

Annual Report on
Home Office Operations
for Fiscal Year 2016



Presented
July 2017

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System Dynamics Society
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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 106 countries (see chart on pages 15-16). With active members in 78 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 2016 we worked diligently to provide service to all of our members, plan and administer the conference in Delft, Netherlands, provide prompt delivery of our products, and maintain and improve our web presence.

I would like to thank staff members Erin Sheehan, Michael Breslin, and Robin Langer. In addition to staff, operations run smoothly with the support of University at Albany graduate students Weijia Ran and Babak Bahaddin; outside contractors: Joan Yanni, LouAnne Lundgren, Carrie Stickan, and Mary Kenney; and many volunteers. Erin Sheehan resigned in October, 2016. The Home Office operations fall into five categories (with sub-categories): conference (summer school), core, publications, sales (book and non-book), and web presence.



Conference

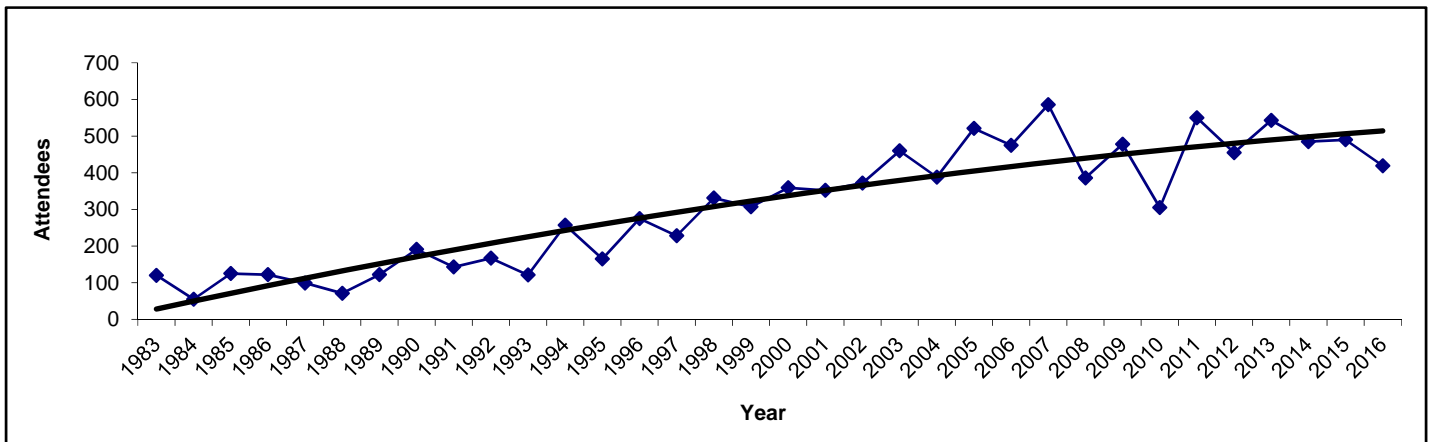
Conference management is a major part of Home Office operations for the first seven months of the year. At any one time, work is being done on the past year’s conference, the current conference, and planning for future conferences. Time spent on conference management is always a substantial percentage 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 Reykjavik (2018) Conference to be held August 5-9. See the 2018 preliminary *Call for Papers* with your conference materials.

Conference Attendance by Year, since 1983



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

For all other Conference-related graphics and lists please see Attachment I – Conference, page 10.

A-Conference Attendance Statistics

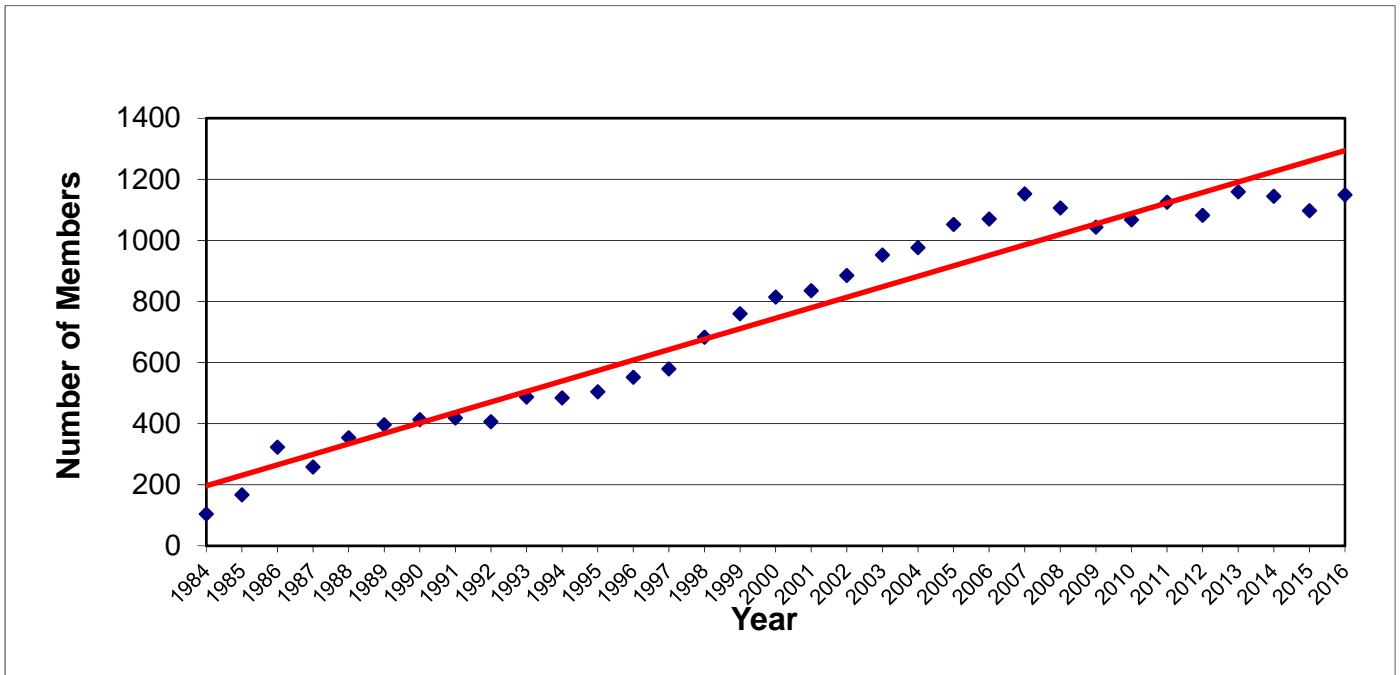
1. Conference Attendance by Year, 1983 – 2016
2. Conference Attendance by Continent Representation, 2007 – 2016
3. Conference Registration Fee Structure, 2007 – 2016
4. Conference Attendees by Type of Payment/Support, 2007 – 2016

B-Conference Management

Core

Membership constitutes the primary core activity of the Society. In 2016, our membership totaled 1,149, up from 1,097 in 2015. The Home Office goal is to provide accurate, prompt and personal service to all members and prospective members.

Membership Growth, since 1984



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

At the end of 2016 we had 9,801 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 – 2016

Year	Valid Records	Year	Valid Records	Year	Valid Records
1998	2,200	2005	6,500	2011	8,870
1999	2,700	2006	7,100	2012	8,092
2000	3,140	2007	7,115	2013	8,741
2001	4,200	2008	7,832	2014	8,941
2002	4,700	2009	7,977	2015	8,984
2003	5,300	2010	8,381	2016	9,801
2004	5,850				

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

We include a membership option on the conference registration form. For the Delft 2016 conference, we processed 82 memberships. Please see Attachment I – Conference, **A-Conference Attendance Statistics**, Conference Registration Fee Structure, 2007-2016 (table 3), page 11.

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 51.6% of members in 2016, an increase from the previous year. In 2016, the number of members taking print copies was 556. 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 2016, 66% of our 2015 members renewed, which is a slightly lower rate from the last few years.

New in 2016, was a University Sponsored Group Student Membership Offer. To expand the sense of community, and have students be included as part of the Society, the Society began offering a one-year membership to students of System Dynamics at Universities that are sponsors of the Society. This also serves in making students aware of the Society and all the resources on our website. We are hoping it will build loyalty to the Society as well as the field. Fifty-seven students from the University of Bergen and the European Master in System Dynamics became members for the calendar year 2016. The offering was continued for 2017.

Transition Committee In the fall of 2015, the Administrative Committee of the System Dynamics Society (SDS) identified the need to look at the future of the Society's Home Office. A Transition Committee was appointed at the Winter Meeting of the Policy Council in 2016 to study alternatives.

At the July meeting of the 2016 Policy Council in Delft, an interim report from the Transition Committee was presented. The committee continued to work through 2016 on options for the relocation of the Society's Home Office. These results will be presented at the 2017 Winter Policy Council Meeting. Please refer to the Policy Council Meeting Minutes page for details.

The Transition Committee of the System Dynamics Society include Robert Eberlein, David Andersen, Birgit Kopainsky, Peter Hovmand, Etienne Rouwette, Eliot Rich, Jeff Trailer, Luis Luna-Reyes, Hyunjung Kim and Roberta Spencer.

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 13.

A-Membership Statistics

1. Membership over Time, 1984 – 2016
2. Membership Distribution by Sector, 2007 – 2016
3. Membership by Continent, 1997 – 2016 (List)
4. Membership by Continent, 1997 – 2016 (Graph)
5. Geographic Distribution, ten years through 2016: 78 Active of 106 Total Countries

B-Chapter and Special Interest Group Statistics

1. New Chapters, 1990 – 2016
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 2016, we are in year six of our eight year contract, which began in 2011. 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 34th International Conference of the System Dynamics Society* (2016) 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 – 2016

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
			2016	11,646

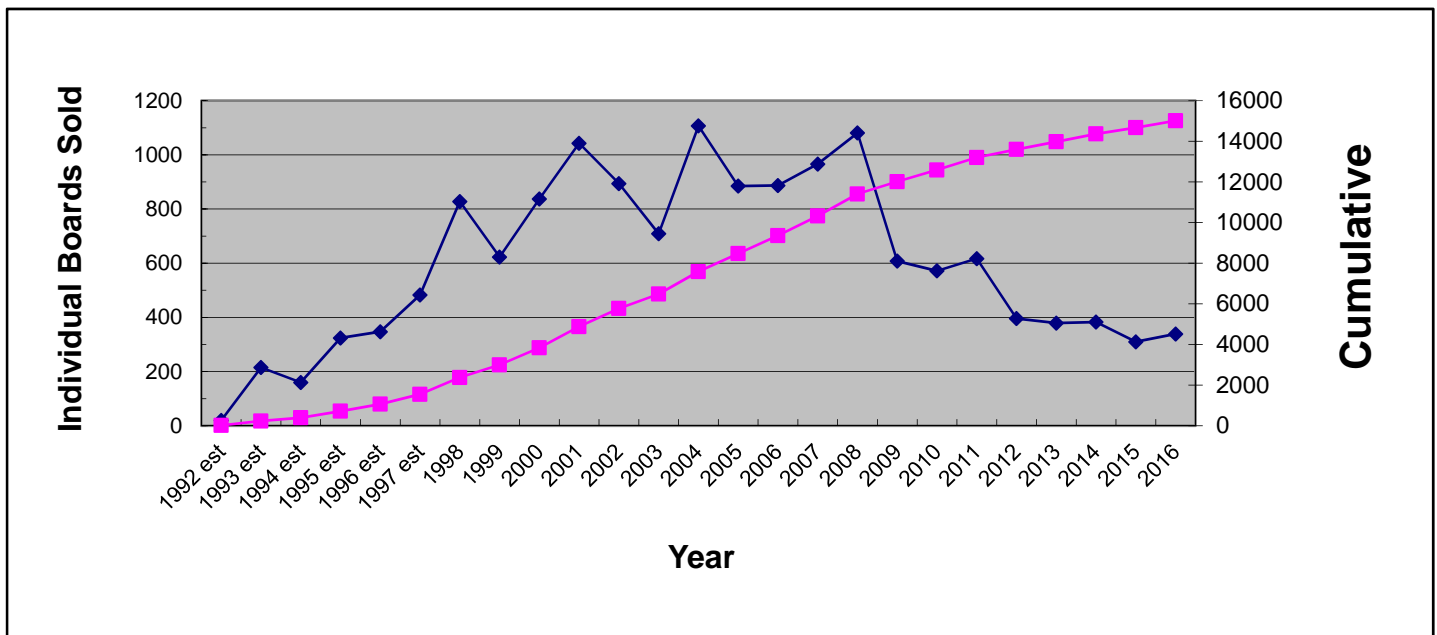
source: rls folders\statistical information\attachforye-report\bibrecordsbyyear

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 increased in 2016; the Society sold 351 boards in 2016 after selling 310 in 2015. The all-time record for sales was 1,107 games sold in 2004.

Beer Game Boards Sold, 1992 – 2016 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.

Principles of Systems by Jay W. Forrester was reprinted and became available for sale in 2016.

Social Dynamics is a new collection of papers identified by Jay W. Forrester in 2015 and 2016. This will be a web-based book available in late 2017.

In 2016, the \$21,280 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 2015.

For more information please see Attachment III-Sales on page 19

Web Presence

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

The Society website was hosted by CirtexHosting from December 2010-August 2016; it has been hosted by inmotionhosting since then. 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 had been used for public and private discussion forums and topics. When we moved the server, the functionality of the private discussion forums was lost, so we moved back to using a email distribution list for the private forums. The Facebook page and the Twitter accounts have gained popularity. We reached 3,880 likes on our Facebook page by the end of December 2016. 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 38 Society sponsors that sent a gift or traded services, there were two new sponsors in 2016. Our sponsors are very committed, 27 of our 2016 Society sponsors have been sponsors for three consecutive years or more.

Of the 25 Conference sponsors that sent a gift or traded services, there were 7 new (including five non-consecutive) sponsors in 2016. Our Conference sponsors are also very committed, 15 of our 2016 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 75 new or renewed members joined the Society for the calendar year 2016 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 2016, there were a total of 31 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 November of 2016, the membership voted for wording changes to Bylaw V; effective January 1, 2017:

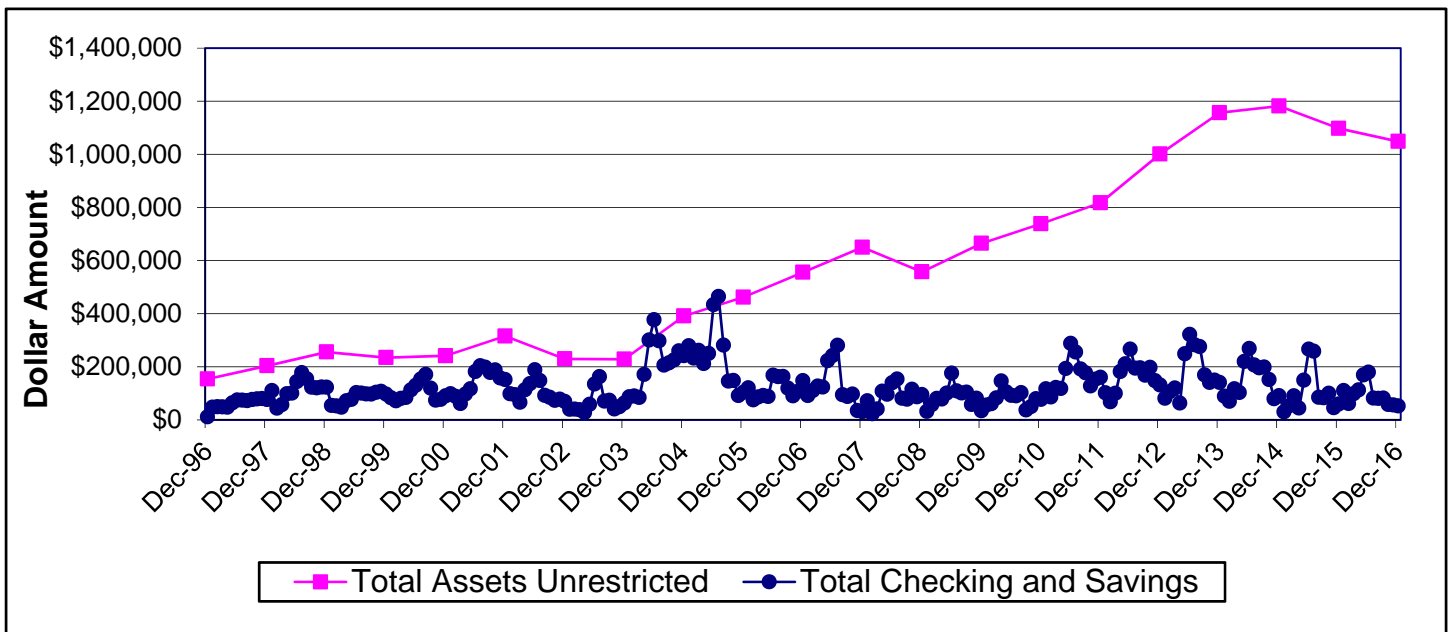
1. To bring the role of the President into compliance with the New York Nonprofit Revitalization Act of 2013 by removing the words 'chief executive officer.'
2. At the request of Jay Forrester, his role as Founding President was changed from voting to non-voting advisory.

Finances

As stated on page one, the Society is managed around five cost centers (with sub-categories): conference (summer school), 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 – 2016



source:\rlsfolders\statistical information\financial\finances_over_time\ye balances since 1996.xlsx

For other Finance-related graphs please see Attachment VI – Finances, page 22.

Part 2: Supporting Attachments

Attachment I – Conference

A-Conference Attendance Statistics

Conference Attendance by Year, since 1983

Year	Location	Attendees	Guests
2016	Delft, Netherlands	399	22
2015	Cambridge, USA	490	38
2014	Delft, Netherlands	485	62
2013	Cambridge, USA	543	43
2012	St. Gallen, Switzerland	455	47
2011	Washington DC	550	36
2010	Seoul, Korea	305	15
2009	Albuquerque, NM USA	478	43
2008	Athens, Greece	386	52
2007	Boston, MA USA	586	55

Year	Location	Attendees	Guests
2006	Nijmegen, Netherlands	475	29
2005	Boston, MA USA	521	39
2004	Oxford, England	388	45
2003	NYC, USA	460	58
2002	Palermo, Italy	372	83
2001	Atlanta, GA USA	352	22
2000	Bergen, Norway	359	55
1999	Wellington, New Zealand	307	27
1998	Québec City, Canada	331	51
1997	Istanbul, Turkey	228	0
1996	Cambridge, MA USA	275	0
1995	Tokyo, Japan	165	0

Year	Location	Attendees	Guests
1994	Stirling, Scotland	257	0
1993	Cancún, Mexico	121	0
1992	Utrecht, Netherlands	146	0
1991	Bangkok, Thailand	159	0
1990	Chestnut Hill, MA USA	191	0
1989	Stuttgart, Germany	122	0
1988	LaJolla, CA USA	71	0
1987	Shanghai, China	99	0
1986	Seville, Spain	122	0
1985	Keystone, CO USA	125	0
1984	Oslo, Norway	55	0
1983	Chestnut Hill, MA USA	120	0

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

Conference Attendance by Continent Representation, 2007 – 2016

		2016	2015	2014	2013	2012	2011	2010	2009	2008	2007
		Delft	Cambridge	Delft	Cambridge	St. Gallen	WDC	Seoul	ABQ	Athens	Boston
Africa	%	3	4	3	1	1	1	6	3	10	2
N America	%	18	59	21	54	23	61	17	62	22	53
C/S America	%	4	4	6	8	4	5	3	5	5	4
Asia	%	16	11	15	10	16	10	45	8	5	8
Pacific	%	3	2	1	2	3	2	4	2	4	4
Europe	%	56	20	54	25	53	21	25	20	54	29
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+country

Conference Registration Fee Structure, 2007 – 2016

	2016 Delft	2015 Cambridge	2014 Delft	2013 Cambridge	2012 St. Gallen	2011 WDC	2010 Seoul	2009 ABQ	2008 Athens	2007 Boston
Member Registration - Early	\$590	\$555	\$555	\$525	\$525	\$500	\$450	\$450	\$450	\$425
Non-Member Registration - Early	\$750	\$650	\$650	\$625	\$620	\$595	\$525	\$525	\$525	\$500
Additional Cost for Membership	Dependent on Dues Tier									\$15
Half year membership	1040	1029	1,088	1,109	1002	1,064	984	950	1,016	1,056
Memberships through registration	82	67	90	82	66	69	34	84	78	106
New members through registration	64	47	47	55	21	45	11	40	43	75

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

Conference Attendees by Type of Payment/Support, 2007 – 2016

	2016 Delft	2015 Cambridge	2014 Delft	2013 Cambridge	2012 St. Gallen	2011 WDC	2010 Seoul	2009 ABQ	2008 Athens	2007 Boston
Paying Members	172	216	201	246	207	247	102	196	171	298
Paying Non-Members	27	41	51	59	58	68	48	73	44	54
Supported Members	22	21	24	30	29	18	21	19	13	25
Paying Day Passes	3	5	26	6	3	3	3	7	3	1
Paying Students	102	109	109	105	87	94	76	82	105	122
Educator Scholarships	0	6	0	13	0	20	0	32	0	0
Organizers/Volunteers/Awards	28	30	27	27	22	25	31	25	16	20
Program Invite	1	4	5	0	8	0	1	2	1	1
Conference Scholarship	11	12	10	10	11	10	10	10	10	12
Sponsor Complimentary	31	46	30	47	30	61	13	32	23	53
TOTAL	399	490	485	543	445	550	305	478	386	586

source: \rfs 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, since 1984

Year	Society Database	Wiley-Blackwell	At June 30th	Regular/Student-Subsidized
2016	1149		1042	738/344
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: \rfs folders\statistical information\growth indicators\membership stats.xls\memvertime

Membership Distribution by Sector, 2007 – 2016

Year	Academic	Military	Private	Public	Other
2016	54	1	26	7	8
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

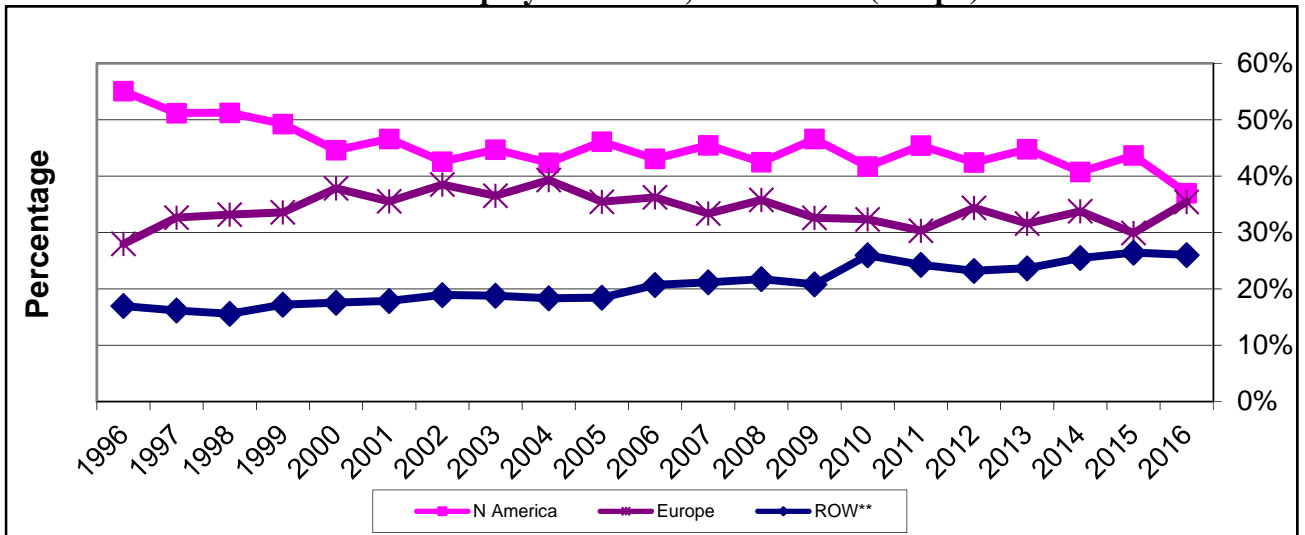
Before 2003, based on the institution name listed in the membership directory. 2003 on, self-reported by members.
 source: \rfs folders\statistical information\growth indicators\membership stats.xls\membysector

Membership by Continent, 2007 – 2016 (List)

		2016	2015	2014	2013	2012	2011	2010	2009	2008	2007
Africa	%	3	3	3	2	2	2	2	2	2	2
N America	%	37	44	41	45	42	45	42	46	42	45
S & C America	%	6	7	6	6	5	6	6	5	4	4
Asia	%	15	12	13	12	12	12	14	9	12	11
Europe	%	35	30	34	32	34	30	32	33	36	33
Pacific	%	3	4	4	4	5	4	5	5	4	5
# of countries		78	73	78	73	70	72	69	70	71	66

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

Membership by Continent, 1996 – 2016 (Graph)



**ROW - other than N Amer. & Europe

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

Geographic Distribution, ten years through 2016: 78 Active of 106 Total Countries*

Country	2016	2015	2014	2013	2012	2011	2010	2009	2008	2007
Albania	2	0	1	0	0	0	0	0	0	0
Argentina	7	9	7	6	5	4	4	4	3	3
Armenia	0	0	1	0	0	0	0	0	0	0
Australia	30	37	36	40	36	36	39	39	33	40
Austria	7	7	10	7	9	8	6	5	6	4
Bahrain	0	1	0	1	0	0	0	0	0	0
Bangladesh	1	0	0	0	0	0	0	0	1	1
Barbados	1	1	1	2	0	0	0	0	0	0
Belgium	7	6	6	3	3	6	9	8	10	10
Bermuda	0	0	0	0	0	0	0	0	1	0
Bolivia	0	0	0	0	0	1	1	1	1	0
Bosnia	0	0	0	0	0	1	1	0	0	0
Botswana	0	0	1	1	1	2	0	0	0	0
Brazil	36	43	32	27	25	30	23	19	16	18
Bulgaria	1	2	3	1	0	1	1	0	0	0
Cambodia	0	1	1	1	1	0	0	0	0	0
Canada	26	33	27	31	29	28	25	27	29	25
Chile	1	6	4	4	3	4	4	5	5	6
China	26	25	26	26	25	30	32	13	16	16
Colombia	15	20	15	16	13	15	15	14	11	12
Costa Rica	2	2	1	2	2	1	1	1	1	1
Crete	0	0	0	0	0	0	0	0	1	0
Croatia	6	0	6	5	6	8	8	9	14	11
Cuba	0	0	0	0	1	1	0	1	0	0
Cyprus	0	1	3	2	2	2	2	2	3	2
Czech Rep	8	5	5	4	6	6	3	5	6	3
Denmark	5	7	3	5	5	6	6	4	4	4
Ecuador	1	0	0	1	0	1	0	0	0	0
Ethiopia	3	0	0	0	0	0	0	0	0	0
Egypt	3	4	3	4	9	13	8	5	7	9
Finland	3	2	6	6	3	4	2	3	4	5
France	9	11	11	8	11	15	13	14	9	9
Georgia	1	0	0	1	1	1	0	0	0	0
Germany	54	48	55	46	55	47	50	55	56	60
Ghana	0	0	0	1	0	0	1	1	0	1
Greece	6	4	7	8	5	8	13	12	14	6
Hong Kong	1	0	0	1	0	0	0	3	3	3
Hungary	0	0	3	2	4	1	0	0	0	1
Iceland	6	4	2	4	3	1	1	1	1	3
India	23	15	10	11	15	15	17	15	14	14
Indonesia	20	15	19	18	13	10	12	7	6	10
Iran	10	5	5	6	7	6	6	5	11	7
Ireland	5	2	4	3	3	2	2	1	1	1
Israel	2	1	1	1	2	1	1	1	2	2
Italy	32	22	25	26	21	19	21	20	25	21
Jamaica	0	0	0	0	0	0	1	0	0	0
Japan	27	25	24	25	20	20	20	19	24	29
Jordan	0	0	0	2	0	0	0	0	0	0
Kazakhstan	1	0	0	1	1	0	0	0	0	0
Kenya	2	2	3	0	0	0	0	0	0	0
Kosovo	1	1	1	1	1	0	0	0	0	0
Kuwait	2	2	1	0	0	0	0	0	0	0
Latvia	0	1	3	4	3	11	4	2	0	2
Lebanon	2	3	3	1	1	1	1	1	1	1

Continued next page

System Dynamics Society Annual Report on Home Office Operations, Fiscal Year 2016

Country	2016	2015	2014	2013	2012	2011	2010	2009	2008	2007
Liechtenstein	0	0	0	0	0	0	0	0	1	1
Lithuania	1	1	1	1	1	0	1	0	0	0
Luxembourg	1	0	0	0	0	0	0	0	0	0
Macao	0	0	0	0	0	0	1	1	2	0
Macedonia	1	0	0	0	0	0	0	0	0	0
Malaysia	6	5	8	9	5	7	6	4	6	8
Mauritius	0	1	1	0	0	1	2	0	1	0
Mexico	15	13	17	17	11	8	8	14	12	12
Myanmar	1	1	0	0	0	2	0	2	0	0
Nepal	8	0	0	0	0	0	0	1	0	0
Netherlands	52	39	49	45	42	30	27	30	36	43
New Zealand	10	10	11	11	13	12	11	10	13	13
Nigeria	6	7	5	5	3	2	2	2	3	1
Norway	44	27	23	25	28	21	28	18	24	24
Pakistan	10	9	8	0	1	1	1	1	9	9
Panama	0	0	2	0	0	0	0	0	0	0
Papua New Guinea	0	1	0	0	0	0	0	0	0	0
Peru	2	1	4	3	3	4	5	2	2	1
Philippines	2	2	4	3	4	4	4	1	2	2
Poland	7	7	7	7	7	8	10	6	8	7
Portugal	5	2	2	2	3	2	0	3	5	6
Puerto Rico(not counted)	0	0	0	0	2	3	3	4	2	3
Romania	3	2	2	1	1	0	0	0	1	0
Russia	9	5	9	12	10	7	7	10	11	9
Rwanda	1	1	1	0	0	0	0	0	0	0
Saudi Arabia	2	2	2	2	3	3	4	3	3	1
Scotland	1	1	1	0	0	0	0	0	0	0
Senegal	0	0	0	0	0	0	0	0	1	1
Serbia	0	1	1	0	0	0	0	0	0	0
Singapore	10	9	9	11	12	11	9	4	5	4
Slovak Republic	0	0	0	0	1	2	2	1	2	2
Slovenia	2	1	2	3	2	2	3	3	2	2
South Africa	17	16	15	12	5	8	8	7	8	8
South Korea	6	8	14	6	10	9	16	6	11	9
Spain	12	6	7	11	14	18	19	19	22	20
Sweden	7	10	10	9	12	8	12	14	14	11
Switzerland	25	30	37	35	37	28	32	24	29	30
Taiwan	6	4	6	5	5	7	9	7	7	9
Thailand	1	1	2	1	1	2	3	1	3	1
Trinidad	0	0	0	0	0	0	0	1	0	0
Tunisia	0	0	0	0	0	0	0	0	0	1
Turkey	9	10	9	10	10	13	10	6	8	7
Uganda	2	1	2	0	0	0	0	1	1	0
Ukraine	2	0	2	1	2	2	0	0	0	1
United Arab Emirates	5	0	1	3	3	2	3	4	2	2
United Kingdom	73	57	70	68	61	53	52	65	79	78
United States	384	433	423	471	417	472	409	441	426	482
Uruguay	0	0	1	1	1	2	2	2	1	0
Venezuela	1	1	1	3	1	2	2	1	3	4
Vietnam	1	2	1	1	1	2	1	1	1	0
West Indies	0	0	1	0	0	0	0	0	0	0
Yemen	0	1	0	0	0	1	1	1	1	0
Totals	1149	1097	1146	1159	1082	1125	1066	1043	1106	1152

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

* Active countries for report year

B-Chapter and Special Interest Group Statistics

New Chapters, since 1990

Year	New Chapter Name
2016	N/A
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 since 2002 (year approved)

- Transportation (2016)
- Asset Dynamics (2016)
- Agriculture & Food (2016)
- Business (2013/2005)
- Biomedical (2012)
- Conflict, Defense and Security (2011 name change)
- Psychology and Human Behavior (2009, 2016 name change)
- Inter- and Intranational Conflict
(2008, 2011 merge to Conflict, Defense and Security)
- Model Analysis (2007)
- Energy (2006)
- Information Science and Information Systems (2006)
- Environmental (2003)
- Health Policy (2003)
- Security
(2003, 2011 merge to Conflict, Defense and Security)
- Education (2002)

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

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, page 21)
- 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 2016

Items Sold	2016	2015	2014	2013	2012	2011	2010	2009	2008	2007
Beer Game Boards including loaner boards	351	310	383	379	396	617	557	608	1,082	996
Proceedings	0	12	0	0	0	4	105*	0	2	6
<i>System Dynamics Review</i>	0	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
Forrester PhD Seminar	6 single 2 sets	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
MIT Literature Collection	3	4	4	7	11	16	14	15	19	19
Electronic Oracle	1	3	12	2	5	3	59*	2	9	178
Fireside Chat	0	1	11	2	2	4	30*	0	4	37
Books	37	94	190							
Fish Banks Ltd	19	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	2016	2015
Alternatives to Growth	0	1
Collected Papers of JW Forrester	0	19
Dynamics of Commodity Production Cycles	1	5
Dynamo User’s Manual	0	1
Electronic Oracle	1	3
Elements of the System Dynamics Method	2	6
Feedback Thought in Social Science	3	11
Industrial Dynamics	0	3
Introduction to System Dynamics Modeling	2	5
Introduction to Urban Dynamics	0	1
Managerial Applications of System Dynamics	0	3
Principles of Systems (Electronic Version)	2	3
Readings in Urban Dynamics, Volume 1	1	4
Study Notes in System Dynamics	3	8
Toward Global Equilibrium	1	2
Urban Dynamics	5	4
World Dynamics, 2nd Edition	11	14
Totals	32	93

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 2013 through 2016

Corporations:

3EDGE Asset Management ¹
AIMS Iic & ConfluentC Iic
Analytic Services Inc/ASysT
AnyLogic North America, XJ
Technologies ^{1,2}
Argonne National Laboratory ^{1,2}
Atkins Nutritionals, Inc. ³
Berkeley Research Group
The Boeing Company ¹
Bolide Pty Ltd ¹
BTN ²
Allen L. Boorstein ^{1,2}
Bobo's Oat Bars ³
Booz Allen Hamilton
Bumblebar ³
Cooper Human Systems
Copernicos Group ¹
Crispy Green ³
Crunchmaster ³
Decision Dynamics, Inc.
Dynaplan AS ¹
Evans & Peck Pty Ltd.
Forio ²
Greenwood Strategic Advisors AG ²
Health Warrior ³
Homer Consulting ¹
Honest Weight Food Co-op ³
HTxA-High Tech x Agency
Hyatt Regency Cambridge ³
Idaho National Laboratory
Informed Dynamic Systems ^{1,2}
International Society for the Systems
Sciences (ISSS) ^{2,3}
isee systems ^{1,2}
Jantz Management LLC
Lane Press of Albany ^{2,3}
Leverage Networks
Lundberg Family Farms ³
The Manufacturing Game[®]/Ledet
Enterprises
Mary's Gone Crackers ³

MITRE Corporation
Natural Balance Foods ³
Nature's Bakery ³
Nonni's Food LLC ³
Northwater Capital Management, Inc. ¹
Organic Food Bar Inc. ³
PA Consulting Group ^{1,2}
Patni Holdings, LLC
Policy Microworlds ¹
Powersim Software AS ¹
Powersim Solutions, Inc. ¹
PricewaterhouseCoopers
RawRev. ³
SACU ¹
Sandia National Laboratories ²
Semantum
SoL, the Society for Organizational
Learning ^{1,3}
Strategy Dynamics Ltd ²
Systems Thinking Collaborative ¹
transentis management consulting GmbH
& Co. KG
Ventana Systems, Inc. ^{1,2}
Ventana Systems UK ¹
ViaSim Solutions ^{1,2,3}
Whole Systems Partnership ^{1,2}
Wiley ^{2,3}
Windhaven Business Management, Inc.
Anonymous ¹

Individual Sponsors:

Jay W. Forrester ¹
Dr. Don Frazier ¹
Gary B. Hirsch ¹
John Richardson ¹
Anonymous ^{1,2}

Individual Donors:

Anonymous ^{1,2}

Universities and University Centers:

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

Key:

¹ 2016 Society Sponsor
² 2016 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 2016

including year-end adjusting entries	2016	2015	2014	2013	2012	2011	2010	2009	2008	2007
ASSETS										
CURRENT ASSETS										
Cash (ckg/svg//PayPal)	\$ 65,866	126,664	153,439	167,525	155,804	179,969	80,850	34,781	95,538	42,615
Investments	\$ 950,460	946,035	972,583	898,711	752,541	616,709	603,166	560,117	460,374	595,364
Accounts receivable	\$ 54,527	61,952	61,830	60,545	62,653	0	0	30	1,171	0
Inventory (at cost)	\$ 22,032	16,800	23,009	26,220	19,843	25,970	20,807	23,447	10,695	0
Prepaid expenses	\$ 45,492	35,023	51,271	74,889	81,782	54,558	82,904	68,024	32,294	38,938
Total Current Assets	\$ 1,138,377	1,186,474	1,262,132	1,227,890	1,072,623	877,206	787,727	686,399	600,072	676,917
PROPERTY (Fixed Assets)										
Furniture and equipment	\$ 651	651	651	651	1,263	1,263	1,263	11,046	11,046	11,046
Less: Accumulated depreciation	\$ -651	-651	-651	-651	-1,263	-1,263	-1,263	11,046	11,046	11,025
Total Property (Fixed Assets)	\$ 0	0	0	0	0	0	0	0	0	21
OTHER ASSETS										
Restricted securities / funds	\$ 130,737	116,806	117,205	104,465	92,242	83,661	76,386	71,657	67,437	73,136
TOTAL ASSETS	\$ 1,269,114	1,303,280	1,379,337	1,332,355	1,164,865	960,867	864,113	758,056	667,509	750,074
LIABILITIES & NET ASSETS										
CURRENT LIABILITIES										
Accounts payable	\$ 34,460	12,402	4,012	903	1,742	5,574	2,863	612	1,282	0
Accrued expenses (conf related)	\$ 0	0	0	0	0	0	0	0	0	0
Membership Sub. Payable	\$ 7,717	9,211	11,567	12,825	12,466	10,679	13,287	12,517	19,957	21,823
Deferred revenue (conf/cust)	\$ 43,150	59,794	55,572	48,124	47,166	43,583	32,164	3,393	15,900	0
Custodial account liability	\$ 4,625	7,525	9,075	9,225	9,900	0	0	0	0	0
Misc. liabilities (sales tax, etc)	\$ 0	0	0	0	0	0	184	65	314	85
Royalty Advance	\$ 0	0	0	0	0	0	0	5,000	5,000	5,000
Total Liabilities	\$ 89,952	88,932	80,226	71,077	71,274	59,836	48,498	21,587	42,453	26,908
NET ASSETS										
Unrestricted - General fund	\$ 1,048,425	1,097,542	1,181,906	1,156,813	1,001,349	817,370	738,480	664,812	557,619	650,030
Temporarily Restricted	\$ 130,737	116,806	117,205	104,465	92,242	83,661	77,135	71,657	67,437	73,136
Total Net Assets	\$ 1,179,162	1,214,348	1,299,111	1,261,278	1,093,591	901,031	815,615	736,469	625,056	723,166
TOTAL LIABILITIES & NET ASSETS	\$ 1,269,114	1,303,280	1,379,337	1,332,355	1,164,865	960,867	864,113	758,056	667,509	750,074

source: \rls folders\executive director & vpf reports\2017\annual report\ multi yr balance sheet comparison thru 2016.xlsx

Revenue and Expenses Comparison, 10 years through 2016

	2016	2015	2014	2013	2012	2011	2010	2009	2008	2007
Ordinary Income/Expense										
Income										
Conversion from Accrual to Cash	\$ 0	0	0	0	0	0	0	0	0	137
INC Conferences	\$ 235,168	302,726	294,654	303,765	327,607	303,463	173,561	233,148	156,401	264,081
Journal Income	\$ 68,263	85,173	84,621	81,676	84,889	85,514	56,292	51,963	43,499	44,375
Membership Dues	\$ 59,872	61,249	65,909	64,487	59,968	63,636	58,741	57,389	61,696	58,597
Other Income	\$ 17	4,776	668	725	0	0	0	0	-165	0
Products	\$ 46,435	48,937	53,908	49,828	47,170	75,106	69,590	71,654	126,685	112,988
Shipping and Handling Income	\$ 7,045	8,155	9,032	7,320	9,829	11,394	17,691	13,878	25,010	19,671
Sponsor Dues and Donations	\$ 32,378	46,590	36,350	33,150	40,106	41,001	18,500	30,125	44,375	27,595
Summer School Income	\$ 39,157	9,300	0	0	0	0	0	0	0	0
Total Income	\$ 488,335	566,906	545,142	540,950	569,569	580,114	394,374	458,157	457,501	527,444
Less Cost of Goods	\$ 7,994	9,830	7,915	10,249	11,161	14,246	10,214	3,564	14,874	30,247
Gross Profit	\$ 480,340	557,076	537,227	530,701	558,408	565,868	384,160	454,593	442,627	497,197
Expense										
Awards-Dana Meadows	\$ 0	2,000	1,500	750	1,200	1,200	1,200	1,200	1,200	1,200
Awards-Others	\$ 5,480	9,776	1,220	0	6,021	0	6,900	0	5,097	5,244
Bank & CC Fees	\$ 17,353	14,440	9,729	12,528	13,034	13,609	9,598	15,092	14,865	16,812
Field Dev (\$20K Max)	\$ 3,500	12,500	17,500	6,405	0	4,000	0	0	0	0
Contracted Expenses at UAlbany	\$ 358,872	341,827	332,483	298,280	277,709	279,400	261,719	253,739	190,610	203,356
Depreciation Expense	\$ 0	0	0	0	0	0	0	0	21	62
EXP Conferences	\$ 103,044	140,954	141,518	132,079	148,823	120,314	61,376	92,004	98,777	116,894
Insurance	\$ 3,767	5,313	5,218	4,645	5,595	2,013	1,354	0	0	0
Journal Expense	\$ 20,000	20,000	20,000	20,000	20,000	19,763	20,000	20,000	20,000	12,000
Marketing (Sponsor Trade)	\$ 2,000	2,000	2,000	0	0	0	0	0	0	0
Membership Directory Exp	\$ 0	0	0	615	2,340	2,170	2,074	1,958	1,872	1,812
Membership Services	\$ 0	0	0	0	0	0	1,060	2,765	1,220	955
Miscellaneous Expense	\$ 883	712	1,144	683	2,444	829	1,898	331	437	361
Office Expense	\$ 3,181	5,818	5,280	4,416	3,354	5,235	4,571	14,417	26,200	19,105
Officer Expenses (=Travel CPA)	\$ 12,839	4,644	10,228	9,871	9,614	9,420	5,417	5,854	5,153	6,108
PHD Stud Chapt Support @ Conf	\$ 0	2,982	837	2,204	0	1,553	974	851	0	0
Professional Fees	\$ 68,249	50,096	42,484	35,132	40,314	38,940	32,326	40,264	35,584	61,391
Summer School Expense	\$ 32,872	7,710	0	0	0	0	0	0	0	0
Total Expense	\$ 632,040	620,773	591,140	527,606	530,448	498,446	410,467	448,475	401,100	445,300
Net Ordinary Income	\$ -151,700	-63,697	-53,912	3,095	27,960	67,422	-26,307	6,118	41,527	51,897
Other Inc	\$ 113,908	-23,517	89,580	161,659	96,556	27,865	102,963	103,461	-142,709	42,147
DM Investment Inc	\$ 2,605	2,452	2,164	2,933	3,673	2,826	2,490	1,833	3,073	2,954
Total Other Income	\$ 116,512	-21,065	91,745	164,593	100,229	30,691	105,453	105,294	-139,636	45,101
Net Income	\$ -35,187	-84,762	37,832	167,688	128,189	98,113	79,146	111,412	-98,109	96,998

source: \rls folders\executive director & vpf reports\2017\annual report\ multi yr revenue & expenses comparison thru 2016.xlsx

