage ethical behaviors in our students?
Time: Saturday, Nov. 20, 1:00-2:30pm

CI-3: Operations Management in the Curriculum – Emerging Issues and New Directions: A Forum Workshop on Course Topic Coverage
Session Chair: Nicole Koppel (Montclair State University)
Authors/Presenters: Mark Berenson (Montclair State University), Charles Bonini (Stanford University), Alan Oppenheim (Montclair State University), Jay Heizer (Texas Lutheran), William Stevenson (Rochester Institute of Technology)
Abstract: Is content flexibility appropriate when teaching the required operations management course that serves the functional area disciplines? In this Workshop, DSI members are invited to give five-minute “testimony” defending a topic to be included in the course. A panel of deans and authors will comment on the “testimony.” Audience participation is encouraged.
Time: Saturday, Nov. 20, 3:00-4:30pm

CI-4: Operations Management in the Curriculum – Emerging Issues and New Directions: A Brainstorming Session on Course Curriculum Development
Session Chair: Mark Berenson (Montclair State University)
Facilitator: Rosa Oppenheim (Rutgers University)

CI-5: The Ph D. Process: How Should We Train Our Students?
Session Chair: Kurt M. Brethbauer (Indiana University)
Authors/Presenters: Kingshuk K. Sinha (University of Minnesota), Vicki Smith-Daniels (Arizona State University), Morgan Swink (Michigan State University), Christopher Voss (London Business School), Peter T. Ward (The Ohio State University), Urban Wemmerlöv (University of Wisconsin-Madison)
Abstract: This session will examine how to best prepare Ph.D. students for a successful career in academics, with an emphasis on operations management and decision sciences. Panelists from leading Ph.D. granting institutions will share views on the future of the field and the corresponding impacts on how we train Ph.D. students.
Time: Sunday, Nov. 21, 10:00-11:30am

CI-6: Integrating ERP into the Curriculum
Session Chair: Robert Rosacker (The University of South Dakota)
Authors/Presenters: Raymond Boykin (California State University, Chico), Joseph Ragan (Saint Joseph’s University), Bret Wagner (Western Michigan University), Edward Watson (SAP America), Heather Czech (SAP AG)
Abstract: Panel members will discuss the approaches their institutions have used to integrate ERP into the undergraduate curriculum. What works? What doesn’t? What are the tips and tricks for developing a successful program? What are some of the pitfalls to avoid? Is it best to focus ERP programs within one or two disciplines or across an entire curriculum? How do you get faculty actively involved? Are distance learning and web-based courses effective ways to deliver ERP content?
Time: Sunday, Nov. 21, 1:00-2:30pm

CI-7: Assessment: A Necessary Evil (Reward) for Accreditation
Session Chair: Raymond Papp (University of Tampa)
2004 Technology in the Classroom Miniconference

A forum for participants to share novel or innovative applications of technology in the classroom that enhance student’s learning experience.

Time: Saturday, Nov. 20, 8:00-9:30am
TC-1: Enhancing Learning in the Classroom
Session Chair: Mari W. Buche (Michigan Technological University)
Technology to Support the Classroom
Authors/Presenters: Michael L. Gibson (University of Houston)
Abstract: From the time that a particular technology emerges, instructors and students find creative ways to use it to expand educational practices, achieve academic goals, and enhance educational experiences. Academicians typically use technology to disseminate knowledge, study assorted phenomena that exist in reality, illustrate aspects of diverse practices, demonstrate various aspects of methods used to complete tasks or analyze outcomes, as well as to teach students how to use assorted technologies.

On-Line Games and Learning Outcomes
Authors/Presenters: Maureen P. Lojo (California State University, Sacramento)
Abstract: Most students prefer taking quizzes that are disguised in a game format, but is “edutainment” really an effective teaching tool? This presentation will report on the relationship between the use of on-line games and learning outcomes in an introductory undergraduate course in Operations Management.

Technology Solutions During Inclement Weather: Web CT and Web Ex
Authors/Presenters: Mari W. Buche (Michigan Technological University)
Abstract: Can technology provide solutions to mitigate the negative impact of inclement weather? This can be a significant factor at universities in certain geographic locations. Even if classes aren’t canceled, attendance is often sparse during these periods. Two possible options are computer aided educational tools (e.g., Web CT) and vendor facilitated group support systems (e.g., WebEx).

Time: Saturday, Nov. 20, 10:00-11:30am
TC-2: Systems Analysis and Design
Session Chair: Richard D. Johnson (University of Central Florida)
Beginning Open Source Software
Authors/Presenters: Bob McQuaid (Pepperdine University)
Abstract: If you’ve heard of Linux, you know what Open Source Code is. You probably don’t know about the opportunities that these software programs provide and probably at a lower cost than the known software providers. What can be done using this resource? How difficult is it to change? Do you have to relearn everything? This tutorial serves as a primer to expose the novice and MS Windows stalwart to the benefits, costs, and opportunities presented by implementing Open Source Software.

Teaching SA&D Using Online, Time-Released Scenarios and Role Play
Authors/Presenters: George M. Marakas (Indiana University), Richard D. Johnson (University of Central Florida)
Abstract: The presentation will focus on the use of an online case to teach Systems Analysis and Design that pedagogically combines a series of time released scenarios and role-play. These scenarios focus on the technical, organizational, and social aspects and are supplemented by online client interviews, archival documents, and other case-specific material.

Ecommerce and Web Programming Technologies for Managers
Authors/Presenters: Gilbert Karuga (University of Kansas)
Abstract: Leveraging on other commonly used technologies, the students learn how to develop Web-based applications. After acquiring the requisite skills the students participate in small groups to develop data-driven Web-based applications. Critical success factors for this course include a flexible and secure computer laboratory where students can develop and deploy Web-based systems, the expected delivery of basic programming skills and utilization of the different skill that students bring to the class.

Time: Saturday, Nov. 20, 1:00-2:30pm
TC-3: Networking and Security
Session Chair: Tom L. Roberts (University of Kansas)
Using Software and the Internet to Support a Network Design Project
Authors/Presenters: Tom L. Roberts (University of Kansas), Chan Li (University of Kansas)
Abstract: One of the difficulties in teaching computer networking is the lack of a hands-on hardware and software networking experience for students. This semester-long project uses diagramming tools and the Internet to develop physical architecture blueprints for a building network. The project extends into the development of a wide area network and allows students to gain insights into networking that cannot be attained through traditional textbooks.

Teaching Information Security: The Use of Demos
Authors/Presenters: Greg Freix (University of Kansas), Ashok L. Fichadia (Union Pacific Railroad Company)
Abstract: Three years ago, the University of Kansas School of Business began delivering a managerially oriented introduction to information security focused on topics including principles of cryptography, risks— and controls for those risks—associated with operating systems, applications, databases, wired and wireless networks, and physical security. The course also highlights leadership issues: change control, contingency planning, and the challenges of inculcating a security culture.

Electronic Team Management and Collaboration
Authors/Presenters: Muthu Karuppan (Drury University), Corrine Karuppan (Southwest Missouri State University), John Gleason (Creighton University)
Abstract: Most of us assigning student team projects face team management problems. We need to devote more time to pedagogical issues than team management. This workshop will teach participants how to use Microsoft’s SharePoint Services, a robust, inexpensive...
software designed to facilitate team management and collaboration. This Web-based tool enables members to meet asynchronously, provides group decision making facilities, and contains a central repository for all project documents.

Tips for Doctoral Students—
Getting the Most from the Annual Meeting

The Decision Sciences Institute Annual Meeting provides an opportunity for doctoral students to network, develop professional skills, interview for faculty positions—and have a good time!

For student who want to know how to get the most out of the Annual Meeting, see “Tips for Doctoral Students” on the DSI Web site at

http://www.decisionsciences.org/doc_tips.htm

Ron Swift Gives Conference Keynote Address
Monday, Nov. 22, 10:00 a.m.

Our second keynote speaker, Ron Swift, is VP of Strategic Customer Relationships, for Teradata and an internationally-known consultant, author, and strategist in the areas of Strategic Technologies for Enterprise-wide Business Decision-Making, Customer Relationship Management, Customer Knowledge, Data Warehousing, Decision Support, and E-Commerce. For more than 30 years, Ron has assisted hundreds of clients on six continents to achieve their strategies and goals. Here’s a snapshot of his DSI talk on “How World-Class Companies Use Customer Knowledge and Analytic Business Intelligence for Increasing Profitability.”

“In today’s fast moving technological arena, there are many challenges which require careful strategies and implementations of information systems resources and the associated application portfolios. Companies that implement and master business intelligence strategies are actually investing in understanding and optimizing the economics of their data resources.

“Forward-thinking investments in customer and market understanding lead to improved value exchanges - that in turn drive new profitability. This session focuses on the integration of information itself into the spectrum of business processes that affect the firm’s customers. Advanced real-time cross-organizational decision-making and customer marketing and services will also be highlighted as one of the key examples to drive profitability.

“You will also hear the key lessons learned, with examples from leading analytical DW/BI implementations where the results have improved marketing, resource allocations, decisioning, customer relationships, and the business bottom line. The session will provide a framework for driving more effective uses of the I/S and marketing resources to drive Operational and Planning systems. This framework has also been utilized to differentiate the business, improve customer experiences, and drive profitable growth.”
Profe$sional Development Program

The Professional and Faculty Development Program, coordinated by Soumen Ghosh (Georgia Tech) in consultation with the Institute’s Professional Development Program Director Robert E. Markland (University of South Carolina), is for the Institute’s members in all stages of their careers, with the goal of keeping them current in their fields. The content of the sessions offered is designed to provide insight into the challenges and opportunities in today’s rapidly changing environment. Topics include, but are not constrained to, the following: new instructional and research methodologies; professional service and counseling; balancing the needs of different stakeholders (students, corporations, alumni, etc.) in the educational process; globalization of business education; role of grading and assessment; obtaining research funding; career path strategies; meeting increasing demands in teaching, service, and research; and challenge and opportunities of new technologies. In addition, the program will include a series of sessions related to research, teaching, publishing, and other professional development issues for faculty who are beginning their academic careers.

Time: Sunday, Nov. 21, 10:00-11:30am

PD-1: Research Methods for Computerized Text Analysis
Session Chair: Kevin Dooley (Arizona State University)
Abstract: This workshop will overview research methods involved in computerized text analysis. Basic approaches will be discussed, and their implication on theory building and testing will be explored. Special emphasis will be placed on longitudinal data and process-theory building. A new method for qualitative data analysis, Centering Resonance Analysis, will be discussed.

Time: Sunday, Nov. 21, 1:00-2:30pm

PD-2: Structural Equation Modeling Workshop
Session Chair: George A. Marcoulides (California State University, Fullerton)
Abstract: Structural equation modeling (SEM) is a comprehensive statistical technique for testing hypotheses about various types of relationships between observed and latent variables. This workshop is designed to give participants a good working knowledge of SEM based on the concepts and principles that form the building blocks of this powerful statistical technique. Major emphasis will be placed on quickly enabling participants to conduct and interpret SEM analyses.

Time: Sunday, Nov. 21, 3:00-4:30pm

PD-3: Assessing Quality of Measurement in Survey Research
Session Chair: Xenophon A. Koufteros (Florida Atlantic University)
Abstract: What are the characteristics of a good measurement tool? An intuitive answer to this question is that the tool should be an accurate and consistent indicator of what we are interested in measuring. The focus is on how we think about and assess quality of measurement. Practical explanations and examples along with comparisons will be provided.

Time: Monday, Nov. 22, 8:00-9:30am

PD-4: Teaching Manufacturing Planning and Control with SAP R/3
Session Chair: Bret Wagner (Western Michigan University)
Abstract: Giving students an appreciation for the practice of Manufacturing Planning and Control is frequently a challenging task due to the student’s lack of manufacturing experience. This lack of context is compounded when Manufacturing Planning and Control software is not used as part of the curriculum. This session demonstrates how SAP’s R/3 software can be used in an undergraduate Manufacturing Planning and Control class to reinforce theoretical concepts and give students a relevant experience.

Time: Monday, Nov. 22, 10:00-11:30am

PD-5: Emerging Issues in Revenue Management Research
Session Chair: Nagesh N. Murthy (University of Oregon)
Authors/Presenters: Timothy Baker (Washington State University), Scott E. Sampson (Brigham Young University)
Abstract: The session briefly introduces the state of the art in revenue management research and focuses on some areas for future research. A combination of stylized models and practical problems will be used to motivate research questions of interest for understanding the role of auction-based mechanisms for selling perishable goods.

Time: Monday, Nov. 22, 1:00-2:30pm

PD-6: Successful Web-based Surveying
Session Chair: Mark T. Frohlich (Boston University)
Authors/Presenters: Kenneth K. Boyer (Michigan State University), Adrian A. Done (London Business School)
Abstract: Web-based surveys are rapidly replacing mail surveys as the method “of choice” for many empirical studies. Based upon the participant’s experience, this workshop looks at lessons learned in online surveying including formatting surveys, targeting respondents, and improving response rates. It also considers emerging trends in online surveys including junk email.

Time: Monday, Nov. 22, 3:00-4:30pm

PD-7: Designing and Delivering Successful Spreadsheet-based DSS Courses
Session Chair: Cliff T. Ragsdale (Virginia Tech)
Authors/Presenters: Paul Bergey (North Carolina State University), Kevin P. Scheibe (Iowa State University)
Abstract: This session focuses on innovative approaches to teaching DSS courses using spreadsheets as the primary development tool. Panelists will describe their experiences teaching this type of course at both the graduate and undergraduate levels. Useful resources, teaching examples and guidelines for success will be presented.

Time: Tuesday, Nov. 23, 8:00-9:30am

PD-8: Developing Course Portfolios
Session Chair: Susan Brown (Indiana University)
Authors/Presenters: Eric Metzler (Indiana University)
Abstract: Course portfolios focus attention on the intellectual work associated with a specific course. An increased interest in teaching assessment beyond student evaluations has raised interest in course portfolios. This session will provide example portfolios, a discussion of the benefits of course portfolio preparation, and an opportunity to begin your own course portfolio (please bring a syllabus).
2004 DSI Annual Meeting

Time: Tuesday, Nov. 23, 10:00-11:30am

PD-9: Operations Management in Not-For-Profit Services
Session Chair: Rohit Verma (University of Utah)
Authors/Presenters: Susan A. Chesteen (University of Utah), David Dilts (Vanderbilt University), Kirk R. Karwan (University of South Carolina)

Abstract: Government services are unique in that they are delivered for the good or benefit of the general public. Nonprofit organizations deliver services for either the general public or for specific groups. Both of these organizational types provide services without income or profits as their primary motive. In this panel, we will address current research and practices associated with delivery of government and nonprofit services, and also discuss alternative and non-traditional performance measures.

Time: Tuesday, Nov. 23, 1:00-2:30pm

PD-10: Incorporating SAP/ERP into the Operations Management Curriculum
Session Chair: Ashok Soni (Indiana University)
Authors/Presenters: Dan Pantaleo (SAP America), Sue F. Abdinnour-Helm (Wichita State University)

Abstract: This session will cover the use of the SAP R/3 system, and its various logistics and supply chain modules in the Operations Management curriculum. Both the Undergraduate and MBA curriculums will be addressed.

Time: Tuesday, Nov. 23, 3:00-4:30pm

PD-11: Supply Chain Technology—RFID Here, There, and Everywhere
Session Chair: Nitin Joglekar (Boston University)
Authors/Presenters: Mark Gaynor (Boston University), Mark T. Frohlich (Boston University), Tilak Subrahmanian (Markem Corporation)

Abstract: Why is RFID technology getting so much attention? In two words—Wal-Mart and the DoD. News that they are mandating RFID in 2005 to track products as they pass through supply chains has elevated awareness of the technology. This panel examines RFID from both a managerial and researcher perspective.

Annual Meeting Contributors and Sponsors

The Decision Sciences Institute would like to thank the following institutions and companies for their participation in a number of program and nonprogram activities that will be held during the Institute’s 2004 Annual Meeting. Through their generous contributions a number of special events and program activities were made possible.

- Airgram
- Alpha Iota Delta
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- Baruch College, City University of New York, Zicklin School of Business
- Beta Gamma Sigma
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- Bucknell University, Department of Management
- CRESH - Center for Remote Enterprise System Hosting, in conjunction with PeopleSoft
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- University of Central Florida, College of Business Administration, Department of Management Information Systems
- University of Massachusetts Dartmouth, Charlton College of Business
- University of Richmond, Robins School of Business
- Western New England College, School of Business

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Distinguished Papers

For the first time the Decision Sciences Institute, in addition to selecting papers for the three Best Paper Awards, is designating one paper from each track as a “Distinguished Paper.” Taking input from the reviewers, each track chair was asked to design a process and use the process to recommend one paper from their track.

Accounting: Theory, Applications and Practice
Earnings Components and Abnormal Returns
Xiaofeng Peng (Kent State University)

DSS/AI/Expert Systems
A Rule-Based Support System Prototype for Assigning Felony Court Appointed Counsel
Queen E. Booker (Center for the Management of Information), Carl M. Rebman Jr. (The University of San Diego), Fred L. Kitchens (Ball State University)

Ecommerce
Internet Ordering of Groceries: An Examination of Pick Method and Customer Experience Level
Kenneth K. Boyer (Michigan State University), G. Tomas Hult (Michigan State University)

Emerging Information Technologies
Beyond Single Agent e-Commerce Applications: A Multi-Agent System Architecture for a Virtual Marketplace
Jing Wang (Kent State University), Marvin Troutt, Kholekile L. Gwebu (Kent State University)

Finance/Financial Management
Prudent Man or Agency Problem? On the Performance and Flow of Insurance Mutual Fund
Xuanjuan Chen (University of Rhode Island), Tong Yao (University of Arizona), Tong Yu (University of Rhode Island)

Information Systems
The Impacts of Learning Capability, Supportive Leadership on the Power in IOS Context
Xiao Li (University of Toledo), Anand S. Kunnathur (The University of Toledo), T. S. Raghunathan (University of Toledo), Thawatchai Jitpaiboon (University of Toledo)

Innovative Education
The Cruelest Experiment
Grandon Gill (University of South Florida)

International Business
n/a

Manufacturing Management
An Investigation of Group Scheduling on a Single Machine to Minimize Total Tardiness and Earliness
Jeffrey E. Schaller (Eastern Connecticut State University)

Marketing: Theory, Models and Applications
The Moderating Role of Competitive Shopping Information on Perceptions of EDLPs
Ainsworth A. Bailey (University of Toledo), Jeen-Su Lim (University of Toledo)

MS/OR: Techniques, Models and Applications
Optimal Sequential Assignment Problem: A Non-Parametric Approach
Young H. Chun (Louisiana State University), Robert Sumichrast (Virginia Tech)

Organizational Behavior/Organizational Theory
Achievement Goal Orientation in Complex Decision Tasks
Vicki L. Goodwin (University of North Texas), Lew Taylor (University of North Texas), Banu Goktan (University of North Texas)

Quality
Meta-Analysis of the Relationship between Total Quality Management Practices and Firm Performance Implications for TQM Theory Development
Anand Nair (Auburn University)

Service Management
A Simulation Study of Appointment Scheduling Rules, Role of Patient Classification, and Environmental Factors on Ambulatory Care Performance
Tugba Cayirli (Hofstra University), Emre A. Veral (Baruch College), Harry Rosen (Baruch College)

Statistics and Decision Analysis
Modeling Consumer Situational Choice of Long Distance Communication with Neural Networks
Peter G. Zhang (Georgia State University), Michael Y. Hu (Kent State University), Murali Shanker (Kent State University), Ming S. Hung (Optimal Solutions Technologies, Inc.)

Strategy and Policy
The Timing of Innovation and its Relationship to Organizational Slack
Gregory N. Stock (Northern Illinois University), William A. Fischer (IMD - International Institute For Management Development), Noel P. Greis (University of North Carolina)

Supply Chain Management
Decision Style and Information Availability: Predicting Individual Performance in a Supply Chain Simulation
Russell Haines (Old Dominion University), Jill Hough (University of Tulsa), Douglas Haines (University of Idaho)

ANNOUNCEMENTS, from page 51

Guest editors are Nicholas G. Hall (hall.33@osu.edu), Lei Lei (lei@andromeda.rutgers.edu), and Michael Pinedo (mpinedo@stern.nyu.edu). Deadline for submission is May 15, 2005.

Journal of Global Information Technology Management, the premier journal in global information technology, invites manuscripts for publication consideration. Send as email attachment (in Word format) to Dr. Prashant Palvia, pcpalvia@uncg.edu. At a minimum, the submission should have three components: an MIS topic, an international orientation (e.g., cross cultural studies or strong international implications), and strong evidence (e.g., survey data, case studies, secondary data, etc.).
The “Paperboy Problem” of the Annual Meeting Luncheon

The “paperboy problem” of the annual meeting meal functions: The registration process for meal functions during the Annual Meeting is really the classic “paperboy” problem of inventory theory. When people pre-register in late spring or the summer, they indicate whether they will attend the Sunday buffet lunch and/or the Tuesday awards luncheon. As the meeting approaches, many change their minds because of airline reservations, or even because of the weather on the day of the meal function. History shows that anywhere from 40 to 91 percent of the people who say they will attend the meal function actually do so. For example, at a recent Institute Annual Meeting, 877 people said they would attend the Tuesday awards luncheon. The Institute committed to the hotel for 625 meals, but only 385 people actually ate a meal. The result was that the Institute was charged $25 for each of the 240 meals not eaten, for a total loss of $4,000. If we had committed for all 877 meals, the loss would have been even larger $12,300. The Board does not believe that we are good stewards of the membership if we allow such waste, and so we seek that illusive middle ground where everyone gets served without too many wasted meals. It is the Institute’s policy that if a person is unable to be seated at a meal function, he or she will be reimbursed if they present the meal ticket to the Institute’s staff at the time of the meal function.

The Southeast Region held its 2005 (35th) Annual Meeting on February 23-25, 2005, at the Raleigh Marriott Crabtree Valley in Raleigh, North Carolina. Submission deadline for regular papers and abstracts was September 20, 2004; the deadline for student papers is November 1, 2004. Contact Samia M. Siha, Program Chair, Kennesaw State University, 1000 Chastain Road, Building 17, Kennesaw, GA 30144, (770) 423-6709, fax: (770) 423-6606, siha@coles2.kennesaw.edu. See the Southeast Homepage at http://www.sedsi.org.

The Southwest Region will hold its 2005 Annual Meeting on March 1-5, 2005, at the Hyatt Regency, Dallas, Texas. Submission deadline was September 15, 2004. Contact Chang-tseh Hsieh, SWDSI Program Chair, University of Southern Mississippi, Box 5178, Southern Station, Hattiesburg, MS 39406, (601) 266-4641, fax: (601) 266-4642, hsieh@cba.usm.edu. See the Southwest Homepage at http://www.swdsi.org.

The Western Region will hold its 2005 Annual Meeting on March 22-26, 2005, at The Sutton Place Hotel in Vancouver, B.C., Canada. Submission deadline is October 1, 2004. Contact Program Chair Bruce C. Raymond, Montana State University-Bozeman, College of Business, 412 Reid Hall, Bozeman, MT 59717-0004, (406) 994-4333, fax: (406) 994-6206, braymond@montana.edu, http://www.wdsinet.org.

Call for Papers
The 23rd International Conference of the System Dynamics Society will be held July 17-21, 2005, in Boston. Submission deadline is March 18, 2005. See www.systemdynamics.org.

The 16th International Conference on Database and Expert Systems Applications will be held August 22-26, 2005, in Copenhagen, Denmark. Submission deadline for abstracts is February 19, 2005. See http://www.dexa.org.

Publications
Annals of Operations Research seeks papers for a special issue on Supply Chain Scheduling and Coordination.
The DSI Placement Services Website is now open for the 2004-2005 recruiting season. Instructions for using the online database are viewable through the Instructions link on the DSI Placement Services Homepage at www.decisionsciences.org/placement.

Listing fees are a great value at $250 for each position listed, $25 for applicant listings, and no charge for student members. DSI membership must be current for all applicants (membership is not required for submitting a position listing).

A number of Applicants and Positions have already been posted for this year—these can be viewed without registering or logging in by simply selecting the “View Listings” link on the Placement Services Homepage. We anticipate many more listings will be added before this year’s Annual Meeting (November 20-23, 2004 in Boston).

New listings may be submitted directly through the Internet—there are no hardcopy forms. For your convenience, instructions for placing new listings are outlined in the enclosed flowcharts.

Applicants
If you would like to link to your Web presence elsewhere, have the URL ready. If you do not have a Web page, you might want to look into setting one up with your university, ISP, or Web sites such as dice.com or geocities. If a URL for your Web page is not yet available, it can be added to your listing later.

Employers
Please have purchase order number or credit card information available. Payment by check will also be accepted—the address for mailing payments is shown on the Web site.

It may be to your advantage to have a more detailed position description posted on your university’s Web site that can be accessed via a link in the DSI placement database. Have the URL ready if you would like to have a link to a more detailed position description or department or school home page. If this is not yet available, it can be added later.

DSI Placement Services Coordinator
Gerard M. Campbell
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2004 Annual Meeting Web Site:
www.bus.ucf.edu/dsi2004/
ing responsibilities, the research projects that I didn’t quite get wrapped up over the summer, and the new projects just getting underway.

This is also the time of year that I start to look forward to the DSI annual meeting. The timing always offers a welcome break in the routine of fall term. With a change in scenery, both physical and mental, the annual meeting gives me an opportunity to step back and shift my focus for a few days. I’ll look for old friends, and also look forward to meeting a few new ones. I’ll look for sessions on research issues that I’m currently working on, and also look for a few sessions that are “off the beaten track,” that might provide ideas for the next projects. I’ll also be on the lookout for ideas and materials that I can bring back with me to the classroom.

There will be plenty to choose from at the meeting in Boston. You’ll find some 400 sessions in a very full program, starting early on Saturday morning, and running through late Tuesday afternoon. With so many options available, I’ve been going through the on-line preliminary program, trying to plan my schedule to get the most out of the meeting. I’ve had to make a few hard choices among two or three interesting sessions in the same time slot—but that’s a good problem to have! I’d encourage you to do some pre-planning of your personal schedule, too. You can find the on-line schedule at http://dsi.byu.edu/dsis/view.pl.

As you’re working your way through the preliminary schedule, take a few minutes to browse the schedule of DSI administrative meetings (find it under “Look up the schedule for a Track . . .”). Here you’ll find listed the various social/networking events, several special sessions, activities of the regional DSI organizations, as well as committee meetings. I want to draw your attention to a few items in particular.

As you’re picking the teaching- and research-related sessions you want to attend, don’t overlook the three invited “keynote” sessions, offering a deeper look at three topics that should be of interest to many meeting attendees:

• Cormac O’Reilly on “Hard Quality Decisions,” on Sunday morning;
• Ron Swift on “How World-Class Companies Use Customer Knowledge and Analytic Business Intelligence for Increasing Profitability,” on Monday morning; and
• James Womack on “Lean Thinking and Operations Management,” on Monday afternoon.

And since life shouldn’t be all work and no play, don’t miss the Improv Asylum’s comedy program on Monday evening, following the President’s Reception.

I want to thank Program Chair Ken Kendall (Rutgers University), Associate Program Chair Sameer Verma (San Francisco State University), Proceedings Coordinator Julie Kendall (Rutgers University), and Program Scheduling Coordinator Scott Sampson (Brigham Young University), as well as all the track chairs and coordinators for the many hours they’ve put into developing this year’s program. It’s been a very full year for all the members of the Program Committee, but their hard work will pay off in a few weeks for all of us who will attend the meeting.

I’m looking forward to one of the best annual meetings ever. I hope to see you there!

Related Links

2004 DSI Preliminary conference schedule: http://dsi.byu.edu/dsis/view.pl

Ballots will be mailed in December 2004. Additional nominations may be made by November 30, 2004. Each additional nomination must be made by petition signed by at least five percent of the members and submitted to the Institute’s Secretary, c/o the Institute’s Home Office, 35 Broad Street, 8th floor, Atlanta, GA 30303.

Additional nominations for vice presidents elected by the regional subdivisions may be made upon petition signed by at least five percent of the regional subdivisions’ members.