

Annual Report on
Home Office Operations
for Fiscal Year 2013



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Annual Report on Home Office Operations
Fiscal Year 2013

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. With 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.

2013 was a very productive year. At the Home Office, we worked diligently to provide service to all of our members, plan and administer the conference in Cambridge, Massachusetts, USA, provide prompt delivery of our products, and maintain and improve our web presence.

I would like to thank staff members Erin Sheehan, Robin Langer and Kara James. Kara joined our staff in September to aid in Robin's transition to reduced (half time) hours. With additional support from Weijia Ran, a graduate student at the University at Albany, volunteers, and outside contractors, Joan Yanni and LouAnne Lundgren, operation run smoothly. The Home Office operations fall into five categories: Conference, Core, Publications, Sales, and Web Presence.



Conference

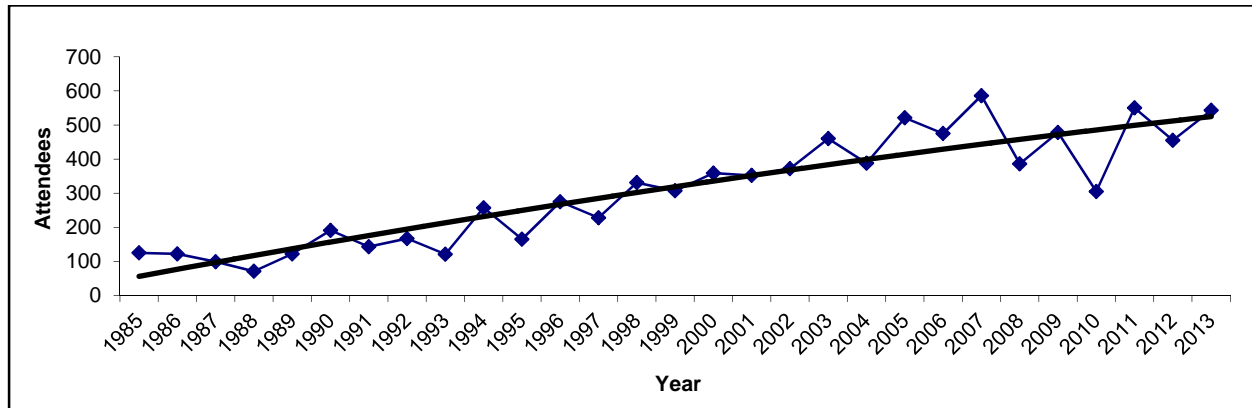
Conference management is a major part of Home Office operations for the first seven months of the year. At any one time, work is being done on the past year's conference, the current conference, and planning for future conferences. Time spent on conference management is always a substantial percentage 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 will be 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. Conference sponsorship contacts and details continue to be managed in Microsoft Access.

Future planning is actively ongoing for the Cambridge, Massachusetts, USA (2015) Conference to be held from July 19 to July 23, 2015. See the preliminary *Call for Papers* with your conference materials.

Conference Attendance by Year, 1983 – 2013



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 – 2013
2. Conference Attendance by Continent Representation, 2004 – 2013
3. Conference Registration Fee Structure, 2004 – 2013
4. Conference Attendees by Type of Payment/Support, 2004 – 2013

B-Conference Management

Core

Membership constitutes the primary core activity of the Society. In 2013, our membership totaled 1,159, our highest membership number ever. The Home Office goal is to provide accurate, prompt and personal service to all members and prospective members.

Membership Growth, 1984 – 2013



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

At the end of 2013 we had 8,741 valid records for members, non-members, conference registrants, authors and others who have contacted this office for products or information. We contact these people in order to provide Society information.

Valid Records by year, 1997 – 2013

Year	Valid Records	Year	Valid Records	Year	Valid Records
1997	1,200	2003	5,300	2009	7,977
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		

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

We include a membership option on the conference registration form. For the Cambridge conference, we processed 82 memberships. Please see Attachment I – Conference, **A-Conference Attendance Statistics, Conference Registration Fee Structure, 2004-2013** (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 39.34% of members in 2013, a slight increase from the previous year.

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 2013, 73% of our 2012 members renewed, which is a similar rate to the last few years. (The average over the last 10 years is 75%.)

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 – 2013
2. Membership Distribution by Sector, 2004 – 2013
3. Percentage of Membership by Continent, 1997 – 2013
4. Membership by Continent, 1997 – 2013
5. Geographic Distribution, ten years through 2013: 73 Active of 102 Total Countries

B-Chapter and Special Interest Group Statistics

1. New Chapters, 1990 – 2013
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-Blackwell four times a year. We are in year four of our eight year contract. The Society continues to build on the existing, successful partnership we have with Wiley-Blackwell.

There are usually three to four **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 reports are the highlight of the October newsletter. For print versions, we have fully transitioned to InDesign software which gives the newsletters a more professional appearance and enables us to more easily collaborate with our printer.

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 31st International Conference of the System Dynamics Society* and the *System Dynamics Review* Volume 29, Number 1-4. New entries and corrections are continuously being made, as the Bibliography is always a work in progress. This year we added a **Bibliographic Updates Page** which lists new additions to the Bibliography that are submitted between updates to the full Bibliography.

Number of Bibliography Records, by year, 2002 – 2013

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

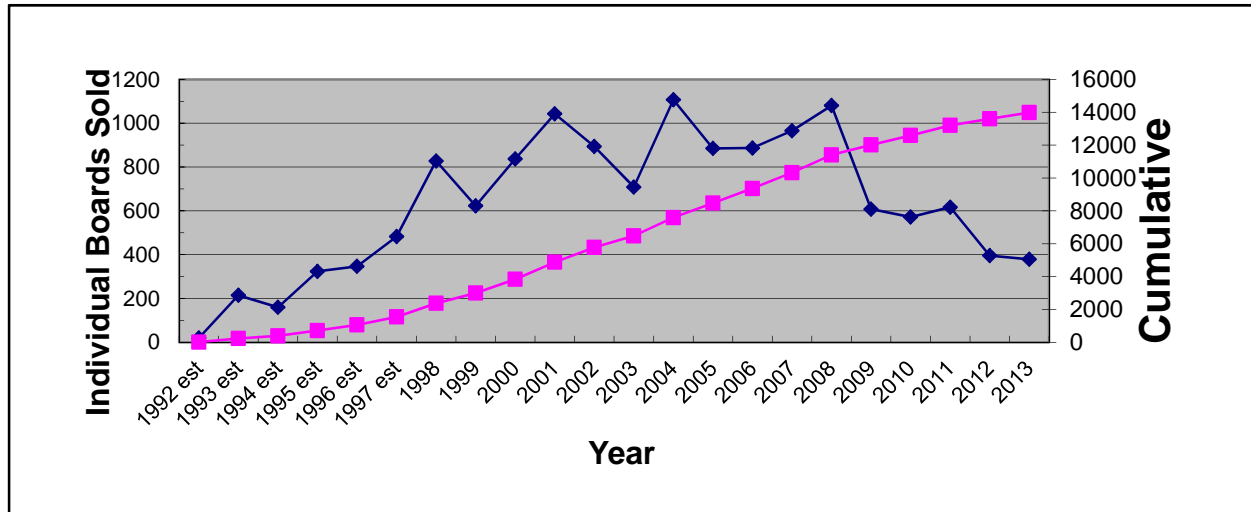
source: rls folders\statistical information\attachforye-report\bibrecordsbyyear

Sales

The **Beer Distribution Game, Conference Proceedings, Journal, Bibliography, PhD Seminar Series** and **MIT Literature Collection** can all be purchased from the Society.

There was a decrease in sales of the Production Distribution Game (Beer Game) in 2013; the Society sold 379 boards in 2013 after selling 396 in 2012. The all-time record for sales was 1,107 games sold in 2004.

Beer Game Boards Sold, 1992 – 2013 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 *Review* are available for sale to members of the Society. Although we continue to stock copies of back issues of the *System Dynamics Review*, access to past journals through our publisher using the Wiley Online Library website has influenced the sales. The last of the complete sets of back issues were sold during a special sale in 2010.

In 2013, the \$27,170 net income from the sales “cost center” helped support all operations offered by the Society office. The number is down slightly from 2012.

For the chart, *Sales, Ten years through 2013*, please see Attachment III – Sales, page 17.

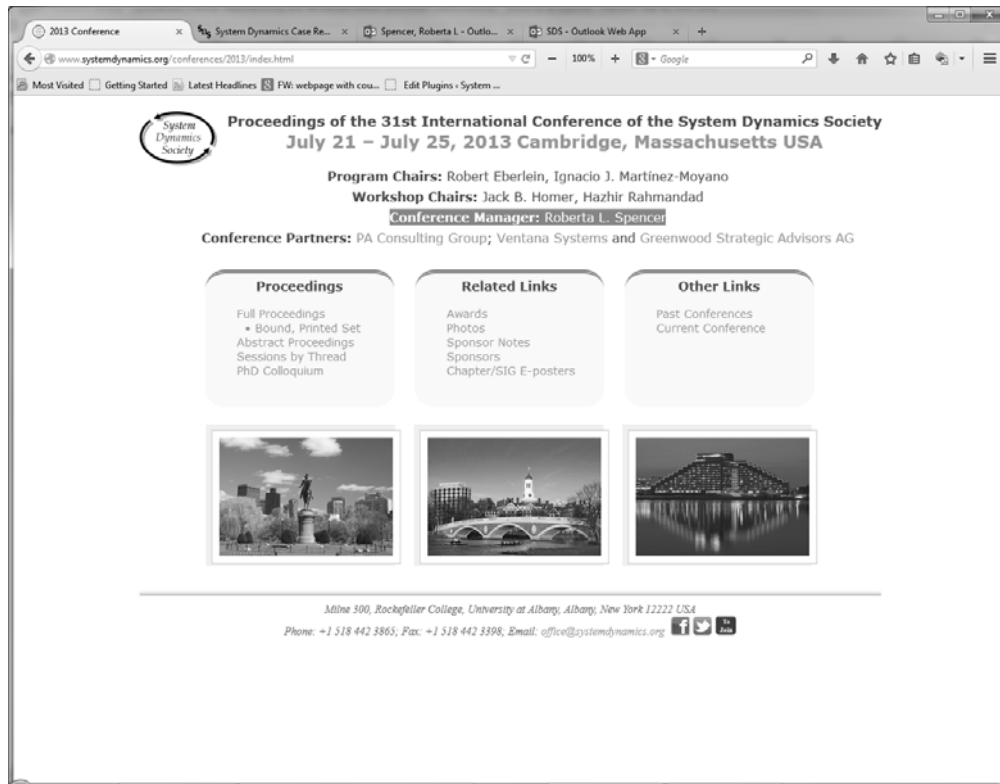
Web Presence

Immediately before the 2012 conference in St. Gallen we rolled out the new content management format for our main Society site. During 2013 we continued to convert the existing pages to Word Press, refining menu categories and checking links to complete the transition. We continue to offer sponsors website header space.

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 website includes an online discussion forum, a Facebook page as well as a Twitter feed. The discussion forum has multiple public and private discussion forums and topics. The Facebook page as well as the Twitter feed, has gained popularity and is used to share news and repost information from other 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

In 2013 we began tracking Society Sponsorship using the Access database as we did in 2012 for Conference sponsor tracking.

Of the 35 Society sponsors that sent a gift or traded services, there were two new sponsors in 2013. Our sponsors are very committed, 28 of our 2013 Society sponsors have been sponsors 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, to involve 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 89 new or renewed members joined the Society for the calendar year 2013 as a result of the Society Sponsorship incentive.

For a list of *All Sponsors by Type, 2010 – 2013*, please see Attachment IV – All Sponsors, page 18.

Governance

A revised version of the Society Bylaws was passed in 2012 and became effective on January 1, 2013.

In 2011, under the advisement of our CPA, we began developing a set of guidelines to address items on the new, longer 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. They are reviewed annually.

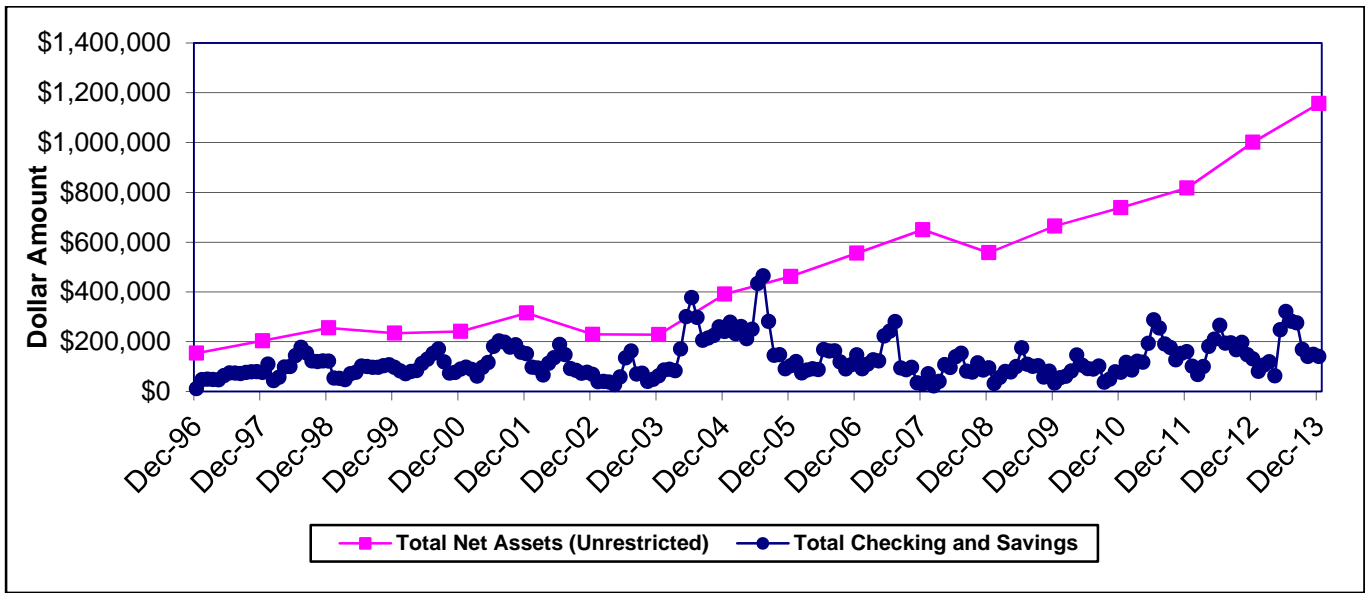
The Organization and Bylaws Committee revised the Policies and the document was posted for review. The revised Policies were approved at the 2013 Winter Policy Council meeting.

Finances

As stated earlier above, the Society is managed around five cost centers: conference, core operations, publications, sales and web presence. Please refer to the VP Finance report for full details. All bookkeeping files are maintained in QuickBooks. Since 2011, the Society continues to work with CPA, Tom Hosey of Lubbe & Hosey, PC.

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

Year-end Balances for Non-Investment Accounts & Unrestricted Net Assets, 1996 – 2013



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For other Finance-related graphs please see Attachment VI – Finances, page 20

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
2013	Cambridge, USA	543	43								
2012	St. Gallen, Switzerland	455	47	2002	Palermo, Italy	372	83	1992	Utrecht, Netherlands	146	
2011	Washington DC	550	36	2001	Atlanta, GA USA	352	22	1991	Bangkok, Thailand	159	
2010	Seoul, Korea	305	15	2000	Bergen, Norway	359	55	1990	Chestnut Hill, MA USA	191	
2009	Albuquerque, NM USA	478	43	1999	Wellington, New Zealand	307	27	1989	Stuttgart, Germany	122	
2008	Athens, Greece	386	52	1998	Québec City, Canada	331	51	1988	LaJolla, CA USA	71	
2007	Boston, MA USA	586	55	1997	Istanbul, Turkey	228		1987	Shanghai, China	99	
2006	Nijmegen, Netherlands	475	29	1996	Cambridge, MA USA	275		1986	Seville, Spain	122	
2005	Boston, MA USA	521	39	1995	Tokyo, Japan	165		1985	Keystone, CO USA	125	
2004	Oxford, England	388	45	1994	Stirling, Scotland	257		1984	Oslo, Norway	55	
2003	NYC, USA	460	58	1993	Cancún, Mexico	121		1983	Chestnut Hill, MA USA	120	

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

Conference Attendance by Continent Representation, 2004 – 2013

	2013 Cambridge	2012 St. Gallen	2011 WDC	2010 Seoul	2009 ABQ	2008 Athens	2007 Boston	2006 Nijmegen	2005 Boston	2004 Oxford
Africa	1%	1	1	6	3	10	2	2	1	1
N America	54%	23	61	17	62	22	53	28	60	31
C/S America	8%	4	5	3	5	5	4	3	2	2
Asia	10%	16	10	45	8	5	8	9	8	7
Pacific	2%	3	2	4	2	4	4	3	3	7
Europe	25%	53	21	25	20	54	29	55	26	52
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, 2004 – 2013

	2013 Cambridge	2012 St. Gallen	2011 WDC	2010 Seoul	2009 ABQ	2008 Athens	2007 Boston	2006 Nijmegen	2005 Boston	2004 Oxford
Member Registration - Early	\$525	\$525	\$500	\$450	\$450	\$450	\$425	\$425	\$425	\$1450
Non-Member Registration - Early	\$625	\$620	\$595	\$525	\$525	\$525	\$500	\$500	\$500	\$1525
Additional Cost for Membership	Dependent on Dues Tier						\$15	\$15	\$15	\$15
Half year membership	1,109	1002	1,064	984	950	1,016	1,056	977	994	875
Memberships through registration	82	66	69	34	84	78	106	59	89	71
New members through registration	55	21	45	11	40	43	75	29	65	45

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

Conference Attendees by Type of Payment/Support, 2004 – 2013

	2013 Cambridge	2012 St. Gallen	2011 WDC	2010 Seoul	2009 ABQ	2008 Athens	2007 Boston	2006 Nijmegen	2005 Boston	2004 Oxford
Paying Members	246	207	247	102	196	171	298	216	274	236
Paying Non-Members	59	58	68	48	73	44	54	48	57	41
Supported Members	30	29	18	21	19	13	25	0	0	0
Paying Day Passes	6	3	3	3	7	3	1	51	19	16
Paying Students	105	87	94	76	82	105	122	96	99	85
Educator Scholarships	13	0	20	0	32	0	0	0	0	0
Organizers/Volunteers/Awards	27	22	25	31	25	16	20	22	19	6
Financial Assistance	0	0	0	0	0	0	0	0	4	0
Program Invite	0	8	0	1	2	1	1	1	6	0
Conference Scholarship	10	11	10	10	10	10	12	9	10	0
Sponsor Complimentary	47	30	61	13	32	23	53	32	33	4
TOTAL	543	445	550	305	478	386	586	475	521	388

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 the Call for Papers brochures, conference information and registration brochures, including electronic formats
- Advertise in related journals
- 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
- 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 printed abstract proceedings 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 Chair 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.

Attachment II – Core Operations

A-Membership Statistics

Membership over Time, 1984 – 2013

Year	Society Database	Wiley-Blackwell	At June 30th	Regular/Student-Subsidized
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\memovertime

Membership Distribution by Sector, 2004 – 2013

Year	Academic	Military	Private	Public	Other
	%	%	%	%	%
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
2005	42	3	39	14	2
2004	45	1.5	41	3	0.5

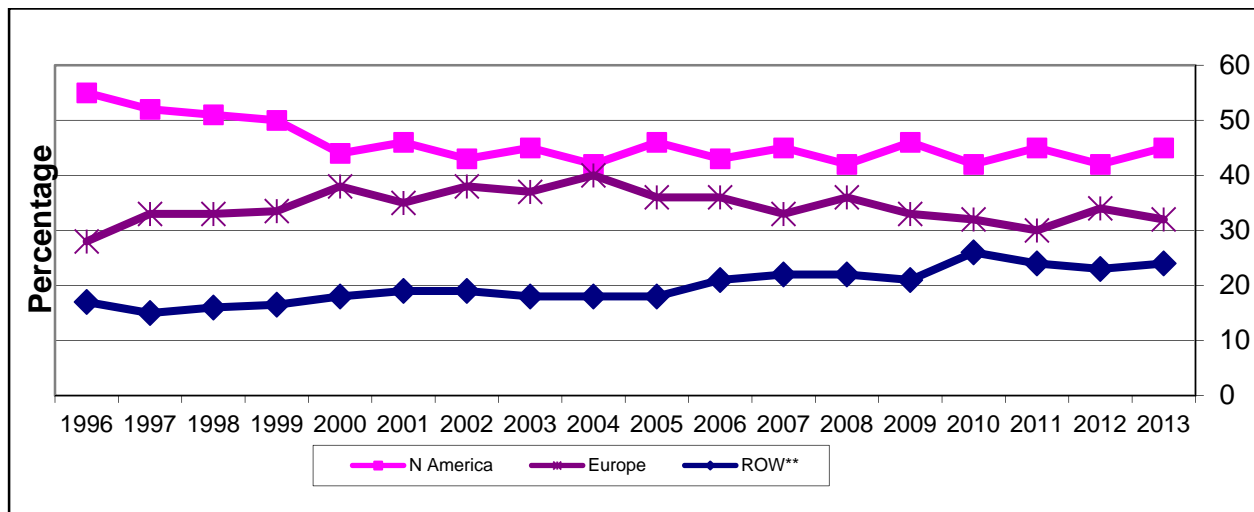
Before 2003, based on the institution name listed in the membership directory. 2003 on, self-reported by members.
 source: \rls folders\statistical information\growth indicators\membership stats.xls\membysector

Membership by Continent, 2004 – 2013 (List)

	2013	2012	2011	2010	2009	2008	2007	2006	2005	2004
Africa	2%	2	2	2	2	2	2	2	2	1
N America	45%	42	45	42	46	42	45	43	46	42
S & C America	6%	5	6	6	5	4	4	4	3	3
Asia	12%	12	12	14	9	12	11	11	10	10
Europe	32%	34	30	32	33	36	33	36	36	40
Pacific	4%	5	4	5	5	4	5	4	4	4
# of countries	73	70	72	69	70	71	66	64	59	56

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

Membership by Continent, 1996 – 2013 (Graph)



**ROW - other than N Amer. & Europe

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

Geographic Distribution, ten years through 2013 (73 Active of 102 Total Countries)

Country	2013	2012	2011	2010	2009	2008	2007	2006	2005	2004
Argentina	6	5	4	4	4	3	3	3	1	1
Australia	40	36	36	39	39	33	40	34	33	33
Austria	7	9	8	6	5	6	4	4	3	
Bahrain	1	0	0	0	0	0	0	0	0	0
Bangladesh	0	0	0	0	0	1	1	1	1	1
Barbados	2	0	0	0	0	0	0	0	0	0
Belgium	3	3	6	9	8	10	10	14	9	8
Bermuda	0	0	0	0	0	1	0	0	0	0
Bolivia	0	0	1	1	1	1	0	0	0	0
Bosnia	0	0	1	1	0	0	0	0	0	0
Botswana	1	1	2	0	0	0	0	0	0	0
Brazil	27	25	30	23	19	16	18	21	21	15
Bulgaria	1	0	1	1	0	0	0	0	0	0
Cambodia	1	1	0	0	0	0	0	1	1	0
Canada	31	29	28	25	27	29	25	25	26	29
Chile	4	3	4	4	5	5	6	4	3	3
China	26	25	30	32	13	16	16	17	6	5
Colombia	16	13	15	15	14	11	12	6	5	5
Costa Rica	2	2	1	1	1	1	1	2	2	2
Cote d'Ivoire	0	0	0	0	0	0	0	0	0	0
Crete	0	0	0	0	0	1	0	0	0	0
Croatia	5	6	8	8	9	14	11	13	8	4
Cuba	0	1	1	1	1	0	0	0	0	0
Cyprus	2	2	2	2	2	3	2	3	1	0
Czech Rep	4	6	6	3	5	6	3	4	5	4
Denmark	5	5	6	6	4	4	4	5	4	4
Dom. Rep.	0	0	0	0	0	0	0	0	0	0
Ecuador	1	0	1	0	0	0	0	0	0	0
Egypt	4	9	13	8	5	7	9	8	9	7
Ethiopia	0	0	0	0	0	0	0	0	0	0
Finland	6	3	4	2	3	4	5	6	5	6
France	8	11	15	13	14	9	9	8	11	11
Georgia	1	1	1	0	0	0	0	0	0	0
Germany	46	55	47	50	55	56	60	57	54	50
Ghana	1	0	0	1	1	0	1	1	1	0
Greece	8	5	8	13	12	14	6	7	8	13
Hong Kong	1	0	0	0	3	3	3	2	2	2
Hungary	2	4	1	0	0	0	1	1	0	0
Iceland	4	3	1	1	1	1	3	0	0	0
India	11	15	15	17	15	14	14	11	6	5
Indonesia	18	13	10	12	7	6	10	9	8	8
Iran	6	7	6	6	5	11	7	3	3	2
Ireland	3	3	2	2	1	1	1	1	2	1
Israel	1	2	1	1	1	2	2	1	1	1
Italy	26	21	19	21	20	25	21	22	22	23
Jamaica	0	0	0	1	0	0	0	0	0	0
Japan	25	20	20	20	19	24	29	26	29	32
Jordan	2	0	0	0	0	0	0	1	1	2
Kazakhstan	1	1	0	0	0	0	0	0	0	0
Kenya	0	0	0	0	0	0	0	0	0	0
Kosovo	1	1	0	0	0	0	0	0	0	0
Kuwait	0	0	0	0	0	0	0	0	1	1

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Country	2013	2012	2011	2010	2009	2008	2007	2006	2005	2004
Latvia	4	3	11	4	2	0	2	1	0	0
Lebanon	1	1	1	1	1	1	1	1	1	1
Liechtenstein	0	0	0	0	0	1	1	0	0	0
Lesotho	0	0	0	0	0	0	0	0	0	0
Lithuania	1	1	0	1	0	0	0	0	0	0
Macao	0	0	0	1	1	2	0	0	0	0
Malaysia	9	5	7	6	4	6	8	5	2	11
Mauritius	0	0	1	2	0	1	0	0	0	0
Mexico	17	11	8	8	14	12	12	13	12	10
Mongolia	0	0	0	0	0	0	0	0	0	0
Myanmar	0	0	2	0	2	0	0	0	0	0
Nepal	0	0	0	0	1	0	0	0	0	0
Neth Antilles	0	0	0	0	0	0	0	0	0	0
Netherlands	45	42	30	27	30	36	43	38	33	32
New Zealand	11	13	12	11	10	13	13	12	11	9
Nicaragua	0	0	0	0	0	0	0	0	0	0
Nigeria	5	3	2	2	2	3	1	1	1	1
Norway	25	28	21	28	18	24	24	28	24	24
Pakistan	0	1	1	1	1	9	9	9	10	1
Peru	3	3	4	5	2	2	1	1	1	2
Philippines	3	4	4	4	1	2	2	1	0	1
Poland	7	7	8	10	6	8	7	7	6	3
Portugal	2	3	2	0	3	5	6	6	9	7
Puerto Rico	0	2	3	3	4	2	3	2	2	1
Romania	1	1	0	0	0	1	0	0	0	0
Russia	12	10	7	7	10	11	9	6	8	2
Saudi Arabia	2	3	3	4	3	3	1	2	2	1
Senegal	0	0	0	0	0	1	1	1	0	0
Singapore	11	12	11	9	4	5	4	5	4	5
Slovak Republic	0	1	2	2	1	2	2	1	0	0
Slovenia	3	2	2	3	3	2	2	4	2	3
South Africa	12	5	8	8	7	8	8	6	6	5
South Korea	6	10	9	16	6	11	9	12	9	11
Spain	11	14	18	19	19	22	20	21	17	21
Sweden	9	12	8	12	14	14	11	10	12	15
Switzerland	35	37	28	32	24	29	30	34	33	39
Taiwan	5	5	7	9	7	7	9	11	11	6
Thailand	1	1	2	3	1	3	1	0	0	0
Trinidad	0	0	0	0	1	0	0	0	0	0
Tunisia	0	0	0	0	0	0	1	0	0	0
Turkey	10	10	13	10	6	8	7	8	11	10
Uganda	0	0	0	0	1	1	0	0	0	0
Ukraine	1	2	2	0	0	0	1	1	1	1
United Arab Emirates	3	3	2	3	4	2	2	1	0	0
United Kingdom	68	61	53	52	65	79	78	79	85	100
United States	471	417	472	409	441	426	482	420	445	374
Uruguay	1	1	2	2	2	1	0	0	0	0
Venezuela	3	1	2	2	1	3	4	2	2	0
Vietnam	1	1	2	1	1	1	0	0	0	0
Virgin Islands	0	0	0	0	0	0	0	0	0	0
Yemen	0	0	1	1	1	1	0	0	0	0
Totals	1159	1082	1125	1067	1043	1106	1152	1070	1052	977

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

B-Chapter and Special Interest Group Statistics

New Chapters, 1990 – 2013

Year	New Chapter Name
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\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:
 - Beer Game
 - Back issues of Proceedings
 - Back issues of *System Dynamics Review*
 - PhD Seminar Series

- MIT Literature Collection
- Electronic Oracle
- Fireside Chat
- Books
- 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
- Produce and distribute *System Dynamics Newsletter* up to four times per year (electronic and hard copy)
- Manage Administrative Calendar and Processes
- Assist with all aspects of conference management
- Continuously strive for less use of paper and postal services
- Maintain SD Career Link on the website and as a job message board at each conference
- Update the Conference Guide after each conference
- Maintain a list of Courses in SD on the website

Attachment III – Sales

Sales, Ten years through 2013

Items Sold	2013	2012	2011	2010	2009	2008	2007	2006	2005	2004
Beer Game Boards including loaner boards	379	396	617	557	608	1,082	996	878	894	1,109
Proceedings	0	0	4	105*	0	2	6	190*	57	98
<i>System Dynamics Review</i>	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	5 single 0 sets	17 single 3 sets
Forrester PhD Seminar	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	14 single 7 sets	15 single 14 sets
MIT Literature Collection	7	11	16	14	15	19	19	42	80	81
Electronic Oracle	2	5	3	59*	2	9	178			
Fireside Chat	2	2	4	30*	0	4	37			

* increase due to special sale

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

Attachment IV – All Sponsors by Type

Society and Conference Sponsors 2009 through 2013

Corporations:

Analytic Services Inc/ASysT¹
 AnyLogic North America, XJ
 Technologies^{1,2}
 Atkins Nutritionals, Inc.^{2,3}
 Atrivé
 Berkeley Research Group²
 The Boeing Company¹
 Bolide Pty Ltd¹
 Allen L. Boorstein^{1,2}
 Booz Allen Hamilton²
 BP
 Bumblebar^{2,3}
 Complexio
 Continental Tires
 CROSSMARK
 CTN Management Development
 Decision Advancement
 Decision Dynamics, Inc.¹
 Dynaplan AS
 e4 English
 Electronics and Telecommunications
 Research Institute (ETRI)
 European Master Programme in System
 Dynamics
 Evans & Peck Pty Ltd.¹
 The Expertool Paradigm
 FoodShouldTasteGood, Inc.^{® 3}
 Forio Online Simulations^{1,2}
 Forrester Consulting, LLC
 Goldsim Technology Group
 Greenwood Strategic Advisors AG²
 Helvetia Versicherungen
 Homer Consulting¹
 Honest Weight Food Co-op^{2,3}
 HSSR, Duke-NUS
 IBM
 Idaho National Laboratory
 International Society for the Systems
 Sciences (ISSS)^{2,3}
 isee systems^{1,2}
 Jantz Morgan LLC^{1,2}
 Korea Radio Promotion Agency (KORPA)
 Korea Research Institute for Human
 Settlements (KRIHS)
 Korea Tourism Organization (KTO)
 Lane Press of Albany^{2,3}
 Livingston Hamilton Rentals GmbH
 Lundberg Family Farms^{2,3}
 The Manufacturing Game[®]/Ledet
 Enterprises^{1,2}
 Mary's Gone Crackers^{2,3}

Mayor of St. Gallen and Canton of St.
 Gallen
 Millenium Institute
 MITRE Corporation^{1,2}
 Mohaseboon Financial and Business
 Consultants
 Murphy-Hall & Company, CPA's
 National IT Industry Promotion Agency
 (NIPA)
 National Research Foundation of Korea
 (NRF)
 Nature's Bakery^{2,3}
 Nonni's Food LLC^{2,3}
 Northwater Capital Management, Inc.¹
 OBSSR, National Institutes of Health
 Organic Food Bar Inc.^{2,3}
 PA Consulting Group^{1,2}
 Patni Holdings, LLC^{1,2}
 Patterson America
 Paul Scherrer Institute³
 Pearson New Zealand (with Kambiz Maani
 & Bob Cavana)
 Pegasus Communications, Inc.³
 Ponte Consulting Group
 Powersim Software AS
 Powersim Solutions, Inc.²
 PricewaterhouseCoopers²
 PROGNOZ
 Proverbs Corporation
 Ratcliff Architects³
 Raw Indulgence Ltd^{2,3}
 RoCC-Responsible Corporate
 Competitiveness Initiative at the
 University of St. Gallen
 SACU²
 Sandia National Laboratories²
 Semantum²
 Seoul Convention Bureau (SCB)
 Seoul Development Institute (SDI)
 SoL, the Society for Organizational
 Learning³
 Stiftung zur Förderung der
 Systemorientierten Managementlehre
 (Foundation for Systems-Oriented
 Management Education)
 Springer
 Strategy Dynamics²
 Synapse Energy Economics, Inc.
 SystemixG
 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}
 Whole Systems Partnership¹
 Wiley-Blackwell^{2,3}
 Windhaven Business Management, Inc.¹
 Anonymous¹

Universities and University Centers:

Delft University of Technology
 Policy Analysis Group¹
 HSG Alumni, University of St. Gallen
 Salford Business School,
 University of Salford
 Social System Design Lab
 Washington University in St. Louis¹
 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 Bergen¹
 System Dynamics Group, Institute of
 Management, University of St. Gallen
 Worcester Polytechnic Institute (WPI)^{1,2}

Individual Sponsors:

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

Individual Donors:

Anonymous^{1,2}

¹ 2013 Society Sponsor

² 2013 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

Attachment VI – Finances

Balance Sheet Comparison, 15 years through 2013

including year-end adjusting entries	2013	2012	2011	2010	2009	2008	2007	2006	2005	2004	2003	2002	2001	2000	1999
ASSETS															
CURRENT ASSETS															
Cash (ckg/svg//PayPal)	\$ 167,525	155,804	179,969	80,850	34,781	95,538	42,615	150,573	132,148	243,394	62,955	69,738	151,704	91,337	98,359
Investments	\$ 898,711	752,541	616,709	603,166	560,117	460,374	595,364	474,826	358,897	167,412	163,506	156,853	159,117	146,535	135,149
Accounts receivable	\$ 60,545	62,653		0	30	1,171	-	-	-	-	-	-	-	-	-
Inventory (at cost)	\$ 26,220	19,843	25,970	20,807	23,447	10,695	-	-	-	-	-	-	-	-	-
Prepaid expenses	\$ 74,889	81,782	54,558	82,904	68,024	32,294	38,938	-	-	-	-	-	-	-	-
Total Current Assets	\$ 1,227,890	1,072,623	877,206	787,727	686,399	600,072	676,917	625,399	491,045	410,806	226,461	226,591	310,821	237,872	233,508
PROPERTY (Fixed Assets)															
Furniture and equipment	\$ 651	1,263	1,263	1,263	11,046	11,046	11,046	11,046	11,046	11,046	11,046	10,396	9,783	6,516	2,857
Less: Accumulated depreciation	\$ -651	-1,263	-1,263	-1,263	11,046	11,046	11,025	10,963	10,690	9,993	8,982	-7,355	-5,147	-2,959	-1,806
Total Property (Fixed Assets)	\$				0	0	21	83	356	1,053	2,064	3,041	4,636	3,557	1,051
OTHER ASSETS															
Restricted securities / funds	\$ 104,465	92,242	83,661	76,386	71,657	67,437	73,136	70,341	66,528	29,439					
TOTAL ASSETS	\$ 1,332,355	1,164,865	960,867	864,113	758,056	667,509	750,074	695,823	557,929	441,297	228,525	229,632	315,457	241,429	234,559
LIABILITIES & NET ASSETS															
CURRENT LIABILITIES															
Accounts payable	\$ 903	1,742	5,574	2,863	612	1,282	-	-	-	-	-	-	-	-	-
Accrued expenses (conf related)	\$				-	-	-	32,536	1,060	1,285	2,525	-	-	-	-
Deferred revenue (conf/cust)	\$ 48,124	47,166	43,583	32,164	3,393	15,900	-	-	-	-	-	-	-	-	-
Membership Sub. Payable	\$ 12,825	12,466	10,679	13,287	12,517	19,957	21,823	32,068	23,190	14,640	-	-	-	-	-
Custodial account liability	\$ 9,225	9,900													
Misc. liabilities (sales tax, etc)	\$			184	65	314	85	49	-	-	-	-	-	-	-
Prepaid editorial / travel	\$				-	-	-	-	-	3,054	-	-	-	-	-
Royalty Advance	\$				5,000	5,000	5,000	5,000	5,000	-	-	-	-	-	-
Total Liabilities	\$ 71,077	71,274	59,836	48,498	21,587	42,453	26,908	69,653	29,250	18,979	2,525	0	0	0	0
NET ASSETS															
Unrestricted - General fund	\$ 1,156,813	1,001,349	817,370	738,480	664,812	557,619	650,030	555,829	462,151	391,351	226,000	229,632	315,457	241,429	234,559
Temporarily Restricted	\$ 104,465	92,242	83,661	77,135	71,657	67,437	73,136	70,341	66,528	30,966					
Total Net Assets	\$ 1,261,278	1,093,591	901,031	815,615	736,469	625,056	723,166	626,170	528,679	422,317	226,000	229,632	315,457	241,429	234,559
TOTAL LIABILITIES & NET ASSETS	\$ 1,332,355	1,164,865	960,867	864,113	758,056	667,509	750,074	695,823	557,929	441,297	228,525	229,632	315,457	241,429	234,559

source: \rls folders\executive director & vpf reports\2014\annual report\ multi yr balance sheet comparison thru 2013.xlsx

System Dynamics Society Annual Report on Home Office Operations, Fiscal Year 2013

Revenue and Expenses Comparison, 15 years through 2013

	2013	2012	2011	2010	2009	2008	2007	2006	2005	2004	2003	2002	2001	2000	1999
including year-end adjusting entries															
Ordinary Income/Expense															
Income															
Conversion from Accrual to Cash	\$ 0	0	0	0	0	0	137	3,185	672	-2,395	-885	3,575	-3,754	0	0
INC 1997 Turkey Conference	\$ 0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
INC Conferences	\$ 303,7655	327,607	303,463	173,561	233,148	156,401	264,081	214,907	219,255	216,501	185,229	163,733	142,580	140,248	49,913
Journal Income	\$ 81,676	84,889	85,514	56,292	51,963	43,499	44,375	39,900	41,122	20,546	19,530	16,655	15,651	15,070	12,302
Membership Dues	\$ 64,487	59,968	63,636	58,741	57,389	61,696	58,597	48,042	80,629	30,285	7,810	7,475	6,975	6,610	6,150
Other Income	\$ 725	0	0	0	0	-165	0	164	269	264	0	28	337	69	481
Products	\$ 49,828	47,170	75,106	69,590	71,654	126,685	112,988	114,296	111,622	139,548	96,706	103,406	120,706	96,955	69,521
Shipping and Handling Income	\$ 7,320	9,829	11,394	17,691	13,878	25,010	19,671	20,191	18,574	20,157	15,358	15,936	17,926	9,084	8,109
Sponsor Dues and Donations	\$ 33,150	40,106	41,001	18,500	30,125	44,375	27,595	40,284	35,952	32,190	38,445	19,519	29,660	22,262	12,910
Total Income	\$ 540,950	569,569	580,114	394,375	458,157	457,501	527,444	480,969	508,095	457,096	362,193	330,327	330,081	290,298	159,386
Cost of Goods Sold															
Cost of Goods	\$ 10,249	11,016	14,246	10,214	3,564	14,874	30,247	33,768	30,062	31,871	12,522	24,875	29,807	23,572	14,699
Total COGS	\$ 10,249	11,016	14,246	10,214	3,564	14,874	30,247	33,768	30,062	31,871	12,522	24,875	29,807	23,572	14,699
Gross Profit	\$ 530,701	558,553	565,868	384,161	454,593	442,627	497,197	447,201	478,033	425,225	349,671	305,452	300,274	266,726	144,687
Expense															
Accrued Interest Paid	\$ 0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Awards-Dana Meadows	\$ 750	1,200	1,200	1,200	1,200	1,200	1,200	0	0	0	0	0	0	0	0
Awards-Others	\$ 0	4,998	0	6,900	0	5,097	5,244	5,086	5,494	5,560	5,130	5,071	6,020	2,066	2,300
Bank & CC Fees	\$ 12,528	13,080	13,609	9,598	15,092	14,865	16,812	11,659	12,100	19,571	10,782	12,182	7,734	7,189	3,708
Chapter Dev (\$20K Max)	\$ 6,405	0	4,000	0	0	0	0	0	0	0	0	0	0	0	0
Contracted Expenses at UAlbany	\$ 298,280	277,709	279,400	261,719	253,739	190,610	203,356	203,355	207,855	165,788	183,014	182,550	111,211	105,295	86,772
Depreciation Expense	\$ 0	0	0	0	0	21	62	273	697	1,011	1,627	2,208	2,188	1,153	552
EXP Conferences	\$ 133,283	149,801	121,091	62,350	92,754	98,777	116,894	81,490	72,291	2,527	98,462	124,011	43,256	103,181	28,061
Freight	\$ 0	145	0	0	0	0	0	0	0	0	0	0	0	0	0
Gordon Brown Closeout	\$ 0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Insurance	\$ 4,645	5,595	2,013	1,354	0	0	0	0	0	0	0	0	0	0	0
Journal Expense	\$ 20,000	20,000	19,763	20,000	20,000	20,000	12,000	12,000	12,000	12,000	11,000	11,000	12,000	12,000	12,000
Less Capitalized Office Equip	\$ 0	0	0	0	0	0	0	0	0	0	0	0	-3,267	-3,659	0
Membership Directory Exp	\$ 615	2,340	2,170	2,074	1,958	1,872	1,812	1,800	1,526	907	1,209	4,516	3,782	4,738	7,046
Membership Services	\$ 0	0	0	1,060	2,765	1,220	955	1,165	0	811	250	2,842	2,995	1,892	1,462
Membership Subsidies	\$ 0	0	0	0	0	0	0	0	0	2,430	8,145	4,320	6,120	3,865	2,785
Miscellaneous Expense	\$ 683	1,996	816	1,886	311	379	341	486	25,140	120	224	125	15	-295	665
Office Expense	\$ 4,416	3,354	5,235	4,571	14,417	26,200	19,105	17,999	20,765	18,397	15,246	12,477	18,416	15,895	18,519
Officer Expenses (=Travel CPA)	\$ 9,871	9,614	10,197	5,417	5,955	5,153	6,108	6,633	7,748	3,121	3,031	4,346	5,511	5,566	1,683
Product Dev.	\$ 0	0	0	0	0	64	0	528	0	0	0	0	0	0	0
Professional Fees	\$ 35,132	40,761	38,953	32,338	40,284	35,642	61,411	58,573	56,016	33,758	21,895	24,443	18,897	13,379	8,424
Repairs	\$ 0	0	0	0	0	0	0	0	287	0	0	0	0	0	0
Total Expense	\$ 526,608	530,593	498,447	410,467	448,475	401,100	445,300	401,047	421,919	266,001	360,015	390,091	234,878	272,265	173,977
Net Ordinary Income	\$ 3,095	27,960	67,421	-26,306	6,118	41,527	51,897	46,154	56,114	159,224	-10,344	-84,639	65,396	-5,539	-29,290
Other Income/Expense															
Other Income															
Investment Income	\$ 161,659	96,556	27,865	102,963	103,461	-142,709	42,147	48,417	15,373	5,566	6,713	-1,184	8,631	12,410	4,601
DMA Endow. Fund Camp.	\$ 0	0	0	0	0	0	0	100	34,125	31,528	0	0	0	0	0
DM Investment Inc	\$ 2,933	3,673	2,826	2,490	1,833	3,073	2,954	2,818	746	0	0	0	0	0	0
Total Other Income	\$ 164,592	100,229	30,691	105,453	105,294	-139,636	45,101	51,335	50,244	37,094	6,713	-1,184	8,631	12,410	4,601
Total Other Expense	\$ 0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Net Other Income	\$ 164,592	100,229	30,691	105,453	105,294	-139,636	45,101	51,335	50,244	37,094	6,713	-1,184	8,631	12,410	4,601
Net Income	\$ 167,687	128,189	98,112	79,147	111,412	-98,109	96,998	97,489	106,358	196,318	-3,631	-85,823	74,027	6,871	-24,689

source: \rls folders\executive director & vpf reports\2014\annual report\ multi yr revenue & expenses comparison thru 2013.xlsx

