

**Annual Report on**  
**Home Office Operations**  
**for Fiscal Year 2014**



Presented  
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Fiscal Year 2014

# 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 101 countries (see chart on pages 14-15). 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.

2014 was a very interesting year. At the Home Office, 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, Robin Langer, and Rochel Rubin. Rochel joined our staff in May 2014. With additional support from Weijia Ran, a graduate student at the University at Albany, volunteers, and outside contractors, Joan Yanni, LouAnne Lundgren, and Mary Kenney, operations run smoothly. The Home Office operations fall into five categories: Conference, Core, Publications, Sales, and Web Presence.



# Conference

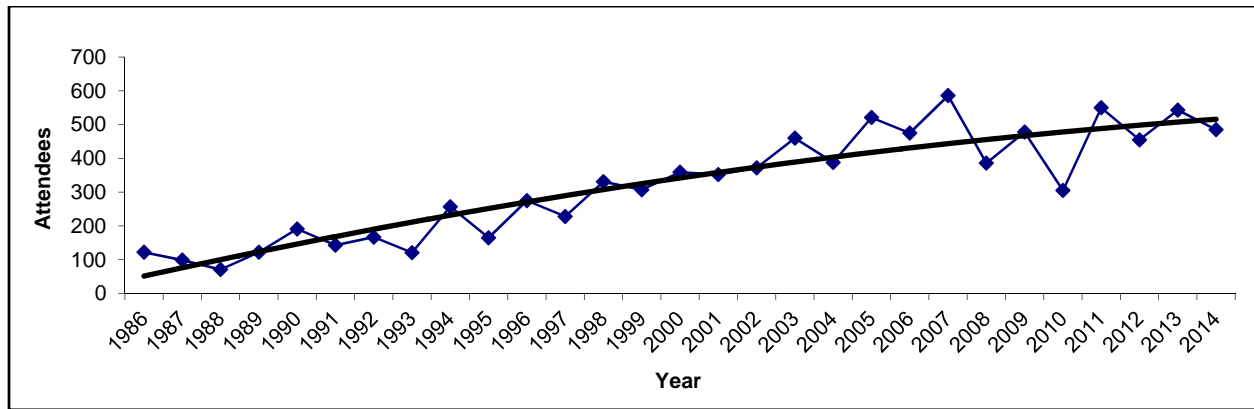
Conference management is a major part of Home Office operations for the first seven months of the year. At any one time, work is being done on the past year’s conference, the current conference, and planning for future conferences. Time spent on conference management is always a substantial percentage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

Our conference location policy has two default locations, one in North America and one in Europe. The North American default site is Cambridge, Massachusetts, USA and the European site is Delft University of Technology, Delft, Netherlands. Locations outside these 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 sponsor contacts and details continue to be managed in Microsoft Access.

Future planning is actively ongoing for the Cambridge, Massachusetts (2015) Conference which will take place on July 19<sup>th</sup> to July 23<sup>rd</sup> and Delft, Netherlands (2016) Conference to be held from July 20<sup>th</sup> to July 24<sup>th</sup>. See the 2016 preliminary *Call for Papers* with your conference materials.

**Conference Attendance by Year, 1983 – 2014**



source: \rfs 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**

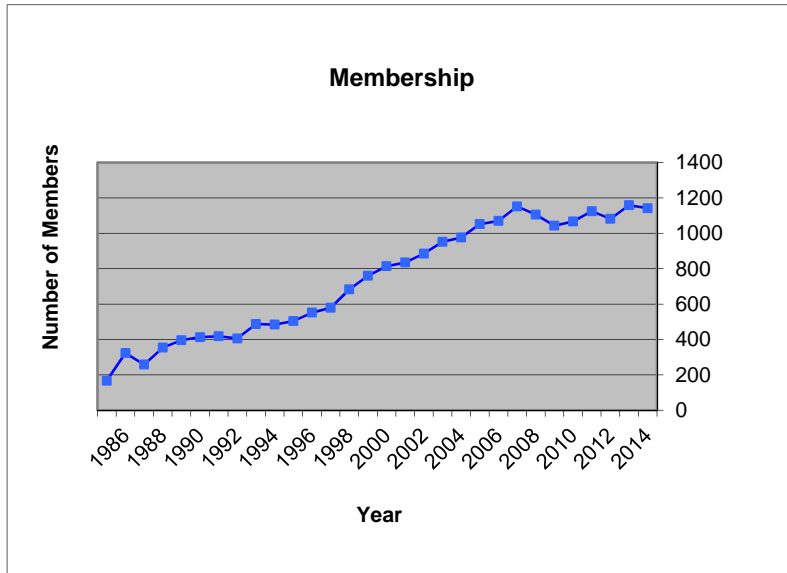
1. Conference Attendance by Year, 1983 – 2014
2. Conference Attendance by Continent Representation, 2005 – 2014
3. Conference Registration Fee Structure, 2005 – 2014
4. Conference Attendees by Type of Payment/Support, 2005 – 2014

## **B-Conference Management**

# Core

Membership constitutes the primary core activity of the Society. In 2014, our membership totaled 1,145 which is slightly down from our highest membership number ever (1,159) in 2013. The Home Office goal is to provide accurate, prompt and personal service to all members and prospective members.

## Membership Growth, 1984 – 2014



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At the end of 2014 we had 8,941 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 – 2014

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	2014	8,941

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We include a membership option on the conference registration form. For the Delft 2014 conference, we processed 90 memberships. Please see Attachment I – Conference, **A-Conference Attendance Statistics**, Conference Registration Fee Structure, 2005-2014 (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 42% of members in 2014, a slight increase from the previous year. 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 2014 number of members taking print copies is 664.

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 2014, 75% of our 2013 members renewed, which is a similar rate to the last few years.

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

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

### **A-Membership Statistics**

1. Membership over Time, 1984 – 2014
2. Membership Distribution by Sector, 2005 – 2014
3. Membership by Continent, 1997 – 2014 (List)
4. Membership by Continent, 1997 – 2014 (Graph)
5. Geographic Distribution, ten years through 2014: 78 Active of 101 Total Countries

### **B-Chapter and Special Interest Group Statistics**

1. New Chapters, 1990 – 2014
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 2014, we are in year four of our eight year contract. The Society continues to build on the existing, successful partnership we have with Wiley.

There are usually three **newsletters** produced each year by Home Office staff. The March and October newsletters feature a message from the president of the Society and other Society news. In June there is a Special Issue on Sponsor News (for both Society and Conference sponsors). Conference 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 32nd International Conference of the System Dynamics Society* (2014) and the *System Dynamics Review* Volume 30, Number 1-4 (2014). New entries and corrections are continuously being made, as the Bibliography is always a work in progress. 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 – 2014**

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+		

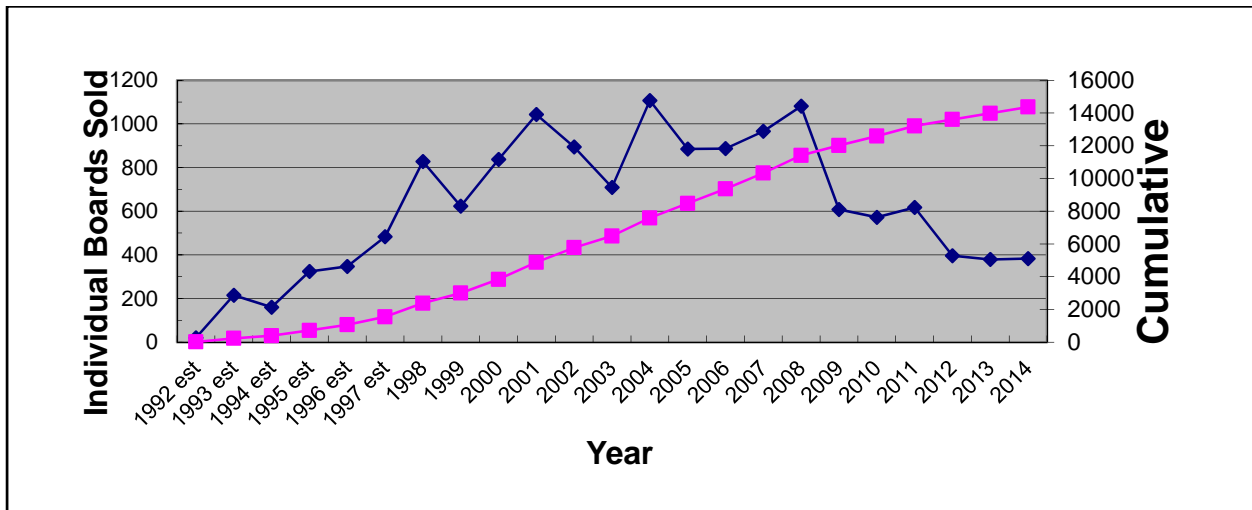
source: rls folders\statistical information\attachforye-report\bibrecordsbyyear

# 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 held steady in 2014; the Society sold 383 boards in 2014 after selling 379 in 2013. The all-time record for sales was 1,107 games sold in 2004.

**Beer Game Boards Sold, 1992 – 2014 and Cumulative**



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

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

In 2014, the \$31,065 net income from the sales “cost center” helped support all operations offered by the Society office. The number is up slightly from 2013.

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

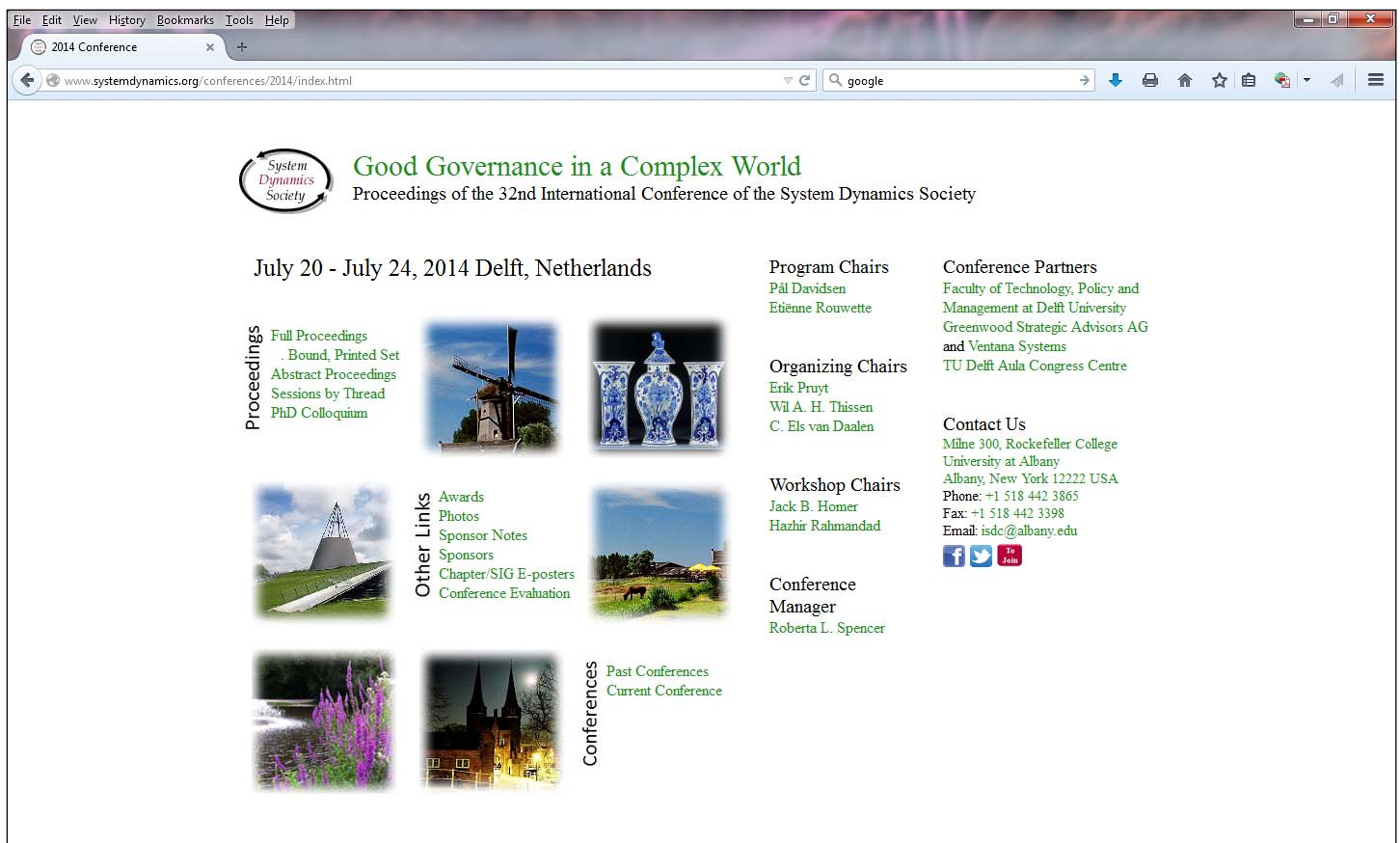
# Web Presence

We continue to use a content management format, Word Press, to manage the Society and Conference sites. We also continue to offer 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 web presence includes an online discussion forum and Facebook page as well as Twitter and LinkedIn accounts. The discussion forum has public and private discussion forums and topics. The Facebook page and the Twitter accounts have gained popularity. We reached 2,000 likes on our Facebook page in December 2014. Both social media sites are used to share news and repost information from other sources. The LinkedIn group numbered 1,666 at the end of 2014 and held international discussions regarding the future of System Dynamics, System Dynamics Education and applications of System Dynamics.

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 36 Society sponsors that sent a gift or traded services, there were two new sponsors in 2014. Our sponsors are very committed, 27 of our 2014 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, 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 82 new or renewed members joined the Society for the calendar year 2014 as a result of the Society Sponsorship incentive.

### 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 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. 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 requires approval of the Policy Council. We anticipate a vote to approve the guideline early in 2015. The Conflict of Interest Report can be found on the Governance web page of the Society website.

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

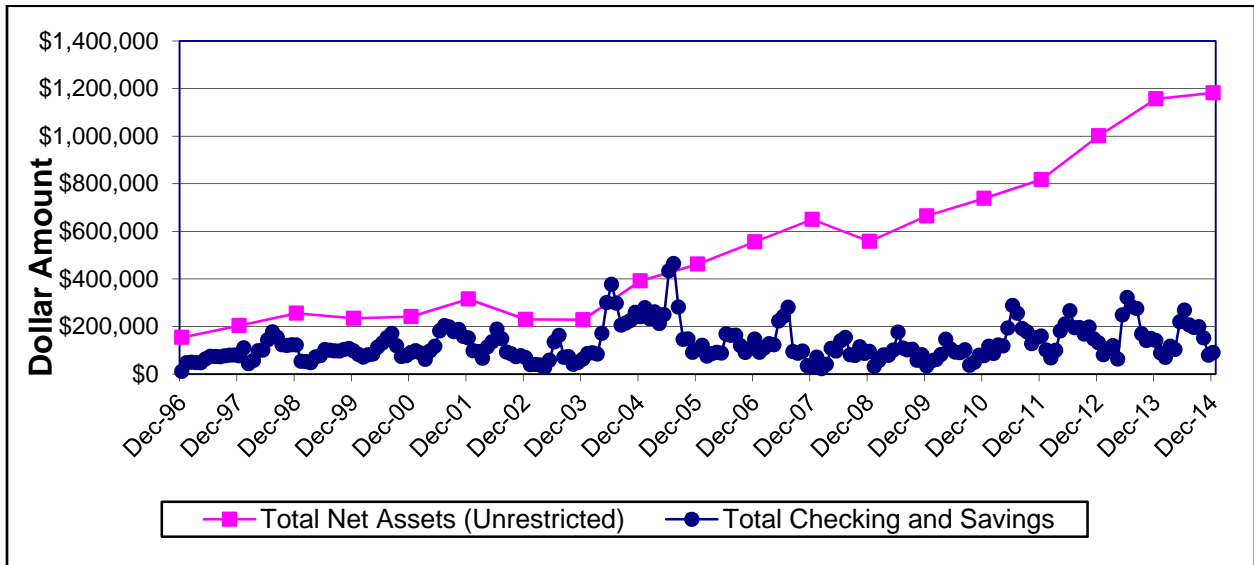


# Finances

As stated on page one, the Society is managed around five cost centers: conference, core operations, publications, sales (book and non-book) and web presence. Please refer to the Vice President of Finance report for full details. All bookkeeping files are maintained in QuickBooks with monthly and annual reconciliation performed by accounting technology advisors from 25<sup>th</sup> 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 – 2014**



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

## Part 2: Supporting Attachments

### Attachment I – Conference

#### A-Conference Attendance Statistics

##### Conference Attendance by Year, since 1983

Year	Location	Attendees	Guests
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
2006	Nijmegen, Netherlands	475	29
2005	Boston, MA USA	521	39

Year	Location	Attendees	Guests
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	
1996	Cambridge, MA USA	275	
1995	Tokyo, Japan	165	
1994	Stirling, Scotland	257	

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

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

##### Conference Attendance by Continent Representation, 2005 – 2014

	2014 Delft	2013 Cambridge	2012 St. Gallen	2011 WDC	2010 Seoul	2009 ABQ	2008 Athens	2007 Boston	2006 Nijmegen	2005 Boston
<b>Africa</b>	3%	1%	1	1	6	3	10	2	2	1
<b>N America</b>	21%	54%	23	61	17	62	22	53	28	60
<b>C/S America</b>	6%	8%	4	5	3	5	5	4	3	2
<b>Asia</b>	15%	10%	16	10	45	8	5	8	9	8
<b>Pacific</b>	1%	2%	3	2	4	2	4	4	3	3
<b>Europe</b>	54%	25%	53	21	25	20	54	29	55	26
<b>Total %</b>	100%	100%	100	100	100	100	100	100	100	100

Note: immediate pre-conference figures

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

### Conference Registration Fee Structure, 2005 – 2014

	2014 Delft	2013 Cambridge	2012 St. Gallen	2011 WDC	2010 Seoul	2009 ABQ	2008 Athens	2007 Boston	2006 Nijmegen	2005 Boston
Member Registration - Early	\$555	\$525	\$525	\$500	\$450	\$450	\$450	\$425	\$425	\$425
Non-Member Registration - Early	\$650	\$625	\$620	\$595	\$525	\$525	\$525	\$500	\$500	\$500
Additional Cost for Membership	Dependent on Dues Tier							\$15	\$15	\$15
Half year membership	1,088	1,109	1002	1,064	984	950	1,016	1,056	977	994
Memberships through registration	90	82	66	69	34	84	78	106	59	89
New members through registration	47	55	21	45	11	40	43	75	29	65

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

### Conference Attendees by Type of Payment/Support, 2005 – 2014

	2014 Delft	2013 Cambridge	2012 St. Gallen	2011 WDC	2010 Seoul	2009 ABQ	2008 Athens	2007 Boston	2006 Nijmegen	2005 Boston
Paying Members	201	246	207	247	102	196	171	298	216	274
Paying Non-Members	51	59	58	68	48	73	44	54	48	57
Supported Members	24	30	29	18	21	19	13	25	0	0
Paying Day Passes	26	6	3	3	3	7	3	1	51	19
Paying Students	109	105	87	94	76	82	105	122	96	99
Educator Scholarships	0	13	0	20	0	32	0	0	0	0
Organizers/Volunteers/Awards	27	27	22	25	31	25	16	20	22	19
Financial Assistance	0	0	0	0	0	0	0	0	0	4
Program Invite	5	0	8	0	1	2	1	1	1	6
Conference Scholarship	10	10	11	10	10	10	10	12	9	10
Sponsor Complimentary	30	47	30	61	13	32	23	53	32	33
<b>TOTAL</b>	<b>485</b>	<b>543</b>	<b>445</b>	<b>550</b>	<b>305</b>	<b>478</b>	<b>386</b>	<b>586</b>	<b>475</b>	<b>521</b>

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 the 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 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 printed abstract and web proceedings
- Support award committees, manage as needed: submissions, ceremonies, scheduling and handouts to recipients for Dana Meadows Student Prize Award, Jay W. Forrester Awards, Applications Award, Outstanding Service Award, Lifetime Achievement Award; and assist with outside awards.
- Event Insurance Coverage
- Design overall conference sponsor information (benefits, web page, etc.)
- Organize outsourcing for specialty work
- Organize the Poster Symposium
- Assist with all social program items including transportation
- Maintain the conference website
- Negotiate and work directly with the conference venue
- Work with Program Co-chairs as needed
- Work with local host as needed
- Assist in implementing any new program features
- Organize all pre-conference and during-conference outside contractor and volunteer labor
- Assist participants with: any attendance issues, including funding transfer issues and letters of invitation for visas; roommate contacts; finding appropriate lodging; and manage other unique site-specific challenges.
- Provide support for pre-conference Summer School
- Work with organizers of the PhD Colloquium

## Attachment II – Core Operations

### A-Membership Statistics

#### Membership over Time, 1984 – 2014

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

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

### Membership Distribution by Sector, 2005 – 2014

Year	Academic	Military	Private	Public	Other
2014	54	1	27	6	7
2013	55	1	28	7	9
2012	55	1	29	7	8
2011	52	1	31	12	4
2010	52	1	30	12	4
2009	51	1	32	11	5
2008	52	1	31	11	5
2007	44	3	36	14	3
2006	43	3	38	14	2
2005	42	3	39	14	2

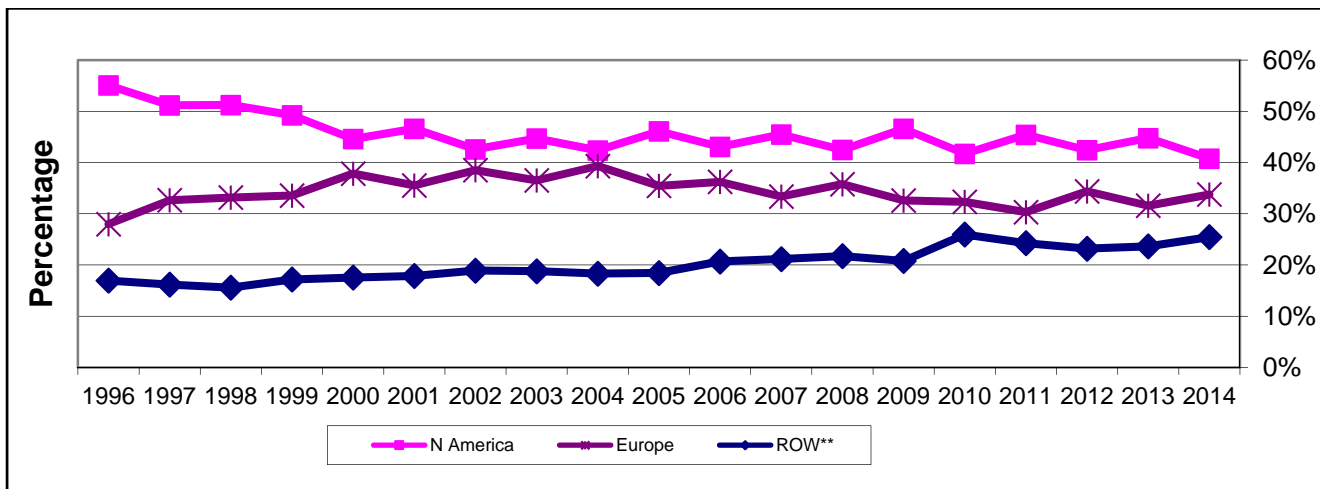
Before 2003, based on the institution name listed in the membership directory. 2003 on, self-reported by members.  
 source: \rls folders\statistical information\growth indicators\membership stats.xls\membysector

### Membership by Continent, 2005 – 2014 (List)

	2014	2013	2012	2011	2010	2009	2008	2007	2006	2005
Africa	3%	2%	2	2	2	2	2	2	2	2
N America	41%	45%	42	45	42	46	42	45	43	46
S & C America	6%	6%	5	6	6	5	4	4	4	3
Asia	13%	12%	12	12	14	9	12	11	11	10
Europe	34%	32%	34	30	32	33	36	33	36	36
Pacific	4%	4%	5	4	5	5	4	5	4	4
# of countries	78	73	70	72	69	70	71	66	64	59

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

### Membership by Continent, 1996 – 2014 (Graph)



\*\*ROW - other than N Amer. & Europe

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

**Geographic Distribution, ten years through 2014: 78 Active of 101 Total Countries**

Country	2014	2013	2012	2011	2010	2009	2008	2007	2006	2005
Albania	1	0	0	0	0	0	0	0	0	0
Argentina	7	6	5	4	4	4	3	3	3	1
Armenia	1	0	0	0	0	0	0	0	0	0
Australia	36	40	36	36	39	39	33	40	34	33
Austria	10	7	9	8	6	5	6	4	4	3
Bahrain	0	1	0	0	0	0	0	0	0	0
Bangladesh	0	0	0	0	0	0	1	1	1	1
Barbados	1	2	0	0	0	0	0	0	0	0
Belgium	6	3	3	6	9	8	10	10	14	9
Bermuda	0	0	0	0	0	0	1	0	0	0
Bolivia	0	0	0	1	1	1	1	0	0	0
Bosnia	0	0	0	1	1	0	0	0	0	0
Botswana	1	1	1	2	0	0	0	0	0	0
Brazil	32	27	25	30	23	19	16	18	21	21
Bulgaria	3	1	0	1	1	0	0	0	0	0
Cambodia	1	1	1	0	0	0	0	0	1	1
Canada	27	31	29	28	25	27	29	25	25	26
Chile	4	4	3	4	4	5	5	6	4	3
China	26	26	25	30	32	13	16	16	17	6
Colombia	15	16	13	15	15	14	11	12	6	5
Costa Rica	1	2	2	1	1	1	1	1	2	2
Crete	0	0	0	0	0	0	1	0	0	0
Croatia	6	5	6	8	8	9	14	11	13	8
Cuba	0	0	1	1		1	0	0	0	0
Cyprus	3	2	2	2	2	2	3	2	3	1
Czech Rep	5	4	6	6	3	5	6	3	4	5
Denmark	3	5	5	6	6	4	4	4	5	4
Ecuador	0	1	0	1	0	0	0	0	0	0
Egypt	3	4	9	13	8	5	7	9	8	9
Finland	6	6	3	4	2	3	4	5	6	5
France	11	8	11	15	13	14	9	9	8	11
Georgia	0	1	1	1	0	0	0	0	0	0
Germany	55	46	55	47	50	55	56	60	57	54
Ghana	0	1	0	0	1	1	0	1	1	1
Greece	7	8	5	8	13	12	14	6	7	8
Hong Kong	0	1	0	0	0	3	3	3	2	2
Hungary	3	2	4	1	0	0	0	1	1	0
Iceland	2	4	3	1	1	1	1	3	0	0
India	10	11	15	15	17	15	14	14	11	6
Indonesia	18	18	13	10	12	7	6	10	9	8
Iran	5	6	7	6	6	5	11	7	3	3
Ireland	4	3	3	2	2	1	1	1	1	2
Israel	1	1	2	1	1	1	2	2	1	1
Italy	25	26	21	19	21	20	25	21	22	22
Jamaica	0	0	0	0	1	0	0	0	0	0
Japan	24	25	20	20	20	19	24	29	26	29
Jordan	0	2	0	0	0	0	0	0	1	1
Kazakhstan	0	1	1	0	0	0	0	0	0	0
Kenya	3	0	0	0	0	0	0	0	0	0
Kosovo	1	1	1	0	0	0	0	0	0	0
Kuwait	1	0	0	0	0	0	0	0	0	1
Latvia	3	4	3	11	4	2	0	2	1	0

System Dynamics Society Annual Report on Home Office Operations, Fiscal Year 2014

Country	2014	2013	2012	2011	2010	2009	2008	2007	2006	2005
Lebanon	3	1	1	1	1	1	1	1	1	1
Liechtenstein	0	0	0	0	0	0	1	1	0	0
Lithuania	1	1	1	0	1	0	0	0	0	0
Macao	0	0	0	0	1	1	2	0	0	0
Malaysia	8	9	5	7	6	4	6	8	5	2
Mauritius	1	0	0	1	2	0	1	0	0	0
Mexico	17	17	11	8	8	14	12	12	13	12
Myanmar	0	0	0	2	0	2	0	0	0	0
Nepal	0	0	0	0	0	1	0	0	0	0
Netherlands	49	45	42	30	27	30	36	43	38	33
New Zealand	11	11	13	12	11	10	13	13	12	11
Nigeria	5	5	3	2	2	2	3	1	1	1
Norway	23	25	28	21	28	18	24	24	28	24
Pakistan	8	0	1	1	1	1	9	9	9	10
Panama	2	0	0	0	0	0	0	0	0	0
Peru	4	3	3	4	5	2	2	1	1	1
Philippines	4	3	4	4	4	1	2	2	1	0
Poland	7	7	7	8	10	6	8	7	7	6
Portugal	2	2	3	2	0	3	5	6	6	9
Puerto Rico	0	0	2	3	3	4	2	3	2	2
Romania	2	1	1	0	0	0	1	0	0	0
Russia	9	12	10	7	7	10	11	9	6	8
Rwanda	1	0	0	0	0	0	0	0	0	0
Saudi Arabia	2	2	3	3	4	3	3	1	2	2
Scotland	1	0	0	0	0	0	0	0	0	0
Senegal	0	0	0	0	0	0	1	1	1	0
Serbia	1	0	0	0	0	0	0	0	0	0
Singapore	9	11	12	11	9	4	5	4	5	4
Slovak Republic	0	0	1	2	2	1	2	2	1	0
Slovenia	2	3	2	2	3	3	2	2	4	2
South Africa	15	12	5	8	8	7	8	8	6	6
South Korea	14	6	10	9	16	6	11	9	12	9
Spain	7	11	14	18	19	19	22	20	21	17
Sweden	10	9	12	8	12	14	14	11	10	12
Switzerland	37	35	37	28	32	24	29	30	34	33
Taiwan	6	5	5	7	9	7	7	9	11	11
Thailand	2	1	1	2	3	1	3	1	0	0
Trinidad	0	0	0	0	0	1	0	0	0	0
Tunisia	0	0	0	0	0	0	0	1	0	0
Turkey	9	10	10	13	10	6	8	7	8	11
Uganda	2	0	0	0	0	1	1	0	0	0
Ukraine	2	1	2	2	0	0	0	1	1	1
United Arab Emirates	1	3	3	2	3	4	2	2	1	0
United Kingdom	70	68	61	53	52	65	79	78	79	85
United States	423	471	417	472	409	441	426	482	420	445
Uruguay	1	1	1	2	2	2	1	0	0	0
Venezuela	1	3	1	2	2	1	3	4	2	2
Vietnam	1	1	1	2	1	1	1	0	0	0
West Indies	1	0	0	0	0	0	0	0	0	0
Yemen	0	0	0	1	1	1	1	0	0	0
<b>Totals</b>	<b>1145</b>	<b>1159</b>	<b>1082</b>	<b>1125</b>	<b>1066</b>	<b>1043</b>	<b>1106</b>	<b>1152</b>	<b>1070</b>	<b>1052</b>

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



## B-Chapter and Special Interest Group Statistics

### New Chapters, 1990 – 2014

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

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

### Special Interest Groups (year approved)

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

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

## C-Routine Operations – Other Processes

- Manage and update all Society information and communication vehicles
- Find the best suppliers, improve when possible, maintain inventory, and fill orders for all current products:
  - Fish Banks Ltd. Game-New!
  - 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 18)
- Bibliography and updates: maintain and post to Bibliographic Updates page as new references are added
- Respond to all inquiries including general member inquiries / member services / non-member questions
- Receive and record all new and renewal memberships and send information to Wiley to distribute the journal
  - Membership maintenance, recruitment, and yearly retention analysis
  - Record and calculate payments to our publisher
- Archive systems: records retention and preservation
- Maintain, improve and monitor website and related social media
- Manage campaigns for growth
  - Membership, new and renewal
  - Society sponsorship solicitation and subsequent management
  - Library campaign for institutional subscriptions
  - Conference sponsorship
  - Volunteer campaign
  - Other as needed, for example, the Dana Meadows Endowment
- Maintain on-line membership directory
- Maintain SD Career Link on the website and as a job message board at each conference
- Maintain a list of Courses in SD on the website
- Produce and distribute *System Dynamics Newsletter* up to four times per year (electronic and hard copy)
- Manage Administrative Calendar and Processes (see Attachment V)
- Assist with all aspects of conference management
- Continuously strive for less use of paper and postal services
- Update the Conference Guide after each conference

## Attachment III – Sales

### Sales, Ten years through 2014

Items Sold	2014	2013	2012	2011	2010	2009	2008	2007	2006	2005
Beer Game Boards including loaner boards	383	379	396	617	557	608	1,082	996	878	894
Proceedings	0	0	0	4	105*	0	2	6	190*	57
<i>System Dynamics Review</i>	0	0	0	8 single 0 sets	19 single 6 sets*	19 single 1 set	6 single 0 sets	8 single 1 set	900* single 0 sets	5 single 0 sets
Forrester PhD Seminar	2	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
MIT Literature Collection	4	7	11	16	14	15	19	19	42	80
Electronic Oracle	12	2	5	3	59*	2	9	178		
Fireside Chat	11	2	2	4	30*	0	4	37		
Books**	190									
Fish Banks Ltd**	2									

\* increase due to special sale

\*\* New in 2014

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

### Book Sales by Title

Book Title	2014
Alternatives to Growth	7
Dynamics of Commodity Production Cycles	11
Dynamo User's Manual	3
Electronic Oracle	12
Elements of the System Dynamics Method	17
Feedback Thought in Social Science	17
First Edition, World Dynamics	1
Industrial Dynamics	19
Introduction to System Dynamics Modeling	15
Introduction to Urban Dynamics	12
Managerial Applications of System Dynamics	10
Principles of Systems (Electronic Version)	16
Readings in Urban Dynamics, Volume 1	8
Study Notes in System Dynamics	16
Toward Global Equilibrium	7
World Dynamics, 2nd Edition	19
<b>Total</b>	<b>190</b>

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

## Attachment IV – All Sponsors by Type

### Society and Conference Sponsors 2011 through 2014

#### Corporations:

AIMS IIc & ConfluentC IIc<sup>1</sup>  
 Analytic Services Inc/ASysT<sup>1</sup>  
 AnyLogic North America, XJ Technologies<sup>1,2</sup>  
 Argonne National Laboratory<sup>2</sup>  
 Atkins Nutritionals, Inc.<sup>3</sup>  
 Berkeley Research Group  
 The Boeing Company<sup>1</sup>  
 Bolide Pty Ltd<sup>1</sup>  
 Allen L. Boorstein<sup>1,2</sup>  
 Booz Allen Hamilton  
 Bumblebar<sup>3</sup>  
 Complexio  
 Continental Tires  
 Copernicos Group BV<sup>2</sup>  
 CROSSMARK  
 CTN Management Development  
 Decision Advancement  
 Decision Dynamics, Inc.<sup>1</sup>  
 Dynaplan AS  
 Evans & Peck Pty Ltd.  
 FoodShouldTasteGood, Inc.<sup>®3</sup>  
 Forio Online Simulations<sup>2</sup>  
 Goldsim Technology Group  
 Greenwood Strategic Advisors AG<sup>2</sup>  
 Helvetia Versicherungen  
 Homer Consulting<sup>1</sup>  
 Honest Weight Food Co-op<sup>3</sup>  
 HTxA-High Tech x Agency<sup>2</sup>  
 IBM  
 Idaho National Laboratory  
 International Society for the Systems Sciences (ISSS)<sup>2,3</sup>  
 isee systems<sup>1,2</sup>  
 Jantz Management LLC<sup>1,2</sup>  
 Lane Press of Albany<sup>2,3</sup>  
 Leverage Networks<sup>2</sup>  
 Livingston Hamilton Rentals GmbH  
 Lundberg Family Farms<sup>3</sup>  
 The Manufacturing Game<sup>®</sup>/Ledet Enterprises<sup>1,2</sup>  
 Mary's Gone Crackers<sup>3</sup>  
 Mayor of St. Gallen and Canton of St. Gallen  
 Millenium Institute  
 MITRE Corporation<sup>1,2</sup>  
 Mohaseboon Financial and Business Consultants  
 National Institutes of Health  
 Nature's Bakery<sup>3</sup>  
 Nonni's Food LLC<sup>3</sup>

Northwater Capital Management, Inc.<sup>1</sup>  
 OBSSR, National Institutes of Health  
 Organic Food Bar Inc.<sup>3</sup>  
 PA Consulting Group<sup>1,2</sup>  
 Patni Holdings, LLC<sup>1</sup>  
 Paul Scherrer Institute<sup>3</sup>  
 Pegasus Communications  
 Powersim Software AS  
 Powersim Solutions, Inc.  
 PricewaterhouseCoopers  
 PROGNOZ  
 Proverbs Corporation  
 Ratcliff Architects<sup>3</sup>  
 Raw Indulgence Ltd<sup>3</sup>  
 RoCC-Responsible Corporate Competitiveness Initiative at the University of St. Gallen  
 SACU<sup>1</sup>  
 Sandia National Laboratories<sup>2</sup>  
 Semantum<sup>2</sup>  
 SoL, the Society for Organizational Learning<sup>1,3</sup>  
 Stiftung zur Förderung der Systemorientierten Managementlehre (Foundation for Systems-Oriented Management Education)  
 Springer  
 Strategy Dynamics<sup>2</sup>  
 Synapse Energy Economics, Inc.  
 Systems Thinking Collaborative<sup>1</sup>  
 transentis management consulting GmbH & Co. KG<sup>1,2</sup>  
 Vanguard Strategy  
 Ventana Systems, Inc.<sup>1,2</sup>  
 Ventana Systems UK<sup>1</sup>  
 ViaSim Solutions<sup>1</sup>  
 Whole Systems Partnership<sup>1,2</sup>  
 Wiley-Blackwell<sup>2,3</sup>  
 Windhaven Business Management, Inc.<sup>1</sup>  
 Anonymous<sup>1</sup>

#### Universities and University Centers:

EMSD: Erasmus Mundus European Master Programme in System Dynamics<sup>2</sup>  
 Faculty of Technology, Policy and Management at Delft University<sup>2</sup>  
 Georgia Health Policy Center, Georgia State University<sup>2</sup>  
 Health Services and Systems Research, Duke-NUS Graduate Medical School  
 HSG Alumni, University of St. Gallen  
 Policy Analysis Group, Faculty of Technology, Policy & Management, Delft University of Technology<sup>1</sup>  
 Social System Design Lab  
 Washington University in St. Louis<sup>1,2</sup>  
 System Dynamics Group, Massachusetts Institute of Technology<sup>1</sup>  
 System Dynamics Group, Nijmegen School of Management, Radboud University Nijmegen<sup>1</sup>  
 System Dynamics Group  
 University at Albany<sup>1,3</sup>  
 System Dynamics Group,  
 University of Bergen<sup>1</sup>  
 System Dynamics Group, Institute of Management, University of St. Gallen  
 TU Delft Aula Congress Centre<sup>2</sup>  
 Worcester Polytechnic Institute (WPI)<sup>1,2</sup>

#### Individual Sponsors:

Jay W. Forrester<sup>1</sup>  
 Dr. Don Frazier<sup>1</sup>  
 Gary B. Hirsch<sup>1</sup>  
 William Killingsworth  
 Anonymous<sup>1,2</sup>

#### Individual Donors:

Anonymous<sup>1,2</sup>

<sup>1</sup> 2014 Society Sponsor

<sup>2</sup> 2014 Conference Sponsor

<sup>3</sup> 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 2014

including year-end adjusting entries	2014	2013	2012	2011	2010	2009	2008	2007	2006	2005
<b>ASSETS</b>										
<b>CURRENT ASSETS</b>										
Cash (ckg/svg/PayPal)	\$ 153,439	167,525	155,804	179,969	80,850	34,781	95,538	42,615	150,573	132,148
Investments	\$ 972,583	898,711	752,541	616,709	603,166	560,117	460,374	595,364	474,826	358,897
Accounts receivable	\$ 61,830	60,545	62,653	0	0	30	1,171	0	0	0
Inventory (at cost)	\$ 23,009	26,220	19,843	25,970	20,807	23,447	10,695	0	0	0
Prepaid expenses	\$ 51,271	74,889	81,782	54,558	82,904	68,024	32,294	38,938	0	0
<b>Total Current Assets</b>	<b>\$ 1,262,132</b>	<b>1,227,890</b>	<b>1,072,623</b>	<b>877,206</b>	<b>787,727</b>	<b>686,399</b>	<b>600,072</b>	<b>676,917</b>	<b>625,399</b>	<b>491,045</b>
<b>PROPERTY (Fixed Assets)</b>										
Furniture and equipment	\$ 651	651	1,263	1,263	1,263	11,046	11,046	11,046	11,046	11,046
Less: Accumulated depreciation	\$ -651	-651	-1,263	-1,263	-1,263	11,046	11,046	11,025	10,963	10,690
<b>Total Property (Fixed Assets)</b>	<b>\$ 0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>21</b>	<b>83</b>	<b>356</b>
<b>OTHER ASSETS</b>										
Restricted securities / funds	\$ 117,205	104,465	92,242	83,661	76,386	71,657	67,437	73,136	70,341	66,528
<b>TOTAL ASSETS</b>	<b>\$ 1,379,337</b>	<b>1,332,355</b>	<b>1,164,865</b>	<b>960,867</b>	<b>864,113</b>	<b>758,056</b>	<b>667,509</b>	<b>750,074</b>	<b>695,823</b>	<b>557,929</b>
<b>LIABILITIES &amp; NET ASSETS</b>										
<b>CURRENT LIABILITIES</b>										
Accounts payable	\$ 4,012	903	1,742	5,574	2,863	612	1,282	0	0	0
Accrued expenses (conf related)	\$ 0	0	0	0	0	0	0	0	32,536	1,060
Membership Sub. Payable	\$ 11,567	12,825	12,466	10,679	13,287	12,517	19,957	21,823	32,068	23,190
Deferred revenue (conf/cust)	\$ 55,572	48,124	47,166	43,583	32,164	3,393	15,900	0	0	0
Custodial account liability	\$ 9,075	9,225	9,900	0	0	0	0	0	0	0
Misc. liabilities (sales tax, etc)	\$ 0	0	0	0	184	65	314	85	49	0
Royalty Advance	\$ 0	0	0	0	0	5,000	5,000	5,000	5,000	5,000
<b>Total Liabilities</b>	<b>\$ 80,226</b>	<b>71,077</b>	<b>71,274</b>	<b>59,836</b>	<b>48,498</b>	<b>21,587</b>	<b>42,453</b>	<b>26,908</b>	<b>69,653</b>	<b>29,250</b>
<b>NET ASSETS</b>										
Unrestricted - General fund	\$ 1,181,906	1,156,813	1,001,349	817,370	738,480	664,812	557,619	650,030	555,829	462,151
Temporarily Restricted	\$ 117,205	104,465	92,242	83,661	77,135	71,657	67,437	73,136	70,341	66,528
<b>Total Net Assets</b>	<b>\$ 1,299,111</b>	<b>1,261,278</b>	<b>1,093,591</b>	<b>901,031</b>	<b>815,615</b>	<b>736,469</b>	<b>625,056</b>	<b>723,166</b>	<b>626,170</b>	<b>528,679</b>
<b>TOTAL LIABILITIES &amp; NET ASSETS</b>	<b>\$ 1,379,337</b>	<b>1,332,355</b>	<b>1,164,865</b>	<b>960,867</b>	<b>864,113</b>	<b>758,056</b>	<b>667,509</b>	<b>750,074</b>	<b>695,823</b>	<b>557,929</b>

source: \rls folders\executive director & vpf reports\2015\annual report\ multi yr balance sheet comparison thru 2014.xlsx

**Revenue and Expenses Comparison, 10 years through 2014**

		2014	2013	2012	2011	2010	2009	20108	2007	2006	2005
<b>Ordinary Income/Expense</b>	<b>Income</b>										
	Conversion from Accrual to Cash	\$ 0	0	0	0	0	0	0	137	3,185	672
	INC Conferences	\$ 294,654	303,765	327,607	303,463	173,561	233,148	156,401	264,081	214,907	219,255
	Journal Income	\$ 84,621	81,676	84,889	85,514	56,292	51,963	43,499	44,375	39,900	41,122
	Membership Dues	\$ 65,909	64,487	59,968	63,636	58,741	57,389	61,696	58,597	48,042	80,629
	Other Income	\$ 668	725	0	0	0	0	-165	0	164	269
	Products	\$ 53,908	49,828	47,170	75,106	69,590	71,654	126,685	112,988	114,296	111,622
	Shipping and Handling Income	\$ 9,032	7,320	9,829	11,394	17,691	13,878	25,010	19,671	20,191	18,574
	Sponsor Dues and Donations	\$ 36,350	33,150	40,106	41,001	18,500	30,125	44,375	27,595	40,284	35,952
	Investment Allocations	\$ 0	0	0	0	0	0	0	0	0	0
	<b>Total Income</b>	\$ 545,142	540,950	569,569	580,114	394,374	458,157	457,501	527,444	480,969	508,095
	<b>Cost of Goods Sold</b>	\$ 7,915	10,249	11,161	14,246	10,214	3,564	14,874	30,247	33,768	30,062
	<b>Gross Profit</b>	\$ 537,227	530,701	558,408	565,868	384,160	454,593	442,627	497,197	447,201	478,033
	<b>Expense</b>										
	Awards-Dana Meadows	\$ 1,500	750	1,200	1,200	1,200	1,200	1,200	1,200	0	0
	Awards-Others	\$ 1,220	0	4,998	0	6,900	0	5,097	5,244	5,086	5,494
	Bank & CC Fees	\$ 9,729	12,528	13,034	13,609	9,598	15,092	14,865	16,812	11,659	12,100
	Field Dev (\$20K Max)	\$ 17,500	6,405	0	4,000	0	0	0	0	0	0
	Contracted Expenses at UAlbany	\$ 332,483	298,280	277,709	279,400	261,719	253,739	190,610	203,356	203,355	207,855
	Depreciation Expense	\$ 0	0	0	0	0	0	21	62	273	697
	EXP Conferences	\$ 141,518	133,283	149,847	121,091	62,350	92,754	98,777	116,894	81,490	72,291
	Insurance	\$ 5,218	4,645	5,595	2,013	1,354	0	0	0	0	0
	Journal Expense	\$ 20,000	20,000	20,000	19,763	20,000	20,000	20,000	12,000	12,000	12,000
	Marketing (Sponsor Trade)	\$ 2,000	0	0	0	0	0	0	0	0	0
	Membership Directory Exp	\$ 0	615	2,340	2,170	2,074	1,958	1,872	1,812	1,800	1,526
	Membership Services	\$ 0	0	0	0	1,060	2,765	1,220	955	1,165	0
	Miscellaneous Expense	\$ 796	683	1,996	816	1,886	311	379	341	486	25,140
	Office Expense	\$ 5,280	4,416	3,354	5,235	4,571	14,417	26,200	19,105	17,999	20,765
	Officer Expenses (=Travel CPA)	\$ 10,228	9,871	9,614	10,197	5,417	5,955	5,153	6,108	6,633	7,748
	PHD Luncheon @ Conf	\$ 837	1,000	0	0	0	0	0	0	0	0
	Product Dev.	\$ 0	0	0	0	0	0	64	0	528	0
	Professional Fees	\$ 42,831	35,132	40,761	38,953	32,338	40,284	35,642	61,411	58,573	56,016
	Repairs	\$ 0	0	0	0	0	0	0	0	0	287
	<b>Total Expense</b>	\$ 591,140	527,606	530,448	498,446	410,467	448,475	401,100	445,300	401,046	421,918
	<b>Net Ordinary Income</b>	\$ -53,912	3,095	27,960	67,422	-26,307	6,118	41,527	51,897	46,155	56,115
	<b>Other Income</b>	\$ 89,580	161,659	96,556	27,865	102,963	103,461	-142,709	42,147	48,417	15,373
	DMA Endow. Fund Camp.	\$ 0	0	0	0	0	0	0	0	100	34,125
	DM Investment Inc	\$ 2,164	2,933	3,673	2,826	2,490	1,833	3,073	2,954	2,818	746
	<b>Total Other Income</b>	\$ 91,745	164,593	100,229	30,691	105,453	105,294	-139,636	45,101	51,335	50,245
	<b>Net Income</b>	\$ 37,832	167,688	128,189	98,113	79,146	111,412	-98,109	96,998	97,490	106,359

source: \rls folders\executive director & vpf reports\2015\annual report\ multi yr revenue & expenses comparison thru 2014.xlsx

