

EVERETTE S. GARDNER, JR.

Bauer College of Business
290B Melcher Hall
University of Houston
Houston, Texas 77204-6021
Telephone 713-743-4744, Fax 713-743-4940
Web site: <http://www.bauer.uh.edu/gardner/>
Email: egardner@uh.edu

Education

B.B.A., 1966, University of Memphis, Memphis, Tennessee; Major in Management, minors in Economics and Accounting.

M.B.A., 1974, University of North Carolina, Chapel Hill, North Carolina; Major in Operations Management, minor in Marketing.

Ph.D. in Business Administration, 1978, University of North Carolina, Chapel Hill, North Carolina; Major in Operations Management, minor in Quantitative Methods. Dissertation: Aggregate Inventory Models: Theory and Application, under the supervision of Professor David G. Dannenbring.

Honors

Graduated first in undergraduate class of 550 students. Received the Wall Street Journal Student Achievement Award.

Graduated second in M.B.A. class of 125 students.

Biography published in:

Who's Who in the World

Who's Who in America

Who's Who in American Education

Who's Who in Science and Engineering

Who's Who in the Media and Communications

Elected Fellow of the International Institute of Forecasters (June, 2007). See <http://forecasters.org/fellows.html>.

Military Career

Retired in 1986 with rank of Commander, Supply Corps, U.S. Navy. Assignments are summarized below.

Graduate of Navy schools in general supply, aviation supply and maintenance, and cryptography.

Supply Officer, USS James C. Owens (DD 776), 1967 - 1969. Managed department of 40 enlisted men during Vietnam combat operations. Received Navy Achievement Medal with Combat "V".

Instructor, Navy Supply Corps School, Athens, Georgia, 1969 - 1972. Taught courses in disbursing and financial management.

Attended the University of North Carolina at Chapel Hill from May, 1972 – May, 1974 under Navy sponsorship for M.B.A. degree.

Management Planning Officer, Naval Supply Depot, Guam, 1974 - 1975. Major projects: transportation scheduling, warehouse layout, work measurement, inspection sampling.

Inventory Control Officer, Naval Supply Depot, Guam, 1975 - 1976. Responsible for inventory of 55,000 service parts with an average investment of \$70 million. Logistics manager for Vietnam evacuation. Received Joint Service Commendation Medal.

Attended the University of North Carolina at Chapel Hill from May, 1976 – December, 1978 under Navy sponsorship for Ph.D. degree.

Assistant Supply Officer, USS Dwight D. Eisenhower (CVN 69), 1979 - 1980. Responsible for inventories of 90,000 service parts and 25,000 repairable components with an average investment of \$125 million. Second in command of department including fourteen officers and 950 enlisted men during deployments to the Mediterranean and Indian Oceans. Received Meritorious Service Medal.

Management Information Systems Director, U. S. Atlantic Fleet Headquarters, Norfolk, Virginia, 1980 - 1984. Managed large MIS and decision support systems. Received Meritorious Service Medal (second award).

Director of Operations Analysis, Navy Fleet Material Support Office, Mechanicsburg, Pennsylvania, 1984 - 1986. Designed models for Navy inventory systems (1.6 million line items with an average investment of \$20 billion). For an example of this work, see "A Top-Down Approach to Modeling U.S. Navy Inventories" cited below. Also served as the Navy's internal consultant on operations research. Managed staff of 75 analysts who completed more than 200 operations research projects during my tour of duty. Received Meritorious Service Medal (third award).

Academic Career

College of Business Administration, University of Houston, Houston, Texas

Appointed Associate Professor of Decision and Information Sciences (1987)

Chair, Decision and Information Sciences Department (1988 – 1995, 2010 - present)

Received tenure and promotion to Full Professor (1989)

College of Business Administration Promotion and Tenure Committee (1996 – 2005)

Director, Bauer Honors Program (2002 - present)

Fellow of the Honors College (2003 – present)

Faculty awards

Halliburton Award (1994) for excellence in research.

Midcon Corporation Award (1992) for excellence in teaching.

Melcher Awards (1988, 1999, 2000) for excellence in research.

Articles in Refereed Journals

E. S. Gardner, Jr., "A Note on Forecast Modification Based Upon Residual Analysis," Decision Sciences, Vol. 10, No. 3 (July, 1979), pp. 493-494.

E. S. Gardner, Jr., "Box-Jenkins Vs. Multiple Regression: Some Adventures in Forecasting the Demand for Blood Tests," Interfaces, Vol. 9, No. 4 (August, 1979), pp. 49-64.

E. S. Gardner, Jr. and D. G. Dannenbring , "Using Optimal Policy Surfaces to Analyze Aggregate Inventory Tradeoffs," Management Science, Vol. 25, No. 8 (August, 1979), pp. 709-720. Reprinted in D. W. McLeavey and S. L. Narasimhan, Production Planning and Control, Boston: Allyn and Bacon, Inc., 1984.

E. S. Gardner, Jr. and D. G. Dannenbring, "Forecasting with Exponential Smoothing: Some Guidelines for Model Selection," Decision Sciences, Vol. 11, No. 2 (April, 1980), pp. 370-383.

E. S. Gardner, Jr., "Inventory Theory and the Gods of Olympus," Interfaces, Vol. 10, No. 4 (August, 1980), pp. 42-45.

E. S. Gardner, Jr., "Approximate Decision Rules for Continuous Review Inventory Systems," Naval Research Logistics Quarterly, Vol. 20, No. 1 (March, 1983), pp. 59-68.

E. S. Gardner, Jr., "Automatic Monitoring of Forecast Errors," (with commentary) Journal of Forecasting, Vol. 2, No. 1 (March, 1983), pp. 1-21.

E. S. Gardner, Jr., "The Tradeoffs in Choosing a Time Series Method," Journal of Forecasting, Vol. 2, No. 3 (September, 1983), pp. 263-267.

E. S. Gardner, Jr., "Evolutionary Operation of the Exponential Smoothing Parameter: Revisited," Omega, Vol. 11, No. 6 (November, 1983), pp. 621-623.

Articles in Refereed Journals (continued)

E. S. Gardner, Jr., "The Strange Case of the Lagging Forecasts," Interfaces, Vol. 14, No. 3 (May-June, 1984), pp. 47-50.

E. S. Gardner, Jr., "A Comparison of Investment Allocation Strategies for Distribution Inventories," Decision Sciences, Vol. 15, No. 1 (Winter, 1984), pp. 22-30.

This paper was nominated for the Decision Science Institute's "Stanley T. Hardy Award" for the best paper published in Operations Management in 1984.

E. S. Gardner, Jr., "CUSUM Vs. Smoothed-Error Forecast Monitoring Schemes: Some Simulation Results," Journal of the Operational Research Society, Vol. 36, No. 1 (March, 1985), pp. 43-47.

E. S. Gardner, Jr., "Exponential Smoothing: the State of the Art," (with commentary) Journal of Forecasting, Vol. 4, No. 1 (March, 1985), pp. 1-38.

This paper was ranked by experts as the third most influential article in forecasting published during 1980 – 2005. For a discussion, see R. Fildes, "The forecasting journals and their contribution to forecasting research: Citation analysis and expert opinion," International Journal of Forecasting, Vol. 22, No. 3 (July - September, 2006), pp. 415-432.

E. S. Gardner, Jr., "Further Notes on Lagging Forecasts," Interfaces, Vol. 15, No. 5 (September - October, 1985), p. 63.

E. S. Gardner, Jr. and E. McKenzie, "Forecasting Trends in Time Series," Management Science, Vol. 31, No. 10 (October, 1985), pp. 1237-1246. Reprinted in R. Fildes and P. G. Allen, Forecasting, London: Sage Publications, 2011.

E. S. Gardner, Jr., "A Top-Down Approach to Modeling U.S. Navy Inventories," Interfaces, Vol. 17, No. 4 (July-August, 1987), pp. 1-10.

E. S. Gardner, Jr., "A Simple Method of Computing Prediction Intervals for Time Series Forecasts," Management Science, Vol. 34, No. 4 (April, 1988), pp. 541-546.

E. S. Gardner, Jr. and S. Makridakis, "The Future of Forecasting," International Journal of Forecasting, Vol. 4, No. 3 (July - September, 1988), pp. 1-6.

E. S. Gardner, Jr. and E. McKenzie, "Model Identification in Exponential Smoothing," Journal of the Operational Research Society, Vol. 39, No. 9 (September, 1988), pp. 863-867.

E. S. Gardner, Jr. and E. McKenzie, "Seasonal Exponential Smoothing with Damped Trends," Management Science, Vol. 35, No. 3 (March, 1989), pp. 372-376.

Articles in Refereed Journals (continued)

E. S. Gardner, Jr., "Evaluating Forecast Performance in an Inventory Control System," Management Science, Vol. 36, No. 4 (April, 1990), pp. 490-499.

E. S. Gardner, Jr., "Forecasting the Failure of Component Parts in Computer Systems: A Case Study," International Journal of Forecasting, Vol. 9, No. 2 (August, 1993), pp. 245-253.

E. S. Gardner, Jr. and J. M. Ivancevich, "Productivity in the U.S. and Japan: A Reexamination," Interfaces, Vol. 24, No. 6 (November - December, 1994), pp. 66-73.

E. S. Gardner, Jr. and E. A. Anderson, "Focus Forecasting Reconsidered," International Journal of Forecasting, Vol. 13, No. 4 (December, 1997), pp. 501-508.

E. S. Gardner, Jr., "Rule-Based Forecasting Vs. Damped-Trend Exponential Smoothing," Management Science, Vol. 45, No. 8 (August, 1999), pp. 1169-1176.

E. S. Gardner, Jr., E. A. Anderson-Fletcher, and A. M. Wickes, "Further Results on Focus Forecasting vs. Exponential Smoothing," International Journal of Forecasting, Vol. 17, No. 2 (April - June, 2001), pp. 287-293.

E. S. Gardner, Jr. and J. Diaz-Saiz, "Seasonal Adjustment of Inventory Demand Series: A Case Study," International Journal of Forecasting, Vol. 18, No. 1 (January - March, 2002), pp. 117-123.

E. S. Gardner, Jr., "Dimensional Analysis of Airline Quality," Interfaces, Vol. 34, No. 4 (July - August, 2004), pp. 272 - 279.

E. S. Gardner, Jr. and A. B. Koehler, "Comments on a patented bootstrapping method for forecasting intermittent demand," International Journal of Forecasting, Vol. 21, No. 3 (July - September, 2005), pp. 617-618.

E. S. Gardner, Jr., "Exponential smoothing: The state of the art - Part II," International Journal of Forecasting, Vol. 22, No. 4 (October - December, 2006), pp. 637-666.

E. S. Gardner, Jr. and J. Diaz-Saiz, "Exponential smoothing in the telecommunications data," International Journal of Forecasting, Vol. 24, No. 1 (January - March, 2008), pp. 170-174.

E. McKenzie and E. S. Gardner, Jr., "The damped trend: a modeling viewpoint," International Journal of Forecasting, Vol. 26, No. 4 (October - December, 2010), pp. 661-665.

E. S. Gardner, Jr. and E. McKenzie, "Why the damped trend works," Journal of the Operational Research Society, Vol. 62, No. 6 (June, 2011), pp. 1177-1180.

Other Published Articles

E. S. Gardner, Jr. and C. P. McLaughlin, "Forecasting: A Cost Control Tool for Health Care Managers," Health Care Management Review, Vol. 5, No. 3 (Summer, 1980), pp. 31-38.

E. S. Gardner, Jr., "A Comment on Research on Forecasting," Interfaces, Vol. 16, No. 1 (January - February, 1986), pp. 106-107.

E. S. Gardner, Jr., "Smoothing Methods for Short-term Planning and Control," Chapter 11 in S. Makridakis and S. C. Wheelwright (Editors), The Handbook of Forecasting: A Manager's Guide (Second Edition), New York: Wiley-Interscience, 1987.

All Lotus articles listed below are by E. S. Gardner, Jr. as the sole author:

"Making Graphs Talk," Lotus, Vol. 1, No. 8 (December, 1985), pp. 64-69.

"Adjusting Data for Seasonal Patterns," Lotus, Vol. 2, No. 3 (March, 1986), pp. 62-65.

"Should You Take That Quantity Discount?" Lotus, Vol. 2, No. 6 (June, 1986), pp. 50-52.

"Analyzing Subjective Decisions with a Spreadsheet," Lotus, Vol. 3, No. 1 (January, 1987), pp. 68-71.

"Short-Range Forecasting," Lotus, Vol. 3, No. 2 (February, 1987), pp. 54-58.

"Forecasting Using Exponential Smoothing," Lotus, Vol. 3, No. 3 (March, 1987), pp. 61-66.

"Making Capital Investment Decisions," Lotus, Vol. 3, No. 5 (May, 1987), pp. 57-60.

"Testing a Regression Model," Lotus, Vol. 3, No. 7 (July, 1987), pp. 50-57.

"Four Steps to Improving Forecast Accuracy," Lotus, Vol. 3, No. 12 (December, 1987), pp. 69-72.

"Project Manager, Part 1," Lotus, Vol. 4, No. 1 (January, 1988), pp. 82-87.

"Project Manager, Part 2," Lotus, Vol. 4, No. 2 (February, 1988), pp. 80-84.

"Forecasting with Exponential Trends," Lotus, Vol. 4, No. 3 (March, 1988), pp. 27-30.

"How to Detect Trends and Seasonal Cycles," Lotus, Vol. 4, No. 5 (May, 1988), pp. 44-50.

"Prediction Intervals for Regression Models," Lotus, Vol. 4, No. 7 (July, 1988), pp. 50-54.

"Four Job Schedules: Choose the One that Matches Your Priority," Lotus, Vol. 4, No. 11 (November, 1988), pp. 54-59.

Other Published Articles (continued)

"A Tutorial on the Binomial Distribution," Lotus, Vol. 4, No. 12 (December, 1988), pp. 62-69.

"How to Monitor Your Forecasts," Lotus, Vol. 5, No. 4 (April, 1989), pp. 54-57.

"Long-Range Forecasting: The Logistic Curve," Lotus, Vol. 5, No. 6 (June, 1989), pp. 58-61.

"Long-Range Forecasting: the Modified-Exponential Model," Lotus, Vol. 5, No. 7 (July, 1989), pp. 70-74.

"Population Forecasting," Lotus, Vol. 5, No. 9 (September, 1989), pp. 50-53.

"Anticipating Business Cycles," Lotus, Vol. 5, No. 10 (October, 1989), pp. 40-43.

"How to Predict Seasonal Patterns," Lotus, Vol. 6, No. 1 (January, 1990), pp. 74-79.

"When the Recent Past Counts More: Forecasting with Discounted Least Squares," Lotus, Vol. 6, No. 5 (May, 1990), pp. 62-66.

"Fine-Tuning Your Forecasts," Lotus, Vol. 6, No. 9 (September, 1990), pp. 76-80.

"Work-force scheduling," Lotus, Vol. 6, No. 11 (November, 1990), pp. 63-66.

"Making Quality Count," Lotus, Vol. 7, No. 1 (January, 1991), pp. 53-56.

"How to Build a Better Forecast," Lotus, Vol. 7, No. 5 (July, 1991), pp. 49-52.

"Forecast with No Data," Lotus, Vol. 7, No. 6 (August, 1991), pp. 42-45.

"Self-correcting Forecasts," Lotus, Vol. 8, No. 1 (January, 1992), pp. 33-36.

Books

E. S. Gardner, Jr., The Spreadsheet Operations Manager, New York: McGraw-Hill, 1992.

E. S. Gardner, Jr., The Spreadsheet Quality Manager, New York: McGraw-Hill: 1993.

E. S. Gardner, Jr., The Spreadsheet Forecast Manager, New York: McGraw-Hill: 1994.

R. I. Levin, D. S. Rubin, J. P. Stinson, and E. S. Gardner, Jr., Quantitative Approaches to Management (Eighth Edition), New York: McGraw-Hill, 1995. Author of chapters on forecasting, decision analysis, inventory management, simulation, and queuing models.

Software

E. S. Gardner, Jr., Autocast II, Morristown, New Jersey: Levenbach Associates, 1986, 1991, 1997, 1999, 2000, 2010. This program is an expert forecasting system based on my paper "Exponential Smoothing: the State of the Art," cited above. The program is used by more than 2,500 corporations in the U.S. and abroad. The computational engine from Autocast II is now used in Peer Planner from Delphus Corporation.

E. S. Gardner, Jr., The Spreadsheet Scheduler, Detroit, Michigan: User Solutions, Inc., 1993, 1997, 1999, 2003, 2005, 2007. A collection of scheduling algorithms for Microsoft Excel.

Executive Teaching

Center for Executive Development, University of Houston, 1987 - 2000. Taught executive seminars in operations management, forecasting, planning, project management, inventory control, capital investment decisions, and quality control. Also designed and taught management training programs for Exxon, Shell, Southwestern Bell, Riviana Foods, and Compaq.

Editorial Positions

Associate Editor, Journal of Forecasting, 1983 - 1985.

Associate Editor, International Journal of Forecasting, 1985 – 1999.

Software reviews editor, International Journal of Forecasting, 1986 - 1989. Also special editor (with Spyros Makridakis) for an issue entitled "The Future of Forecasting: Directions for Research" (Vol. 4, No. 3, 1988).

Associate Editor, Management Science, 1987 - 1991.

Editor-at-large, Interfaces, 1987 - 1992.

Professional Societies

American Production and Inventory Control Society

Vice President for student affairs, Houston chapter, 1997-1998

International Institute of Forecasters

Board of Directors, 1987 - 1993, President, 1990 - 1992

Institute for Operations Research and the Management Sciences

Operational Research Society (U.K.)

U.S. Naval Institute

Selected Client List

Alamo Water Refiners, San Antonio, Texas. Forecasting and inventory control for repair and maintenance parts. Advisor on supply chain strategy. Cut inventories by 30% (\$2.5 million) despite sales increase of 20%.

American Airlines, Fort Worth, Texas. Forecasting of mileage redemptions by frequent flyers.

Beirne, Maynard, & Parsons, LLP, Houston, Texas. Expert witness in manufacturing case.

Burroughs Wellcome Company, Research Triangle Park, North Carolina. Forecasting and inventory control for pharmaceutical products.

Centel Communications Systems, Houston, Texas. Forecasting and inventory control for finished goods inventories and service parts. Cut inventories by 33% (\$7.5 million) with no impact on customer service.

Chantal Cookware, Inc., Houston, Texas. Forecasting and inventory control for finished goods and components. Cut inventories by 20% (\$1.2 million) with no impact on customer service.

Compaq Computer Corporation, Houston, Texas. Forecasting and inventory control for service parts. Designed system to provide forecasts and inventory targets to suppliers. Advisor on supply chain strategy. Developed long-range industry sales forecasts.

Continental Airlines, Houston, Texas. Statistical consultant to Controller. Statistical quality control of revenues. Sampling for revenue estimates and inventory audits. Forecasting of yields, revenues, passenger volumes, and mileage redemptions by frequent flyers.

Delta Airlines, Atlanta, Georgia. Forecasting of yields, revenues, passenger volumes, and mileage redemptions by frequent flyers.

Exxon Company USA, Houston, Texas. Risk analysis and forecasting of oil/gas well completions.

Frito-Lay, Inc., Dallas, Texas. Forecasting and inventory planning for packaging materials. Advisor on supply chain strategy. Designed system to provide forecasts and inventory targets to suppliers.

Hawaiian Airlines, Honolulu, Hawaii. Statistical consultant to Controller. Forecasting of yields, revenues, and passenger volumes.

Houston Livestock Show and Rodeo, Houston, Texas. Forecasting of CD sales generated by rodeo and pay-per-view performances.

Selected Client List (continued)

King & Spalding, LLP, Houston, Texas. Expert witness in manufacturing case.

NASA Johnson Space Center, Space Station Projects Office, Houston, Texas. Project management consultant for space station.

Pennzoil Company, Houston, Texas. Forecasting and inventory control for Jiffy Lube stores. Advisor on supply chain strategy.

Porter & Hedges, LLP, Houston, Texas. Expert witness in manufacturing case.

Randalls Food Markets, Houston, Texas. Forecasting and inventory control for stores and warehouses.

Shell Oil Company, Houston, Texas. Scenario analysis of gasoline demand. Statistical forecasting of commodity prices. Project management, risk analysis, and forecasting of oil/gas well completions.

Southwestern Bell Telephone Company, Houston, Texas. Forecasting of telecommunications demand. Production planning strategy for printing subsidiary.

Spring Communications, Los Angeles, California. Forecasting of concert sales.

Texaco, Houston, Texas. Simulation modeling of energy prices.

Texas Industries, Houston, Texas. Quality analysis of construction materials. Demand forecasting for production planning.

Toshiba, Houston, Texas. Executive training in forecasting, project management, and inventory control.

Community service

The Women's Home of Houston, Houston, Texas

Board of Directors, 1992 – 1996, Vice President, 1993-1996

Caring Critters, Houston, Texas

Member, 2003 – present. Trained and managed my Australian Shepherd, Milo, as a therapy dog for work with patients at hospitals and nursing homes. Milo has made more than 100 therapy visits. For more on therapy dogs, see:

<http://www.caringcritters.org/introduction.htm>