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The summer research conferences and the SRCOS: a historical perspective

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In this paper, a brief account of the origin and evolution of the Southern Regional Council on Statistics/American Statistical Association (SRCOS/ASA) Summer Research Conference (SRC) is outlined. The 40th SRC was held in Blacksburg, Virginia, on 6–9 June 2004. The conference was originally the brainchild of the Southern Regional Education Board’s Committee on Statistics (SREB-COS), created to fulfill a unique need for a small gathering of statisticians and other scientists in the Southern region of the United States, at which research topics in statistics and statistical training could be addressed in a relaxed and unhurried way amid pleasant surroundings. Young statisticians were included along with well-known senior researchers to be able to interact, get to know each other, and enhance their research and training efforts. A brief history of the SREB-COS and its successor, the SRCOS, is also presented to convey its role in the development of the discipline in the region.

Keywords: Southern Regional Education Board; Research conference on statistics; Southern Regional Council on Statistics; History of statistics; Statistics in the South

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1. Introduction

The field of statistics includes a wide spectrum of interests: vigorous abstract theory; varying philosophical or structural fundamental approaches to the subject; an extremely wide variety of applications in industrial and academic fields of research; research in new theory and methods of applications; problems of teaching rapidly changing material to differing groups of students. One method of bringing together such heterogeneous interests ‘· · · [is] by means of a leisurely and informal conference amid pleasant surroundings.’

This quote is from the introductory statements of the Purpose and General Comments of the Southern Regional Education Board (SREB) Committee on Statistics (COS) in establishing the ‘SREB Summer Conference in Statistics’ in the mid-1960s, and shows that the main purpose for such a conference as envisioned by the COS still exists. Since this issue of JSCS is dedicated to papers arising from the 2004 Southern Regional Council on Statistics/American

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Statistical Association (SRCOS/ASA) Summer Research Conference, this article is intended to briefly review the history of the Conference and its sponsoring organization.

The SREB Summer Conference in Statistics was initiated in a format similar to the well-known Gordon Research Conferences. It was 5 days long (Monday through Friday noon) with only two sessions per day, one 3 hours long in the morning and the other in the evening, leaving afternoons free for informal interactions or other functions. Each session consisted of one long presentation that began with an overview of the topic under discussion, gave recent progress and current results, and finally, discussed unsolved problems in the area. The speakers included both junior and senior researchers, providing opportunities for junior scientists to give longer invited presentations on their work than was possible at typical professional meetings. Attendance at the Conference was by written invitation based on nominations made by the SREB-COS members (described later in this article). Lively discussion by the attendees was highly encouraged!

Although the Conference format has evolved over the years, its spirit has been preserved. Young statisticians continue to be given an opportunity to present an extended talk on their research and to interact in an unhurried and informal setting with more senior colleagues ‘amid pleasant surroundings.’ The size of the Conference is kept small for such interactions and pursuit of new ideas. The evolution of the Summer Conferences and the sponsoring organization is described in the remainder of this article.

2. The Summer Research Conferences

The Summer Research Conferences are currently sponsored by the SRCOS and the ASA and have a long tradition. The SRCs originated in 1966 as a special effort by the Committee on Statistics of the SREB to offer a research conference with a different focus for a different audience than the standard professional meetings. The co-sponsorship of the SRC with the ASA began in 1983. The format of the SRC has only seen minor changes while spanning the careers of numerous prominent statisticians. The 2004 SRC at Blacksburg, Virginia, was the 40th conference, as shown in the following list:

2004  Blacksburg, Virginia, 6–9 June
2003  Jekyll Island, Georgia, 8–11 June
2002  Natchez, Mississippi, 2–5 June
2001  St. Augustine, Florida, 3–6 June
2000  Colonial Williamsburg, Virginia, 4–8 June
1999  Mountain View, Arkansas, 13–17 June
1998  Navarre Beach, Florida, 7–11 June
1997  Gatlinburg, Tennessee, 19–21 June
1996  DeGray State Park, Arkansas, 9–13 June
1995  Melbourne Beach, Florida, 11–14 June
1994  Colonial Williamsburg, Virginia, 9–12 June
1993  Galveston, Texas, 11–15 June
1992  Flat Rock, North Carolina, 13–17 June
1991  Melbourne Beach, Florida, 9–13 June
1990  Mobile, Alabama, 10–14 June
1989  Unicoi State Park, Georgia, 11–15 June
1988  Holiday Island, Arkansas, 18–24 June
1987  Holiday Island, Arkansas, 19–25 June
1986  Brookley Conference Center, Mobile, Alabama, 15–20 June
The main goal of the current SRC is to encourage the interchange and mutual understanding of research ideas and to provide motivation and direction to further research progress in a manner not ordinarily possible at other meetings. The 4-day conference has been typically at a picturesque vacation area where participants may engage in friendly, unhurried discussions in an informal atmosphere (e.g. see [http://www.stat.uga.edu/SRCOS/FILES/SRC2000.html](http://www.stat.uga.edu/SRCOS/FILES/SRC2000.html), and [http://www.stat.uga.edu/SRCOS/2003/sr/index.html](http://www.stat.uga.edu/SRCOS/2003/sr/index.html) for the amenities at Colonial Williamsburg 2000 and Jekyll Island 2003). Participants are encouraged to bring their families, which enriches the conference activities and strengthens professional interactions. Time is provided for rest and recreation. Conference programs allow for formal presentations with discussion periods for clarification, amplification, or argument. The sessions are planned with a diversification of interests in accordance with the purpose of the conference. Examples of session topics are rigorous abstract theory, philosophical expositions, new and unusual applications of statistics, and ideas in teaching. Attendance at the SRC is now open to all, with younger statisticians especially encouraged to attend. The inclusion of junior faculty members in the program and financial support for graduate students are examples of intentional efforts to integrate younger statisticians into the activities. The following quotes from the 8–9 April 1965, SREB-COS Business Meeting’s minutes best illustrate the guiding principles for the SRC:

The SRC should be informal, with provisions for extensive interaction between the participants. They should be able to get acquainted to a degree that is not possible in most meetings. The conference should be at a comfortable, not too rustic retreat so that expenses can be kept to a reasonable level and so that families can be accommodated. Some formal presentations should be considered to spar discussions. These occasions might be used to develop a self-contained topic in detail in a leisurely manner. To provide group understanding, the presentation could break frequently for questions and clarifications. An element of training therefore could be injected into the program. The presentations should be scholarly yet energetic. The bulk of the conference should stress the social contacts built around the presentations.

Originally, the SRC spanned 5 days. For the past decade, the format of the SRC has entailed a 4-day conference with a reception on Sunday evening and technical sessions on Monday, Tuesday, and Wednesday. Monday sessions have been in the morning and evening, with the
afternoon available for family recreation. A golf tournament has been a regular attraction on Monday afternoons, with the competition results reported later at breaks. Socials and session break discussions have been greatly enhanced by the actual Monday afternoon play. Tennis competition has been a frequent activity, with beach strolls or mountain walks, depending on the location, adding to the enjoyment of the conference participant. A Tuesday evening banquet with award announcements of student paper competition, golf/tennis champions, and Paul Minton Service Awards has typically been a highlight of the SRC. The Wednesday morning session has been devoted to statistical education in recent years. Programs of the eight most recent SRCs are available at http://www.stat.uga.edu/srcos.

In June 1992, the SRCOS celebrated the 25th anniversary of the Summer Conference with a special program at the Conference in Flat Rock, North Carolina. The program included a panel discussion and reminiscences by several of the original organizers and long-time members, see figure 1.

Attendance at the SRCs varied from 40 to 65 until recent years when attendance soared to over 100 at both Natchez, Mississippi, in 2002 and Jekyll Island, Georgia, in 2003. Funding from the National Science Foundation for graduate students (in addition to SRCOS funding) to attend the past five SRCs has accounted for part of this increase.

3. The SREB and the Committee on Statistics

The SREB, the first interstate compact in the country, which was established in 1948, is a public agency of 15 member states cooperating to improve education. SREB works directly with state governments, academic institutions, and other agencies concerned with education. In 1952, SREB sponsored a Southern Regional Conference on Statistics. This conference spawned plans to conduct a series of Southern Regional Graduate Summer Sessions and, later, the formation of the SREB Southern Regional Committee on Statistics (SREB-COS). The Committee’s purpose was · · · to provide a means of joint planning and cooperative action by which the member institutions can coordinate and supplement their respective educational, research, and service programs in statistics to meet more effectively the present and future...
needs of the region and nation.’ The first organizational meeting of the SREB-COS was in Atlanta, Georgia, on 5–6 October 1955. Ten universities were represented at the first meeting:

Gene E. Albert, University of Tennessee, Knoxville
Broadus Browne, University of Georgia, Athens
Dana Card, University of Kentucky, Lexington
H. H. Chapman, University of Alabama, Tuscaloosa
Boyd Harshbarger, Virginia Polytechnic Institute, Blacksburg
Herbert Meyer, University of Florida, Gainesville
Carl Marshall, Oklahoma A&M University, Stillwater
George Nicholson, University of North Carolina, Chapel Hill
Jack A. Rigney, North Carolina State University, Raleigh
John Stockton, University of Texas, Austin.

These 10 institutions and the University of Virginia signed the first memorandum of agreement (MOA) in 1955, and there have been nine renewals (every 5 years) of the MOA by over 40 different institutions over the past 49 years. The SREB-COS grew rapidly over the next 18 years with the inclusion of Oak Ridge National Laboratories (1956), Georgia Institute of Technology (1958), Florida State University (1961), Johns Hopkins University (1961), Southern Methodist University (1963), Texas A&M University (1964), Clemson University (1966), Duke University (1966), Mississippi State University (1966), Emory University (1966), Vanderbilt University (1967), University of South Carolina (1967), Virginia Commonwealth University (1967), Louisiana State University (1968), Tulane University (1968), University of Alabama at Birmingham (1969), Auburn University (1970), Texas Tech University (1971), Rice University (1971), Louisiana Tech University (1971), the Medical University of South Carolina (1971), University of Southwest Louisiana (1971), University of West Virginia (1971), University of Arkansas, Medical Center (1972), University of Maryland (1972), and Georgia State University (1973).

Major activities of the SREB-COS during the first two decades of its existence centered around a variety of cooperative programs, including a Visiting Lecturer Program and a series of 20 Regional Graduate Summer Sessions. The summer programs allowed students from one institution to enroll at another SREB institution (with instate tuition, often waived or supported by grant funds) for summer classes to obtain a broad educational experience. Early summer programs were considerable successes. The following is a complete listing of the summer programs:

1959 North Carolina State University
1960 University of Florida
1961 Virginia Polytechnic Institute
1962 Oklahoma State University
1963 North Carolina State University
1964 Virginia Polytechnic Institute
1965 University of Florida
1966 University of Georgia
1967 Emory University
1968 Texas A&M University
1969 Virginia Polytechnic Institute
1970 Southern Methodist University
1971 Clemson University
1972 Rice University
1973 Florida State University
Following the successful but somewhat local 1973 summer program (with only one non-Floridian attending), it was decided that most graduate programs had grown to the point that they could sustain their own summer offerings, and the summer programs were discontinued.

A major function of the SREB-COS (and later SRCOS) has been to provide extensive expertise as advisors or consultants to institutions of higher learning in determining how to optimally organize their statistics offerings. This consultation has enabled university and college administrators to make decisions regarding the optimum environment in which to conduct their statistical activities. In many instances, separate statistics departments were recommended and later established. In other cases, combined departments (e.g. mathematics and statistics) or institutes (combining several programs) were recommended and later established.

Prior to the establishment of the SRCOS website at the University of Georgia in 1995, the SREB-COS (and later SRCOS) regularly published a brochure on Statistics Programs in the South. In this brochure, the statistics-related degree programs at each member institution were described in detail, along with institutional information and contacts. The brochure was targeted to prospective statistics students at both undergraduate and graduate levels.

SREB provided substantial support to the Committee throughout the earlier years and continues to aid the Committee with its activities. Dr. John K. Folger, Research Associate at SREB, served as the first secretary for the Committee beginning in 1955. He was succeeded by Lloyd W. Chapin in 1958 with William C. Geer assuming the duties in 1961. In 1962, William L. Bowden, Associate Director for SREB programs, assumed the duties of secretary for SREB-COS. In the 1960s, J. W. Rollow and Mary Howard Smith served as secretary for the Committee. Tex Schietinger served the longest term as SREB-COS secretary, over a decade, retiring in 1987. SREB Director of Educational Programs, Robert Stoltz, served 2 years as SREB-COS secretary, facilitated the founding of SRCOS in 1989, and provided invaluable assistance throughout the 1990s from his Atlanta office.

### 4. The birth of SRCOS

In 1987–1988, the SREB felt that SRCOS had developed into an organization in its own right, and it was no longer appropriate to consider it as a Committee of the SREB. Consequently, SRCOS ceased to be a formal committee of SREB in 1989, but continues to pursue its original purpose as an independent group under the name of the SRCOS. SREB remains interested in the work of SRCOS and continues in an ex-officio membership capacity. SRCOS has continued the effort to foster cooperation in statistical affairs among institutions concerned with higher education. The mission of SRCOS is to promote the improvement of postsecondary education in statistical science, assist in the development of high quality statistics instruction in elementary and high schools, and promulgate educational activities which improve the quality of statistical practices. SRCOS fulfills this mission by fostering and facilitating cooperation among institutions in its membership region concerned with statistics education. Specific current examples of SRCOS activities are providing forums for communication on effective approaches to solving common problems with statistical training, sponsoring (joint with ASA) annual summer research conferences, and maintaining an electronic network for sharing statistical information among its members. A current membership listing for SRCOS is available at [http://www.stat.uga.edu/SRCOS](http://www.stat.uga.edu/SRCOS).

The various functions of SRCOS change over time, depending upon the needs and concerns of the statistics community. From its inception in 1955, the original SREB Committee on Statistics became formally involved in cooperative action and joint planning. At the present time, the SRCOS is involved in discussions of problems concerning teaching, consulting, research,
ethics, courts of law, curricula, and student recruitment. Every institution that has statistics in its curriculum faces its own distinct set of problems. In some institutions, all statistics courses are taught by a statistics department; in others, statistics is taught by faculty within several departments. Thus, the Council makes available surveys on statistics organizational structure and statistics curricula as well as its recommendations on important issues. Development of teaching materials is also of concern to the Council. The SRCOS also addresses problems in the various statistical applications. For example, medical schools have different problems in statistics than do business schools. A major consideration is with the unique problems faced. In response to the widespread development of statistics programs throughout the South, the Council now publicizes summer graduate offerings, a Summer Research Conference, and advisory services to member institutions.

5. Business meetings of SREB-COS and SRCOS

The activities of SREB-COS/SRCOS are planned at the annual business meetings which are typically held in the fall on the campus of one of the member institutions (figure 2). Following is a complete list of the annual business meetings through 2004:

1955  SREB Office in Atlanta, 5–6 October
1956  North Carolina State University, 25–26 June
1956  New Orleans, LA, 29 October
1957  Mountain Lake, VA, 23–28 August (in conjunction with the first SRC)
1958  Oklahoma State University, 23–24 June
1959  North Carolina State University, 16–17 July
1960  University of Georgia, 28 April
1961  University of Kentucky, 30 March
1962  Florida State University, 22–23 March
1963  University of Alabama, 29–30 March
1964  University of Texas, 13–14 March
1965  Oak Ridge Institute of Nuclear Studies, 28–29 October
1966  Southern Methodist University, 27–28 October

Figure 2. SREB-COS representatives at the annual business meeting in Galveston, Texas, 11–13 October, 1978, hosted by the University of Texas Medical Branch.
1967  University of Florida, 23–24 October
1968  Duke University, 7–8 November
1969  University of Tennessee, 6–7 November
1970  Texas A&M University, 29–30 October
1971  Florida State University, 11–12 November
1972  Virginia Polytechnic Institute and State University, 19–20 October
1973  University of South Carolina, 18–19 October
1974  Vanderbilt University, 10–11 October
1975  Medical University of South Carolina, 9–10 October
1976  New Orleans, Louisiana, 7–8 October
1977  University of Alabama at Birmingham, 7–8 October
1978  University of Texas Medical Branch, 11–13 October
1979  University of Kentucky, October 31–November 2
1980  Atlanta, Georgia, 8–10 October
1981  Virginia Polytechnic Institute and State University, 14–16 October
1982  Southern Methodist University, 6–8 October
1983  University of Florida, 5–7 October
1984  Virginia Commonwealth University, 3–5 October
1985  Atlanta, Georgia, 2–4 October
1986  Medical University of South Carolina, 1–3 October
1987  McNeese State University, 7–9 October
1988  University of North Florida, 5–7 October
1989  University of South Carolina, 29–30 September
1990  Baylor University, 28–29 September
1991  Louisiana State University Medical Center, 27–28 September
1992  Duke University, 2–3 October
1993  University of Southwest Louisiana, 1–2 October
1994  University of Georgia, September 30–October 1
1995  Melbourne Beach, Florida, 10–11 June (in conjunction with the SRC)
1996  North Carolina State University, 4–5 October
1997  University of Florida, 17–18 October
1998  George Mason University, 2–3 October
1999  Texas A&M University, 1–2 October
2000  Rice University, 6–7 October
2001  Virginia Tech, 5–6 October
2002  University of Alabama, 27–28 September
2003  Emory University, 2–3 October
2004  Virginia Commonwealth University, 8–9 October

Boyd Harshbarger, then Head of the Statistics Department at Virginia Polytechnic Institute, was elected as the original chair of SREB-COS in 1955 and served until 1959. Professor Harshbarger’s dynamic leadership was instrumental in the Committee’s early successes. He was succeeded by a long line of effective leaders:

Chairs of SREB-COS (1955–1989) and SRCOS (1989 to present)

1955–1959  Boyd Harshbarger, Virginia Polytechnic Institute
1959–1961  Jack Rigney, North Carolina State University
1961–1963  Carl Marshall, Oklahoma State University
1963–1965  Ralph Bradley, Florida State University
1965–1967  Don Gardiner, Oak Ridge Associate Universities
1969–1971  James Walker, Georgia Tech University
1971–1973  Ed Hickman, University of South Carolina
1973–1975  David Mason, North Carolina State University
1975–1977  Richard Anderson, University of Kentucky
1977–1979  Wanzer Drane, Southern Methodist University
1979–1981  Jean Gibbons, University of Alabama
1981–1983  Clint Miller, Medical University of South Carolina
1983–1985  Dick Scheaffer, University of Florida
1987–1989  Tom Bratcher, Baylor University
1989–1991  Linda Malone, University of Central Florida
1993–1995  Bob Taylor, University of Georgia
1995–1997  Larry Ringer, Texas A&M University
1997–1999  Ron Randles, University of Florida
1999–2001  Tom Gerig, North Carolina State University
2001–2003  Kathy Ensor, Rice University
2003–2004  Jack Tubbs, Baylor University

The annual business meetings typically last one and a half days with a full agenda. Many topics and issues important to the higher education statistics community have been addressed during these meetings. Examples include undergraduate curricula in statistics, accreditation of programs in statistics, issues in statistical consulting, the supply and demand of statistical professionals, teaching of statistics, statistical computing issues, areas of application of statistics, publicizing statistical careers and student recruitment, recruiting faculty in statistics, and guidelines for operation and planning of the SRC each year. Sometimes, a ‘controversial’ topic was brought up to the committee which took a large amount of time for discussion and argument. As a humorous relief at each business meeting, it is a tradition for an ad hoc Resolutions Committee to be appointed at the beginning of the meeting and to report its ‘resolutions’ at the end. Many of the resolutions are quite humorous and poke fun at some of the discussions during the meeting. A few examples:

From the 1984 business meeting Resolutions:

WHEREAS Al Manson has wisely and repeatedly pointed out the importance of discussion in the summer research conference, NOW, THEREFORE BE IT RESOLVED that he be awarded the 1984 SREBCOS White Noise Award.

WHEREAS in the good old days, scholars would attend meetings even in the most Spartan housing conditions in order to save money, NOW, THEREFORE BE IT RESOLVED that, for his selection of the Brookley Center for the 1986 SRC, Joe Padgett be given the 1984 SREBCOS Award for Contributing to a Return to Traditional Values.

From the 1989 meeting:

[BE IT RESOLVED that] SRCOS hire an additional van to carry Clint Miller’s handouts.

We award the Patience-of-Job Award to our corporate observers for their endurance in the face of our fast-paced decision making.

6. Awards of the SREB-COS and SRCOS

Student attendance has traditionally been strongly encouraged and supported by the Council. Although a few small ‘scholarships’ were given to students to partially support their
attendance at the SRC earlier, the Council decided in 1993 to formalize such support each year. So, in recognition of their many contributions to the advancement of statistics in the South and nationally, graduate student travel and stipend awards were made annually in honor of Richard Anderson (support to present a paper) and Boyd Harshbarger (travel support to attend). The first awards were given for the 1994 SRC in Williamsburg, Virginia, supported entirely by the SRCOS. Beginning with the 2000 SRC, also held in Williamsburg, support in the form of grants from federal agencies has been obtained for these student awards (figure 3).

Long time supporter and 1981–1983 SRCOS President Clint Miller died recently. In his honor, the first annual Clint Miller Award for Outstanding Student Presentation was given at the 2004 SRC in Blacksburg, Virginia, to Amy Bardeen and Thomas McCoy of Clemson University for their poster presentation of ‘Effects of Endometrial Growth Patterns and Embryo Transfer Time on Pregnancy Rates in an Assisted Reproduction Technology Program.’

The Paul Minton Service Award was established by the SRCOS in 1991 to recognize an individual in the Southern region for outstanding service to the statistics profession. The award was established to honor Paul Minton, who served the statistics profession nationally and in the southern region for many years, notably at Southern Methodist University and Virginia Commonwealth University, and was instrumental in the continued development of statistical education in the SRCOS region. Individuals nominated for this award must reside in one of the states represented on the SRCOS. The selection criteria include: contributions to statistical education, statistical service to industry and government agencies, service to professional statistical organizations, and promotion of the use of statistics. The nominee’s contributions are expected to have extended over a long-time period and have been significant in their impact. The awardees are listed as follows:

Paul Minton Service Award Winners

1992  Paul Minton (Founder’s Award)
1993  R.L. Anderson
1994  Ralph Bradley
1997  Richard Scheaffer
1999  Jim Davenport (figure 4)
2000  Jean Gibbons
2001  Bob Taylor and Larry J. Ringer
2002  Mike Kutner
2003  Joe Padgett
2004  Ron Randles

Figure 3. Patches Johnson and Wendy Smith receiving R.L. Anderson Awards from SRCOS president Tom Gerig at the 2000 SRC, Williamsburg.
Figure 4. Jim Davenport, Virginia Commonwealth University, receiving the Paul Minton Service Award from SRCOS President Tom Gerig at the 2000 SRC.

7. Future

The SRC continues a long tradition of providing a unique format and opportunity for exploring new statistical concepts and practices and for helping to promote statistics in the Southern region and throughout the nation. The SRCOS will continue to seek ways to enhance the SRCs and its other activities as it prepares for its 50th anniversary in 2005.