

Guidelines for the Program of the International System Dynamics Conference

V0.05 February, 2016

Version History

- V0.01 October 6, 2011. Prepared by Rogelio Oliva (SPOC Chair). Captures experience from the 2007 conference, conversations with program chairs for the 2009 conference, and debriefing meeting with the chairs of the 2011 conference.
- V0.02 November 21, 2011. Prepared by Rogelio Oliva (SPOC Chair). Incorporates feedback from past program chairs to v0.01 and adjustments after the Thread Chair selection and appointment process during the fall of 2011.
- V0.03 July 10, 2012 Prepared by Bob Eberlein (upcoming Program Chair) The roles of the SPOC and Workshop Chair were added in order to bring more of the non-administrative program related issues into a single document. The section on Conflict of Interest was added.
- V0.04 December, 2012 Prepared by Bob Eberlein (incoming Program Chair). Created details regarding the new proposed Thread Chair rotation process.
- V0.05 February, 2016: Prepared by Andreas Größler (SPOC Chair). Clarifications, minor stylistic/language improvements.

Document Purpose

The purpose of this document is to capture the lessons and insights developed by System Dynamics Conference Program Committees so that they can easily be transferred to their successors. It also serves as the source of record for the list of threads to be used for the upcoming conference. Ideally, this document should be continuously updated as new issues and resolutions emerge, but at least one update a year should be done based on the SPOC debriefing as described below. The responsibility of updating this document is that of the SPOC chair but all changes to policy and practices should be approved by the full SPOC. While all topics related to the conference program could be captured in this document, its main focus should be in the preparation of the conference academic program.

SPOC (Society Program Oversight Committee)

The SPOC is a Standing Committee of the Society charged with overseeing and providing guidance to the Program Committee, consisting foremost of the Program Chairs of future conferences but also of local organizers and the society's administrative staff. The SPOC performs the following functions during each calendar year:

1. During the Winter Policy Council Meeting, make a report outlining activities and guideline updates and record into the minutes as supporting material copy of these guidelines as they have been revised in the previous calendar year.
2. Before April, select the Workshop Chairs for the conference to be held the following year.
3. In preparation for the Summer Policy Council Meeting, recruit two or more Program Chairs, at least one of whom has previously served as a Program Chair, for the conference two

years in the future. These chairs will be approved by a vote of the Policy Council. Note that this activity may be carried out earlier for an earlier approval by the Policy Council if deemed appropriate.

4. (Optionally) During the conference, have a meeting to discuss program related issues. This meeting, if held, would be the first part of the SPOC debriefing.
5. Gather comments from the Program Chairs, Thread Chairs, Workshop Chairs and Conference Executive as a basis for updating this document. Ideally, such debriefing sessions should be held when experiences are fresh, for example, right after the Thread Chairs have classified papers, or Program Chairs have designed the conference program.
6. Select the set of Threads to be included in the upcoming conference and their respective chairs (more details on this below). This needs to be completed before the end of October.
7. Approve the modification of this document based on the changes from the debriefing and the updated Thread list.

Members of the SPOC are appointed for three year terms. Though the SPOC does not have any ex-officio members, it is recommended that one of the (experienced) incoming thread chairs be appointed to the Committee the year prior to his or her tenure. The chairmanship of the SPOC will normally rest with the previous year's Program Chair; other openings in the committee are filled based on recommendations of the remaining members, preferably resulting in staggered terms of members. All members need to have the approval of the Policy Council as with all Standing Committees of the Society.

Plenary, Parallel and Poster Sessions

Plenary Sessions

The conference plenary sessions are one of the critical elements of the conference program. Not only do they have a wider impact on the attendees as all the conference participants benefit from it, but it is also the most mentioned item in the program when asking members to judge the quality of the conference. As such, plenary sessions deserve special planning and consideration from the program chairs (PC). Following are some guidelines for structuring plenary sessions.

1. It is often the case that not enough 'plenary quality' papers emerge from the regular submissions to the conference. As such, the PC needs to take a proactive role in inviting guest speakers for this session. These invited speakers are also a good way to shape the conference around the desired conference themes. In the last few conferences, only about 60% of the plenary talks have been based on papers submitted to the conference (the other 40% being guest speakers). The 25th anniversary conference (Boston, 2007) and the Boston 2015 conference were an exception to this, as most of the plenary sessions were invited.
2. When selecting a paper for a plenary session, please keep in mind that a great paper does not necessarily mean a great presentation. Ideally, only *excellent* speakers should be selected to deliver plenary presentations. Of course, we can take some risks in this dimension, but if a speaker of unknown quality, or English speaking skills, is being considered, the PC should try to obtain references from colleagues.
3. Program Chairs should help the speakers structure their presentation so that the presentations become more effective in the context of the other presentations in the same plenary. For instance, a great paper might be selected for a plenary because of its methodological approach. If the other papers in that plenary were selected to provide an interesting methodological contrast, it would be inappropriate for the presenter to spend most of the time talking about her results while ignoring the methodological dimension of

the paper. Good design and coaching from the PC will do wonders to structure the plenary session and make it more effective. Program chairs may ask plenary speakers to send their slides and presentations in advance for comment and suggestions, and the PC should review these to make sure the presentation suits the context of a plenary talk, will fit in the time available, are compelling, and fit with the other presentations in the session. Program Chairs should not, of course, seek to alter the substance of these presentations (unless there is objectionable or inappropriate material).

4. To the extent possible, efforts should be made to increase the diversity of speakers and moderators in the plenary sessions—but not at the cost of quality of contributions and/or presentation. Plenary session moderators are chosen by the PC.

Parallel and Poster Sessions

The remainder of the conference academic program (parallel and poster sessions) is organized by academic threads. As such, the Program Chair relies on the Thread Chairs (TCs) to structure a Thread Suggested Program (TSP). Specifically,

1. TCs recommend to the PC whether a paper allocated to their thread should be accepted or rejected, and if accepted, whether the paper deserves to be in a poster, a poster+, a parallel, a parallel+, or a plenary session. Classification of papers should only be into the categories approved by the PC. For instance, a few years ago we used the category 'research session.' Those sessions have been discontinued, yet some TCs still classify papers in this category. Instructions on what categories are acceptable should be clearly communicated to TCs (see next section).
2. TCs need to provide a justification (one or two sentences) for the allocation decision. This is particularly important when the final recommendation differs from the recommendation of one of the reviewers of the papers. If the recommendation is to reject a paper, and none of the reviews support that position, the thread chair should also include a brief review for the authors.
3. Provide a grouping of papers into parallel sessions and a justification (one or two sentences) on the reason or theme behind the grouping. In structuring these parallel sessions, the TCs should take care to:
 - a. Create a title for the session to be listed in the program schedule.
 - b. Consider only papers within their thread.
 - c. Consider only papers that have been deemed worthy of a parallel session, i.e., don't fill the required number of papers in a parallel session with papers originally classified as poster, poster+, or plenary. The role of the poster+ classification is to allow the PCs to complete a session in case of withdrawal from an author in a parallel. As such, poster+ papers should be of enough quality to be in a parallel session but are probably not there because of a lack of fit.
 - d. All parallel sessions should include three papers. If groupings are not evident, or there are not enough papers to fill a parallel session, the TCs should leave an incomplete session and let the PCs fill them with papers from other threads or by reallocating papers into the parallel status.
4. By their nature, the TSP will be incomplete and will not consider overall optimization of the conference program. It is the responsibility of the PCs to resolve all the conflicts, decide on the final allocation of papers for the plenary sessions, and structure all the parallel sessions. See the next section for guidelines on how to manage the thread chairs.
5. The PCs are responsible for the final decision on all papers and should only take the TSPs as recommendations. For example, the PC can decide that a higher rejection rate is needed to maintain the program within the space and time constraints of the conference, and to ensure high overall quality for the conference.

6. Parallel session moderators are organized by the home office.

Conflicts of Interest

A Thread Chair may submit a paper for presentation. That thread chair should not make any recommendation as to the disposition of that paper. In addition, even though reviewer's names are never shown to a listed author, the Thread Chair should not view the Program Committee Review page for his or her paper. If there are two Thread Chairs, the second Thread Chair should make a recommendation by email (not using the Web Portal) to the Program Chairs and they will make the decision. If there is only one Thread Chair, or if both Chairs are authors, then he, she or they should send a note to the Program Chair informing them of the paper number.

If one of the Program Chairs is a named author on a paper, then they should recuse themselves from making any choice as to the disposition of the paper. The Program Chairs should not submit any papers for which they would be the designated presenter, nor should they submit any paper for which all program chairs are named authors. If a Program Chair is a named author on a paper that is appropriate for plenary presentation, the Program Chairs shall request the approval of the SPOC before scheduling it.

Managing Threads and Thread Chairs

If Thread Chairs (TCs) do not perform their job effectively, all conflicts will have to be addressed and resolved by the PC—see previous section. Thus, setting expectations for the thread chairs is one of the most significant activities for the SPOC and the PCs. The job of structuring the conference program will be made simpler to the extent that the PCs can effectively set the expectations and manage the TCs. Here are some basic guidelines for that process.

1. Two TCs are appointed for each Thread.
2. TCs will normally serve a term of 4 years with two years of overlap between each pair when possible.
3. PCs should keep a log of interactions with TCs that highlight good and bad experiences, confusion or suggestions to improve the coordination of Thread and Program experiences.
4. The outgoing PCs should send a 'thank you' note to all the TCs after their work is completed (in June or July) and, with it, solicit feedback on the experience, recommendations for a replacement if one is rotating out and whether the TCs not rotating out are willing to continue serving next year. The email should note that re-appointments are not automatic and that the new PCs, in conjunction with the SPOC, will be responsible for those re-appointments.
5. After the conference (in August or September), all Threads, Thread Definitions and TCs should be evaluated by the conference PCs. The outgoing PCs should provide to the SPOC and incoming PCs:
 - a. Recommendations for splitting, joining, dropping or adding Threads. These recommendations should be based on volume of submissions, coherence of submissions and relevance of work in the Threads.
 - b. Recommended adjustments of Thread descriptions.

- c. Recommendations for TCs (continuing and new) for both the existing and proposed Thread structure (if different).
- 6. The incoming PCs should propose the list of Threads, Thread Definitions and TCs to the SPOC asking for feedback or concerns. Formal approval will require a vote of the SPOC only if there are significant concerns expressed.
- 7. The PCs should review and, if desired, update the TC instructions page at <http://conference.systemdynamics.org/tci>.
- 8. Once approved by the SPOC, the incoming PCs should make the appointments (or re-appointments) for *all* the TCs of the agreed threads. While the communication to the TCs might come from the Home Office, it is important that the PC signs that message to signal to the TCs that this is a new appointment under 'new management.' This appointment of the team of TCs should be done by the end of September to allow for all the promotional materials to include this information.
- 9. In February, before the beginning of the active review process, the PCs should communicate to the TCs their expectations regarding the specific deliverables out of the review process. At a minimum, the communication should state expectations on the following dimensions:
 - a. The date for the delivery of the Thread Suggested Program (TSP).
 - b. The guidelines for the TSP articulated in the previous section.
 - c. A reminder that the TC is a shared position and that both of the co-chairs should agree on the TSP before submitting it. We've had problems with this issue, so it is important to remind them.

Note that the information in 9.a-c. should also be included in the thread chair instructions web page referenced in 7.
- 10. At the start of the active review process (mid-March):
 - a. Decide on a target rejection rate informed by the number of slots available and the expected number of submissions. We've found that TCs tend not to reject enough and it is often the responsibility of the PC to review the TCs allocations. Much time and effort can be saved if the PC provides a ballpark figure for the rejection rate, as well as clear criteria for rejecting a paper.

Reviews

Thread Chairs should take note of reviews that are surprisingly good or bad relative to the expectations based on the star rating of the reviewer. They should rate such review in order to start adjusting this star rating (this is an exponential smooth of recorded ratings). For reviews that seem particularly inappropriate, there is a mechanism to block the review from being displayed to the authors of the paper. Blocked reviews will not appear to authors and will no longer appear for TCs. For both these functions, click on (Rate/Block) within the paper information page.

While the main responsibility of the PC and the TCs is the creation of the conference program, there is also an expectation that all authors will receive useful reviews for their papers. While there are some of us that feel that the responsibility of providing feedback to the authors is too much to be handled by the same group of people responsible for structuring the program, this issue has not been fully resolved by the SPOC (see unresolved issues section below). For the time being, however, if there are papers without any reviews,

it is the responsibility of the TC to ensure that a review for the author is generated (whether it is prepared by the TC or assigned to somebody). The idea here is that all authors deserve a review.

Workshops

Workshops are intended as a way to build skills and share developments in the field in a hands-on environment that can go beyond what is learned in a short presentation of material. For the past years, workshops have been managed almost completely separately from the main conference program. Though this has worked well, the Program Committee is encouraged to find ways of making the combination of the two appeal to managers, policy makers and others who might not normally attend the conference.

Unresolved 'Issues'

Medium term issues (for next conference or review of this document)

1. This document should also include a more detailed schedule of all the activities that need to be performed by the SPOC and the program chairs along with approximate dates. Some information has been gathered on this issue, but has not been completed to include in this document.
2. This document should be expanded to include a bit more information on the formation of parallel sessions and the resolution of the tradeoffs between forming coherent sessions and sessions that include three papers. Perhaps a short meeting for TCs during the next conference would be enough to develop the main guidelines that experienced TCs are using to resolve this conflict.
3. There is an ongoing debate on whether the perceived quality of the conference is driven by the rejection rate and if a target rejection rate could be given to TCs. Data from participant satisfaction and rejection rates should be used to calibrate this policy.

Major issues (probably requiring Policy Council approval)

4. There is an ongoing debate in the Society on whether the review process should be open to anyone who wants to do it or whether we should trim the reviewer pool based on past performance. Currently, the standing policy is that any member of the system dynamics community can serve as a reviewer and we do not exclude anyone from future reviews (regardless of the quality of reviews submitted to date). A mechanism is in place to allow the Thread or Program Chairs to block reviews from being displayed to authors. This will help prevent inappropriate, unhelpful and misguided criticism being passed to authors and also situations in which a paper having a very positive review is rejected. Fortunately, this only represents one or two papers per conference, so this is not a big issue from that perspective. The main issue is if we want to waste all those person-hours generating reviews that are not very useful to the authors, or more importantly, reviews that convey the wrong idea of what SD is, or is not. The envisioned technological solution may resolve this issue.

New ideas usually create new work. PCs are encouraged to make improvements and do something new, but the PCs must also be responsible to define the item/event and related responsibilities in ample time so as to not create emergencies by implementing the new idea during the conference.