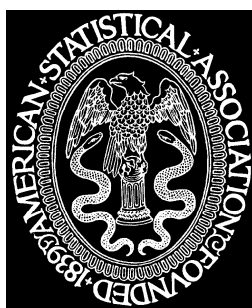


Continuing Education (CE) Programs Course Proposal Guide



2010 Joint Statistical Meetings
Vancouver, British Columbia, Canada
(CE events held July 31-August 3)

Deadline for CE Course Proposals: September 30, 2009

Submit CE Course Proposals Online at:

<http://www.amstat.org/education/cecoursesatjism.cfm>

Updated: August 13, 2009

Dear Colleague,

On behalf of all American Statistical Association (ASA) members, we thank you for your interest in the ASA Continuing Education (CE) Program.

This document will be useful to presenters, section chairs, continuing education officers and chapter presidents. It contains an overview of the Continuing Education program, schedule and guidelines for course proposals, and information on honoraria, allotments for travel related expenses, and tuition fees.

Note: The Computer Technology Workshop Proposal Guide is a separate document that has been prepared for those vendors who are interested in providing educational material with significant computer-oriented content.

Please check the ASA web site, www.amstat.org/education, for the latest guidelines. Contact the ASA Center for Statistics Education or one of the members of the Advisory Council on Continuing Education (ACCE) if you have any questions or suggestions at: rick@amstat.org.

Thank you for helping the American Statistical Association meet the needs of its members through the Continuing Education Program.

2010 ADVISORY COMMITTEE ON CONTINUING EDUCATION (ACCE)

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The mission of the ASA Advisory Committee on Continuing Education is

- to provide at the annual Joint Statistical Meetings an affordable, high-quality continuing education program of interest to a broad segment of the ASA membership;
- to provide similar continuing education presentations throughout the year in such numbers and at such locations as can be supported by the ASA membership; and
- to support efforts of other ASA entities to offer quality, affordable continuing education to their constituencies.

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I. OVERVIEW OF ASA CONTINUING EDUCATION (CE) COURSES

In This Section: **Duration of a CE Course**
 Content of a CE Course
 Evaluation of Presentations at CE-JSM
 Excellence-in-CE Award Program
 Learning Objectives
 Who Attends a CE Course
 Recognition of Participation

Duration of a CE Course

Each CE proposal should be appropriate for a half day (4 contact hours) or full day (7 contact hours) presentation.

Content of a CE Course

The content of the course might fulfill any one of the following class descriptions:

- An in-depth presentation of a specific area of statistical theory, methodology, or application. The material covered may focus on “cutting edge” methods or other more established topics;
- A broad overview of an established area of statistical theory or methodology suitable either as a refresher “course” or as an introduction to the field for those not exposed to it in previous training;
- A description of a statistical method and its application using one or more software tools- as long as there is *significant* content material described in the proposal.

Note: Presentations offered by vendors of a software product should consider proposing a Computer Technology Workshop (CTW) rather than a course. No CE offering should be a software “infomercial.” Those offerings that are heavily software dependent should be proposed as a CTW. (Please see the Computer Technology Workshop Proposal Guide i.e. [The Green Book](http://www.amstat.org/education/2010greenbook.pdf) at www.amstat.org/education/2010greenbook.pdf.)

Evaluation of CE Presentations at JSM

At the conclusion of each presentation, participants fill out an evaluation form. Summaries of the evaluation findings are sent to the ACCE for review and are used for planning future CE presentations at the Joint Statistical Meetings. Presenters also receive evaluation summaries. The CE evaluations are reviewed by the ACCE members and used to determine the **Excellence-in-CE Award** winner(s).

Excellence-in-CE Award Program

The purpose of the Excellence-in-CE Award program is to recognize and re-offer JSM courses

that have been both highly regarded and well attended. Course selections are determined by committee consensus and are made in August.

Excellence-in-CE courses are recognized by being listed with appropriate annotation in the program. In addition, these course presenters receive a certificate in front of their attendees prior to making presentations.

Excellence-in-CE course may not be co-sponsored (See section II). Presenters may choose not to accept the award in favor of having their course co-sponsored by a section or chapter at the subsequent JSM.

Learning Objectives

Presenters are strongly urged to present the learning objectives of the course in one of the first introductory overheads and review them as one of the last topics of the course. The learning objectives must be included in the handout material and overheads as well as in the proposal for the course.

Who Attends a CE Course

Data collected from course evaluations completed by CE attendees provide the following profile of presentation attendees:

- Over 95% of attendees are members of the ASA.
- A cross section of the entire society attends CE presentations.
- More than 85% of CE participants are age 30 or above.
- More than 80% of the attendees have participated in a CE presentation previously.

Recognition of Participation

Course attendees may choose to receive a Certificate of Participation. The request forms are available at the conclusion of the course or via email: rick@amstat.org

II. COSPONSORING CE PRESENTATIONS

In This Section: **Guidelines for Cosponsorship**
 Revenue Sharing For Cosponsorship

Guidelines for Cosponsorship

Sections and Chapters of the ASA may cosponsor CE courses. Cosponsorship is a means for Sections and Chapters to address the needs and interests of their members.

CO-SPONSORSHIP IS NOT REQUIRED FOR ACCEPTANCE OF A CONTINUING EDUCATION PRESENTATION.

Before submission of proposal to CSE (Center for Statistics Education):

A potential cosponsor contacts or is contacted by a potential presenter regarding cosponsorship of a CE course. If the Section/Chapter elects to cosponsor the presentation, the cosponsor must adhere to the following procedures and guidelines. The cosponsor will:

- Attest to the quality of the course proposal.
- Send to CSE a cosponsor letter of support with signature by the same deadline for CE course proposals – September 30. The letter can be mailed, faxed, or sent as an attachment to an email. The letter of support must acknowledge reviewing this section (Section II) of The Blue Book and contain information concerning how the course will be advertised.

If proposal is accepted, the cosponsor will:

- Complete and return a cosponsorship Agreement that designates the conditions of revenue/loss sharing between ASA and the Section/Chapter. The original cosponsor letter must identify the person to whom the agreement should be sent in the event that the proposal is accepted. Because the cosponsor letter is due in September, but the agreements are not mailed until February, the person providing the original letter may not be the appropriate section/chapter officer to sign the agreement if new officers are installed in January. *Keep all section officers informed of CE cosponsorship especially incoming officers.*
- Assess the A/V equipment and copying needs of the presenter(s); consider alternative methods of funding for those needs that are not funded by the ASA Center for Statistics Education. Presenters are given a limit to the number of pages allowed for their course handouts. The costs of copying any overages are the responsibility of the cosponsor. Similarly, a standard audio visual package is provided for each CE course. The costs of ordering any additional audio visual equipment are the responsibility of the cosponsor.
- Prepare and disseminate special advertisements such as announcements in *Amstat News*, newsletters, brochures or broadcast emails to members informing them about the cosponsored course. In the cosponsor letter of support, cosponsor will be required to identify the advertising plans and the person(s) responsible for implementing the plans.
- Confirm that the presenter is available to instruct on the required teaching day.

In the event the course is not accepted, the Section or Chapter will be notified.

Generally it is the Chair/President or the Program Chair/Education Chair of the cosponsoring organization who provides the letter of support for the course. However, this officer should not provide the letter of support for a course if this officer is a presenter for the course. The organization's Treasurer may provide the letter if conflicts occur.

Revenue Sharing For Cosponsorship

- Revenue sharing is for courses that are cosponsored via the proposal application process. All courses, except the two-day course and Excellence-in-CE course(s), can be cosponsored.

- If a proposed course is accepted, the Section or Chapter will be notified and sent a Cosponsorship Agreement that must be signed by the Chair of the Section or the President of the Chapter (In the event that the designated representative is an author of the proposal, a different Section or Chapter Officer must sign the agreement). The signed agreement must be returned to the Center for Statistics Education by the deadline date specified in the cosponsor agreement. The agreement includes a formula (see following) to determine how revenue will be described.
- If the course is cancelled (e.g., due to under-enrollment), the sponsoring organization will not be assessed any cost. The final decision regarding cancellation lies with the ASA Executive Director.
- The cosponsoring Section or Chapter shares positive and negative revenue with ASA [50% ASA, 50% co-sponsor(s)]. In the event of more than one cosponsor, the cosponsor portion of the revenue (positive or negative) will be divided equally among all the cosponsoring partners.
- Revenue (positive or negative) is determined using the following formula:

$$\begin{array}{lcl}
 \text{Revenue} & = & \text{Course Fees} - \text{Total Expenses} \\
 \text{Course Fees} & = & \text{CE tuition} \\
 \text{Total Expenses} & = & \text{DC}^* + \text{CMC}^{**} + 30\%(\text{DC} + \text{CMC})
 \end{array}$$

* Direct Costs (DC) are the presenters' honoraria and their allowable expenses, copying, AV equipment rental, food functions, etc.

** Course Management Costs (CMC) are annual ASA internal costs associated with running the CE program.

III. PROPOSAL SELECTION

In This Section: **Selection Process**
 Notification Date
 Common Reasons for Non-Acceptance

Selection Process

Proposals are sent to the CE Course Evaluation Subcommittee for review. The ACCE makes the final course selections based on the reviews of the Subcommittee, ACCE member evaluations, consideration of the balance of the program, and previous CE offerings.

Note: In some cases, the ACCE may ask that the proposal be modified in some manner (e.g., a half-day course turned into a full-day course, a change in the title that might appeal to a wider audience.)

Notification Date

Presenters (and co-sponsors if applicable) will receive notification of acceptance or non-acceptance in December of 2009.

Common Reasons for Non-Acceptance

If the proposal is not invited to be part of JSM, some of the more common reasons for non-acceptance include the following:

- Multiple course proposals with overlapping content were received, and acceptance of the similar proposals would reduce attendance in each one.
- The Committee received a large number of strong proposals, not all of which could be accepted due to timing/space considerations.
- The facilities at the particular JSM site may not accommodate the technical needs of the presentation.
- The course has been presented recently and there is concern that enrollment may be low if the course is repeated too soon.
- The course would fit better into another type of ASA presentation format.
- The course has promise but needs to be re-worked.
- The proposal is too narrowly focused or may not have wide appeal.
- The course does not appear to meet the goals of the CE program as well as other proposed courses.

Note: The ACCE may suggest that a proposal that is not suitable for a CE course be submitted as a Computer Technology Workshop (see the Green Book at www.amstat.org/education/2009greenbook.pdf).

IV. PROCEDURES REGARDING ACCEPTED COURSE PROPOSALS

In This Section: **Presenter Packet**
 Honoraria/Travel Related Expense Allotments for Presenters
 Handouts
 Course Prerequisite
 Course Cancellation
 Conduct of the Course
 After the Course

Presenter Packet

If the proposal is accepted, the presenter is sent a “Presenter Packet” that contains a contractual agreement as well as forms to aid the presenter in planning the presentation. **Agreement and Forms must be returned to the ASA Education Department by the dates indicated in the packet.**

Honoraria/Travel Related Expense Allotments for Presenters

The honoraria/travel related expense allotments for presenters are provided on page 13. Honoraria/travel related expenses cannot be negotiated with the following exceptions:

- The presenter may waive any or part of the travel related expenses or honoraria.

- If there are multiple presenters, the financial reimbursements can be distributed in an unbalanced manner (e.g., 75% to one speaker, 25% to another). The amounts must be agreed upon and indicated on the signed Presenter Agreement. No changes requested after receipt of the signed Presenter Agreement will be honored.
- The presenter may receive supplemental honoraria/expenses from the cosponsoring Section/Chapter—a matter unrelated to the CE program.
- If the presenter(s) has a question about the honoraria/travel related expense allotments and distribution, these questions must be addressed with ASA prior to signing the Presenter Agreement.

Honoraria and Travel Related Expense Allotments for CE Program

CE Offering	Length	Total Honorarium	Number of Presenter(s)	Total Travel Maximum*
Course	2-day	\$3000	1	\$1750
			2 or more	\$2500
	1-day	\$1500	1	\$1250
			2 or more	\$2000
½ day	\$750	1 or more	\$1250	

* Requests for reimbursement must be made in a timely fashion. Expenses submitted to ASA more than 30 calendar days after JSM will not be reimbursed.

Travel related expense allowance for speakers outside North America is on a case by case basis. Please contact CSE for further information.

Handouts

Each attendee in each course will receive a set of handouts. Presenters will be informed when the handouts must be received electronically at ASA so that the handouts may be copied. ALL copying of handouts will be managed by ASA. Handouts must be submitted electronically. All pages must be numbered and numbered sequentially with no breaks. There can be no more than 200 pages per handout for a one-day course and no more than 100 pages per handout for a half-day course. Overage costs will be deducted from presenter honoraria/travel. If a course is cosponsored, overage costs will be deducted from the cosponsoring section/chapter revenue. Providing participants with a CD of the overheads or a web site reference is not a substitute for a paper copy made available during the class.

Content of Handouts

- The handouts must be in the same order as the course presentation. Low evaluations are invariably given to those instructors who deviate from this practice.

- The handouts must be readable. For example, a large font should be used and plots should replace complicated tables.

Course Prerequisite

The presenters will be required to specify at least one book that course attendees should be familiar with as a prerequisite for the course. A recurring comment from course attendees of previous JSMs is the course was either too advanced or too remedial. A recommended prerequisite book clarifies the target audience for the course.

Course Cancellation

To keep the CE program viable, ASA occasionally must consider cancelling a course that is seriously under-enrolled in order to avoid incurring excessive costs with inadequate compensating income. Attendance information is monitored carefully. As soon as feasible after the close of pre-registration for JSM (which typically is about 2-3 weeks prior to the start of the meetings) decisions regarding course cancellations will be made based on the pre-registration information available. The final decisions regarding cancellations lie with the ASA Executive Director. At the discretion of the Executive Director, the cosponsor of a course may be contacted to determine whether or not the cosponsor would like to guarantee enrollment by purchasing additional registrations for the class. **If the course is cancelled, there can be no honoraria or travel related expense reimbursements for the presenters.**

Conduct of the Course

Presenters are expected to arrive at their classroom in time to be ready to start the class on time. Presenters will be notified as to the time for breaks, and these break times are to be honored as closely as possible. As a point of reference to prepare handouts, break times can be presumed as “mid-morning” or “mid-afternoon.” If the presenter(s) has questions about the usual or expected conduct of the course, these questions must be asked prior to signing the presenter's agreement.

After the Course

Presenters are expected to present their travel related costs to CSE within 30 calendar days following JSM. The ASA Travel Guidelines, which will have been sent with the “Presenter Packet”, should be used as a basis for filing. If the presenter(s) has questions about the Travel Guidelines, these questions must be asked prior to signing the presenter's agreement. TRAVEL RELATED EXPENSES are airfare, hotel, food, ground transportation, and parking. The TOTAL for all components of TRAVEL RELATED EXPENSES cannot exceed the agreed upon amount for TRAVEL RELATED EXPENSES in the Presenter’s Agreement.

V. FREQUENTLY ASKED QUESTIONS ABOUT CE COURSES

This section contains other information of interest to persons considering providing a proposal for a course. Various CE policies are contained herein. **It is assumed that all presenters are familiar with the policies in this and other sections of this document.**

Why make a CE presentation?

- To share your expertise in reviewing and summarizing fundamental topics in statistics
- To present state-of-the-art techniques used by data analysts and practicing statisticians
- To encourage innovative ideas in data analysis and new theoretical developments in statistics
- To promote growth in specialized areas of statistics and other related fields
- To serve as a vehicle for informing the statistical profession about related tools that enhance productivity and efficiency

What are the rewards of doing a CE presentation?

- To obtain professional recognition for yourself and your Section/Chapter
- To promote statistical education and statistical thinking
- To meet educational needs in statistics through a quality national program
- To ensure that the specific needs or interests of an ASA Section/Chapter are met at professional meetings
- To offer ASA Sections/Chapters an additional way to generate revenue through CE courses

Who should propose a CE presentation?

- The author of a new book on novel and widely interesting material
2004 Example: Spiegelhalter, Abrams, and Myles, Bayesian Approaches to Clinical Trials and Health-Care Evaluation
- An industrial statistician who wants to discuss new methods of dealing with applied problems
1997 Example: Cornell and Piepel, Designs and Models for Experiments with Mixtures
- An expert in a specific but well-populated field
2003 Example: Alan Agresti in Categorical Data Analysis

Can more than one presenter teach a single course?

Yes. During the online proposal submission process, there is a section where one can identify the approximate proportion allotted to each speaker (e.g., S. Chang, 60% and J. Jones 40%; or R.

Fisher, 15% and A. Newcome, 85%). These proportions reflect the best estimate of the amount of class presentation time that each speaker will teach, not necessarily the proportion of time the various speakers spent developing the presentation. All presenters should be identified in the proposal, and new presenters should not be added at a later time.

What should be presented?

Topics: An ASA committee evaluates presentation proposals based on the course content and the committee's perception of the interest in the topic by a significant portion of ASA meeting attendees. If you believe that the material you propose to present meets these criteria, then that topic may be a candidate for a CE course. (*Presentations that focus on a particular software are offered as Computer Technology Workshops rather than as courses. A course should not emphasize software, although some examples may be acceptable.*)

Content: The outline should clearly describe the content to the audience. *Consider the background of the audience when preparing the presentation.* Judge the quantity of material to present based on the length of the presentation. In some situations, the ACCE may accept a course contingent on some change in the proposal such as the length of the presentation being changed (either from ½ day to 1 day or from 1 day to ½ day). A recurring criticism from attendees of CE courses is that too much material was covered in the allotted course time. It is important to scale material to course length.

Can the day the course is presented be requested?

Yes. The courses are offered from Saturday to Tuesday. If the course proposal is accepted, the contact person for the course will be asked to indicate the day(s) you will be available to give the presentation. In making the schedule, the committee takes into account day preferences by presenter, topic conflicts within the CE program as well as with a co-sponsoring Section, and other events occurring during the JSM program. Due to the many factors taken into account while scheduling courses, the committee will consider, but cannot guarantee, your first preference.

How is the amount of revenue (positive or negative) determined for a particular CE course?

The ASA's Continuing Education Program is expected to be financially self-sufficient thus total income from all CE activities must cover all costs, both direct and indirect. **Direct expenses** for a given CE offering are: honoraria and travel related expenses for the presenter(s); course handouts and texts; catering for break refreshments; and rental, set-up, and stand-by support of the audio-visual equipment. **Indirect expenses** are: ASA personnel costs and general overhead required to run the CE Program in a professional manner throughout the 12 months of planning done each year; costs for temporary workers needed on-site when courses are being taught; travel and other expenses associated with running the ASA's Advisory Committee for Continuing Education; and cost-sharing for convention space at the Joint Statistical Meetings. The CE Program's total indirect expenses are determined using standard cost-accounting methods and then pro-rated to

individual CE courses based on their tuition receipts. The allocation formula strikes a fair balance in that the better-attended course will underwrite a larger share of the CE program's total indirect costs.

Can I illustrate a software package in a course?

A JSM course should not be used as a marketing venue, but specific products may be used to illustrate applications of the course material. A presentation that uses a software product for some examples may be acceptable as a course, while a presentation that is heavily dependent on a particular software product should be proposed as a **Computer Technology Workshop (CTW)**.

Will the ASA office be able to contact those who enroll in my class prior to JSM?

Yes. Any special instructions to the class can be communicated via email after the end of Advance Registration and before the start of JSM. For instance, an email can be sent to the class with a link to the presenter's personal web site where papers or data sets can be downloaded. The presenter may collect contact information during the course with the attendees' permission.

Will the ASA put materials associated with my course on the ASA website after my course so participants can obtain additional material?

The ASA does not have the resources to support this activity, although presenters are welcome to provide participants with additional web-based information if they so choose. In this event, it is instructor's responsibility to inform the class about the website during the class and to maintain the website. The ASA is not responsible for the content on any such site.

Can the distribution of the honoraria/travel related expense allotments change after the course has been presented at JSM?

No. If there are multiple presenters, all monies are distributed equally unless a change is indicated on the signed Presenter Agreement.

VI. SCHEDULE FOR CE PRESENTATION PROPOSALS

A. Year Prior to Proposed Presentation

- September 30, 2009* Deadline for CE proposals. Course proposals are to be submitted online at the ASA web site no later than 11:59 p.m. EST September 30. Cosponsor letters (if applicable) are to be received by this date as well.
- October 2009* Proposals are sent to the CE Course Evaluation Subcommittee and Advisory Committee on Continuing Education (ACCE).
- November 2009* CE Course Evaluation Subcommittee recommendations sent to ASA Center for Statistics Education.
- December 2009* ACCE decides on proposals via telephone conference. Course contact persons are informed of the acceptance/non-acceptance of their proposals.

B. Year of Proposed Presentation

- January 2010* ACCE assigns preliminary presentation dates and times. Acceptance/rejection notices sent to presenters and Section/Chapter (if applicable). Presenter Packets mailed. Cosponsorship agreements mailed (if applicable).
- March 2010* Presenter Packets due to CSE office. Cosponsorship agreements due to CSE office.
- April 2010* Presentation descriptions and fee schedules appear on ASA Web site.
- May 2010* JSM registration begins.
- July 2010* Pre-registration enrollment counts monitored. Courses may be cancelled by ASA at the end of pre-registration if the enrollment is remarkably low. *Final decisions regarding cancellation rest with the ASA Executive Director.* Handouts sent electronically to CSE - no exceptions.
- August 2010* Presentations at Joint Statistical Meetings. Excellence-in-CE awards decisions made.
- September 2010* Honoraria/Travel reimbursement forms due.
- October 2010* Honoraria and travel related expense reimbursements mailed (if applicable) to presenters.
- November 2010* Cosponsorship revenue credited or debited to Section/Chapter account (if applicable).

During the course proposal online submission process this information must be provided. For course abstract, outline, learning objectives, and presenter(s) background, it is recommended that this information be cut and pasted into the online submission form.

1. TITLE OF PRESENTATION

2. NAME(S) AND ADDRESS(ES) OF PRESENTER(S): List by presentation *order*. Email and office phone and fax numbers are to be included. Please use same form of name for all JSM correspondence – including CE. *It is essential that Center for Statistics Education at ASA is notified of any changes that occur between the time of submission and the time of presentation.*

3. ABSTRACT: Provide an abstract **not to exceed 200 words** of the proposed course including the prerequisite for the anticipated audience. If the course is selected, this abstract will be used for advertising purposes in the registration material and on the CE web site. Prerequisite knowledge or assumptions regarding the background of the attendees must be included in the abstract. If the abstract is more than 200 words, it will be edited by ASA.

4. OUTLINE: Provide a detailed outline of the entire program. Describe what will occur during each segment. **DO NOT INCLUDE** chapters of an upcoming book. Provide a description of the target audience.

5. LEARNING OUTCOMES: The following must be included in your proposal:

(a) Learning outcomes (performance objectives): The proposal must include a clear and concise statement of intended learning outcomes for the course. Learning outcomes are statements that identify what knowledge, skills and/or attitudes attendees are expected to accomplish/demonstrate as a result of the course. The attainment of the stated learning outcomes will be assessed as part of the CE evaluation process at the conclusion of the course so it is imperative that the presenter teach to these objectives.

(b) Content and instructional methods: The presenter must include a description of course content and instructional strategies based on the learning outcomes (performance objectives).

6. PRESENTER(s): Paragraph highlighting presenter's background and experience with subject. **DO NOT** include resumes and/or curriculum vitae.

7. AUDIO-VISUAL EQUIPMENT: Each presentation will be provided with one overhead projector, one screen, one data projector and one lavalier microphone. A flip chart and second screen are available at no extra charge upon request. Presenters desiring additional AV equipment are responsible for additional equipment expense. Details are available upon request.