## Curriculum Vitae

## Cong SHI

Email: congshi-at-bus-dot-miami-edu Web: https://congshi-research.github.io/

## Education

Massachusetts Institute of Technology (MIT), Cambridge, MA, USA Ph.D. in Operations Research (Thesis Advisor: Professor Retsef Levi)	9/2007 - 8/2012
National University of Singapore (NUS), Singapore B.S. in Mathematics (First Class Honors)	9/2003 - 6/2007
Academic Employment	
University of Miami, Coral Gables, FL, USA Associate Professor (with tenure), Management Science, Miami Herbert Business School	7/2023 - Present
University of Michigan, Ann Arbor, MI, USA Associate Professor (with tenure), Industrial & Operations Engineering, College of Engineering	9/2019 - 6/2023
University of Michigan, Ann Arbor, MI, USA Assistant Professor, Industrial & Operations Engineering, College of Engineering	9/2012 - 8/2019
Professional Experiences	
IBM Research Zurich, Rüeschlikon, Switzerland Research Fellow (Summer Intern)	6/2010 - 9/2010
Motorola Solutions Venture Capital, Sunnyvale, CA, USA Quantitative Analyst (Summer Intern)	6/2006 - 9/2006
Citigroup Global Markets, Singapore Onantitative Analyst (Summer Intern)	6/2005 - 9/2005

## Selected Awards

Amazon Research Award, 2021

Finalist, INFORMS MSOM Data Driven Research Challenge, 2018

Third Place, INFORMS Junior Faculty Forum Paper Competition (JFIG), 2017

First Place, INFORMS George E. Nicholson Student Paper Competition, 2009

UM IOE Graduate Course Professor of the Year, University of Michigan, 2019

UM CoE Vulcans Education Excellence Award, University of Michigan, 2019

INFORMS Management Science Meritorious Service Award, 2018, 2019, 2021, 2023

# Selected Awards (won by students)

Hao Yuan:

Finalist, INFORMS Applied Probability Society (APS) Best Student Paper, 2019.

Esmaeil Keyvanshokooh:

Finalist, INFORMS Manufacturing & Service Operations Management (MSOM) Best Student Paper, 2021.

Finalist, INFORMS Health Applications Society (HAS) Best Student Paper, 2021.

Second Place, INFORMS Decision Analysis Society (DAS) Best Student Paper, 2020.

Finalist, POMS College of Healthcare Operations Management (CHOM) Best Paper, 2022.

## Research Interests

Theory: Online Learning, Offline Learning, Data-Driven Optimization, Approximation Algorithms

Applications: Supply Chain Management, Revenue Management, Healthcare Operations, Human-Robot Interaction

## **Books and Book Chapters**

- Xi Chen, J. Stefanus Jasin, Cong Shi, "The Elements of Joint Learning and Optimization in Operations Management", Springer, New York, NY. Available @ https://link.springer.com/book/9783031019258
- Cong Shi, "Approximation Algorithms for Stochastic Inventory Systems", Research Handbook on Inventory Management, edited by J.-S. Song, Edward Elgar, Cheltenham, UK.
- Cong Shi, "Approximation Algorithms for Stochastic Optimization Problems in Operations Management", Wiley Encyclopedia of Operations Research and Management Sciences, edited by J. J. Cochran, Wiley, Hoboken, NJ.

## **Journal Publications**

(Authors underlined are Ph.D. advisees; authors underlined and asterisked are undergraduate students\*.)

1. S. Li, Q. Luo, Z. Huang, C. Shi,

"Online Learning for Constrained Assortment Optimization under Markov Chain Choice Model",

Operations Research, to appear.

2. E. Keyvanshokooh, M. Zhalechian, C. Shi, M. P. Van Oyen, P. Kazemian,

"Contextual Learning with Online Convex Optimization: Theory and Application to Medical Decision-Making",

Management Science, to appear.

(Finalist, POMS College of Healthcare Operations Management (CHOM) Best Paper, 2022.)

(Finalist, INFORMS Manufacturing & Service Operations Management (MSOM) Best Student Paper, 2021.)

(Second Place, INFORMS Decision Analysis Society (DAS) Best Student Paper, 2021.)

(Finalist, INFORMS Health Applications Society (HAS) Best Student Paper, 2021.)

3. J. Tang, B. Chen, C. Shi,

"Online Learning for Dual-Index Policies in Dual Sourcing Systems",

 $\textbf{Manufacturing \& Service Operations Management}, \ Vol.\ 26(2),\ 758-774,\ 2024.$ 

4. H. Jia, C. Shi, S. Shen,

"Online Learning and Pricing for Service Systems with Reusable Resources",

Operations Research, Vol. 72(3), 1203-1241, 2024.

5. X. Chen, L. Liang, S. Miao, C. Shi,

"Play It Safe or Leave the Comfort Zone? Optimal Content Strategies

for Social Media Influencers on Streaming Video Platforms Decision Support Systems",

Decision Support Systems, Vol. 179, 114-148, 2024.

6. <u>M. Zhalechian,</u> E. Keyvanshokooh, C. Shi, M. P. Van Oyen,

"Data-Driven Hospital Admission Control: A Learning Approach",

Operations Research, Vol. 71(6), 2111-2129, 2023.

7. Y. Chen, C. Shi,

"Network Revenue Management with Online Inverse Batch Gradient Descent Method",

Production and Operations Management, Vol. 32(7), 2123-2137, 2023.

8. X. Chen, L. Jiang, S. Miao, C. Shi,

"Road to Micro-Celebration: The Role of Mutation Strategy of Micro-Celebrity in Digital Media",

New Media and Society, Vol. 25(12), 3455-3476, 2023.

9. M. Zhalechian, E. Keyvanshokooh, C. Shi, M. P. Van Oyen,

"Online Resource Allocation with Personalized Learning",

Operations Research, Vol. 70(4), 2138-2161, 2022.

10. S. Bhat, J. B. Lyons, C. Shi, X. J. Yang,

"Clustering Trust Dynamics in a Human-Robot Sequential Decision-Making Task",

IEEE Robotics and Automation Letters, Vol. 7(4), 8815-8822, 2022.

11. H. Jia, S. Shen, J. Garcia, C. Shi,

"Partner with a Third-Party Delivery Service or Not?

A Prediction-and-Decision Tool for Restaurants Facing Takeout Demand Surges During a Pandemic",

Service Science, Vol. 14(2), 139-155, 2022.

12. H. Jia, C. Shi, S. Shen,

"Multi-Armed Bandit with Sub-Exponential Rewards",

Operations Research Letters, Vol. 49(5), 728-733, 2021.

13. H. Yuan, Q. Luo, C. Shi,

"Marrying Stochastic Gradient Descent with Bandits: Learning Algorithms for Inventory Systems with Fixed Costs", Management Science, Vol. 67(10), 6089–6115, 2021.

(Finalist, INFORMS Applied Probability Society (APS) Best Student Paper, 2019.)

14. B. Chen, X. Chao, C. Shi,

"Nonparametric Learning Algorithms for Joint Pricing and Inventory Control with Lost-Sales and Censored Demand", Mathematics of Operations Research, Vol. 46(2), 405-833, 2021.

15. E. Keyvanshokooh, C. Shi, M. P. Van Oyen,

"Online Advance Scheduling with Overtime: A Primal-Dual Approach",

Manufacturing & Service Operations Management, Vol. 23(1), 246-266, 2021.

16. Y. Guo, C. Shi, X. J. Yang,

"Reverse Psychology in Trust-Aware Human-Robot Interaction",

IEEE Robotics and Automation Letters, Vol. 6(3), 4851-4858, 2021.

17. W. Chen, C. Shi, I. Duenyas,

"Optimal Learning Algorithms for Stochastic Inventory Systems with Random Capacities",

Production and Operations Management, Vol. 29(7), 1624-1649, 2020.

18. H. Zhang, X. Chao, C. Shi,

"Closing the Gap: A Learning Algorithm for the Lost-sales Inventory System with Lead Times", Management Science, Vol. 66(5), 1962–1980, 2020.

19. R. Levi, G. Perakis, C. Shi, W. Sun,

"Strategic Capacity Planning Problems in Revenue Sharing Joint Ventures",

Production and Operations Management, Vol. 29(3), 664-687, 2020.

20. Y. Chen, C. Shi,

"Joint Pricing and Inventory Management with Strategic Customers",

Operations Research, Vol. 67(6), 1610-1627, 2019.

(Third Place, INFORMS Junior Faculty Forum Paper Competition (JFIG), 2017.)

21. C. Shi, Y. Wei, Y. Zhong,

"Process Flexibility for Multi-Period Production Systems".

Operations Research, Vol. 67(5), 1300-1320, 2019.

22. Y. Jiang, C. Shi, S. Shen,

"Service Level Constrained Inventory Systems",

Production and Operations Management, Vol. 28(9), 2365-2389, 2019.

23. H. Zhang, X. Chao, C. Shi,

"Perishable Inventory Systems: Convexity Results for Base-Stock Policies and Learning Algorithms under Censored Demand",

Operations Research, Vol. 66(5), 1276-1286, 2018.

24. X. Chao, X. Gong, C. Shi, C. Yang, H. Zhang, S. X. Zhou,

"Approximation Algorithms for Capacitated Perishable Inventory Systems with Positive Lead Time", Management Science, Vol. 64(11), 5038-5061, 2018.

25. Y. Chen, R. Levi, C. Shi,

"Revenue Management of Reusable Resources with Advanced Reservations",

Production and Operations Management, Vol. 26(5), 836-859, 2017.

26. Y. Jiang, J. Xu\*, S. Shen, C. Shi,

"Production Planning Problem with Joint Service-Level Guarantee: A Computational Study", International Journal of Production Research, Vol. 55(1), 38-58, 2017.

27. Y. Xu, C. Shi, I. Duenyas,

"Priority Rules for Multi-Task Due-Date Scheduling under Varying Processing Costs",

Production and Operations Management, Vol. 25(12), 2086-2102, 2016.

28. H. Zhang, C. Shi, C. Qin\*, C. Hua\*,

"Stochastic Regret Minimization for Revenue Management Problems with Nonstationary Demands", Naval Research Logistics, Vol. 63(6), 433-448, 2016.

29. V. Nagarajan, C. Shi,

"Approximation Algorithms for Inventory Problems with Submodular or Routing Costs", Mathematical Programming Series A, Vol. 160(1), 225-244, 2016.

30. H. Zhang, C. Shi, X. Chao,

"Approximation Algorithms for Perishable Inventory Systems with Setup Costs", **Operations Research**, Vol. 64(2), 432-440, 2016.

31. C. Shi, W. Chen, I. Duenyas,

"Nonparametric Data-Driven Algorithms for Multiproduct Inventory Systems with Censored Demand", **Operations Research**, Vol. 64(2), 362-370, 2016.

32. M. Yu\*, Y. Ding, R. Lindsey, C. Shi,

"A Data-Driven Approach to Manpower Planning at U.S.-Canada Border Crossings",

Transportation Research Part A: Policy and Practice, Vol. 91, 34-47, 2016.

33. X. Chao, X. Gong, C. Shi, H. Zhang,

"Approximation Algorithms for Perishable Inventory Systems",

Operations Research, Vol. 63(3), 585-601, 2015.

34. C. Shi, H. Zhang, C. Qin\*,

"A Faster Algorithm for the Resource Allocation Problem with Convex Cost Functions", **Journal of Discrete Algorithms**, Vol. 34, 137-146, 2015.

35. C. Shi, H. Zhang, X. Chao, R. Levi,

"Approximation Algorithms for Capacitated Stochastic Inventory Systems with Setup Cost", Naval Research Logistics, Vol. 61(4), 304-319, 2014.

36. R. Levi, C. Shi,

"Approximation Algorithms for the Stochastic Lot-Sizing Problem with Order Lead Times", **Operations Research**, Vol. 61(3), 593-602, 2013.

(First Place, INFORMS George E. Nicholson Student Paper Competition, 2009.)

# **Working Papers**

37. B. Chen, C. Shi,

"Tailored Base-Surge Policies in Dual-Sourcing Inventory Systems with Demand Learning", **Operations Research**, conditionally accepted.

38. J. Tang, Z. Qi, X. Fang, C. Shi,

"Offline Feature-Based Pricing under Censored Demand: A Causal Inference Approach".

Manufacturing & Service Operations Management, Major Revision.

39. Jingwen Tang, Izak Duenyas, Cong Shi, Nan Yang,

"Multiproduct Inventory Systems with Upgrading: Replenishment, Allocation, and Online Learning".

Manufacturing & Service Operations Management, Major Revision.

40. Sichen Guo, Cong Shi, Chaolin Yang, Christos Zacharias,

"An Online Mirror Descent Learning Algorithm for Multiproduct Inventory Systems".

Operations Research, Major Revision.

41. <u>Shukai Li, Cong Shi, Sanjay Mehrotra,</u>

"LEGO: Optimal Online Learning under Sequential Price Competition".

Operations Research, Major Revision.

42. Ganggang Xu, Cong Shi,

"It is All About the Demand CDF: Data-Driven Periodic Review Inventory Control".

Management Science, Submitted.

43. M. Li, X. Liu, Y. Huang, C. Shi, C. Hua,

"Integrating Empirical Estimation and Assortment Personalization for E-Commerce: A Consider-then-Choose Model". (Finalist, INFORMS MSOM Data Driven Research Challenge, 2018.)

44. X. Chen, L. Ji, L. Jiang, S. Miao, C. Shi,

"More Bang for Your Buck: Effective KOL Marketing Campaign in Emerging Short-Video Markets".

- 45. Y. Chen, C. Shi,
  - "Near-Optimal Pricing Policy for Service Systems with Reusable Resources and Forward-Looking Customers".
- 46. H. Jia, C. Shi, S. Shen,
  - "Online Learning and Pricing for Network Revenue Management with Reusable Resources".
- 47. R. Miao, Z. Qi, C. Shi, L. Lin,
  - "Personalized Pricing with Invalid Instrumental Variables: Identification, Estimation, and Policy Learning".

## Conference Proceedings

(Authors underlined are Ph.D. advisees; authors underlined and asterisked are undergraduate students\*.)

- 1. S. Bhat, J. B. Lyons, C. Shi, X. J. Yang,
  - "Evaluating the Impact of Personalized Value Alignment in Human-Robot Interaction:

Insights into Trust and Team Performance Outcomes"

International Conference on Human-Robot Interaction (HRI 2024), Boulder, CO.

- 2. J. Dong, W. Mo, Z. Qi, C. Shi, X. Fang, V. Tarokh,
  - "PASTA: Pessimistic Assortment Optimization",

International Conference on Machine Learning (ICML 2023), Honolulu, HI.

- 3. Y. Guo, X. C. Shi, J. Yang,
  - "Reward Shaping for Building Trustworthy Robots in Sequential Human-Robot Interaction"

International Conference on Intelligent Robots and Systems (IROS 2023), Detroit, MI.

- 4. Y. Guo, X. J. Yang, C. Shi,
  - "Enabling Team of Teams: A Trust Inference and Propagation (TIP) Model in Multi-Human Multi-Robot Teams", Robotics: Science and Systems (RSS 2023), Daegu, South Korea.
- 5. H. Jia, C. Shi, S. Shen,
  - "Online Learning and Pricing for Network Revenue Management with Reusable Resources",

Advances in Neural Information Processing Systems (NeurIPS 2022), New Orleans, LA.

- 6. H. Jia, C. Shi, S. Shen,
  - "Online Learning and Pricing with Reusable Resources: Linear Bandits with Sub-Exponential Rewards", International Conference on Machine Learning (ICML 2022), Baltimore, MD.
- 7. S. Bhat, J. B. Lyons, C. Shi, X. J. Yang,
  - "Clustering Trust Dynamics in a Human-Robot Sequential Decision-Making Task".

International Conference on Intelligent Robots and Systems (IROS 2022), Kyoto, Japan.

- 8. Y. Guo, C. Shi, X. J. Yang,
  - "Reverse Psychology in Trust-Aware Human-Robot Interaction",

International Conference on Robotics and Automation (ICRA 2021), Xi'an, China.

- 9. Y. Chen, C. Shi,
  - "Joint Pricing and Inventory Management with Strategic Customers",

ACM Conference on Economics and Computation (EC 2017) MIT, Cambridge, MA.

## Research Grants

<ol> <li>Amazon Research Award, PI         Machine Learning for Personalized Assortment Optimization, \$68K     </li> </ol>	5.2021 - 5.2024
2. Boeing Research Award, Co-PI (with X. J. Yang) Predicting and Optimizing Trust Towards Autonomous Delivery Vehicles, \$50K	10.2022 - 10.2023
3. DOD-AFOSR, FA9550-23-1-0044, Co-PI (with X. J. Yang) Enabling Re-configurable Multi-Operator Multi-Agent (MOMA) Teams: A Trust Inference and Propagation (TIP) Approach, \$800K (my share: \$400K)	5.2023 - 5.2026
4. DOD-AFOSR, FA9500-20-1-0406, Co-PI (with X. J. Yang) Trust Building in Human-Autonomy Teaming: A Reinforcement Learning Approach, \$578K (my share: \$289K)	9.2020 - 9.2023
5. DOD-ARL, W911NF2020087, Co-PI (with X. J. Yang)	5.2020 - 4.2021

Modeling and Predicting Trust Dynamics, \$100K (my share: \$50K)

Trust-Driven Human-Agent Teaming:

6.	National Science Foundation (NSF), CMMI-1634505, PI Nonparametric Sampling-Based Algorithms for Supply Chain Systems, \$290K	9.2016 - 8.2019
7.	National Science Foundation (NSF), CMMI-1451078, PI Sustainability in Supply Chain: An Innovative and Systemic Approach, \$273K	9.2014 - 8.2016
8.	National Science Foundation (NSF), CMMI-1362619, Co-PI (with X. Chao) Managing Perishable Inventory Systems: New Algorithms and Approximations, \$375K (my share: \$160K)	6.2014 - 5.2017
9.	Seeding to Accelerate Research Themes (START), University of Michigan, Co-PI Trusted AI Decision-Makers for Complex and Rapid Response in Dynamic Situations, with S. Shen (PI), X. Yang, R. Jiang, \$60K	5.2022 - 5.2023
10.	Mcubed, University of Michigan, PI Optimal Learning in Dynamic Matching, with I. Duenyas and S. Shen, \$60K	5.2020 - 5.2021
11.	Mcubed, University of Michigan, PI Integrating Review Information with Pricing, with R. Kapuscinski and R. Jiang, \$60K	9.2016 - 9.2017
12.	Mcubed, University of Michigan, PI Distribution Free Inventory Control for Supply Chains, with I. Duenyas and Y. A. Bozer, \$60K	9.2013 - 9.2014

## **Professional Activities**

#### **Editorial Services**

- Co-Editor (with Professor George Shanthikumar), Naval Research Logistics, 2023 Present Special Issue on "Online and Offline Learning in Operations Management"
- Associate Editor, Operations Research, 2024 Present
- Associate Editor, Management Science, 2021 Present
- Associate Editor, Manufacturing & Service Operations Management, 2024 Present
- Senior Editor, Production and Operations Management, 2019 Present
- Associate Editor, Naval Research Logistics, 2022 Present
- Associate Editor, IISE Transactions, 2017 Present
- Associate Editor, Operations Research Letters, 2015 Present
- Journal Reviewer for Operations Research, Management Science, Mathematics of Operations Research, Mathematical Programming, Manufacturing & Service Operations Management, Production and Operations Management, INFORMS Journal on Computing, Stochastic Systems, Naval Research Logistics, IISE Transactions, Operations Research Letters, Journal of Applied Probability, International Journal of Production Research, Computers & Operations Research, A Quarterly Journal of Operations Research, European Journal of Operations Research, Flexible Services and Manufacturing, International Transactions in Operational Research, Journal of the Operations Research Society of China, Decision Sciences, Journal of Machine Learning Research.
- Conference Reviewer for Conference on Neural Information Processing Systems (NeurIPS), International Conference on Machine Learning (ICML), ACM Conference on Economics and Computation (EC), ACM-SIAM Symposium on Discrete Algorithms (SODA), European Symposia on Algorithms (ESA), MSOM Conference, MSOM SIG (including 1RR initiative).
- Book Reviewer for Advances and Trends in Optimization with Engineering Applications by Society for Industrial and Applied Mathematics (SIAM).

## **Extramural Services**

- Cluster Chair for MSOM Supply Chain for INFORMS Annual Meeting, 2020
- Conference Session Chairs: INFORMS Annual (2012–2022), INFORMS International (2016), POMS (2015)
- Judge, INFORMS George Nicholson Prize Committee, 2023, 2024
- Judge, INFORMS Applied Probability Society (APS) Best Student Paper Prize Committee, 2024, 2025
- Judge, INFORMS Junior Faculty Forum (JFIG) Paper Competition, 2019, 2020
- Judge, POMS Supply Chain College Student Paper Competition, 2016, 2017, 2018, 2019, 2020, 2021, 2022
- Judge, POMS College of Healthcare Operations Management Paper Competition, 2018, 2019, 2020, 2021, 2022, 2023, 2024

- Judge, CSAMSE Best Paper Competition, 2021, 2022, 2023, 2024
- Judge, MSOM Supply Chain Management Special Interest Group (SCM SIG), 2023
- Judge, IISE Supply Chain and Logistics (S&L) Best Paper Competition, 2023
- Judge, POMS-HK Best Student Paper Competition, 2023
- Judge, POMS-China Best Student Paper Competition, 2024
- External Reviewer, Research Grants Council (RGC) of Hong Kong, 2019, 2020, 2021, 2022, 2023
- National Science Foundation Panelist: December 2013 (CMMI), September 2016 (DRMS), March 2020 (CMMI)
- External Examiner, Ph.D. Thesis, The University of British Columbia, 2023

## Internal Services at University of Miami

• Co Program Director, Master of Science in Business Analytics (MSBA) Program (responsible for recruiting, especially in the greater China region, curriculum development, student placements)

## Internal Services at University of Michigan

- IOE Master of Engineering Program Task Force (Chair), 2021-2023
- IOE Murty Prize Committee, 2023
- Co-organizer (with Xiuli Chao and Stefanus Jasin),
   MIDAS/IOE Colloquium on Decision Making with Data Analytics on Dec 9, 2022.
- IOE Master of Engineering Program Task Force (Chair), 2022
- COE Representative for ECE Faculty Candidate, 2022
- IOE Master's Program Task Force (Chair), 2021
- Graduate Recruiting & Admissions Committee (GRA), 2021
- IOE Graduate Program Committee, 2021
- IOE First-Year Ph.D. Advisor, 2021
- IOE Faculty Mentor for IOE 316 (Daniel Felipe Otero-Leon, Luke DeRoos), 2021
- IOE Curriculum Committee, 2020
- IOE Graduate Program Committee, 2020
- IOE First-Year Ph.D. Advisor, 2020
- IOE Murty Prize Committee, 2020
- IOE Undergraduate Program Computing and Data Science Task Force, 2020
- COE Representative for CSE Faculty Candidate, 2020
- IOE Graduate Admissions and Financial Aid (GAFA) Committee, 2019–2020
- IOE Faculty Search Committee, 2019
- IOE Review Committee for Reza Kamaly (Lecturer), 2019
- IOE Curriculum Committee, 2019
- IOE Graduate Program Committee, 2019
- IOE First-Year Ph.D. Advisor, 2019
- IOE Wilson Prize Committee, 2019
- IOE Undergraduate Program Computing and Data Science Task Force, 2019
- IOE Review Committee for Luis Guzman (Lecturer), 2018
- IOE Departmental Committee, 2018-2019
- IOE Murty Prize Committee and IOE Wilson Prize Committee, 2018
- IOE Internal Review Committee (formed by the College of Engineering), 2018
- IOE Graduate Admissions and Financial Aid (GAFA) Committee, 2017–2018
- IOE Murty Prize Committee, 2017

- IOE Review Committee for Dan Reaume (Lecturer), 2017
- IOE Graduate Admissions and Financial Aid (GAFA) Committee, 2016–2017
- IOE Ph.D. Preliminary Exam Coordinator (Operations Research), 2016
- IOE Graduate Admissions and Financial Aid (GAFA) Committee, 2015–2016
- IOE Ph.D. Preliminary Exam Coordinator (Operations Research), 2015
- IOE Ph.D. Qualifying Exam Coordinator (Stochastic Models), 2015
- IOE Graduate Admissions and Financial Aid (GAFA) Committee, 2014–2015
- IOE Departmental Committee, 2014-2015
- IOE Graduate Admissions and Financial Aid (GAFA) Committee, 2013–2014
- IOE Graduate Admissions and Financial Aid (GAFA) Committee, 2012–2013
- IOE Seminar Series Coordinator (11 External Speakers), Fall 2013
- Ph.D. Prelim Committee Member for IOE Ph.D. students (Jeffrey Choy, Arlen Dean, Kati Moug, Xinyu Fei, Jingwen Tang, Yaohui Guo, Haoming Shen, Rohan Ghuge, Xian Yu, Luke DeRoos, Huiwen Jia, Mohammad Zhalechian, Hideaki Nakao, Elnaz Kabir, Esmaeil Keyvanshokooh, Alejandro Vigo, Fatemeh Navidi, Qi Luo, Sentao Miao, Francisco Aldarondo, Nima Salehi, Armando Bernal, Yuchen Jiang, Huanan Zhang, Weidong Chen, Hao Yuan, Amirhossein Meisami, Abdullah Al-Shelahi, Zhihao Chen, Yuanyuan Guo, Elliot Lee, Xiang Liu, Jingxing Wang, Emily Speakman, Patrick Nestor)

## **Invited Seminars at Peer Institutions**

- 1. Purdue University, Quantitative Methods, Seminar Series, Fall 2023.
- 2. University of Miami, MHBS Faculty Colloquium, Fall 2023.
- 3. University of Chicago, Institute for Mathematical and Statistical Innovation, Spring 2023.
- 4. University of North Carolina at Chapel Hill, OM Seminar Series, Spring 2023.
- 5. Hong Kong University of Science and Technology, ISOM Seminar Series, Fall 2022.
- 6. Northwestern University, IEMS Seminar Series, Fall 2022.
- 7. University of Miami, Management Science Seminar Series, Fall 2022.
- 8. University of Colorado Boulder, OM Seminar Series, Fall 2022.
- 9. University of Rochester, Simon School of Business Seminar Series, Fall 2022.
- 10. University of Toronto, Rotman School of Management Seminar Series, Fall 2021.
- 11. Arizona State University, IE Seminar Series, Fall 2021.
- 12. Massachusetts Institute of Technology, Data Science Lab (DSL) Seminar Series, Summer 2021.
- 13. University of Chicago, Booth School of Business Seminar Series, Fall 2020.
- 14. University of Michigan, IOE Seminar Series, Spring 2020.
- 15. Zhejiang University, International Symposium on Revenue Management, Summer 2019.
- 16. Chinese University of Hong Kong, Shenzhen, MOSTLY OM Workshop, Summer 2019.
- 17. Institute for Mathematics and its Applications, University of Minnesota, Fall 2018.
- 18. Tsinghua University, MOSTLY OM Workshop, Summer 2018.
- 19. Cornell University, ORIE Seminar Series, Fall 2017.
- 20. Northwestern University, IEMS Seminar Series, Spring 2017.
- 21. University of Illinois at Urbana-Champaign (UIUC), ISE Seminar Series, Spring 2017.
- 22. Columbia University, IEOR-DRO Seminar Series, Spring 2017.
- 23. Georgia Institute of Technology, ISyE Seminar Series, Spring 2016.
- 24. Columbia University, IEOR Seminar Series, Spring 2012.
- 25. University of Michigan, IOE Seminar Series, Spring 2012.
- 26. University of British Columbia, Sauder School of Business Seminar Series, Spring 2012.
- 27. Rugters University, Rugters Business School Seminar Series, Spring 2012.
- 28. University of Rochester, Simon School of Business Seminar Series, Spring 2012.
- 29. National University of Singapore, Decision Sciences Seminar Series, Spring 2012.
- 30. Singapore Management University, LKC Business School Seminar Series, Spring 2012.
- 31. Chinese University of Hong Kong, Business School Seminar Series, Spring 2012.
- 32. Massachusetts Institute of Technology, Operations Management Seminar Series, Spring 2008.

## **Invited Conferences**

Omitted due to a long list of conference talks (more than 100).

#### Ph.D. Dissertation Chair

1. Dr. Huanan Zhang (co-advised with Professor X. Chao), UM-IOE, 2012 – 2017

Dissertation: Data-Driven Algorithms for Stochastic Supply Chain Systems

Defense Date: April 20, 2017

First Position: Assistant Professor, Industrial and Manufacturing Engineering, Penn State University Current Position: Assistant Professor, Leeds School of Business, University of Colorado Boulder

2. Dr. Yuchen Jiang (co-advised with Professor S. Shen), UM-IOE, 2013 – 2018

Dissertation: Supply Chain and Revenue Management for Online Retailing

Defense Date: February 16, 2018

First Position: Data Scientist, Uber, San Francisco, CA

Current Position: Sr. Machine Learning Engineer, Robinhood, San Francisco, CA

3. Dr. Weidong Chen (co-advised with Professor I. Duenyas), UM-IOE, 2014 – 2019

Dissertation: Online Learning Algorithms for Stochastic Inventory and Queueing Systems

Defense Date: March 14, 2019

First Position: Data Scientist, Gap, San Francisco, CA Current Position: Data Scientist, Amazon, Seattle, WA

4. **Dr. Hao Yuan**, UM-IOE, 2015 – 2019

Dissertation: Data Driven Optimization: Theory and Applications in Supply Chain Systems

Defense Date: March 28, 2019

First Position: Applied Scientist, Amazon, Seattle, WA

Current Position: Machine Learning Engineer, Facebook, San Francisco, CA

5. Dr. Armando Bernal, UM-IOE, 2016 - 2020

Dissertation: Pricing in Network Revenue Management Systems with Reusable Resources

Defense Date: March 19, 2020

First Position: Data Scientist, Amobee, Baltimore, MD

6. Dr. Esmaeil Keyvanshokooh (co-advised with Professor M. P. Van Oyen), UM-IOE, 2015 – 2020

Dissertation: Personalized Data-Driven Learning and Optimization

Defense Date: December 16, 2020

First Position: Assistant Professor, Mays Business School, Texas A&M University

7. Dr. Huiwen Jia (co-advised with Professor S. Shen), UM-IOE, 2018 – 2022

Dissertation: Adaptive Optimization and Learning for Service Systems

Defense Date: March 9, 2022

First Position: Applied Scientist, Amazon, Seattle, WA

Current Position: Assistant Professor, Industrial Engineering & Operations Research, UC Berkeley

8. **Dr. Jingwen Tang**, UM-IOE, 2019 – 2024

Dissertation: Online and Offline Learning Algorithms in Operations Management

Defense Date: March 14, 2024

First Position: Assistant Professor, Miami Herbert Business School, University of Miami

9. Yaohui Guo (co-advised with Professor X. Yang), UM-IOE, 2019 – 2024

Dissertation: Trust-Aware Multi-Agent Human-Robot Teaming

Defense Date: July 1, 2024 First Position: TBD

10. Shreyas Bhat (co-advised with Professor X. Yang), UM-IOE, 2021 –

## Ph.D. Dissertation Committee

- 1. Shukai Li, IEMS, Northwestern University, 2019 -
- 2. Daniele Bracale, STAT, University of Michigan, 2019 -

3. Dr. Arlen Dean, IOE, University of Michigan, 2019 – 2024

Dissertation: Learning, Matching, and Allocation Algorithms for Healthcare and

Revenue Management Problems with Reusable Resources

Defense Date: May 14, 2024

First Position: Postdoc, Oxford University, UK

4. Dr. Moyan Li, IOE, University of Michigan, 2019 - 2023

Dissertation: Statistical Inference on Large-Scale and Complex Data via Gaussian Process

Defense Date: May 10, 2023

First Position: Applied Scientist, Amazon, Seattle, WA

5. Dr. Haoming Shen, IOE, University of Michigan, 2016 – 2023

Dissertation: Theory and Algorithms of Robust Chance Constraints

Defense Date: May 8, 2023

First Position: Assistant Professor, Industrial Engineering, University of Arkansas

6. Dr. Rohan Ghuge, IOE, University of Michigan, 2018 – 2023

Dissertation: The Power of Adaptivity for Decision-Making under Uncertainty

Defense Date: March 20, 2023

First Position: Postdoc, ISyE, Georgia Institute of Technology

7. Dr. Kati Moug, IOE, University of Michigan, 2019 – 2023

Dissertation: Sequential Decision Making in Crisis: Mitigating Risk in Marginalized Communities with Stochastic Optimization

Defense Date: February 21, 2023

First Position: Clinical Assistant Professor, ISyE, Georgia Institute of Technology

8. Dr. Luke DeRoos, IOE, University of Michigan, 2016 – 2023

Dissertation: Managing Chronic Health Conditions with Limited Resources

Defense Date: February 13, 2023

First Position: Applied Scientist, Optilogic, Ann Arbor, MI

9. Dr. Mohammad Zhalechian, IOE, University of Michigan, 2016 – 2023

Dissertation: Data-Driven Learning and Resource Allocation in Healthcare Operations Management

Defense Date: July 7, 2022

First Position: Assistant Professor, Kelley School of Business, Indiana University

10. Dr. Mengzhenyu Zhang, Technology & Operations, University of Michigan, 2015 –

Dissertation: Revenue Management in the New Age: Analysis and Learning with Dependency and Non-Stationarity

Defense Date: June 4, 2021

First Position: Assistant Professor, UCL School of Management, University College London

11. Dr. Pornpawee Bumpensanti, ISYE, Georgia Institute of Technology, 2016 – 2021

Dissertation: Pricing and Revenue Management in Supply Chain Networks and Service Systems

Defense Date: April 29, 2021

First Position: Applied Scientist, Amazon, Seattle, WA

12. Dr. Feng Tian, Technology & Operations, University of Michigan, 2015 – 2021

Dissertation: Continuous-time Optimal Dynamic Contracts

Defense Date: Jul 16, 2021

First Position: Assistant Professor, HKU Business School, University of Hong Kong

13. Dr. Hideaki Nakao, IOE, University of Michigan, 2016 – 2021

Dissertation: Distributionally Robust Optimization in Sequential Decision Making

Defense Date: March 8, 2021

First Position: Researcher, Argonne National Laboratory

14. Dr. Manqi (Maggie) Li, Technology & Operations, University of Michigan, 2014 – 2021

Dissertation: Data-Driven Operations Management

Defense Date: March 4, 2021

First Position: Assistant Professor of Business, Renmin University

15. Dr. Seok Joo Kwak, IOE, University of Michigan, 2015 – 2020

Dissertation: Examining Interventions and Cognitive Load Factors in Online Learning Experiences

Defense Date: June 16, 2020

First Position: Researcher, AI/OR Lab, Korean Army

16. Dr. Zhaohui (Zoey) Jiang, Technology & Operations, University of Michigan, 2014 – 2020

Dissertation: Towards a Better Design of Online Marketplaces

Defense Date: April 30, 2020

First Position: Assistant Professor, Tepper School of Business, Carnegie Mellon University

#### 17. Dr. Fatemah Navidi, IOE, University of Michigan, 2015 – 2020

Dissertation: Adaptive Approximation Algorithms for Ranking, Routing and Classification

Defense Date: March 24, 2020

First Position: Postdoc, Booth Business School, University of Chicago

#### 18. Dr. Qi Luo, IOE, University of Michigan, 2015 – 2020

Dissertation: Dynamic Pricing, Incentives and Learning in Sharing Mobility: A Continuous Approach

Defense Date: March 23, 2020

First Position: Assistant Professor, Industrial Engineering, Clemson University

#### 19. Dr. Sentao Miao, IOE, University of Michigan, 2015 – 2020

Dissertation: Data-Driven Optimization in Revenue Management: Pricing, Assortment Planning, and Demand Learning

Defense Date: March 18, 2020

First Position: Assistant Professor, Desautels Faculty of Management, McGill University

#### 20. Dr. Frank Cheng, Computer Science and Engineering, University of Michigan, 2015 - 2020

Dissertation: Agent-Based Models for Analyzing Strategic Adaptations to Government Regulation

Defense Date: January 22, 2020

First Position: Researcher, Microsoft Research, San Francisco, CA

#### 21. Dr. Aravind Govindarajan, Technology & Operations, University of Michigan, 2014 – 2019

Dissertation: Essays on Omnichannel and E-commerce Retail Operations

Defense Date: September 4, 2019

First Position: Data Scientist, Target, Minneapolis, MN

#### 22. Dr. Francisco Aldarondo, IOE, University of Michigan, 2014 – 2019

Dissertation: Design and Operational Analysis of Automated Guided Vehicle-Based Goods-to-Person Order Picking and Sor-

tation Systems

Defense Date: August 27, 2019

First Position: Researcher, Applied Physics Laboratory, Johns Hopkins University

#### 23. Dr. Yuanyuan Guo, IOE, University of Michigan, 2014 – 2019

Dissertation: Data-Driven Distributionally Robust Optimization on Power System Operations

Defense Date: July 19, 2019

First Position: Data Scientist, ExxonMobil, Irving, TX

#### 24. Dr. Qiyun Pan, IOE, University of Michigan, 2015 - 2019

 $Dissertation: \ Computationally \ Efficient \ Methods \ and \ Uncertainty \ Quantification \ for \ Extreme \ Quantile \ Estimation \ with \ Stochaster \ Annual \ Computation \ Annual \$ 

tic Simulation Models Defense Date: May 2, 2019

First Position: Senior Data Scientist, Nielsen, Chicago, IL

### 25. Dr. Ece Sanci, IOE, University of Michigan, 2015 – 2019

Dissertation: Strategies for Disaster Preparedness and Disruption Risk Mitigation

Defense Date: April 30, 2019

First Position: Assistant Professor, School of Management, University of Bath

#### 26. Dr. Abdullah Alshelahi, IOE, University of Michigan, 2014 – 2019

Dissertation: Macroscopic Look at Equity Markets

Defense Date: February 20, 2019

First Position: Researcher, General Motors Research & Development, Warren, MI

#### 27. Dr. Xiang Liu, IOE, University of Michigan, 2014 – 2018

Dissertation: Operations Research Models for Reducing Hospital Readmissions

Defense Date: December 18, 2018

First Position: Assistant Professor, Department of Industrial Engineering, Tsinghua University

#### 28. Dr. Nima Salehi Sadghiani, IOE, University of Michigan, 2014 – 2018

Dissertation: Models for Flexible Supply Chain Network Design

Defense Date: April 23, 2018

First Position: Data Scientist, Gap, San Francisco, CA

#### 29. Dr. Amirhossein Meisami, IOE, University of Michigan, 2014 – 2018

Dissertation: Integrated Learning and Optimization Frameworks with Applications in Operations Management

Defense Date: April 5, 2018

First Position: Data Scientist, Adobe Research, San Jose, CA

30. Dr. Qi (George) Chen, Technology & Operations, University of Michigan, 2010 – 2017

Dissertation: Dynamic Pricing under Operational Frictions

Defense Date: April 11, 2017

First Position: Assistant Professor, Naveen Jindal School of Management, University of Texas at Dallas

31. Dr. Do Yong (Elliot) Lee, IOE, University of Michigan, 2011 – 2016

Dissertation: Management of a Chronically Ill Population: An Operations Approach to Liver Cancer Screening

Defense Date: May 4, 2016

First Position: Research Analyst, Center for Naval Analyses (CNA) Corporation

32. Dr. Zhihao Chen, IOE, University of Michigan, 2011 - 2016

Dissertation: Strategic Network Planning under Uncertainty with Two-Stage Stochastic Integer Programming

Defense Date: February 12, 2016

First Position: Research Scientist II, Amazon, Seattle, WA

33. Dr. Boxiao (Beryl) Chen, IOE, University of Michigan, 2010 - 2016

Dissertation: Learning Algorithms for Stochastic Dynamic Inventory Systems

Defense Date: March 23, 2016

First Position: Assistant Professor, College of Business Administration, University of Illinois at Chicago

34. Dr. Yao Cui, Technology & Operations, University of Michigan, 2009 – 2015

Dissertation: Strategic Pricing in Service Industries

Defense Date: April 9, 2015

First Position: Assistant Professor, Johnson Graduate School of Business, Cornell University

## **Masters Students Supervised**

1. Jing Yang, IOE, University of Michigan, 2018 – 2019

Project Title: Inventory Routing Problems

First Position: Ph.D. Student at School of Industrial Engineering, Purdue University.

2. Charles Su, Ross MBA, University of Michigan, 2018 – 2019

Project Title: Applying a Facility Location Model to Amazon's US Fulfillment Center Network

First Position: Data Scientist, Amazon, Seattle, WA

3. Baiyang (Sarah) Liu, IOE, University of Michigan, 2012 - 2013

Project Title: Revenue Management of Reusable Resources with Advanced Reservations

First Position: Senior Researcher, General Motors Research & Development, Warren, MI

4. Xing (Shane) Li, IOE, University of Michigan, 2012 - 2013

Project Title: Cyclical Production Scheduling

First Position: Senior Operations Research Consultant, Sabre Corporation, Dallas/Fort Worth Area

# Undergraduate Students Supervised

1. Chao Qin, IOE, University of Michigan, 2012 - 2015

Project Title: A Faster Algorithm for the Resource Allocation Problem with Convex Cost Functions

First Position: Ph.D. Student at IEMS, Northwestern University

Current Position: Ph.D. Student at DRO, Columbia Business School, Columbia University

Joint papers have been Finalists, INFORMS Undergraduate Research Prize, 2014, 2015

2. Cheng Hua, IOE, University of Michigan, 2012 - 2015

Project Title: Stochastic Regret Minimization for Revenue Management Problems with Nonstationary Demands

First Position: Ph.D. Student at Yale School of Management, Yale University

Current Position: Assistant Professor, Antai School of Business, Shanghai Jiaotong University Joint paper has been Finalist, INFORMS Undergraduate Research Prize, 2014

3. Yiren Zhou, IOE, University of Michigan, 2015 – 2017

Project Title: Priority Rules for Multi-Task Due-Date Scheduling under Varying Processing Costs

First Position: Masters Student at ORIE, Cornell University

Current Position: High Frequency Trading, DRW, Chicago, IL

## Courses at the University of Michigan - Ann Arbor

- 1. IOE 202 Operations Engineering & Analytics (Undergraduate Core Class)
- 2. IOE 265 Probability and Statistics for Engineers (Undergraduate Core Class)
- 3. IOE 516 Stochastic Processes II (Ph.D. Core Class)
- 4. IOE 541 (IOE 591) Optimization Methods in Supply Chain (Ph.D./Masters Class)

## Teaching Evaluations (based on a 5.0 scale)

Q1: Overall, this was an excellent course;

**Q2**: Overall, the instructor was an excellent teacher;

Q4: The student had a strong desire to take this course (independent of any instructors).

Semester	Course	Level	Title	Enroll/Resp.	Q1	$\mathbf{Q2}$	Q4
Winter 23	IOE 516	PHD/G	Stochastic Proc II	31/31	4.80	4.90	4.60
Winter 23	IOE 202	UG	Ops Eng & Analytics	67/66	4.60	4.80	4.40
Fall 22	IOE 541	PHD/G	Supply Chain Mgt	47/44	4.81	4.83	4.73
Winter 22	IOE 516	PHD/G	Stochastic Proc II	33/29	4.76	4.81	4.83
Winter 22	IOE 202	UG	Ops Eng & Analytics	73/64	4.58	4.67	4.30
Fall 21	IOE 541	PHD/G	Supply Chain Mgt	40/38	4.81	4.81	4.74
Winter 21	IOE 516	PHD/G	Stochastic Proc II	19/18	4.81	4.90	4.60
Winter 21	IOE 202	UG	Ops Eng & Analytics	66/55	4.08	4.21	3.76
Winter 20	IOE 516	PHD/G	Stochastic Proc II	34/23	4.54	4.68	4.25
Fall 19	IOE 541	PHD/G	Supply Chain Mgt	38/34	4.61	4.68	4.69
Fall 19	IOE 265	UG	Prob&Stat Engr	137/128	4.11	4.38	3.76
Winter 19	IOE 516	PHD/G	Stochastic Proc II	27/26	4.88	4.93	4.78
Fall 18	IOE 541	PHD/G	Supply Chain Mgt	40/38	4.73	4.79	4.53
Fall 18	IOE 265	UG	Prob&Stat Engr	131/118	4.28	4.54	3.70
Winter 18	IOE 516	PHD/G	Stochastic Proc II	23/23	4.78	4.86	4.68
Fall 17	IOE 591	PHD/G	Supply Chain Mgt	38/35	4.85	4.85	4.36
Fall 17	IOE 265	UG	Prob&Stat Engr	140/121	4.53	4.67	4.03
Winter 17	IOE 516	PHD/G	Stochastic Proc II	23/21	4.88	4.92	4.55
Fall 16	IOE 591	PHD/G	Supply Chain Mgt	31/20	4.68	4.82	4.85
Fall 16	IOE 265	UG	Prob&Stat Engr	108/93	4.69	4.69	3.96
Winter 16	IOE 516	PHD/G	Stochastic Proc II	21/19	4.77	4.82	4.77
Fall 15	IOE 265	UG	Prob&Stat Engr	141/114	4.15	4.34	3.87
Winter 15	IOE 516	PHD/G	Stochastic Proc II	18/17	4.85	4.89	4.25
Fall 14	IOE 265	UG	Prob&Stat Engr	121/89	4.03	4.28	3.81
Winter 14	IOE 516	PHD/G	Stochastic Proc II	17/16	4.70	4.77	4.25
Fall 13	IOE 265	UG	Prob&Stat Engr	133/69	4.12	4.31	3.62
Winter 13	IOE 516	PHD/G	Stochastic Proc II	17/14	4.86	4.96	4.63

# Teaching Activities

## Courses at the Miami Herbert Business School

- $1.\ \, {\rm MAS\ 311\ Applied\ Probability\ of\ Statistics\ (Undergraduate\ Core\ Class)}$
- 2. MAS 691 Applied Reinforcement Learning (Ph.D. Class)

## Teaching Evaluations (based on a 5.0 scale)

Q1: My overall evaluation of the course (content, organization and structure) is positive.

**Q7**: My overall evaluation of the instructor is positive.

Semester	Course	Level	Title	Enroll/Resp.	Q1	Q7
Spring 24	MAS 311 P	UG	Applied Probability and Statistics	49/38	4.80	4.90
Spring 24	MAS 311 R	UG	Applied Probability and Statistics	45/20	4.80	4.90
Fall 23	MAS 691	PHD	Applied Reinforcement Learning	7/6	5.00	5.00