

**Third International Conference on Establishment Surveys**

Survey Methods for Businesses, Farms, and Institutions  
(ICES-III)

Hyatt Regency Montréal

**Montréal, Québec, Canada**

**June 18-21, 2007**

**ices-iii**  
hyatt regency montreal

*June 18-21, 2007*



# Organizing and Program Committee

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## Information

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**Web** [www.amstat.org/meetings/ices/2007](http://www.amstat.org/meetings/ices/2007)

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**Important information** will be sent to you via email.  
Please set any spam-blocking filters to allow emails sent  
from addresses containing "@amstat.org."

# Welcome

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Dear Colleague,

Welcome to the Third International Conference on Establishment Surveys. Building on the achievements of the first two ICES conferences, which were held in 1993 and 2000, ICES-III presents a wealth of opportunities for intellectual enrichment and professional networking.

Robert Edwards, director of the statistics department at the International Monetary Fund, will present the keynote address. This presentation will open the conference with insights gleaned from Edward's global experience addressing the needs of both producers and users of official statistics while promoting best practices in national statistical systems.

The program described on the following pages presents the latest thinking on key issues pertaining to establishment surveys via introductory overview lectures, invited and contributed sessions, and a panel discussion. Poster sessions and software demonstrations provide further opportunities for cross-national, interdisciplinary discussions and the exchange of ideas.

The social program allows participants to enjoy unique cultural aspects of our beautiful host city. In addition, the receptions and concluding dinner provide opportunities to renew existing friendships and meet new colleagues.

On behalf of all who have worked to make this conference a reality, I am pleased to welcome you, to thank you for participating, and to invite you to take advantage of the variety and depth of opportunities at the conference.

Howard Hogan, Chair  
ICES-III Organizing Committee  
Associate Director for Demographic Programs, U. S. Census Bureau

## This conference is sponsored by:



American Statistical Association



International Association of Survey Statisticians



ASA Section on Government Statistics

## The organizing and program committees would like to thank the following organizations for their generous support of the ICES-III 2007:

Statistics Canada  
Statistics Sweden  
The ASA Section on Business and Economic Statistics  
Bureau of Labor Statistics  
U.S. Census Bureau  
National Agricultural Statistics Service  
Westat



ASA Section on Survey Research Methods



Statistical Society of Canada

## The City

Montréal is a city rich in history, art, culture, learning, and sports. The city's architecture, too, is an artful mix of old and new, with graceful historic structures lovingly preserved and merged with the cool lines of the 21st century. The visual arts flourish here at the Montréal Museum of Fine Arts, the Musée d'art contemporain, and hundreds of top-notch local galleries. To learn more about Montréal, visit the Greater Montréal Convention and Tourism Bureau web site at

[www.tourisme-montreal.org](http://www.tourisme-montreal.org).

Montréal is an international city, accessible from just about anywhere in the world. Connected via major airlines across the globe, Montréal is only an hour and a half from New York City, two hours from Chicago, and six hours from London. Montréal-Trudeau International Airport recently underwent major renovations in order to improve services for travelers and modernize the infrastructure. Taxis and limousines ensure quick service to and from Montréal's downtown core. There is also shuttle bus service, l'Aérobis, that links the airports to convenient connecting points in Montréal.

Montréal's Gare centrale (Central Station), with rail connections from New York or Washington, DC, is also a major stop for domestic trains from eastern or western Canada. The downtown station is conveniently connected to Bonaventure underground métro station by a pedestrian passageway. Bus travelers arrive downtown at the Montréal Bus Central Station, also connected to the métro (Berri-UQAM station).

Montréal is only 29 miles (47 km) from the New York border. The New York State Thruway (I-87) becomes Route 15, and U.S. I-89 becomes two-lane Route 133, which joins Highway 10 to Montréal. From I-91 in Massachusetts, highways 55 and 10 lead to Montréal. Visitors coming to Montréal from eastern or western Canada may use highways 20 and 40. Québec speed limits are in kilometers (100 kph equals about 62 mph). Gasoline is sold in liters (3 3/4 liters equals 1 gallon).

## Weather

The weather in Montréal greatly varies with the four seasons, so visitors are encouraged to check the forecast before packing. Web site links providing basic weather information include [www.meteo.ec.gc.ca](http://www.meteo.ec.gc.ca) (Meteorological Service of Canada) and [www.theweathernetwork.com](http://www.theweathernetwork.com) (The Weather Network).

Average High: 80° F/26.4° C

Average Low: 61° F/16.3° C

## Time Zone

Montréal is in the Eastern Daylight Time (EDT) Zone.

## Map

<http://www.amstat.org/meetings/ices/2007/pdfs/montrealmap.pdf>

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# Travel Information

## Airport

The recommended airport is Montréal-Pierre Elliott Trudeau International Airport (Montréal-Trudeau) (YUL), which offers direct flights to more than 100 destinations.

Air Canada is pleased to offer special discounts on fares booked via [www.aircanada.com](http://www.aircanada.com) using the promotion code **T7RQKDZ1**. Note: Travel agents are not able to call in reservations using this promotion code.

## Ground Transportation

Tickets for l'Aérobús may be purchased at the Montréal Central Bus Station (505 de Maisonneuve Blvd. East), Montréal Trudeau International Airport (at the dispatcher's counter on the main level in the arrivals area), or from the driver. Rates: one-way - \$13 (Canadian dollars); round-trip - \$22.75 (Canadian dollars). The shuttle operates from 4:00 a.m.–11:30 p.m. Pick-up is at the baggage claim area. For more information, call (514) 843-4938.

Limousines cost about \$65 (Canadian dollars) one-way, and taxis cost about \$35 (Canadian dollars) one-way.

## Public Transportation

Société de transport de Montréal (STM)

**Phone:** STM-INFO (786-4636)

**Fax:** (514) 280-5658

**Web:** [www.stm.info](http://www.stm.info)

## Métro Schedule

**Green and Orange lines:** Monday–Friday and Sunday, 5:30 a.m.–12:30 a.m.; Saturday, 5:30 a.m.–1 a.m.

**Yellow line:** Monday–Friday and Sunday, 5:30 a.m.–1:00 a.m.; Saturday, 5:30 a.m.–1:30 a.m.

**Blue line:** Daily, 5:30 a.m.–12:15 a.m.

Fares (bus and métro): Adult fare: \$2.50; booklet of six tickets: \$11.50; STM tourist pass: one day, \$9; three days, \$17. STM offers tourist passes for a one- or three-day period, allowing unlimited access to its bus and métro (subway) network. (All fares are in Canadian dollars.)

## Rental Cars

AVIS – (800) 331-1600 or [www.avis.com](http://www.avis.com)

Avis Worldwide Discount (AWD) Number: **J099649**

Negotiated rates are guaranteed, available from June 18–21, 2007, and include unlimited mileage. Return to the same renting location, or additional surcharges may apply. Weekend daily rates are available from noon Thursday–Monday at 11:59 p.m. (The vehicle must be checked out by 3 p.m. on Sunday). Rates are listed in Canadian dollars and do not include state or local surcharges, tax, optional coverage, or gas refueling charges. Renters must meet Avis' age, driver, and credit requirements.

Should a lower qualifying rate become available, Avis will offer a 5% discount off the lowest rate. Attendees must use the assigned Avis Worldwide Discount number (provided above) and meet Avis' rate requirements to receive the discount. Rate discounts are available at all corporate and participating licensee locations.

car class	car group	daily	weekly	weekend/daily
Sub-compact	A	\$50	\$214	\$25
Compact	B	\$50	\$215	\$25
Intermediate	C	\$52	\$225	\$27
Full-size (four-door)	E	\$55	\$236	\$29
Premium	G	\$57	\$256	\$31
Luxury	H	\$65	\$298	\$42
Sport Utility	W	\$81	\$349	\$56
Minivan	V	\$81	\$349	\$56

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# Hotel Information

## Hotel

### Hyatt Regency Montréal

1255 Jeanne-Mance, P.O. Box 130  
Montréal, Québec H5B 1E5  
Canada

**Tel:** (514) 982-1234

**Fax:** (514) 285-1243

**Web:** [www.montreal.hyatt.com](http://www.montreal.hyatt.com)

Housing will open December 18, 2006, and close on May 17, 2007.

Participants must make their own hotel reservations. Lodging is not included in conference registration. All meeting activities will be held at the Hyatt Regency Montréal.

The Hyatt Regency Montréal provides the following: iron/ironing board, coffee maker, cable/satellite TV channels, AM/FM clock radio, dual-line phones with voice mail, individual air conditioning and heat controls, safe-deposit boxes (available at hotel's frontdesk), hairdryer, room service, data port, high-speed internet access, full bath amenities, wireless high-speed internet in public areas, fully equipped fitness center, indoor pool, sundeck, massage services, full service business center, laundry and dry cleaning, concierge services, Le Café Fleuri Restaurant, and lobby lounge. Connecting rooms and cribs are available upon request. No roll-a-way beds will be provided, and the maximum number of guests per room is three.

Facilities for persons with disabilities include Braille symbols in elevators and on room signs, TDD phones, vibratory alarm clocks, smoke detectors, raised toilet seats, grab bars, a door knocker device, connecting rooms, wheelchair accessibility (doors, peepholes, closet poles, towel racks, and sink/vanity), and a guest room with roll-in shower. **Rooms for persons with disabilities must be prearranged with reservation staff.**

## Wireless Internet Access

Wireless internet connection is available in guest rooms and public areas of the Hyatt Regency Montréal for \$12.95 Canadian dollars per day.

## Reserving Your Room

When using the internet (recommended for best availability—available 24 hours a day/7 days a week), reservations may be made at <http://montreal.hyatt.com/groupbooking/mtlrmamsa2007> for regular rooms and <http://montreal.hyatt.com/groupbooking/mtlrmamsg2007> for government rooms.

When using the Hotel Reservation Form:

- ♦ Print or type all information and keep a copy for your records.
- ♦ Use a separate form for each reservation.
- ♦ Reference refer to **AMSA** (regular rate rooms) and **AMSG** (for government rate rooms) to receive the correct hotel rates
- ♦ Fax your form(s) to (514) 285-1243.
- ♦ Forms received after May 17, 2007, will be charged a higher rate.

## Cancellation Policy

Cancel by 4 p.m. on day of arrival.

## Submit Early!

You can expect delays due to heavy volume during the week of the deadline.

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# Hotel Reservation Form

## The Third International Conference on Establishment Surveys

June 18–21, 2007 • Hyatt Regency Montréal  
Montréal, Québec

**Call Hotel Directly:** (514) 982-1234

**Fax:** (514) 285-1243

**Online:** The main block at <http://montreal.hyatt.com/groupbooking/mtlrmamsa2007>  
or the government block at <http://montreal.hyatt.com/groupbooking/mtlrmamsg2007>

### Rates provided below are in Canadian dollars

\$209 Single/Double

\$229 Triple

\$249 Quad

\$259 Regency Club

\$399 One-Bedroom Suites

### U.S. Government or Canadian Government Rate

\$150 Single/Double

\$175 Triple

\$200 Quad

## Room Type

- Government rate
- Single (one bed, one person)
- Double (one bed, two people)
- Double/Double (two beds, two people)
- Triple (two beds, three people)
- Quad (two beds, four people)
- Nonsmoking
- Smoking
- Handicapped Equipped: Please specify  
.....
- Wheelchair

### Other (Available upon request and availability)

- Roll-a-way bed (not available for double-bed rooms)
- Connecting rooms
- Crib
- Quiet room

### Please list roommates

- 1) .....
- 2) .....
- 3) .....

### Credit Card Guarantee

- VISA
- MasterCard
- American Express
- Discover Card
- Diners Club
- Japan Credit Bureau
- Carte Blanche

\* The CVS number is a three-digit security number printed on the back of MasterCard and VISA cards or a four-digit number printed on the front of an American Express card.



# Short Courses

## **SC1 - Introduction to Survey Methods for Businesses and Organizations**

**Monday, June 18, 2007, 8:30 a.m.–5:00 p.m.**

**Paul Biemer, RTI International and The University of North Carolina, and David Cantor, Westat**

Business surveys are critical for economic and social statistics. Estimates of economic growth, productivity, and price levels rely on data collected through surveys of businesses and administrative record systems. Understanding the costs of supplying medical services depends on surveys of employers. Surveys of other types of organizations (e.g., schools, hospitals, police departments) also play a key role in generating estimates of crime, school performance, medical care, and scientific productivity (among other things).

Surveys of businesses and organizations differ markedly from demographic data collection because of the complexity of organizations, the process of eliciting response from organizations, and the requirement to retrieve information from multiple sources. In many surveys of businesses and organizations, information must be collected quickly and as often as every month. This course begins by providing an overview of the basic steps used to conduct business and organizational surveys. We explain principles and practices in designing, implementing, evaluating, and coordinating data collection from organizations. We explore strategies used in ongoing data collections and contrast current implementations with alternatives for design and mode of conducting surveys and censuses.

The course is structured around the concept of Mean Square Error (MSE), which gives a systematic approach to evaluating problems and quality in data collection. Sources of error that contribute to the MSE include specification error, frame error, nonresponse error, measurement error, and processing error. Each of these sources of error will be illustrated using examples from organizational surveys conducted for the federal government and private sponsors. We will discuss ways of evaluating and reducing error, concentrate attention on nonsampling error, and describe techniques for understanding and improving data quality.

## **SC2 – Small-Area Estimation**

**Monday, June 18, 2007, 8:30 a.m.–5:00 p.m.**

**Ray Chambers, University of Wollongong, Australia**

Although the primary focus of business surveys carried out by national statistical agencies is measuring economic activity at the national level, there is a growing demand from users for reliable estimates of this activity at subnational and regional levels. In the UK, for example, the recently released Allsopp report of business statistics has as one of its major recommendations the release of regional UK estimates of economic activity, and it can be expected that this demand will grow.

Production of regional estimates from business surveys has profound implications for business survey methodology, ranging from issues that arise in the geocoding of businesses with multiple locations to collection of regional data from businesses with integrated enterprise-level accounting systems to estimation of regional effects using the skewed and heteroskedastic data typically collected in business surveys. Although a well-developed literature on small-area estimation exists, these methods almost always make the unrealistic (from a business surveys perspective) assumption of a homogeneous population within each small area.

A move to regional business surveys also raises the prospect of integration of regional social survey results (e.g., on earnings and income) with regional business survey results (e.g., on employees and wages), leading to extremely powerful data sources for government microeconomic policymaking. Issues of confidentiality in the release of regional business survey estimates also are expected to play a large part in determining appropriate designs and estimation strategies for business surveys of the future.

The aim of this course is to expose participants to some of these issues, focusing on methodological issues that arise when adapting standard methods of population estimation used in business surveys to regional estimation and newly developed robust approaches that explicitly allow for the heterogeneity in business survey data. Extensions to estimation of the distribution of business performance within small areas also will be described. Where possible, methods described in the course will be illustrated using actual business survey data.

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### **SC3 - Nuts and Bolts of Web Surveys**

**Monday, June 18, 2007, 8:30 a.m.–12:00 p.m.**

**Reg Baker, Market Strategies, Inc.**

One major reason for the recent and rapid proliferation of web surveys is the relative ease with which they can be conducted. Almost anyone with a computer and an internet connection can design and conduct a web survey at a fraction of the cost of other modes, including mail. One unfortunate consequence of this dramatic increase in survey quantity has been an equally dramatic deterioration in survey quality. Some of this is due to lack of training in survey methods for a new generation of practitioners, but equally problematic has been the lack of agreed-upon standards and methods for web-based data collection within the survey profession.

As the survey research record builds, we can identify several best practices emerging in web survey design, implementation, and execution that help reduce survey error and establish web surveys as a legitimate, mature mode of rigorous survey data collection. This course will provide a basic understanding of current issues and best practices in web survey design and implementation. The first part will focus on the 'mechanics' of web surveys and include topics such as software selection and use, survey testing and quality assurance, and sample acquisition and contact methods. The second part will discuss screen design and question presentation by covering several important topics, such as survey navigation, presentation of standard question types, use of color, and impact of images. Much of the course is based on the emerging literature in web survey methods and will include a special emphasis on findings from a series of experiments funded by the National Science Foundation on visual and interactive features of web surveys.

In addition, this course will discuss lessons learned from two recent establishment surveys: the 2006 Cyber Security Survey and the 2005 A Matter of Degree Program. The Cyber Security Survey, funded by the Department of Homeland Security and the Bureau of Justice Statistics, is a large-scale, national-level web survey on cyber security practices and experiences across approximately 30,000 U.S. companies. The A Matter of Degree Program, conducted for the Harvard School of Public Health, gathered information about binge drinking and its related harms among college students who were 18 or older. In 2005, data were collected via a web survey of 18,500 college students from 31 colleges across the United States.

### **SC4 - Question Testing for Establishment Surveys**

**Monday, June 18, 2007, 1:30 p.m.–5:00 p.m.**

**Fran Featherston, National Science Foundation, and Kristin Stettler, U.S. Census Bureau**

The merits of testing survey questions and data collection instruments have been generally accepted by survey practitioners. While questionnaire design, development, and testing methods are reasonably well-known and accepted in surveys of individual respondents reporting for themselves, similar activities are (or should be) conducted for surveys of establishments. Establishments may include entities such as schools, hospitals, businesses, farms, and government agencies.

This course will cover methods and techniques for question testing with a focus on their application in surveys of establishments. There are special challenges and considerations when surveying establishment respondents that are not considerations with general population surveys. For example, establishments often retrieve information from formal record systems, rather than memory; establishments may be defined in more than one way; it often is unclear who the appropriate respondent within the establishment is; technical or specialty terminology is used often; and testing often must be conducted in the business setting, rather than the laboratory. These and other key differences between establishment and general population surveys will be discussed. We will provide examples of how question-testing methods—such as expert review, feasibility studies (i.e., company/site visits), cognitive interviewing, focus groups, and pilot tests—are affected by these differences. The emphasis will be on practical advice for conducting question testing.

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Montréal skyline from the Old Port | T© Tourisme Montréal, Stéphan Poulin

## Instructions

Reservation forms and payment must be received by May 29, 2007.

All tours include admissions, a professional guide, and some transportation. A member of the Local Arrangements Team will be there to help at all times during the tours.

Additional reservations for tours will be taken onsite at the Registration Desk only if there is space available. There will be an additional \$5 fee charged for each ticket purchased onsite.

The ASA reserves the right to cancel any tour if the minimum required number of participants is not met.

All tours will depart from Hyatt Regency Montréal from Jeanne Mance Street.

Arrive 15 minutes before departure time in the Hyatt Montréal lobby.

June is peak season for tour events in Montréal, so we recommend purchasing tickets for tours in advance.

## Cancellations

A written notice must be received by the ASA Registration Department for the cancellation of any tour reservation. Cancellations received by 11:59 p.m. EDT March 29, 2007, will incur a 20% cancellation fee for each item cancelled. Cancellations received March 30–May 29, 2007, will incur a 40% cancellation fee for each item cancelled. Any cancellations received after 11:59 p.m. EDT May 29, 2007, will not be refunded.

## Tour Details

### Montréal and Notre-Dame Basilica Bus Tour

**Adult: \$30; Child: \$27.50; Onsite Adult: \$35; Onsite Child: \$32.50**

**TR1 - Sunday, June 17, 2:30 p.m.–5:30 p.m.**

**TR5 - Tuesday, June 19, 9:00 a.m.–12:00 p.m.**

On this tour of the second-largest French-speaking city in the world, you will discover Old Montréal, Notre-Dame Basilica, and Montréal's popular downtown. You will see the view from Mount-Royal; visit the Plateau Mount-Royal, a chic residential and commercial district; Olympic Park, constructed for the 1976 summer Olympic Games; and much more. You will appreciate the unique character of the city of 100 bell towers.

### Beer-Tasting in the Richelieu Valley

**(must be 18 to participate)**

**Adult: \$35; Onsite Adult: \$40**

**TR4 - Monday, June 18, 12:30 p.m.–4:30 p.m.**

The Richelieu Valley, colonized by the French, was at the heart of the seigniorial system and is noteworthy for its panoramic scenery. This tour will take you back into colonial-era Québec at Fourquet Fourchette with its 17th-century theme of period furniture, costumes, music, and entertainment. You will discover the distinctive taste of traditionally brewed beers, each having a unique label, and enjoy a tour of the facility while learning about the intricate steps of the traditional brewing process. Of course, you'll get to sample many of the establishment's finest beers. Second, you will relive the history of the region by visiting Fort Chambly, which stands on the banks of the Richelieu River. Fort Chambly is an impressive stone fort that protected the route to Montréal against British attack.

### Dinner Cruise on the St. Lawrence River

**Adult: \$85; Child: \$85; Onsite Adult: \$90; Onsite Child: \$90**

**TR6 - Tuesday, June 19, 6:30 p.m.–10:30 p.m.**

Discover Montréal's Old Port, Ste-Helen's Island (site of the 1967 World Fair and Expo), the Jacques-Cartier Bridge, and the shoreline and islands of Boucherville while enjoying a multicourse fine meal and live music. There is no transportation provided to and from the boat, so guests need to be in the hotel lobby by 5:45 p.m. to meet the local arranger and take a taxi to the dock.

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### Old Montréal and Notre-Dame Basilica Guided Walking Tour

**Adult: \$15; Child: \$15; Onsite Adult: \$20; Onsite Child: \$20**  
**TR2 - Monday, June 18, 9:30 a.m.–12:00 p.m.**  
**TR7 - Wednesday, June 20, 2:00 p.m.–4:30 p.m.**

A professional guide will take you through a maze of streets and historic buildings on this tour, which will start with a brief introduction to the “RÉSO,” an impressive network of underground passageways and shopping malls linking major office buildings. Then, you will head to the Chinese district before continuing to Old Montréal. In addition to St. Jacques Street, the lively Place Jacques-Cartier, St. Paul Street, and the revitalized Old Port, a visit to the inside of the outstanding Notre-Dame Basilica will be included.

### Downtown Montréal and Its Underground Guided Walking Tour

**Adult: \$13; Child: \$13; Onsite Adult: \$18; Onsite Child: \$18**  
**TR3 - Monday, June 18, 9:30 a.m.–12:00 p.m.**  
**TR8 - Wednesday, June 20, 2:00 p.m.–4:30 p.m.**

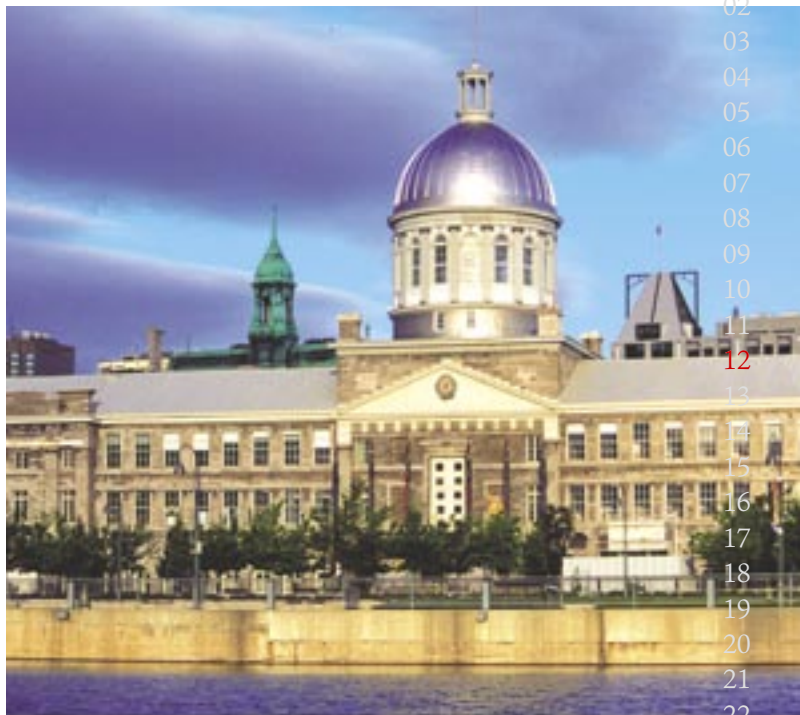
A professional guide will take you for a visit of the downtown and its unique network of underground passages, called the “RÉSO.” The RÉSO is the largest North American underground city, with almost 30 km of pedestrian walkways and shopping malls linking major office buildings and metro stations. You also will discover Ste. Catherine Street, the most important commercial street in Canada; Dorchester square; McGill University at the heart of the Mille Carré Doré, the opulent district of the Victorian-era middle class; the Place des Arts; and much more. The tour also will include a jaunt on the subway. This tour will be conducted rain or shine, so comfortable clothes and shoes are recommended.

### Take Advantage of the Montréal Museum Pass

The Montréal Museum Pass gives you access to 30 museums and public transportation (metro and buses) for three consecutive days. It includes major attractions, such as the Montréal Biodôme, Botanical Gardens, and Insectarium. The pass comes independent of the public transportation card, leaving you the option of activating it at two dates. For your convenience, museum passes will be available for purchase onsite at the Local Arrangements Committee Desk, located on Level 4 near the Conference Registration Desk. The cost is \$45 (Canadian dollars) with public transportation or \$35 (Canadian dollars) without public transportation.

A detailed list of participating museums can be found at [www.tourisme-montreal.org](http://www.tourisme-montreal.org)

1. Click on “Traveller”
2. Click on “Tips and Maps”
3. Click on “Montréal Museum Pass.”



Marché Bonsecours | [www.old.montreal.qc.ca](http://www.old.montreal.qc.ca), le photographe masqué



Pointe-à-Callière, Montréal Museum of Archaeology and History | © Tourisme Montréal, Stéphan Poulin

**Advance Tour Registration—Deadline: May 29, 2007**

## **Keynote Address: “Business Surveys: Past, Present, and Challenges for the Future”**

**Robert W. Edwards**

Director, Statistics Department,  
International Monetary Fund

Monday, June 18, 2007, 6:30 p.m.–7:30 p.m.



As director of the statistics department at the International Monetary Fund, Edwards plays a key role in fostering the highest quality standards for consistency, coverage, and transparency in economic and financial statistics. Working with

countries around the world, he promotes the implementation of best practices in statistics in order to enhance the quality of national statistical systems and the data they provide to users.

Edwards leads the statistics department’s mission to provide outstanding statistical services within the IMF and to serve the needs of the international statistical community at the national and international levels.

Prior to joining the IMF in 2004, Edwards was deputy Australian statistician, economic statistics, at the Australian Bureau of Statistics. His focus throughout his career has been on statistical and user services, corporate services, population and social statistics, and economic statistics.

ICES-III conferees will learn insights from Edward’s global experience and understanding of the requirements of both producers and users of official statistics.

## **Closing Session and Dinner**

Thursday, June 21, 2007, 5:30 p.m.–9:30 p.m.

**“The Future of Using Administrative Data Sources for Statistical Purposes”**

**Moderator:** Fritz Scheuren, *Vice President, Statistics at NORC at The University of Chicago*

**Panelists:** Heli Jeskanen-Sundström, *Director General, Statistics Finland*,  
Stephen Penneck, *Executive Director for Surveys and Administrative Sources, Office for National Statistics*, Don Royce, *Director General, Methodology Branch, Statistics Canada*

**Background:** Statistical offices are under budgetary pressure to do more with fewer resources. As technology for handling large volumes of data becomes more efficient, information from administrative sources is increasingly being considered to improve efficiency of survey designs—and even to replace direct data collection. Statistics based on administrative sources are relatively inexpensive, and they impose no additional burden on providers. However, several issues need to be considered that may cause frustration: conceptual differences, timeliness, and nonsampling errors.

**Content:** Panelists will debate future strategies for ensuring that statistics on businesses and establishments are fit for their purposes, as greater use is being made of data from administrative sources.

How should a policy jointly emphasize quality, burden, and cost?

How are the users affected, and how do they react?

How could administrative sources be used to improve surveys?

What are the challenges faced in integrating data from different sources?

How can quality be assessed and influenced?

Are current methods adequate, or do we need a new theory?

## **Panelists**

**Fritz J. Scheuren**

Vice President, Statistics at NORC at The University of Chicago



Scheuren works on sampling issues in applied settings. In recent years, these applications have largely involved human rights matters, both overseas and in the United States.

**Heli Jeskanen-Sundström**

Director General, Statistics Finland



Jeskanen-Sundström joined Statistics Finland in 1968 and has since worked in a variety of statistical areas, including national accounts, business statistics, and coordination of official statistics in Finland. Currently, she is a member of the National Information Society

Council and deputy member of the Senate of the University of Helsinki.

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## **Stephen Penneck**

**Executive Director for Surveys and Administrative Sources, Office for National Statistics**



Penneck joined the Office for National Statistics (ONS) in 1997 and has worked in his current job since September 2005. He has much experience as a government statistician, primarily in economic statistics. Prior to his current job, he was head of the Statistical

Outputs Group at ONS. Penneck currently has responsibility for all aspects of ONS surveys and administrative sources, including the continuous household surveys, business surveys (e.g., Annual Business Inquiry, Prodcum, and the consumer and producer price indices), and financial surveys. He also has responsibility for the Statistical Modernization Program.

## **Don Royce**

**Director General, Methodology Branch, Statistics Canada**



Royce earned his bachelor's and master's degrees in mathematics (statistics) from the University of Waterloo, Ontario, Canada, in 1973 and 1974, respectively. Since that time, he has worked as a mathematical statistician in the Methodology Branch of Statistics Canada. In

his current position, he is responsible for all statistical methods used in Statistics Canada's programs and for the program of small-area and administrative data based on tax returns.

## **Introductory Overview Lectures (IOLs)**

These lectures provide relatively brief, high-quality introductions to important and timely statistical topics that are covered in a more specialized form. In some cases, IOLs present material from rapidly developing areas of methodology or applications. In other cases, IOLs introduce important and challenging statistical topics that are relatively mature, but may not be well-known outside of a specialist group. In all cases, IOL topics are selected because of their potential to enrich the future directions of statistical theory and practice through broader dissemination. IOLs are designed to be accessible to a range of statisticians, and are open to all registrants.

## **IOL1. Data Processing Activities Editing and Coding**

**Katherine J. Thompson, U.S. Census Bureau**

This introductory lecture will give a general overview of common editing practices with occasional forays into accompanying coding information. The focus will be on methods for designing useful edit-test procedures for new or ongoing surveys. The talk will cover best practices for edit-developers, garnered from the author's personal experience and the literature. Special topics, such as selective editing and macroediting, will be briefly introduced in the context of strengthening microedit systems.

## **Integrated Editing/Imputation**

**Ton de Waal, Statistics Netherlands**

To edit data arising from business surveys, many techniques (e.g., manual editing, selective editing, automatic editing, and macroediting) are applied at statistical offices. The same holds true for imputation (e.g., regression imputation, hot-deck imputation, and ratio hot-deck imputation). In this presentation, we will examine how various editing and imputation techniques can be integrated into an efficient and effective overall edit and imputation strategy, while ensuring the edited and imputed data are consistent with the edit rules.

## **IOL2. Business Registers/Sampling Frames**

### **Business Register**

**Jean Rizen, Statistics Netherlands**

This lecture will focus on the role of the high-quality business register as the linchpin for high-quality, and thus comparable, business economic statistics. It examines the basic content of the register, as well as its several and different purposes and functions. The distinction between statistical and administrative registers also will be part of the presentation. Because of the high cost of maintaining a register, the lecture also will highlight the continuing search for improving update strategies, from a historical perspective, too.

### **Definitions and Units**

**Andreas Lindner, Organization for Economic Cooperation and Development**

This lecture will address key issues in globalization analysis, particularly focusing on new needs, such as the linkages of business statistics with trade statistics, the statistical treatment of enterprise groups, multinationals, and intrafirm transactions.



### **IOL3. Questionnaire Design and Testing**

#### **Instrument Design**

**Don Dillman, Washington State University**

This overview presentation on questionnaire design will review both the theory and research findings that are changing the manner in which this process needs to be viewed by survey designers. It will link theory, results from experimental research, and practical examples of survey designs to convey the need for applying scientifically based principles to the design of business questionnaires.

#### **Pretesting**

**Diane Willimack, U.S. Census Bureau**

This presentation will describe methods used for establishment survey questionnaire development, evaluation, and testing (QDET). We will discuss how establishment survey QDET methods accommodate the special needs and circumstances of establishments, such as the technical nature of the collected data, reliance on records, and a labor-intensive response process often involving multiple reporters. In addition, because establishment surveys have been at the forefront in developing electronic data reporting, we will present an overview of methodologies used to test and evaluate electronic instruments.

### **IOL4. Time Series**

#### **Seasonal Adjustment**

**Catherine Hood, Catherine Hood Consulting**

This presentation will cover the basic concepts needed to understand the uses and mechanics of seasonal adjustment. We also will discuss various software packages available for seasonal adjustment, focusing primarily on the software used for production of seasonal adjustments from establishment surveys (i.e., X-11/X-12-ARIMA and SEATS). In addition, we will summarize recent developments in methods, including the diagnostics, and give an overview of practices in seasonal adjustment from Europe and North America.

#### **Benchmarking**

**Susie Fortier, Statistics Canada**

This lecture will give an overview of the benchmarking methodology used at Statistics Canada and present detailed examples. Issues such as preservation of period-to-period change and availability of benchmarks, especially at the end of the series, will be discussed. Other innovative uses of the methodology, such as its use as a linkage method to reconcile two sections of a time series, also will be presented. The presented method is a special case of the general regression-based benchmarking model proposed by Dagum and Cholette. The software to be demonstrated is Statistics Canada Proc Benchmarking from the Forillon package.

### **IOL5. System of National Accounts U.S. Perspective**

**Brent Moulton, Bureau of Economic Analysis**

This talk will provide an overview of the forthcoming changes in the updated System of National Accounts and some of the implications for collection of business statistics in the United States.

#### **UK/International Perspective**

**Robin Lynch, Office for National Statistics (UK)**

The measurement of national economies is becoming increasingly difficult as globalization increases. The update to the 1993 System of National Accounts is tackling topics such as research and development leading to the creation of intellectual property and goods for processing, both of which pose measurement challenges under globalization. How should we expand the Frascati Manual coverage of 'traditional' R&D respondents to all business? Can we recognize and measure the transfer of knowledge across national borders in multinational firms? Measuring goods for processing that remain in the same multinational ownership requires special treatment. What do users expect of national accounts, and what does that imply for surveys and the associated business registers? If the production arrangements of multinational companies are as much to do with global tax burden minimization as effective use of factors of production, can we expect these companies to collaborate in the harmonized recording of all international flows? Why are we seeing such big mismatches between countries in the recording of foreign direct investment? National business registers must identify multinationals and record cross-border relationships, ultimately leading to genuine multinational business registers. But does this beg the more fundamental question of whether measurement of the world economy can be based on residency principles and national boundaries? Should ownership principles and company accounts become the fundamental structure underlying the economic accounts of the world? Should national accounts be relegated to the quality standard often observed in regional accounts of countries??

### **IOL6. Issues Related to Unit Nonresponse**

#### **Measurement of Bias**

**Clyde Tucker, Bureau of Labor Statistics; John Dixon, Bureau of Labor Statistics; and David Cantor, Westat**

This lecture will try to provide guidance concerning the measurement of bias that goes beyond simple response rates. Methods for both the direct measurement and the modeling of bias for various types of establishments will be considered and the possible relationship between response rates and bias will be discussed.

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## **Current/New Methods**

**Michael A. Hidioglou, Statistics Canada**

This presentation will focus on the treatment of unit non-response. The best way to reduce the negative effects of unit nonresponse is to minimize it. However, full response is hard to achieve, even with a rigorous follow-up of the nonresponding units. The residual unit nonresponse is customarily treated by either weighting and/or imputation methods. Here, a number of methods to reduce the negative impact of unit nonresponse will be presented.

## **IOL7. Variance Estimation**

### **Design-Based Variance**

**Kirk Wolter, National Organization for Research, University of Chicago**

Instruction will be given in methods of variance estimation for complex sample surveys. The lecture will include discussion of the random group, balanced half-sample, jackknife, bootstrap, and Taylor series methods, and brief examples will be given. The lecture will be based on the authors recently released Introduction to Variance Estimation (2nd Ed.).

### **Model-Based Variance**

**Phillip S. Kott, National Agricultural Statistics Service**

This introductory lecture will begin with a discussion of the uses of models in establishment surveys, which range from providing estimation strategies using cutoff or convenience samples of some statistical structure to improving the accuracy of more robust strategies based on probability sampling.

## **IOL8. Data Collection**

### **Multimode Data Collection: Why, When, How**

**Richard J. Rosen, Bureau of Labor Statistics**

This presentation will review the advantages and disadvantages of collecting survey data using multiple modes. It will look at the multimode data collection from a number of perspectives, such as:

**Why** Why survey organization might consider multimode collection. Here, questions related to response, timeliness, or cost considerations will be raised.

**When** When should a survey organization consider adding additional collection modes? Are there clear signs that can help determine that a new mode is needed?

**How** If an organization is going to add new modes of collection, how should it proceed? What factors need to be considered in planning for any transition?

### **Nonresponse Reduction Methods**

**Carl Ramirez, Government Accountability Office, and Jaki McCarthy, National Agricultural Statistics Service**

This lecture will give an overview of current practices employed by U.S. federal statistical agencies that are members of the Interagency Group on Establishment Nonresponse. The rationale for the effectiveness of these practices and specific examples from member agencies will be provided. In addition, several examples of empirical evaluation of the effectiveness of these strategies will be presented.

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## Call for ICES-III Session Chairs

In order to encourage global participation in the conference, the program committee requests volunteers serve as session chairs. A session chair is responsible for running a contributed paper session, introducing presenters, and ensuring the session stays on schedule by monitoring the timing of each presentation. In addition, the session chair serves as the moderator for the question-and-answer period of each session, engaging participation and encouraging discussion. The session chair also may assist with coordinating presentation slides and materials, if needed. Volunteer by sending an email to the program committee at [ICES3@census.gov](mailto:ICES3@census.gov). Preference in assignments will be given to volunteers not participating elsewhere on the program.

## Software Demonstrations

Since 2000, when the second ICES was held, many processing systems have been developed by statistical agencies or software organizations around the globe. Therefore, ICES-III is setting aside a room for demonstrating software used in establishment surveys. These demonstrations should target live processing of data and be able to adapt to the interests of specific audiences. Inflexible slide shows or presentations are

discouraged. Demonstrations will take place during regular conference sessions from June 19–20. They will be split into four groups, with a dedicated half day for each. A final schedule of these demonstrations will be provided in January 2007. Any questions should be sent to Dale Atkinson at [dale.atkinson@nass.usda.gov](mailto:dale.atkinson@nass.usda.gov) or (703) 877-8000, ext. 130.

## Program and Abstracts Online

The printed program book and abstract book will be distributed with registration materials in Montréal. The program and abstracts also are available at [www.amstat.org/meetings/ices/2007/index.cfm?fuseaction=program](http://www.amstat.org/meetings/ices/2007/index.cfm?fuseaction=program). A PDF of the preliminary program will be available by December 18, 2006. The final program PDF will be available by April 5, 2007.

## Proceedings

Would you like to publish your presentation in the Post-Conference Proceedings? Eligibility guidelines and author instructions for ICES-III presenters are available at [www.amstat.org/meetings/ices/2007](http://www.amstat.org/meetings/ices/2007). Click the “Program” tab and select “Proceedings.” Submissions must be in electronic format; the submission site will be open from June 1, 2007–August 30, 2007.

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# Registration Add-Ons & information

## Short Courses

The program committee is offering a number of full-day and half-day courses on Monday, June 18, 2007. Join your colleagues in learning traditional and cutting-edge techniques in statistics.

## Guest Badges

Guest badges are available for \$35. All guests over the age of 18 must purchase a badge to attend the Monday Opening Reception. Guest registration does not include technical session attendance; anyone wishing to attend technical sessions must pay a full registration fee. The closing dinner on Thursday, June 21, costs \$50 per guest, and tickets must be purchased by May 29, 2007.

## Tours and Attractions

Most tours are limited in size, so reserve tickets early. Tickets must be purchased by May 29, 2007, to guarantee availability; there is no guarantee of ticket availability onsite. Once a tour is sold out, no additional buses will be available to accommodate last-minute purchases. For additional information about local attractions, check the tours section of this brochure or click on "Conference Information," then "Tours," at [www.amstat.org/meetings/ices/2007](http://www.amstat.org/meetings/ices/2007). If you have questions about registration, call (888) 231-3473. Registrations are not accepted by telephone or email.

## Accessibility for People with Disabilities

If you have a disability, please check the box on the registration form and send a statement about your needs. Someone from the ASA will contact you. Availability of appropriate accommodations cannot be ensured without prior notification.

## Registration Information

Three ways to register:

**Online:** [www.amstat.org/meetings/ices/2007](http://www.amstat.org/meetings/ices/2007)

**Fax:** (703) 684-2037

**Mail:** ASA/ICES-III Registration

Attn: Michael Chevalier

732 North Washington Street  
Alexandria, VA 22314-1943

Registrations are not accepted by telephone or email.

Purchase orders are not accepted. No exceptions. ASA Federal ID #53-0204661.

Registration confirmations will be emailed to all preregistered attendees. Confirmations will be faxed or mailed by request only.

## Spam Filters

Confirmations and other important information will be sent to you via email. Please set any spam-blocking filters you have to allow emails sent from addresses containing "@amstat.org."

\*Please provide an accurate address on your registration form. The ASA is not responsible for lost, misdirected, incomplete, damaged, or late mail.

## Avoid Headaches! Plan Ahead!

You can expect delays due to heavy volume during the weeks of the registration deadlines.

### Early Bird—December 18, 2006–March 29, 2007

General registration opens. Early Bird prices apply until 11:59 p.m. EDT, March 29, 2007.

### Advance Registration—March 30–May 29, 2007

General registration continues at Advance registration prices. Advance registration closes at 11:59 p.m. EDT, May 29, 2007.

### After May 29, 2007

Register onsite June 17–21, 2007, at the Hyatt Regency Montréal.

Program participants—December 18, 2006–February 15, 2007 **must** register and pay a nonrefundable registration fee.

## Registration Fees

Fees include the program/abstract book; Opening Mixer; lunch on Tuesday and Wednesday; dinner on Thursday; morning and afternoon refreshments for Tuesday, Wednesday, and Thursday; and a copy of the proceedings CD-ROM (to ship in December 2007).

Full-day short course fees include course materials and morning and afternoon refreshments. Half-day short course fees include course materials and either morning or afternoon refreshments.

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	<b>Early Bird 12/18/06– 03/29/07</b>	<b>Advance 03/30/07– 05/29/07</b>	<b>Onsite 06/17/7- 06/21/07</b>
<b>Registration Fee</b>	\$375	\$475	\$550
<b>Add-Ons Registration Fee</b>			
<b>Full Day Short Course</b>	\$150	\$175	\$200
<b>Half-Day Short Course</b>	\$95	\$110	\$125
<b>Guest</b> (includes badge and entrance into Monday night Opening Mixer)	\$35	\$35	\$35
<b>Guest for Thursday Dinner</b>	\$50	\$50	\$55

## Payment

Payment must accompany registration for the form to be processed. Know your organization's reimbursement policies before you register to avoid problems later. Be sure to submit check requests to your organization in sufficient time to meet registration deadlines.

If you are paying by check, register by mail. If you are paying by credit card, you may register using any of the three options listed above. Using a departmental credit card? Don't forget to obtain permission from the cardholder in advance of registration deadlines, and be clear about what you may charge to the card. The ASA Registration Department will assist you if you need to use multiple forms of payment. We are unable to accept purchase orders as payment. To prevent duplicate billing, do not submit registration materials more than once. Make your check or money order payable to American Statistical Association in U.S. funds drawn on a U.S. bank. The ASA Federal ID is #53-0204661.

## Cancellation Policy

- ♦ All cancellations and substitutions must be submitted in writing. Email: [mchevalier@amstat.org](mailto:mchevalier@amstat.org); Fax: (703) 684-2037; Mail: ICES-III Registration, ATTN: Michael Chevalier, 732 North Washington Street, Alexandria, VA 22314-1943.
- ♦ Program participant registrations are nonrefundable.
- ♦ For all others, including cancellation of add-ons, cancellations received by 11:59 p.m., EDT, March 29, 2007, will incur a 20% cancellation fee for each item cancelled.

Cancellations received March 30–May 29, 2007, will incur a 40% cancellation fee for each item cancelled. Any cancellations received after 11:59 p.m., EDT, May 29, 2007, will not be refunded.

## Conference Meals

A lunch will be provided on Tuesday and Wednesday, and a dinner will be provided on Thursday. These meals are included as part of your registration fee. Vegetarian and heart healthy menus are available for only those who preregister. Select your meal type when you register. The menus are provided within the detailed program.

## Onsite Registration

The registration desk will be located on Level 4 in the Grand Salon Foyer of the Hyatt Regency Montréal and will be open during the following hours:

Sunday, June 17	4:00 p.m.–8:00 p.m.
Monday, June 18	7:30 a.m.–5:30 p.m.
Tuesday, June 19	7:30 a.m.–5:30 p.m.
Wednesday, June 20	7:30 a.m.–5:30 p.m.
Thursday, June 21	7:30 a.m.–5:30 p.m.

## Questions/Assistance

If you have questions about registration or require assistance, contact the ASA Registration Department by emailing [mchevalier@amstat.org](mailto:mchevalier@amstat.org) or calling (888) 231-3473. We do not accept registrations by telephone or email.

### ASA Emergency Contact for Travel Orders

Steve Porzio  
Associate Executive Director/Director of Operations  
American Statistical Association  
732 North Washington Street  
Alexandria, VA 22314-1943  
Phone: (703) 684-1221

### ASA Emergency Contact for Travel Orders (in Montréal)

Steve Porzio  
Associate Executive Director/Director of Operations  
c/o Hyatt Regency Montréal  
1255 Jeanne-Mance, PO Box 130  
Montréal, Québec H5B 1E5, Canada  
Phone: (514) 982-1234 Fax: (703) 684-8069

### Hotel

**Call:** (514) 982-1234 **Fax:** (514) 285-1243

**Online:** The Main block at <http://montreal.hyatt.com/groupbooking/mtlrmamsa2007>  
Or The Government Block at <http://montreal.hyatt.com/groupbooking/mtlrmamsg2007>



# Registration Form

## The Third International Conference on Establishment Surveys

June 18–21, 2007 • Hyatt Regency Montréal—Montréal, Québec

[www.amstat.org/meetings/ices/2007](http://www.amstat.org/meetings/ices/2007)

### Instructions

- Print or type all information and retain a copy for your records. Use a separate form for each registrant.
- Mail form with payment to ASA/ICES-III Registration, ATTN: Michael Chevalier, 732 North Washington Street Alexandria, VA 22314-1943.
- Fax form (credit card payments only) to (703) 684-2037.
- Registration form must be received by May 29, 2007, to be processed at the reduced rate. Forms received after May 29, 2007, will be charged higher fees.

**Forms Received Without Payment Will Not Be Processed**

Name	
ASA ID # (if known)	
Preferred Name for Badge (if different)	
Organization/Company	
Address Line 1	
Address Line 2	
City	State/Province
ZIP/Postal Code	Country (non-U.S.)
Daytime Phone	Fax
Email	

Check here if you would like your ASA customer contact information updated with your meeting contact information.

### This meeting is ADA accessible

Check here if you need special services due to a disability and attach a statement regarding your needs.

### Meal Preference

Lunch on Tuesday and Wednesday and dinner on Thursday are included with your workshop registration. Select one of the following menu options:

- Regular    Vegetarian    Heart Healthy

### Registration Fees

#### Workshop Fee (required)

Early Bird (12/18/06-03/29/07)      \$375   
 Advance (03/30/07-05/29/07)      \$475

#### Short Courses—Monday, June 18, 2007

	Early Bird	Advance	
8:30 a.m.–5:00 p.m. SC1	\$150 <input type="checkbox"/>	\$175 <input type="checkbox"/>	.....
8:30 a.m.–5:00 p.m. SC2	\$150 <input type="checkbox"/>	\$175 <input type="checkbox"/>	.....
8:30 a.m.–12:00 p.m. SC3	\$150 <input type="checkbox"/>	\$175 <input type="checkbox"/>	.....
1:30 p.m.–5:00 p.m. SC4	\$150 <input type="checkbox"/>	\$175 <input type="checkbox"/>	.....

Registration  
Total

Short Courses  
Total

	Adult	Child	
<b>Sunday, June 17</b> TR1	\$30 <input type="checkbox"/>	\$27.50 <input type="checkbox"/>	.....
<b>Monday, June 18</b> TR2	\$15 <input type="checkbox"/>	\$15 <input type="checkbox"/>	.....
TR3	\$13 <input type="checkbox"/>	\$13 <input type="checkbox"/>	.....
<b>Tuesday, June 19</b> TR4	\$35 <input type="checkbox"/>	N/A <input type="checkbox"/>	.....
TR5	\$30 <input type="checkbox"/>	\$27.50 <input type="checkbox"/>	.....
<b>Wednesday, June 20</b> TR6	\$85 <input type="checkbox"/>	\$85 <input type="checkbox"/>	.....
TR7	\$15 <input type="checkbox"/>	\$15 <input type="checkbox"/>	.....
TR8	\$13 <input type="checkbox"/>	\$13 <input type="checkbox"/>	.....

### Guest Fees

Guest Badge      \$35   
 Guest Name .....

Guest Thursday Dinner      \$50

Guest  
Total

**TOTAL OF ALL FEES \$** .....

### Payment

- Check/money order payable to the American Statistical Association (in U.S. dollars on U.S. bank)  
 VISA    MasterCard    American Express

Card Number	
Exp. Date	CVS Number*
Name of Cardholder	
Authorizing Signature	

\* The CVS number is a three-digit security number printed on the back of MasterCard and VISA cards or a four-digit number printed on the front of an American Express card.

Cancellations received by March 29, 2007, will incur a 20% cancellation fee for each item cancelled. Cancellations received March 30–May 29, 2007, will incur a 40% cancellation fee for each item cancelled. Any cancellations received after 11:59 p.m., May 29, 2007, will not be refunded. All cancellations must be made in writing and emailed to [mchevalier@amstat.org](mailto:mchevalier@amstat.org); faxed to (703) 684-2037; or mailed to ASA/ICES-III Registration, ATTN: Michael Chevalier, 732 North Washington Street, Alexandria, VA 22314-1943.