

# Report VP Chapters – July 2012 <sup>1</sup>

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## Background

This is the second “summer” report elaborated under the same reporting format. Last year a number of reflections concerning chapters and chapter development have been discussed. Also, the “chapter capacity development” fund was launched.

This report outlines the essentials reported by the chapters, maintaining last year’s structure. It then gives some information on the “capacity development” workshop that has taken place in Brazil. The following section contains a reflection concerning the relationship between the Society and its Chapters. The last theme is the relationship between Chapters and SIGs.

## The current situation

### *Chapter reports and web presence*

All chapters have been invited to send in updates concerning their activities and their situations. The following ones have sent such updates until today (July 16<sup>th</sup>):

<i>Chapter</i>	<i>Commentary</i>
Australasia	Website void, no report
Benelux	Website up to date, report: several events, membership 34-> 47, 8 universities, no fees. Plans: one major conference, 1 SI in SRBS
Brazil	Website almost updated (some months lagged); report: members (22 full and 8 who are not SDS>), several activities: internal, conference and development workshop)
China	Many activities and publications, one institutional relationship, no fees raised, 22 members (no new entries, but plan to promote chapter). Many active universities, 1 school project, many own materials. Celebrated 30 years! Several activities planned for coming year; demand for professional help from SDS for summer school (including financial help).
Economics	Website outdated, some activities and publications. 2 institutional relationships. No fee collected.
German	Website up to date, report: several activities, membership leveling around 120; growth mainly from non-SDS members (very interesting analysis in Chapter Poster), own award for outstanding publications, approx, 50% academics and 50% consultants, several institutional members. Fee raised, financial situation not reported
India	Website up to date, several activities visible in site; several activities, several institutional relationships, no fees, 116 members (40 new), 1 University + 3 in process, 5 faculty members active, school initiative under way, materials under construction.
Italy	Website updated and activities visible; several activities, publication and institutional relationships. Constitution under revision. No fees collected. 175 members (11 new this year), report very interesting analysis of their membership; good presence in universities. Renew

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<sup>1</sup> Version 3 – July 18<sup>th</sup> : UK report added (v2: Italy report added).

	interest in Capacity Building Fund, will create local legal entity.
Japan	Website outdated, no report
Latin-American	Webpage in SDS not used, website ( <a href="http://dinamica-sistemas.mty.itesm.mx/">http://dinamica-sistemas.mty.itesm.mx/</a> ) not linked from SDS site, but updated and activities visible. Several activities, conference proceedings, no fees raised, 380 members (20 new)
Russia	Website seemingly updated (can't read), report promised for after the conference
South Korea	Several activities, several publications, several institutional relationships, cash reserves approx. US\$5,000. Started year with 12 members, but 70 new entries. 20 active universities, 5 second-generation faculty members, 1 school project, several own materials. Plan to raise fee, there is demand for a book and software. They demand information about travelling plans of "famous system dynamicists" to the region, possibly connecting with Japan and China Chapters, in order to have lectures/visits.
Students	webpage on SDS site up to date; report: high membership volatility, around 66 members. PhD-colloquium remains central activity.
Switzerland	Website updated and activities visible; several activities and publications, cash reserves=CHF 2,986 (December 2011), 16 members (2 new); installed in 8 universities, some school activities one institutional relationship. Challenges in maintaining collaboration.
UK	Website updated and activities visible; several activities and a publication; US\$16,545, about 120 active participants (in mailing system); 10 universities, 20 courses, may proper materials, no schooling initiative. Constitution updated in February. Plan to improve engagement with PhD students.

After the disenfranchisements of the Pakistan, Hellenic and Egypt Chapters last year, the Egypt group reassembled and submitted the required documentation (memberships, constitution). However, the number of full members in good standing was not sufficient; I told them, but in the following months the situation did not change. There was an attempt in the name of the Pakistan group, but it did not succeed. I did not have contact with the Hellenic group.

### ***The Capacity Development workshop***

Initiated by members of the Brazil Chapter and carried out aside the joint conference of the Brazil and Latinamerican Chapters, the first (and yet only) "capacity development workshop" has allowed 10 participants to learn advanced topics. Even though participants were less than expected, the activity yielded a surplus of about US\$200. Participants have expressed their satisfaction and their desire to be part of more such activities.

Besides the successful case of Brazil, there were expressions of interest from other chapters, especially Italy and more recently Asian Chapters are reporting interest.

## **Diagnosis**

### ***The current state of chapters***

The following table is an attempt at classifying chapters. There are several categories:

- *new*: chapters that may need special attention and support for their start-up phase;
- *high*: satisfying situation, no specific needs;
- *medium*: improvable operations or communication;

- *low*: no signs of activity, no information available, but will be at the conference to talk about it;
- *unviable*: no signs of activity, no information available, not at the conference.

Since the following table is now presented for the second time, I dare to indicate the trends I perceive.

Chapter	Active	Development level	Web-presence	At conf.	Report	Category 2012	Category 2012	Trend
Australasia	?	?	outdated	1	0	low	low	stable
Benelux	1	new	1	1	1	new	new	stable
Brazil	1	stabilizing	1	1	1	medium	medium	up
Economics	little	stabilizing	outdated	1	1	medium	medium	stable
China	1	stable	none	1	1	low	high	stable
German	1	stable	1	1	1	high	high	stable
India	1	new	1	1	1	new	new	stable
Korea	?	?	none	1	0	low	low	
Latin America	1	growing	1	1	1	high	high	up
Russian	?	?	1	1	0	unviable	unviable	stable
Student	1	stable	1	1	1	high	high	stable
Italian	1	stable	1	1	1	high	high	stabilizing
UK	1	stable	1	1	0	high	high	stable
Swiss	1	stable	1	1	1	high	medium	

I would like to express my satisfaction with the chapters that are working in a stable manner, maintain a satisfactory web presence and maintain the minimal communication with the Society.

### *A reflection on Chapters*

Last year it seemed to me that there are several types of chapters (as indicated above). This year I still believe this, but in addition I have come to the opinion that Chapters cannot be helped much beyond supporting those who ask for it on their own.

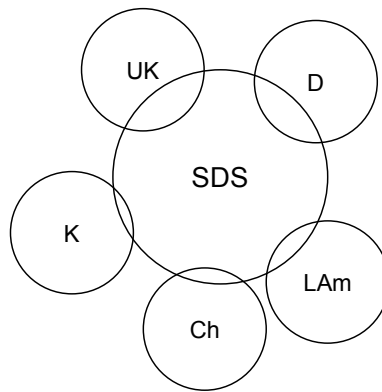
In new Chapters (India, Benelux, Brazil) with a group of strongly motivated individuals (people may have different motives), the trend is very clear and they do this without being pushed or pulled by the Society. Naturally, support like the Capacity Development Fund is good and useful, but I'd suggest the initiative and the will to advance is endogenous.

In other cases (UK, Germany, Latinamerica, China, South Korea), established groups are very stable in their structures and activities. They do not call for help, and they appear to be rather self-dependent. Those that collect a fee (UK, Germany) have their own local legal existence<sup>2</sup>. Key members in the local legal structure are also rather active and visible members in the SDS. However, in cases like China or South Korea, there are stable, solid local groups that, while they are Chapters of the SDS, would probably be the same and do the same on their own.

Such groups act a little as if they were "societies" in their own right. The following diagram illustrates the situation:

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<sup>2</sup> I tend to think that fees are collected by and belong to the local legal bodies. Therefore I also believe we should not require Chapters to report "their" resources (members, cash reserves) any more than we are ready to give the equivalent information.



In the UK and German (“D”) case, the intersection between SDS and local Group is considerable, and the “Chapter” is a substantial part of the local group. In the Latin-American (LAm), China (Ch) and South Korea (K) cases, the intersection becomes ever smaller. In such groups, the SDS should decide if it desires to increase the intersection (and in that case, ask how this can be done). There is no obvious answer: some countries may be so far away from the geographical center of the SDS that the costs exceed the benefits.

If we invoke the mental image of systems dynamic on the whole earth a couple of decades ahead, will it be a world with a federation of system dynamics societies? If so, will the current SDS be the overarching global organization of societies? Or should the SDS strive to be the global society of system dynamics, and any local groups would be its chapters.

This may seem a big question, but in the face of local developments going on in several regions (the Chinese group celebrates its 30 years in 2012), it appears to be a relevant one. In any case, it would be good to decide on this.

One short-term implication would be that we can reflect on the nature and function of initiatives like the “Capacity Development Fund”. Most of the inquiries (past and present) from Chapters started with wishes like “diffusion” or “promotion”, and we explained them this was not the function of the “capacity development” initiative. After which they ceased to inquire. While from the SDS standpoint it is logical to strive for capacity development, and the SDS has the right to decide what it strives for, if one acknowledges the status of self-sufficiency of groups like the Asian ones, the SDS might be interested in supporting local activities that deal with educational material and even promotional issues (like the one inquired for by the Korea Chapter).

In places where there is not an establish group or at least one strongly motivated individual, a different dynamic seems to govern: people are busy with their local responsibilities and will not respond much to offers or demands from the SDS. If it is true that early chapter development depends on intrinsic local motivation, and such motivation cannot be created from outside by the SDS, then the SDS should only start thinking about a possible Chapter when the early phases have already occurred or when there is high trust in the prospective founding officers.

I believe the examples India and Benelux are very illustrative, but also the discussion about a possible Eastern European Chapter last year is informative. Conclusion: if it does not happen by itself, we will not try to induce it; and the initial recognition of future Chapters should be decided according to criteria similar to those used in this report to describe existing chapters:

- is there a group of individuals who already have a joint activity?
- do they have a presentable website?
- do they have insertion at university level (or other facilities that deal with education and training)?
- how well do we know the founding officers?

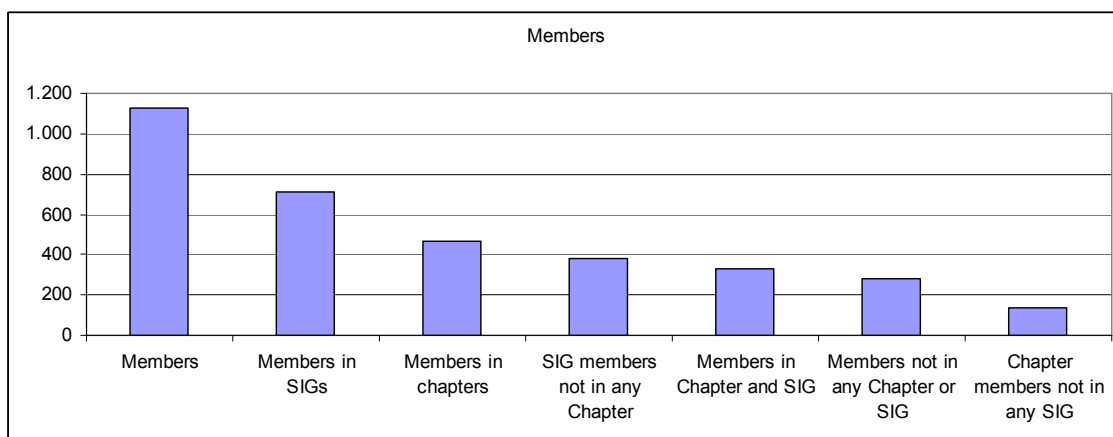
***A reflection about Chapters and SIGs and member attributes***

The Home Office has given me access to the 2010 membership data concerning the memberships in SIGs and Chapters. The original request was a consequence of recognizing that the members of SIGs and of Chapters are the same people, but we do not know how SIGs and Chapters intersect.

SIGs may be defined as thematic groups, while Chapters are mostly geographical or language oriented groups. The Economics Chapter is an exception, and for the following analysis, I have treated it like a SIG. Another special case is the Student Chapter (which is neither thematic nor geographic).

The table structure of the data is complicated to analyze, because SIGs and Chapters are mixed. This is already visible on the “standard membership form”, where “Chapter and Special Interest Group (SIG) Interests” are selected in one field, and every member can make up to 3 choices. This leads to a variety of different situations from being in none, one or several Chapters and none or one or several SIGs<sup>3</sup>.

The general situation is displayed in the following graphic and table:



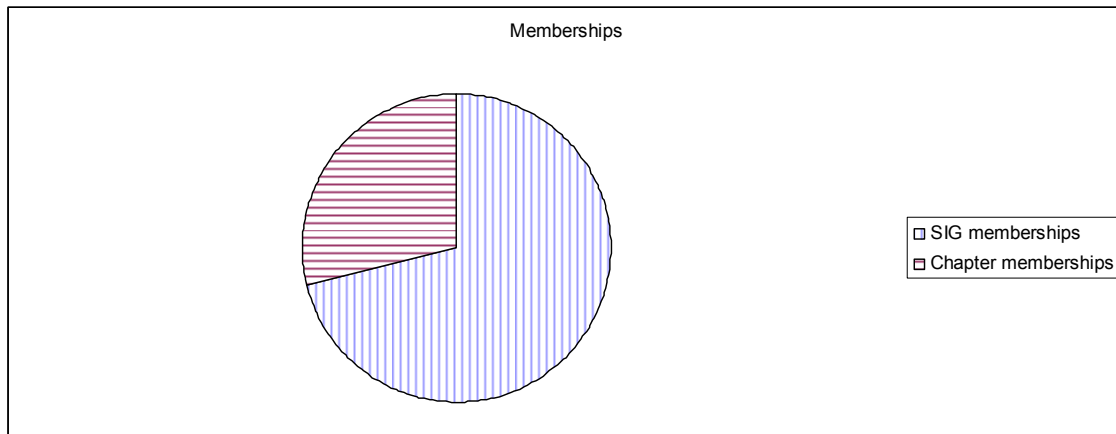
Members	1.125
Members in SIGs	712
Members in chapters	464
SIG members not in any Chapter	384
Members in Chapter and SIG	328
Members not in any Chapter or SIG	277
Chapter members not in any SIG	136

A huge share of SDS members maintain membership in at least one SIG. A lower number has Chapter memberships (which is in part due to the fact that many SDS members are from the USA, but there is no USA Chapter). Half of the SIG members is not in any Chapter, and a sizeable amount of Chapter members are not in any SIG. Almost a third of SDS members is in Chapter and SIG, while a quarter of SDS members are in neither a SIG nor a Chapter.

It is interesting to note that a huge part of SDS members find the existing SIGs interesting enough to maintain a membership – even we do not know how many of them are truly active members. It is also sobering for a VP Chapters to see that SIGs attract 80% more members than Chapters.

<sup>3</sup> I went through the 1126 data rows by hand and using Excel functions, so there may be slight errors in the count; however, such errors are not significant for the analysis presented here.

Taken together, the 1,125 members had 1,921 membership registers, most of which (1,325) where SIG memberships (against 553 Chapter memberships):



This general perspective could allow to call into question the motto that “the Chapters are the future”. What about the SIGs? However, a more detailed inspection will lead to the recognition that the relevant question is not if the SDS should turn its attention from Chapters towards SIGs, but if it should not manage its Chapter and SIGs development in an integrated manner.

The following table presents the counts of membership registers per SIG and Chapter. The totals sum up to more registers than individual members, since many individuals have multiple memberships in SIGs/Chapters.

Memberships SIGs	Chapter memberships																Totals			
	Australasia	Benelux	Brazil	China	Egypt	Germany	Hellenic	India	Italian	Japan	Korea	Latin America	Pakistan	Russian	Student	Swiss	UK	In a SIG	Not	All
Business SIG	16		6	7	3	6	2	6	3			14		1	16	3	6	95	91	186
Conflict, Defense and Security SIG	2			1		1			1			3		5	5	1	3	22	63	85
Economics SIG	9	6	9	11	1	6	3	2	4	4	2	21	1	4	22	5	7	117	100	217
Education SIG	4	2	4	2	2	3		5	2			18			13		7	62	96	158
Energy SIG	3	1	3	2	2	1	1	1	2	1	2	8			11	2	6	46	89	135
Environmental SIG	12		6	1	1	8	1	2	1	4	4	8		2	16	3	9	78	138	216
Health Policy SIG	9	1	3	2	2	1						1	1	1	10	1	12	44	100	144
Info Sci/Systems SIG	2	1	2	1	1	1	1	1				2	4	1	7	1	4	29	59	88
Model Analysis SIG	3	5	6	1	1	2		3	2	1		10		1	13	3	7	58	87	145
Psychology SIG	1			1	1	1				1		1		1	2		2	11	40	51
<b>Chapter memberships without SIG</b>	<b>22</b>	<b>5</b>	<b>11</b>	<b>17</b>	<b>2</b>	<b>18</b>	<b>1</b>	<b>1</b>	<b>7</b>	<b>7</b>	<b>5</b>	<b>16</b>		<b>3</b>	<b>11</b>	<b>15</b>	<b>19</b>			
<b>Chapter memberships in SIGs</b>	<b>61</b>	<b>16</b>	<b>39</b>	<b>29</b>	<b>14</b>	<b>30</b>	<b>8</b>	<b>20</b>	<b>15</b>	<b>11</b>	<b>17</b>	<b>88</b>	<b>1</b>	<b>16</b>	<b>115</b>	<b>19</b>	<b>63</b>	<b>562</b>	863	1425
<b>Total memberships</b>	<b>83</b>	<b>21</b>	<b>50</b>	<b>46</b>	<b>16</b>	<b>48</b>	<b>9</b>	<b>21</b>	<b>22</b>	<b>18</b>	<b>22</b>	<b>104</b>	<b>1</b>	<b>19</b>	<b>126</b>	<b>34</b>	<b>82</b>	<b>722</b>		
<b>Chapter members total</b>	<b>56</b>	<b>15</b>	<b>36</b>	<b>44</b>	<b>9</b>	<b>45</b>	<b>5</b>	<b>13</b>	<b>20</b>	<b>17</b>	<b>14</b>	<b>81</b>	<b>2</b>	<b>13</b>	<b>88</b>	<b>37</b>	<b>64</b>	<b>553</b>		

In this table, the Economics Chapter appears as a SIG because it is a thematic group. The Student Chapter, which is not a geographically motivated group either, still appears as Chapter (the table has only two dimensions available). Amongst the SIGs, most are application-field themes, except the Model Analysis SIG and the Education SIG (in part).

There are many interesting questions that can be asked here; however, this time we will only focus on some noteworthy aspects:

1. The student chapter has the largest part of its members in SIGs, and to the exception of the Education SIG (where the Latin-American Chapter has more members), no other Chapter has as many SIG memberships. This suggests that the members of the Student Chapter have well-identified interests.

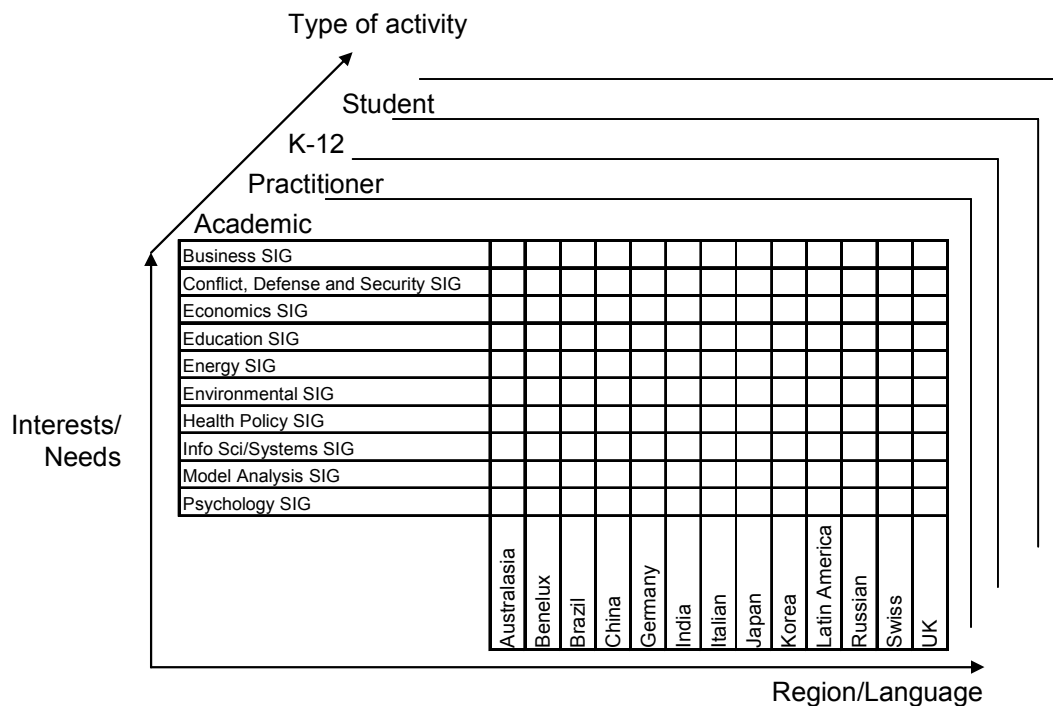
2. Some Chapters have few members without SIG membership: Benelux, Brazil, India, Korea, Latin America, Russian, Student and UK. In these Chapters, members appear to find what they need inside the SDS.
3. Other Chapters have a substantial parts of their membership without SIG membership: Australasia, China, Germany, Italian, Japan and Swiss. Are there many Chapter members whose specific interests and needs are not served by the SDS?
4. The SIGs appear to be truly global communities, except for the cases of the Psychology SIG (which has very few memberships), the Health Policy and the Conflict, Defense and Security SIG.
5. The Latin-American Chapter has an outstanding number of memberships in the Education SIG. This suggests that some interesting activity must be going on in the realm of this Chapter.
6. The Pakistan and Hellenic Chapters had very few SIG memberships before they were disenfranchised. The Egypt Chapter had a somewhat more SIG membership profile, but a small number of Chapter memberships.

One important point will be discussed separately: there is a huge intersection between thematic and geographical groups. Additionally it has to be assumed that there are activity-related groups, too. One example is the Student Chapter. However, the SDS *membership form* invites members to indicate their type of activity (“work category”) in a rather detailed list: Academic, Consulting/Training/Software, Corporate, Government/Public Policy, Health Care, K-12 Education, Military, Retired, Student, Other. Different types on interests and needs are to be expected according to if members are “academic” (supposedly research and therefore develop methodological advances or application domain theories, and also educate), “K-12 Education” (who educate) and others, where one would expect practitioner needs and interests.

It could well be that the current approach – treat geographically motivated and thematically motivated groups separately (and do not treat activity type oriented groups at all) – has the consequence that relevant aspects and possibilities are not taken into account and exploited.

All members live in a given region, have certain interests/needs and do a given type of work, but they are still the same individuals, looked upon from three different angles. We could as well look at their individual attributes in the following way (next page):





If each SDS member is invited and allowed to be a regional group member where he or she lives, maintain a membership in the interest groups he values and indicate his type of activity, we can store this data in a structure that allows to analyze the whole set of members along three axes.

Therefore, membership in regional groups, interest groups and activity type groups should be stored separately. Then we could ask and answer questions like:

1. are the interest groups that are geographically concentrated (and which are they)?
2. are there geographical groups that concentrate on (or avoid) specific interests?
3. how are the shares of academics, educators, practitioners and students represented in the different geographical regions and over the different interests (themes)? Are there concentrations? Are there holes?

## A plan for the coming year

### *Regarding the treatment of Chapters and SIGs*

What are the differences between being a SIG and being a Chapter? This question has been asked repeatedly, and in general, the answers I heard were:

- Chapters can collect membership fees, but SIGs cannot;
- SIGs do not have so strict reporting obligations.

While these answers may be incomplete, the relevant point is that in the light of the data presented above, I cannot see why such differences should exist.

The current Policies only mention Chapters (<http://systemdynamics.org/SDS%20PC%20Web/policy2.htm>), but the revised Bylaws mention Chapters and SIGs in the same sentence (<http://systemdynamics.org/BylawsDraftFeb10-2012.pdf>).

This is not a very clear situation. The bottom line seems to be that Chapters and SIGs are basically the same thing: subgroups of the SDS that commit to objectives that are compatible with those of the SDS. As such, there should be one set of rules and procedures. If the “Policy 8” is modified into “Chapters and SIGs”, this should suffice. The Policy’s section 1 about the

purpose seems to confirm this: “Chapters of the Society are intended to further the dissemination and encourage the advancement of system dynamics. Chapters can do this by undertaking activities that are specific to the *interests* or convenience of a subset of all practitioners and researchers in system dynamics. A subset of all practitioners might be delineated on the basis of *location* (regional or national), language, culture, *application area*, research *interest* or software use.” (emphasis added). According to this, one might conclude that SIGS are Chapters; however, the established way to call some groups “Chapter” and others “SIGs” makes it recommendable to adjust the phrasing of the remaining sections in Policy 8.

### ***Regarding the management of member groups***

Beyond voluntary groups of members of the SDS, we should consider default groups based on activity type, geographical region and maybe work theme in order to connect with our members in ways they will find positive. Since we know each member’s data, we can take advantage by sending news and invitations based upon such group memberships and probably help to foster and support “social networks”.

Also, questions like the ones mentioned at the end of the previous chapter become especially interesting when they can be asked concerning periods of time (not only one year’s state).

Therefore, exploring the possibilities of mining into the membership data should be a topic for the near future. In this sense, I propose to develop a data model and a prototype for a database that would support such mining activities and to carry out the data examination for the years 2010 through 2012 until the upcoming Winter Meeting.

As far as such questions deal with the members the whole subject might be understood as being part of “membership services”, but it also has implications for the future development of the SDS. Therefore, the function of the current *VP Chapter activities* might be subject to changes, for instance in the direction of turning *VP Chapter activities* into a *VP Membership development*. But at the other hand, it might as well be that in the future, *VP Chapter activities* becomes part of *VP Member services* and the Policy Council’s structure gets a little simpler. In order to shed light onto this subject, *VP Member services* and *VP Chapters* should conjointly analyze the subject and prepare a proposal for the Policy Council.