

Annual Report on
Home Office Operations
for Fiscal Year 2015



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Annual Report on Home Office Operations
Fiscal Year 2015
System Dynamics Society
Table of Contents

From the Executive Director.....	1
<i>Conference</i>	2
<i>Core</i>	3
<i>Publications</i>	4
<i>Sales</i>	5
<i>Web Presence</i>	6
<i>Cross Category Issues</i>	7
Attachment I – Conference	9
A-Conference Attendance Statistics	9
B-Conference Management	11
Attachment II – Core Operations.....	12
A-Membership Statistics.....	12
B-Chapter and Special Interest Group Statistics.....	16
C-Routine Operations – Other Processes.....	17
Attachment III – Sales	18
Attachment IV – All Sponsors by Type.....	19
Attachment V – Administrative Processes	20
Attachment VI – Finances	21

Part I: Narrative Summary

From the Executive Director

The *System Dynamics Society* is an international, nonprofit organization devoted to encouraging the development and use of System Dynamics and systems thinking around the world. Over the past 10 years there have been members in 102 countries (see chart on pages 14-15). With active members in 73 countries, the Society provides a forum in which researchers, educators, consultants, and practitioners in the corporate and public sectors interact to introduce newcomers to the field, keep abreast of current developments, and build on each other's work.

In 2015 we worked diligently to provide service to all of our members, plan and administer the conference in Cambridge, Massachusetts, provide prompt delivery of our products, and maintain and improve our web presence.

I would like to thank staff members Erin Sheehan and Robin Langer. With additional support from Weijia Ran and Babak Bahaddin, graduate students at the University at Albany, volunteers, and outside contractors, Joan Yanni, LouAnne Lundgren, and Mary Kenney, operations run smoothly. The Home Office operations fall into five categories: Conference, Core, Publications, Sales, and Web Presence.



Conference

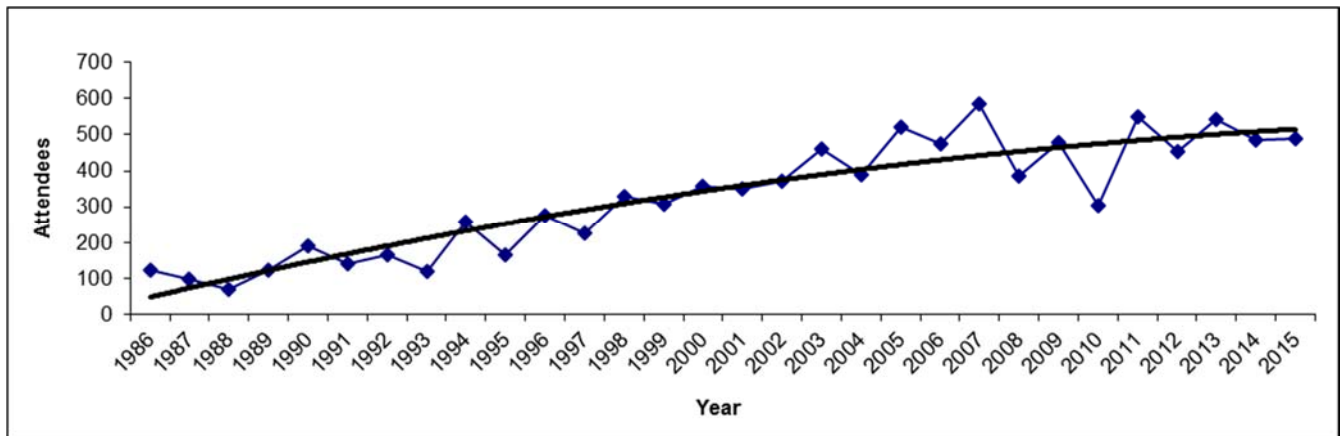
Conference management is a major part of Home Office operations for the first seven months of the year. At any one time, work is being done on the past year's conference, the current conference, and planning for future conferences. Time spent on conference management is always a substantial percentage of full year time allocation. Outsourcing is necessary and is a successful way to keep abreast of all the duties. Efforts to improve conference operations are ongoing as always.

Our conference location policy has two default locations, one in North America and one in Europe. The North American default site is Cambridge, Massachusetts, USA and the European site is Delft University of Technology, Delft, Netherlands. Locations outside these are considered on a case by case basis.

The Web Portal continues to be improved by Bob Eberlein, with the assistance of Weijia Ran. The Web Portal not only manages the submissions and program but assists with overall conference management. Many improvements and custom features are made each year improving functionality and reporting.

Future planning is actively ongoing for the Cambridge, Massachusetts, USA (2017) Conference to be held July 19-23. See the 2017 preliminary *Call for Papers* with your conference materials.

Conference Attendance by Year, 1983 – 2015



source: \rls folders\statistical information\conference related\attendees.xls\all attendees

For all other Conference-related graphics and lists please see Attachment I – Conference, page 9.

A-Conference Attendance Statistics

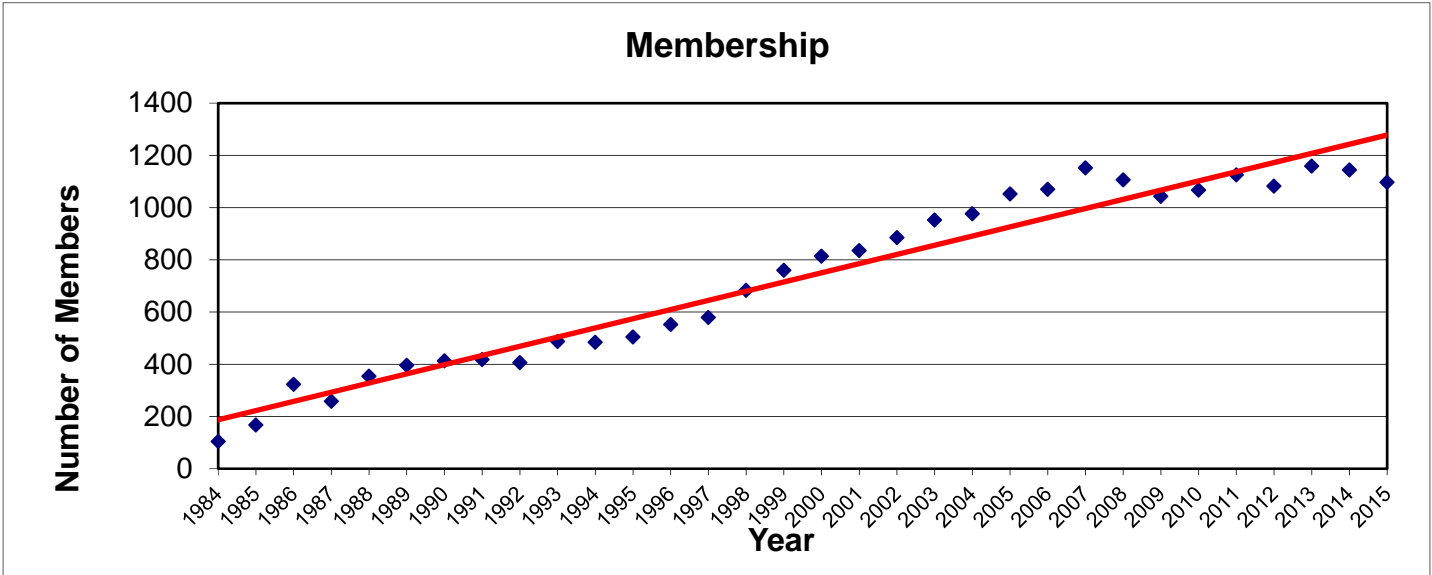
1. Conference Attendance by Year, 1983 – 2015
2. Conference Attendance by Continent Representation, 2006 – 2015
3. Conference Registration Fee Structure, 2006 – 2015
4. Conference Attendees by Type of Payment/Support, 2006 – 2015

B-Conference Management

Core

Membership constitutes the primary core activity of the Society. In 2015, our membership totaled 1,097, down from 1,145 in 2014. The Home Office goal is to provide accurate, prompt and personal service to all members and prospective members.

Membership Growth, 1984 – 2015



source: rls folders\statistical information\growth indicators\membership stats.xls\memovvertime

At the end of 2015 we had 8,984 valid records for members, non-members, conference registrants, authors and others who have contacted this office for products or information. Several times a year we contact these people in order to provide Society information.

Valid Records by year, 1998 – 2015

Year	Valid Records	Year	Valid Records	Year	Valid Records
1998	2,200	2004	5,850	2010	8,381
1999	2,700	2005	6,500	2011	8,870
2000	3,140	2006	7,100	2012	8,092
2001	4,200	2007	7,115	2013	8,741
2002	4,700	2008	7,832	2014	8,941
2003	5,300	2009	7,977	2015	8,984

source: rls folders\statistical information\attachforye-report\validmembyyear

We include a membership option on the conference registration form. For the Cambridge 2015 conference, we processed 67 memberships. Please see Attachment I – Conference, **A-Conference Attendance Statistics**, Conference Registration Fee Structure, 2006-2015 (table 3), page 10.

After the annual conference, a personal invitation for membership is sent to non-member conference attendees. In addition, our renewal campaign includes monthly communications to members who did not renew.



Electronic-only delivery of the *System Dynamics Review* was chosen by 43.6% of members in 2015, a slight increase from the previous year. In 2015, the number of members taking print copies was 618. It should be noted for future planning purposes that (per the 2011 contract with John Wiley & Sons, Ltd), the member rate for print copies (with online access) shall remain the same until the number of members taking print falls below 250 per year, then we will meet to review this rate so that the cost of manufacturing and sending the print copies is still covered by the rate.

The Society receives and processes membership for a particular year from September of the previous year to March of the following year (19 months). In 2015, 74% of our 2014 members renewed, which is a similar rate to the last few years.

Other Core services include support to Chapters and Special Interest Groups.

For other Core-related graphics and lists please see Attachment II – Core Operations, page 12.

A-Membership Statistics

1. Membership over Time, 1984 – 2015
2. Membership Distribution by Sector, 2006 – 2015
3. Membership by Continent, 1997 – 2015 (List)
4. Membership by Continent, 1997 – 2015 (Graph)
5. Geographic Distribution, ten years through 2015: 73 Active of 102 Total Countries

B-Chapter and Special Interest Group Statistics

1. New Chapters, 1990 – 2015
2. Special Interest Groups (year approved)

C-Routine Operations-Other Processes

Publications

Publication of the System Dynamics Society newsletters, the Bibliography, and support to the editors in the publication of, as well as, support to the members in the access of the *System Dynamics Review* are other Home Office duties.

The *System Dynamics Review* is published by WILEY four times a year. In 2015, we are in year five of our eight year contract. The Society continues to build on the existing, successful partnership we have with Wiley.

There are usually three **newsletters** produced each year by Home Office staff. The March and October newsletters feature a message from the president of the Society and other Society news. In June there is a Special Issue on Sponsor News (for both Society and Conference sponsors). Conference news is highlighted in the October newsletter.

The System Dynamics **Bibliography** is maintained by an in-office bibliographer with scheduled published updates and is downloadable from our website. The Bibliography has been updated to include the *Proceedings of the 33rd International Conference of the System Dynamics Society* (2015) and the *System Dynamics Review* Volume 31, Number 1-4 (2015). New entries and corrections are continuously being made. The **Bibliographic Updates Page** lists new additions to the Bibliography. This list is maintained so that users can see new entries as they are submitted to the Society.

Number of Bibliography Records, by year, 2002 – 2015

Year	Number of Records		Year	Number of Records
2002	6,630		2009	9,319
2003	7,076		2010	9,538
2004	7,461		2011	9,868
2005	7,754		2012	10,250
2006	7,951		2013	10,557
2007	app. 8,800		2014	10,933
2008	8,800+		2015	11,332

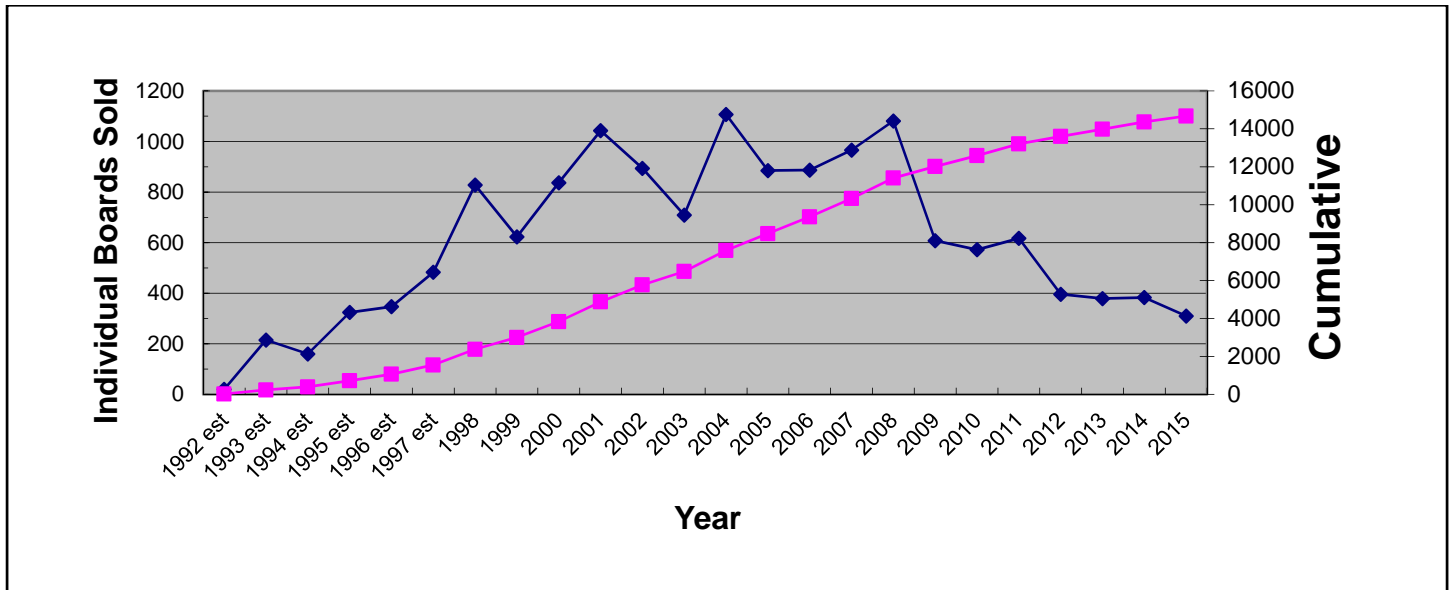
source: rls folders\statistical information\attachforye-report\bibrecordsbyyear

Sales

The **Product Distribution Game (Beer Game)**, **Conference Proceedings**, **Journal**, **Bibliography**, **PhD Seminar Series**, **MIT Literature Collection**, and **Books** can all be purchased from the Society. Late in 2014 we began selling the **Fish Banks Ltd. Game**.

Sales of the Beer Game decreased in 2015; the Society sold 310 boards in 2015 after selling 383 in 2014. The all-time record for sales was 1,107 games sold in 2004.

Beer Game Boards Sold, 1992 – 2015 and Cumulative



source: rls folders\statistical information\product sales history\sales history.xls\bg-yearly

In accordance with the 2011 contract with Wiley, past issues of the *System Dynamics Review (Review)* are available for sale to members of the Society. Although we continue to stock copies of back issues of the *Review*, access to past journals through our publisher using the Wiley Online Library website has reduced the sales. The last of the complete sets of back issues were sold during a special sale in 2010.



In 2015, the \$26,090.50 net income from the Book and Non-Book sales cost center helped support all operations offered by the Society office. The number is down slightly from 2014.

For more information please see Attachment III-Sales on page 18

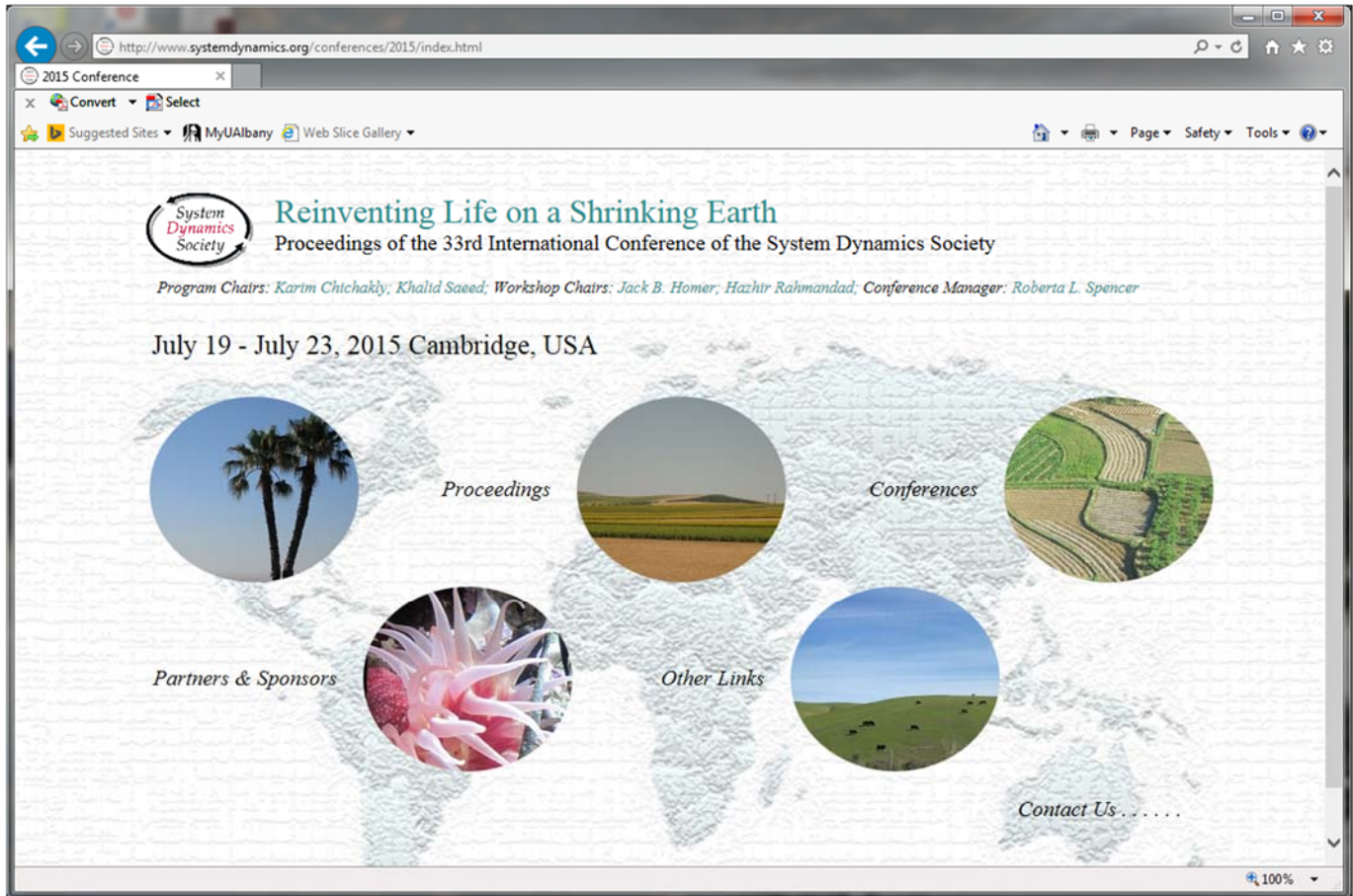
Web Presence

We continue to use a content management format, Word Press, to manage the Society and Conference sites. We also continue to offer website header space to our sponsors.

The Society website has been hosted by CirtexHosting since December 2010. To keep abreast of technological advancements, development funding must continue to be placed in the budget for web presence. We remain diligent regarding computer hygiene issues.

Our web presence includes an online discussion forum and Facebook page as well as Twitter and LinkedIn accounts. The discussion forum has public and private discussion forums and topics. The Facebook page and the Twitter accounts have gained popularity. We reached 2,890 likes on our Facebook page in December 2015. The System Dynamics Society, Inc. LinkedIn group was launched in November 2015 and introduced a Showcase page for the Case Repository. Posts are done frequently to engage interaction among various stakeholder groups. Our social media sites are used to share news and repost information from many sources.

We continue to model our permanent conference pages after the redesign of 2012:



For more details about our web presence, please see the report from the Vice President Electronic Presence.

Cross Category Issues

Sponsorship

We track both Society and Conference Sponsorship using the Access database.

Of the 37 Society sponsors that sent a gift or traded services, there were three new sponsors in 2015. Our sponsors are very committed, 28 of our 2015 Society sponsors have been sponsors for three consecutive years or more.

Of the 39 Conference sponsors that sent a gift or traded services, there were 21 new (including nine non-consecutive) sponsors in 2015. Our Conference sponsors are also very committed, 16 of our 2015 Conference sponsors have been sponsor for three consecutive years or more.

The Society office performs a systematic Society sponsorship program contacting all past Society sponsors and conference sponsors, inviting them to continue their support. In addition, we identify and email messages to repeat customers, to organizations with numerous members and to other consulting firms owned by members. This mailing is not only to solicit, but also to cultivate a relationship, embracing our members and others in the field of System Dynamics.

With Society sponsorship, a sponsor receives up to three personal memberships and can purchase additional memberships at a discount. A total of 84 new or renewed members joined the Society for the calendar year 2015 as a result of the Society Sponsorship incentive.

With Conference sponsorship, a sponsor receives many benefits including complimentary registrations for the conference; the number depends on the level of sponsorship. In 2015, there were a total of 54 complimentary registrations available to sponsors.

Governance

We continue to operate under a revised version of the Society Bylaws which was passed in 2012 and became effective on January 1, 2013.

Under the advisement of our CPA, we continue to develop and review guidelines that address items on the long IRS Form 990. These guidelines deal with records retention and destruction as well as conflict of interest issues and are consistent with the operation of the Society as a not for profit organization. A mandate by the New York Non-Profit Revitalization Act of 2013, effective July 2014, led to the creation of a formal Conflict of Interest (COI) guideline which was approved by the Policy Council at the 2015 Winter Meeting. The Conflict of Interest Report can be found on the Governance web page of the Society website.

In order to improve Board effectiveness Policy Council members participated in a Board Assessment survey. The results were presented to the Administrative Committee. One recommendation from this report was that Board Assessment should be repeated every two years.

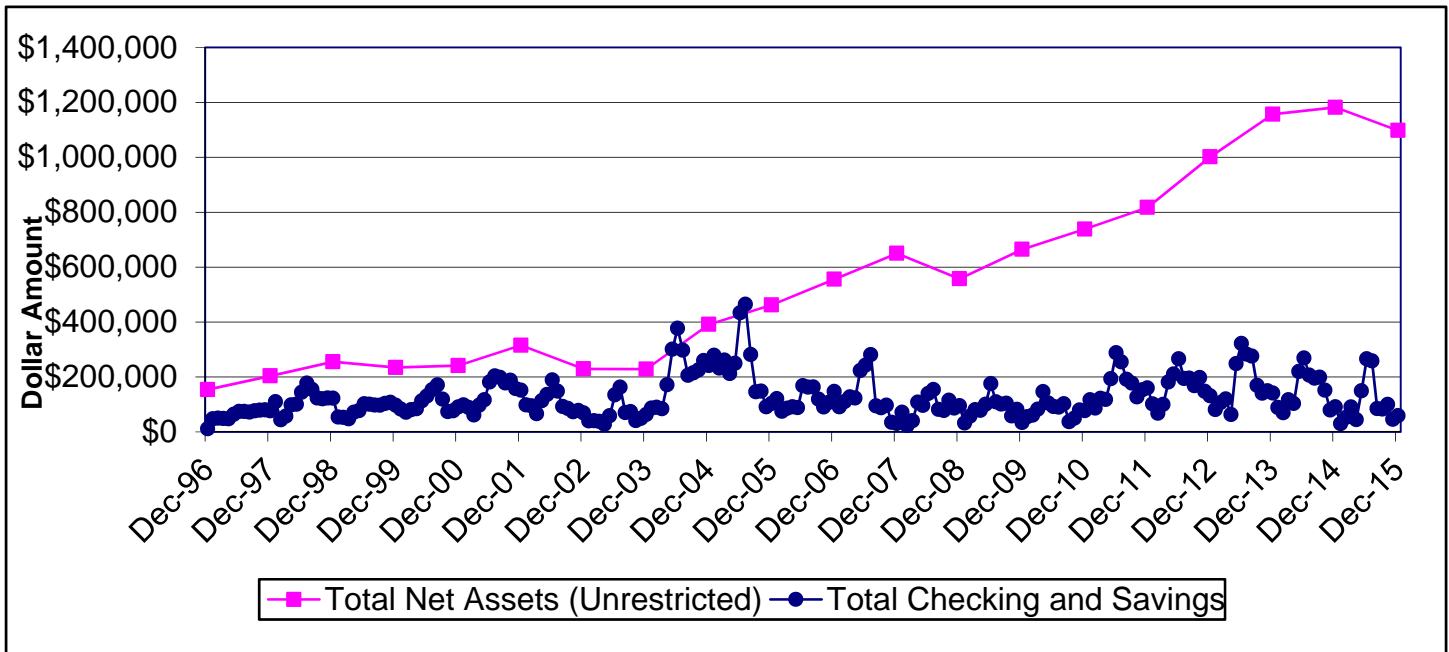


Finances

As stated on page one, the Society is managed around five cost centers: conference, core operations, publications, sales (book and non-book) and web presence. Please refer to the Vice President of Finance report for full details. All bookkeeping files are maintained in QuickBooks with monthly and annual reconciliation performed by accounting technology advisors from 25th Hour Accounting Solutions. The Society continues to work with CPA, Tom Hosey of Lubbe & Hosey, PC for tax preparation and planning as well as other financial advice.

An overall investment policy for the Society was implemented in 2005 and continues to be maintained. As per our investment consultant's suggestion, rebalancing is done annually to achieve the original weighting in the overall investment policy. The investment plan is being maintained for the Dana Meadows Fund (student prize) restricted accounts.

Year-end Balances for Non-Investment Accounts & Unrestricted Net Assets, 1996 – 2015



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For other Finance-related graphs please see Attachment VI – Finances, page 211.

Part 2: Supporting Attachments

Attachment I – Conference

A-Conference Attendance Statistics

Conference Attendance by Year, since 1983

Year	Location	Attendees	Guests	Year	Location	Attendees	Guests	Year	Location	Attendees	Guests
2015	Cambridge, USA	490	38								
2014	Delft, Netherlands	485	62	2003	NYC, USA	460	58	1992	Utrecht, Netherlands	146	
2013	Cambridge, USA	543	43	2002	Palermo, Italy	372	83	1991	Bangkok, Thailand	159	
2012	St. Gallen, Switzerland	455	47	2001	Atlanta, GA USA	352	22	1990	Chestnut Hill, MA USA	191	
2011	Washington DC	550	36	2000	Bergen, Norway	359	55	1989	Stuttgart, Germany	122	
2010	Seoul, Korea	305	15	1999	Wellington, New Zealand	307	27	1988	LaJolla, CA USA	71	
2009	Albuquerque, NM USA	478	43	1998	Québec City, Canada	331	51	1987	Shanghai, China	99	
2008	Athens, Greece	386	52	1997	Istanbul, Turkey	228		1986	Seville, Spain	122	
2007	Boston, MA USA	586	55	1996	Cambridge, MA USA	275		1985	Keystone, CO USA	125	
2006	Nijmegen, Netherlands	475	29	1995	Tokyo, Japan	165		1984	Oslo, Norway	55	
2005	Boston, MA USA	521	39	1994	Stirling, Scotland	257		1983	Chestnut Hill, MA USA	120	

source: \rls folders\statistical information\conference related\attendees.xls\all attendees

Conference Attendance by Continent Representation, 2006 – 2015

	2015 Cambridge	2014 Delft	2013 Cambridge	2012 St. Gallen	2011 WDC	2010 Seoul	2009 ABQ	2008 Athens	2007 Boston	2006 Nijmegen
Africa	4%	3%	1%	1	1	6	3	10	2	2
N America	59%	21%	54%	23	61	17	62	22	53	28
C/S America	4%	6%	8%	4	5	3	5	5	4	3
Asia	11%	15%	10%	16	10	45	8	5	8	9
Pacific	2%	1%	2%	3	2	4	2	4	4	3
Europe	20%	54%	25%	53	21	25	20	54	29	55
Total %	100%	100%	100%	100	100	100	100	100	100	100

Note: immediate pre-conference figures

source: \rls folders\statistical information\conference related\attendees.xls\by continent



Conference Registration Fee Structure, 2005 – 2015

	2015 Cambridge	2014 Delft	2013 Cambridge	2012 St. Gallen	2011 WDC	2010 Seoul	2009 ABQ	2008 Athens	2007 Boston	2006 Nijmegen
Member Registration - Early	\$555	\$555	\$525	\$525	\$500	\$450	\$450	\$450	\$425	\$425
Non-Member Registration - Early	\$650	\$650	\$625	\$620	\$595	\$525	\$525	\$525	\$500	\$500
Additional Cost for Membership	Dependent on Dues Tier								\$15	\$15
Half year membership	1029	1,088	1,109	1002	1,064	984	950	1,016	1,056	977
Memberships through registration	67	90	82	66	69	34	84	78	106	59
New members through registration	47	47	55	21	45	11	40	43	75	29

source: \rls folders\statistical information\conference related\attendees.xls\fee structure

Conference Attendees by Type of Payment/Support, 2005 – 2015

	2015 Cambridge	2014 Delft	2013 Cambridge	2012 St. Gallen	2011 WDC	2010 Seoul	2009 ABQ	2008 Athens	2007 Boston	2006 Nijmegen
Paying Members	216	201	246	207	247	102	196	171	298	216
Paying Non-Members	41	51	59	58	68	48	73	44	54	48
Supported Members	21	24	30	29	18	21	19	13	25	0
Paying Day Passes	5	26	6	3	3	3	7	3	1	51
Paying Students	109	109	105	87	94	76	82	105	122	96
Educator Scholarships	6	0	13	0	20	0	32	0	0	0
Organizers/Volunteers/Awards	30	27	27	22	25	31	25	16	20	22
Program Invite	4	5	0	8	0	1	2	1	1	1
Conference Scholarship	12	10	10	11	10	10	10	10	12	9
Sponsor Complimentary	46	30	47	30	61	13	32	23	53	32
TOTAL	490	485	543	445	550	305	478	386	586	475

source: \rls folders\statistical information\conference related\attendees.xls\bypayment

B-Conference Management

Management of our conferences is a major activity at the Society office.

Conference Tasks: Responsibilities for conference activities have included, but are not limited to:

- Design/produce/mail Call for Papers brochures, conference information and registration brochures, including electronic formats
- Contact conference sponsors including generating new contacts
- Conference sponsor management
- Create and maintain conference budget
- Monitor the memorandum of understanding (MoU) if appropriate
- Maintain office and site finances in QuickBooks and Excel; project management for two to three working years
- Manage registrations
- Organize and schedule meetings and events, including assignment of chairs
- Use Web Portal to:
 - manage all aspects of submissions and review
 - manage the tentative and final program
 - schedule session chairs, room assignments and AV equipment arrangements
- Produce the conference booklet and web proceedings
- Support award committees, manage as needed: submissions, ceremonies, scheduling and handouts to recipients for Dana Meadows Student Prize Award, Jay W. Forrester Awards, Applications Award, Outstanding Service Award, Lifetime Achievement Award; and assist with outside awards.
- Event Insurance Coverage
- Design overall conference sponsor information (benefits, web page, etc.)
- Organize outsourcing for specialty work
- Organize the Poster Symposium
- Assist with all social program items including transportation
- Maintain the conference website
- Negotiate and work directly with the conference venue
- Work with Program Co-chairs as needed
- Work with local host as needed
- Assist in implementing any new program features
- Organize all pre-conference and during-conference outside contractor and volunteer labor
- Assist participants with: any attendance issues, including funding transfer issues and letters of invitation for visas; roommate contacts; finding appropriate lodging; and manage other unique site-specific challenges.
- Provide support for pre-conference Summer School
- Work with organizers of the PhD Colloquium



Attachment II – Core Operations

A-Membership Statistics

Membership over Time, 1984 – 2015

Year	Society Database	Wiley-Blackwell	At June 30th	Regular/Student-Subsidized
2015	1097		1029	771/326
2014	1145		1028	798/347
2013	1159		1109	831/328
2012	1082		1002	794/288
2011	1125		829	819/306
2010	1067		984	783/284
2009	1043		950	807/236
2008	1106		1016	863/243
2007	1152		1056	888/264
2006	1070		977	839/229
2005	1052		994	852/200
2004	976	972	875	770/206
2003	953	952	844	750/202
2002	883	885	761	676/209
2001	1003	835	737	657/178
2000	946	814	720	643/171
1999	995	760	655	592/168
1998	808	683	600	547/136
1997	680	579		457/122
1996	572	552		443/109
1995		504		461/43
1994		484		400/84
1993		487		400/87
1992		406		320/89
1991		418		332/70
1990		413		328/85
1989		396		328/67
1988		354		307/47
1987		258		n/a
1986		323		277/46
1985		167		143/24
1984		104		86/18

Wiley-Blackwell ceased keeping membership records after 2004. Calculation source changed from Society directory to database in 2002.
 source: \rls folders\statistical information\growth indicators\membership stats.xls\memovvertime

Membership Distribution by Sector, 2006 – 2015

Year	Academic	Military	Private	Public	Other
2015	52	1	28	7	7
2014	54	1	27	6	7
2013	55	1	28	7	9
2012	55	1	29	7	8
2011	52	1	31	12	4
2010	52	1	30	12	4
2009	51	1	32	11	5
2008	52	1	31	11	5
2007	44	3	36	14	3
2006	43	3	38	14	2

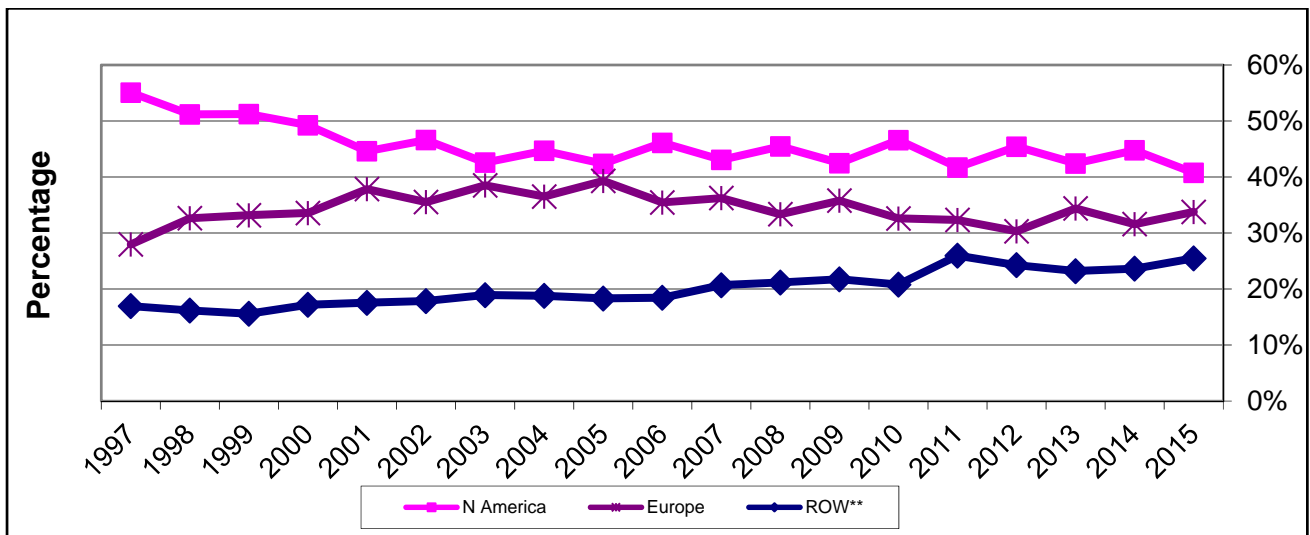
Before 2003, based on the institution name listed in the membership directory. 2003 on, self-reported by members.
 source: \rfs folders\statistical information\growth indicators\membership stats.xls\membysector

Membership by Continent, 2006 – 2015 (List)

	2015	2014	2013	2012	2011	2010	2009	2008	2007	2006
Africa	3%	3%	2%	2	2	2	2	2	2	2
N America	44%	41%	45%	42	45	42	46	42	45	43
S & C America	7%	6%	6%	5	6	6	5	4	4	4
Asia	12%	13%	12%	12	12	14	9	12	11	11
Europe	30%	34%	32%	34	30	32	33	36	33	36
Pacific	4%	4%	4%	5	4	5	5	4	5	4
# of countries	73	78	73	70	72	69	70	71	66	64

source: \rfs folders\statistical information\growth indicators\membership stats.xls\membycountry

Membership by Continent, 1996 – 2015 (Graph)



**ROW - other than N Amer. & Europe

source: \rfs folders\statistical information\growth indicators\membership stats.xls\membycountry



Geographic Distribution, ten years through 2015: 73 Active of 102 Total Countries

Country	2015	2014	2013	2012	2011	2010	2009	2008	2007	2006
Albania	0	1	0	0	0	0	0	0	0	0
Argentina	9	7	6	5	4	4	4	3	3	3
Armenia	0	1	0	0	0	0	0	0	0	0
Australia	37	36	40	36	36	39	39	33	40	34
Austria	7	10	7	9	8	6	5	6	4	4
Bahrain	1	0	1	0	0	0	0	0	0	0
Bangladesh	0	0	0	0	0	0	0	1	1	1
Barbados	1	1	2	0	0	0	0	0	0	0
Belgium	6	6	3	3	6	9	8	10	10	14
Bermuda	0	0	0	0	0	0	0	1	0	0
Bolivia	0	0	0	0	1	1	1	1	0	0
Bosnia	0	0	0	0	1	1	0	0	0	0
Botswana	0	1	1	1	2	0	0	0	0	0
Brazil	43	32	27	25	30	23	19	16	18	21
Bulgaria	2	3	1	0	1	1	0	0	0	0
Cambodia	1	1	1	1	0	0	0	0	0	1
Canada	33	27	31	29	28	25	27	29	25	25
Chile	6	4	4	3	4	4	5	5	6	4
China	25	26	26	25	30	32	13	16	16	17
Colombia	20	15	16	13	15	15	14	11	12	6
Costa Rica	2	1	2	2	1	1	1	1	1	2
Crete	0	0	0	0	0	0	0	1	0	0
Croatia	0	6	5	6	8	8	9	14	11	13
Cuba	0	0	0	1	1		1	0	0	0
Cyprus	1	3	2	2	2	2	2	3	2	3
Czech Rep	5	5	4	6	6	3	5	6	3	4
Denmark	7	3	5	5	6	6	4	4	4	5
Ecuador	0	0	1	0	1	0	0	0	0	0
Egypt	4	3	4	9	13	8	5	7	9	8
Finland	2	6	6	3	4	2	3	4	5	6
France	11	11	8	11	15	13	14	9	9	8
Georgia	0	0	1	1	1	0	0	0	0	0
Germany	48	55	46	55	47	50	55	56	60	57
Ghana	0	0	1	0	0	1	1	0	1	1
Greece	4	7	8	5	8	13	12	14	6	7
Hong Kong	0	0	1	0	0	0	3	3	3	2
Hungary	0	3	2	4	1	0	0	0	1	1
Iceland	4	2	4	3	1	1	1	1	3	0
India	15	10	11	15	15	17	15	14	14	11
Indonesia	15	19	18	13	10	12	7	6	10	9
Iran	5	5	6	7	6	6	5	11	7	3
Ireland	2	4	3	3	2	2	1	1	1	1
Israel	1	1	1	2	1	1	1	2	2	1
Italy	22	25	26	21	19	21	20	25	21	22
Jamaica	0	0	0	0	0	1	0	0	0	0
Japan	25	24	25	20	20	20	19	24	29	26
Jordan	0	0	2	0	0	0	0	0	0	1
Kazakhstan	0	0	1	1	0	0	0	0	0	0
Kenya	2	3	0	0	0	0	0	0	0	0
Kosovo	1	1	1	1	0	0	0	0	0	0
Kuwait	2	1	0	0	0	0	0	0	0	0
Latvia	1	3	4	3	11	4	2	0	2	1

System Dynamics Society Annual Report on Home Office Operations, Fiscal Year 2015

Country	2015	2014	2013	2012	2011	2010	2009	2008	2007	2006
Lebanon	3	3	1	1	1	1	1	1	1	1
Liechtenstein	0	0	0	0	0	0	0	1	1	0
Lithuania	1	1	1	1	0	1	0	0	0	0
Macao	0	0	0	0	0	1	1	2	0	0
Malaysia	5	8	9	5	7	6	4	6	8	5
Mauritius	1	1	0	0	1	2	0	1	0	0
Mexico	13	17	17	11	8	8	14	12	12	13
Myanmar	1	0	0	0	2	0	2	0	0	0
Nepal	0	0	0	0	0	0	1	0	0	0
Netherlands	39	49	45	42	30	27	30	36	43	38
New Zealand	10	11	11	13	12	11	10	13	13	12
Nigeria	7	5	5	3	2	2	2	3	1	1
Norway	27	23	25	28	21	28	18	24	24	28
Pakistan	9	8	0	1	1	1	1	9	9	9
Panama	0	2	0	0	0	0	0	0	0	0
Papua New Guinea	1	0	0	0	0	0	0	0	0	0
Peru	1	4	3	3	4	5	2	2	1	1
Philippines	2	4	3	4	4	4	1	2	2	1
Poland	7	7	7	7	8	10	6	8	7	7
Portugal	2	2	2	3	2	0	3	5	6	6
Puerto Rico(not counted)	0	0	0	2	3	3	4	2	3	2
Romania	2	2	1	1	0	0	0	1	0	0
Russia	5	9	12	10	7	7	10	11	9	6
Rwanda	1	1	0	0	0	0	0	0	0	0
Saudi Arabia	2	2	2	3	3	4	3	3	1	2
Scotland	1	1	0	0	0	0	0	0	0	0
Senegal	0	0	0	0	0	0	0	1	1	1
Serbia	1	1	0	0	0	0	0	0	0	0
Singapore	9	9	11	12	11	9	4	5	4	5
Slovak Republic	0	0	0	1	2	2	1	2	2	1
Slovenia	1	2	3	2	2	3	3	2	2	4
South Africa	16	15	12	5	8	8	7	8	8	6
South Korea	8	14	6	10	9	16	6	11	9	12
Spain	6	7	11	14	18	19	19	22	20	21
Sweden	10	10	9	12	8	12	14	14	11	10
Switzerland	30	37	35	37	28	32	24	29	30	34
Taiwan	4	6	5	5	7	9	7	7	9	11
Thailand	1	2	1	1	2	3	1	3	1	0
Trinidad	0	0	0	0	0	0	1	0	0	0
Tunisia	0	0	0	0	0	0	0	0	1	0
Turkey	10	9	10	10	13	10	6	8	7	8
Uganda	1	2	0	0	0	0	1	1	0	0
Ukraine	0	2	1	2	2	0	0	0	1	1
United Arab Emirates	0	1	3	3	2	3	4	2	2	1
United Kingdom	57	70	68	61	53	52	65	79	78	79
United States	433	423	471	417	472	409	441	426	482	420
Uruguay	0	1	1	1	2	2	2	1	0	0
Venezuela	1	1	3	1	2	2	1	3	4	2
Vietnam	2	1	1	1	2	1	1	1	0	0
West Indies	0	1	0	0	0	0	0	0	0	0
Yemen	1	0	0	0	1	1	1	1	0	0
Totals	1097	1146	1159	1082	1125	1066	1043	1106	1152	1070

source: \r\ls folders\statistical information\growth indicators\membership stats.xls\membycountry



B-Chapter and Special Interest Group Statistics

New Chapters, 1990 – 2015

Year	New Chapter Name
2015	Iran
2014	Africa Regional, South Africa
2013	N/A
2012	Canada
2011	Benelux
2010	India
2008/09	N/A
2007	German
2006	Psychology (This chapter became a SIG in 2009)
2005	Russian, Pakistan
2004	Swiss, Economics
2003	Brazil
2002	Student, Latin America, Hellenic, Egypt
2000	South Korea
1999	UK, Australasia
1996	Italian
1990	China, Japan

source: \rls folders\statistical information\growthindicators\chapter-sig growth.xls\chapters

Special Interest Groups (year approved)

- Business (2013/2005)
- Biomedical (2012)
- Conflict, Defense and Security (name change 2011)
- Psychology (2009)
- Inter- and Intranational Conflict (2008)
- Model Analysis (2007)
- Energy (2006)
- Information Science and Information Systems (2006)
- Environmental (2003)
- Health Policy (2003)
- Security (2003)
- Education (2002)

source: \rls folders\statistical information\growthindicators\chapter-sig growth.xls\sig

C-Routine Operations – Other Processes

- Manage and update all Society information and communication vehicles
- Find the best suppliers, improve when possible, maintain inventory, and fill orders for all current products:
 - Fish Banks Ltd. Game
 - Beer Game
 - Back issues of Proceedings
 - Back issues of *System Dynamics Review*
 - PhD Seminar Series
 - MIT Literature Collection
 - Electronic Oracle
 - Fireside Chat
 - Books (see **Book Sales by Title** page 19)
- Bibliography and updates: maintain and post to Bibliographic Updates page as new references are added
- Respond to all inquiries including general member inquiries / member services / non-member questions
- Receive and record all new and renewal memberships and send information to Wiley to distribute the journal
 - Membership maintenance, recruitment, and yearly retention analysis
 - Record and calculate payments to our publisher
- Archive systems: records retention and preservation
- Maintain, improve and monitor website and related social media
- Manage campaigns for growth
 - Membership, new and renewal
 - Society sponsorship solicitation and subsequent management
 - Library campaign for institutional subscriptions
 - Conference sponsorship
 - Volunteer campaign
 - Other as needed, for example, the Dana Meadows Endowment
- Maintain on-line membership directory
- Maintain SD Career Link on the website and as a job message board at each conference
- Maintain a list of Courses in SD on the website
- Produce and distribute *System Dynamics Newsletter* up to four times per year (electronic and hard copy)
- Manage Administrative Calendar and Processes (see Attachment V)
- Assist with all aspects of conference management
- Continuously strive for less use of paper and postal services
- Update the Conference Guide after each conference



Attachment III – Sales

Sales, Ten years through 2015

Items Sold	2015	2014	2013	2012	2011	2010	2009	2008	2007	2006
Beer Game Boards including loaner boards	310	383	379	396	617	557	608	1,082	996	878
Proceedings	12	0	0	0	4	105*	0	2	6	190*
<i>System Dynamics Review</i>	1 set	0	0	0	8 single 0 sets	19 single 6 sets*	19 single 1 set	6 single 0 sets	8 single 1 set	900* single 0 sets
Forrester PhD Seminar	6 sets	2 sets	5 single 6 sets	5 single 2 sets	1 single 7 sets	11 single 16 sets*	8 single 2 sets	5 single 2 sets	5 single 4 sets	5 single 6 sets
MIT Literature Collection	4	4	7	11	16	14	15	19	19	42
Electronic Oracle	3	12	2	5	3	59*	2	9	178	
Fireside Chat	1	11	2	2	4	30*	0	4	37	
Books	94	190								
Fish Banks Ltd	26	2								

* increase due to special sale

source: \rls folders\statistical information\product sales history\ sales history.xls\all prod – yearly

Book Sales by Title

Book Title	2015	2014
Alternatives to Growth	1	7
Collected Papers of JW Forrester	19	N/A
Dynamics of Commodity Production Cycles	5	11
Dynamo User's Manual	1	3
Electronic Oracle	3	12
Elements of the System Dynamics Method	6	17
Feedback Thought in Social Science	11	17
Industrial Dynamics	3	19
Introduction to System Dynamics Modeling	5	15
Introduction to Urban Dynamics	1	12
Managerial Applications of System Dynamics	3	10
Principles of Systems (Electronic Version)	3	16
Readings in Urban Dynamics, Volume 1	4	8
Study Notes in System Dynamics	8	16
Toward Global Equilibrium	2	7
Urban Dynamics	5	N/A
World Dynamics, 2nd Edition	14	19
Totals	94	190

source: \rls folders\statistical information\product sales history\ sales history.xls\all prod – yearly\book sales

Attachment IV – All Sponsors by Type

Society and Conference Sponsors 2012 through 2015

Corporations:

AIMS Ilc & ConfluentC Ilc¹
 Analytic Services Inc/ASysT¹
 AnyLogic North America, XJ Technologies^{1,2}
 Argonne National Laboratory^{1,2}
 Atkins Nutritionals, Inc.³
 Berkeley Research Group
 The Boeing Company¹
 Bolide Pty Ltd¹
 Allen L. Boorstein^{1,2}
 Bobo's Oat Bars^{2,3}
 Booz Allen Hamilton
 Bumblebar^{2,3}
 Complexio
 Continental Tires
 Cooper Human Systems²
 Copernicos Group¹
 Crispy Green^{2,3}
 CROSSMARK
 Crunchmaster^{2,3}
 CTN Management Development
 Decision Dynamics, Inc.¹
 Dynaplan AS
 Evans & Peck Pty Ltd.
 Forio²
 Greenwood Strategic Advisors AG²
 Health Warrior^{2,3}
 Helvetia Versicherungen
 Homer Consulting¹
 Honest Weight Food Co-op³
 HTxA-High Tech x Agency
 Hyatt Regency Cambridge^{2,3}
 Idaho National Laboratory²
 International Society for the Systems Sciences (ISSS)^{2,3}
 isee systems^{1,2}
 Jantz Management LLC^{1,2}
 Lane Press of Albany^{2,3}
 Leverage Networks
 Livingston Hamilton Rentals GmbH
 Lundberg Family Farms^{2,3}
 The Manufacturing Game®/Ledet Enterprises¹
 Mary's Gone Crackers^{2,3}

Mayor of St. Gallen and Canton of St. Gallen
 MITRE Corporation^{1,2}
 Mohaseboon Financial and Business Consultants
 Natural Balance Foods^{2,3}
 Nature's Bakery^{2,3}
 Nonni's Food LLC³
 Northwater Capital Management, Inc.¹
 Organic Food Bar Inc.³
 PA Consulting Group^{1,2}
 Patni Holdings, LLC
 Paul Scherrer Institute³
 Pegasus Communications
 Powersim Software AS
 Powersim Solutions, Inc.
 PricewaterhouseCoopers
 PROGNOZ
 Proverbs Corporation
 RawRev^{2,3}
 RoCC-Responsible Corporate Competitiveness Initiative at the University of St. Gallen
 SACU^{1,2}
 Sandia National Laboratories²
 Semantum
 SoL, the Society for Organizational Learning^{1,3}
 Stiftung zur Förderung der Systemorientierten Managementlehre (Foundation for Systems-Oriented Management Education)
 Strategy Dynamics Ltd²
 Systems Thinking Collaborative¹
 transentis management consulting GmbH & Co. KG^{1,2}
 Vanguard Strategy
 Ventana Systems, Inc.^{1,2}
 Ventana Systems UK¹
 ViaSim Solutions^{1,2,3}
 Whole Systems Partnership^{1,2}
 Wiley^{2,3}
 Windhaven Business Management, Inc.
 Anonymous¹

Universities and University Centers:

EMSD: Erasmus Mundus European Master Programme in System Dynamics
 Faculty of Technology, Policy and Management at Delft University)
 Frankfurt School of Finance and Management²
 Georgia Health Policy Center, Georgia State University²
 HSG Alumni, University of St. Gallen
 Policy Analysis Group, Faculty of Technology, Policy & Management, Delft University of Technology¹
 Social System Design Lab
 Washington University in St. Louis^{1,2}
 System Dynamics Group, Massachusetts Institute of Technology^{1,2}
 System Dynamics Group, Nijmegen School of Management, Radboud University Nijmegen¹
 System Dynamics Group University at Albany^{1,2,3}
 System Dynamics Group, University of Bergen^{1,2}
 System Dynamics Group, Institute of Management, University of St. Gallen^{2,3}
 System Dynamics Program, Worcester Polytechnic Institute^{2,3}
 TU Delft Aula Congress Centre
 Worcester Polytechnic Institute (WPI)^{1,2}

Individual Sponsors:

Jay W. Forrester¹
 Dr. Don Frazier¹
 Gary B. Hirsch¹
 Anonymous^{1,2}

Individual Donors:

Anonymous^{1,2}

¹ 2015 Society Sponsor

² 2015 Conference Sponsor

³ In-kind Sponsor (in one or more years)



Attachment V – Administrative Processes

Business Processes Tightly Linked to Administrative Calendar:

- Maintain checking account and accounting for funds with University at Albany
- Tax filings/returns; work with bookkeeper and CPA
 - May 15 Federal (no fee), Massachusetts and New York (annual fees) to be filed
 - November 15 – Annual filing with the Massachusetts Secretary of State; a one-page form that lists officers, policy council members and date of annual meeting for the past year. (Society Clerk/Secretary must be a resident of Massachusetts.)
 - Sales Tax returns (Massachusetts and New York) due quarterly or annually based on volume of sales.
- Complete filings in other states for tax-exempt purposes as required
- Manage annual contract and contractual obligations with the University at Albany, and as the contract relates to the State of New York
- Monitor and acquire correct insurance coverage for the Society
- Manage agenda and follow-up for Winter Meeting of Policy Council (Jan, Feb)
- Manage agenda and follow-up for Summer Meeting of Policy Council at research conference
- Assist as needed for smooth transition and continuity for the presidents each year
- Assist with management of nominations and elections procedures
- Assist with administration of Awards:
 - Jay W. Forrester Award selection procedure
 - Dana Meadows Award at research conference
 - System Dynamics Applications Award
 - Outstanding Service Award
 - Lifetime Achievement Award
 - Other awards
- Annual membership billing
- Manage conference site selection (3-4 years in advance)
- Annual Report of Home Office Operations
- Support all VP's and committee chairs for Policy Council reporting.
- Update Society pages printed in the *System Dynamics Review*
- Work with Administration Committee to continually refine processes
- Meet with Wiley to review and negotiate contract as needed
- Manage Policy Council governance assessment review and follow up on recommendations

Attachment VI – Finances

Balance Sheet Comparison, 10 years through 2015

including year-end adjusting entries	2015	2014	2013	2012	2011	2010	2009	2008	2007	2006
ASSETS										
CURRENT ASSETS										
Cash (ckg/svg//PayPal)	\$ 126,664	153,439	167,525	155,804	179,969	80,850	34,781	95,538	42,615	150,573
Investments	\$ 946,035	972,583	898,711	752,541	616,709	603,166	560,117	460,374	595,364	474,826
Accounts receivable	\$ 61,952	61,830	60,545	62,653	0	0	30	1,171	0	0
Inventory (at cost)	\$ 16,800	23,009	26,220	19,843	25,970	20,807	23,447	10,695	0	0
Prepaid expenses	\$ 35,023	51,271	74,889	81,782	54,558	82,904	68,024	32,294	38,938	0
Total Current Assets	\$ 1,186,474	1,262,132	1,227,890	1,072,623	877,206	787,727	686,399	600,072	676,917	625,399
PROPERTY (Fixed Assets)										
Furniture and equipment	\$ 651	651	651	1,263	1,263	1,263	11,046	11,046	11,046	11,046
Less: Accumulated depreciation	\$ -651	-651	-651	-1,263	-1,263	-1,263	11,046	11,046	11,025	10,963
Total Property (Fixed Assets)	\$ 0	0	0	0	0	0	0	0	21	83
OTHER ASSETS										
Restricted securities / funds	\$ 116,806	117,205	104,465	92,242	83,661	76,386	71,657	67,437	73,136	70,341
TOTAL ASSETS	\$ 1,303,280	1,379,337	1,332,355	1,164,865	960,867	864,113	758,056	667,509	750,074	695,823
LIABILITIES & NET ASSETS										
CURRENT LIABILITIES										
Accounts payable	\$ 12,402	4,012	903	1,742	5,574	2,863	612	1,282	0	0
Accrued expenses (conf related)	\$ 0	0	0	0	0	0	0	0	0	32,536
Membership Sub. Payable	\$ 9,211	11,567	12,825	12,466	10,679	13,287	12,517	19,957	21,823	32,068
Deferred revenue (conf/cust)	\$ 59,794	55,572	48,124	47,166	43,583	32,164	3,393	15,900	0	0
Custodial account liability	\$ 7,525	9,075	9,225	9,900	0	0	0	0	0	0
Misc. liabilities (sales tax, etc)	\$ 0	0	0	0	0	184	65	314	85	49
Royalty Advance	\$ 0	0	0	0	0	0	5,000	5,000	5,000	5,000
Total Liabilities	\$ 88,932	80,226	71,077	71,274	59,836	48,498	21,587	42,453	26,908	69,653
NET ASSETS										
Unrestricted - General fund	\$ 1,097,542	1,181,906	1,156,813	1,001,349	817,370	738,480	664,812	557,619	650,030	555,829
Temporarily Restricted	\$ 116,806	117,205	104,465	92,242	83,661	77,135	71,657	67,437	73,136	70,341
Total Net Assets	\$ 1,214,348	1,299,111	1,261,278	1,093,591	901,031	815,615	736,469	625,056	723,166	626,170
TOTAL LIABILITIES & NET ASSETS	\$ 1,303,280	1,379,337	1,332,355	1,164,865	960,867	864,113	758,056	667,509	750,074	695,823

source: \rls folders\executive director & vpf reports\2015\annual report\ multi yr balance sheet comparison thru 2015.xlsx

Revenue and Expenses Comparison, 10 years through 2015

Ordinary Income/Expense		2015	2014	2013	2012	2011	2010	2009	2008	2007	2006
Income	Conversion from Accrual to Cash	\$ 0	0	0	0	0	0	0	0	137	3,185
	INC Conferences	\$ 302,726	294,654	303,765	327,607	303,463	173,561	233,148	156,401	264,081	214,907
	Journal Income	\$ 85,173	84,621	81,676	84,889	85,514	56,292	51,963	43,499	44,375	39,900
	Membership Dues	\$ 61,249	65,909	64,487	59,968	63,636	58,741	57,389	61,696	58,597	48,042
	Other Income	\$ 4,776	668	725	0	0	0	0	-165	0	164
	Products	\$ 48,937	53,908	49,828	47,170	75,106	69,590	71,654	126,685	112,988	114,296
	Shipping and Handling Income	\$ 8,155	9,032	7,320	9,829	11,394	17,691	13,878	25,010	19,671	20,191
	Sponsor Dues and Donations	\$ 46,590	36,350	33,150	40,106	41,001	18,500	30,125	44,375	27,595	40,284
	Summer School Income	\$ 9,300	0	0	0	0	0	0	0	0	0
	Total Income	\$ 566,906	545,142	540,950	569,569	580,114	394,374	458,157	457,501	527,444	480,969
	Cost of Goods	\$ 9,830	7,915	10,249	11,161	14,247	10,214	3,564	14,874	30,247	33,768
	Gross Profit	\$ 557,076	537,227	530,701	558,408	565,868	384,160	454,593	442,627	497,197	447,201
Expense	Awards-Dana Meadows	\$ 2,000	1,500	750	1,200	1,200	1,200	1,200	1,200	1,200	0
	Awards-Others	\$ 9,776	1,220	0	6,021	0	6,900	0	5,097	5,244	5,086
	Bank & CC Fees	\$ 14,440	9,729	12,528	13,034	13,609	9,598	15,092	14,865	16,812	11,659
	Field Dev (\$20K Max) / Prod Dev	\$ 12,500	17,500	6,405	0	4,000	0	0	64	0	528
	Contracted Expenses at UAlbany	\$ 341,827	332,483	298,280	277,709	279,400	261,719	253,739	190,610	203,356	203,355
	Depreciation Expense	\$ 0	0	0	0	0	0	0	21	62	273
	EXP Conferences	\$ 143,936	142,355	134,283	148,823	121,867	62,350	92,855	98,777	116,894	81,490
	Insurance	\$ 5,313	5,218	4,645	5,595	2,013	1,354	0	0	0	0
	Journal Expense	\$ 20,000	20,000	20,000	20,000	19,763	20,000	20,000	20,000	12,000	12,000
	Marketing (Sponsor Trade)	\$ 2,000	2,000	0	0	0	0	0	0	0	0
	Membership Directory Exp	\$ 0	0	615	2,340	2,170	2,074	1,958	1,872	1,812	1,800
	Membership Services	\$ 0	0	0	0	0	1,060	2,765	1,220	955	1,165
	Miscellaneous Expense	\$ 712	1,144	683	2,444	829	1,898	331	437	361	539
	Office Expense	\$ 5,818	5,280	4,416	3,354	5,235	4,571	14,417	26,200	19,105	17,999
	Officer Expenses (=Travel CPA)	\$ 4,644	10,228	9,871	9,614	9,420	5,417	5,854	5,153	6,108	6,633
	Professional Fees	\$ 50,096	42,484	35,132	40,314	38,940	32,326	40,264	35,584	61,391	58,520
	Summer School Expense	\$ 7,710	0	0	0	0	0	0	0	0	0
	Total Expense	\$ 620,773	591,140	527,606	530,448	498,446	410,467	448,475	401,099	445,300	401,046
Net Ordinary Income		\$ -63,697	-53,912	3,095	27,960	67,422	-26,307	6,118	41,527	51,897	46,155
Other Income	Investment Income	\$ -23,517	89,580	161,659	96,556	27,865	102,963	103,461	142,709	42,147	48,417
	DM Investment Inc	\$ 2,452	2,164	2,933	3,673	2,826	2,490	1,833	3,073	2,954	2,918
	Total Other Income	\$ -21,065	91,745	164,593	100,229	30,691	105,453	105,294	139,636	45,101	51,335
Net Income		\$ -84,762	37,832	167,688	128,189	98,113	79,146	111,412	-98,109	96,998	97,490

source: \rls folders\executive director & vpf reports\2015\annual report\ multi yr revenue & expenses comparison thru 2015.xlsx

