

Annual Report on Home Office Operations
Fiscal Year 2017
System Dynamics Society
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Part I: Narrative Summary

From the Executive Director

The *System Dynamics Society* is an international, nonprofit organization devoted to encouraging the development and use of System Dynamics and systems thinking around the world. Over the past 10 years there have been members in 106 countries (see chart on pages 15-16). With active members in 81 countries, the Society provides a forum in which researchers, educators, consultants, and practitioners in the corporate and public sectors interact to introduce newcomers to the field, keep abreast of current developments, and build on each other's work.

In 2017 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 Michael Breslin (who completed his first year at the Society) and Robin Langer. In addition to staff, operations run smoothly with the support of University at Albany graduate student Babak Bahaddin; outside contractors: Joan Yanni, LouAnne Lundgren, Carrie Stickan, and Mary Kenney; and many volunteers. The Home Office operations fall into five categories (with sub-categories): conference (summer school), core, publications, sales (book and non-book), and web presence.



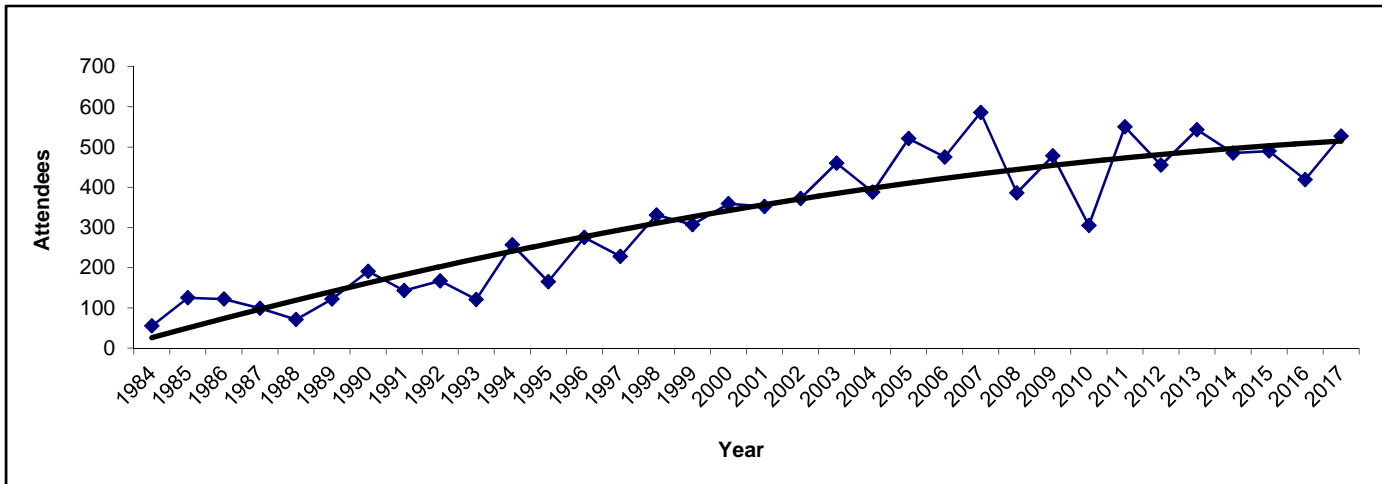
Conference

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

The Web Portal continued to be maintained and improved by Bob Eberlein through the 2017 conference. The Web Portal not only managed the submissions and program, but was a great tool for all overall conference management. Many improvements and custom features were made each year improving functionality and reporting. In late 2017, the Society prepared to transition to MemberClicks, an association management software, to be used in conjunction with X-CD Technologies, a conference management software. Both these new platforms were launched in 2018. I would like to thank Bob Eberlein for the many years of dedicated volunteer work, providing us with a fully customized web submission system that the Society, and our conferences, depended on daily.

In 2017, our staff at Capitol Hill Management Services (CHMS) attended the Cambridge conference and also started work on planning future conferences. Planning is actively ongoing for the Albuquerque (2019) Conference to be held July 21-25. See the 2019 preliminary *Call for Papers* with your conference materials.

Conference Attendance by Year, since 1983



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 10.

A-Conference Attendance Statistics

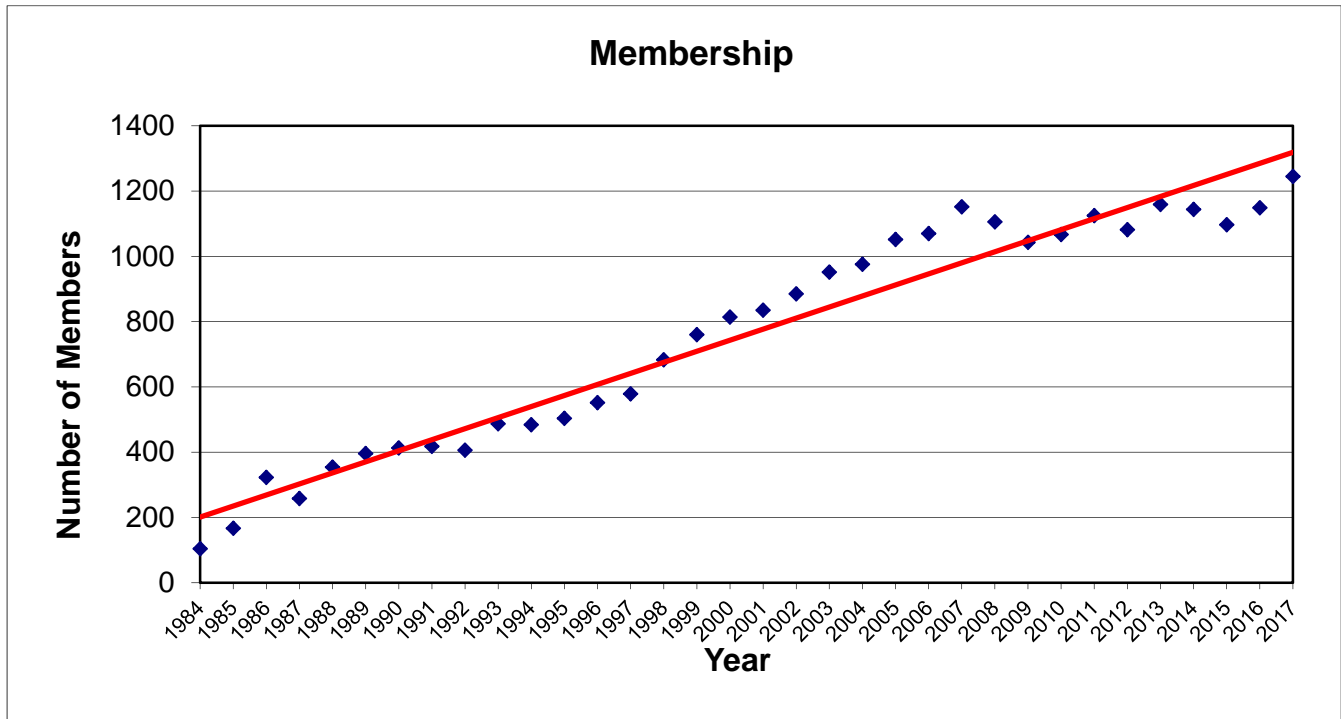
1. Conference Attendance by Year, 1983 – 2017
2. Conference Attendance by Continent Representation, 2008 – 2017
3. Conference Registration Fee Structure, 2008 – 2017
4. Conference Attendees by Type of Payment/Support, 2008 – 2017

B-Conference Management

Core

Membership constitutes the primary core activity of the Society. In 2017, our membership totaled 1,245, up from 1,149 in 2016. The Home Office goal is to provide accurate, prompt and personal service to all members and prospective members.

Membership Growth, since 1984



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

At the end of 2017 we had 10,699 valid records for members, non-members, conference registrants, authors and others who have contacted this office for products or information. At least monthly we contact these people in order to provide Society information.

Valid Records by year, 1998 – 2017

Year	Valid Records	Year	Valid Records	Year	Valid Records
1998	2,200	2005	6,500	2012	8,092
1999	2,700	2006	7,100	2013	8,741
2000	3,140	2007	7,115	2014	8,941
2001	4,200	2008	7,832	2015	8,984
2002	4,700	2009	7,977	2016	9,801
2003	5,300	2010	8,381	2017	10,699
2004	5,850	2011	8,870		

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

We include a membership option on the conference registration form. For the Cambridge 2017 conference, we processed 91 memberships. Please see Attachment I – Conference, **A-Conference Attendance Statistics**, Conference Registration Fee Structure, 2008-2017 (table 3), page 11.

After the annual conference, a personal invitation for membership is sent to non-member conference attendees. In addition, our renewal campaign includes monthly communications to members who did not renew.

Electronic-only delivery of the *System Dynamics Review* was chosen by 57.7% of members in 2017, an increase from the previous year. In 2017, the number of members taking print copies was 527. It should be noted for future planning purposes that (per the 2011 contract with John Wiley & Sons, Ltd), the member rate for print copies (with online access) shall remain the same until the number of members taking print falls below 250 per year, then we will meet to review this rate so that the cost of manufacturing and sending the print copies is still covered by the rate.

The Society receives and processes membership for a particular year from September of the previous year to March of the following year (19 months). In 2017, 62% of our 2016 members renewed, which continues to be at a lower rate from the last few years.

The University Sponsored Group Student Membership program, introduced in 2016, grew in 2017. To expand the sense of community, and have students be included as part of the Society, the Society began offering a one-year membership to students of System Dynamics at Universities that are sponsors of the Society. This also serves in making students aware of the Society and all the resources on our website. In 2017, the University Sponsored Group Student Membership resulted in 73 new student members.

Transition Committee: In the fall of 2015, the Administrative Committee of the System Dynamics Society (SDS) identified the need to look at the future of the Society's Home Office. A Transition Committee was appointed at the Winter Meeting of the Policy Council in 2016 to study alternatives. An interim report was presented at the 2016 Policy Council Meeting in Delft. Work continued through 2016 and at the 2017 Winter Policy Council Meeting, the PC authorized the Administrative Committee to proceed with contract negotiations with Capitol Hill Management Services. Please refer to the Policy Council Meeting Minutes page for details.

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

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

For other Core-related graphics and lists please see Attachment II – Core Operations, page 13.

A-Membership Statistics

1. Membership over Time, 1984 – 2017
2. Membership Distribution by Sector, 2008 – 2017
3. Membership by Continent, 1997 – 2017 (List)
4. Membership by Continent, 1997 – 2017 (Graph)
5. Geographic Distribution, ten years through 2017: 81 Active of 106 Total Countries

B-Chapter and Special Interest Group Statistics

1. New Chapters, 1990 – 2017
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. In 2017, we are in year seven of our eight year contract, which began in 2011. The Society continues to build on the existing, successful partnership we have with Wiley.

There are usually three **newsletters** produced each year by Home Office staff. The March and October newsletters feature a message from the president of the Society and other Society news. In June there is a Special Issue on Sponsor News (for both Society and Conference sponsors). Conference news is highlighted in the October newsletter.

The System Dynamics **Bibliography** is maintained by an in-office bibliographer with scheduled published updates and is downloadable from our website. The Bibliography has been updated to include the *Proceedings of the 35th International Conference of the System Dynamics Society* (2017) and the *System Dynamics Review* Volume 33, Number 2 (2017). New entries and corrections are continuously being made. The **Bibliographic Updates Page** lists new additions to the Bibliography. This list is maintained so that users can see new entries as they are submitted to the Society.

Number of Bibliography Records, by year, 2002 – 2017

Year	Number of Records		Year	Number of Records
2002	6,630		2010	9,538
2003	7,076		2011	9,868
2004	7,461		2012	10,250
2005	7,754		2013	10,557
2006	7,951		2014	10,933
2007	app. 8,800		2015	11,332
2008	8,800+		2016	11,646
2009	9,319		2017	11,894

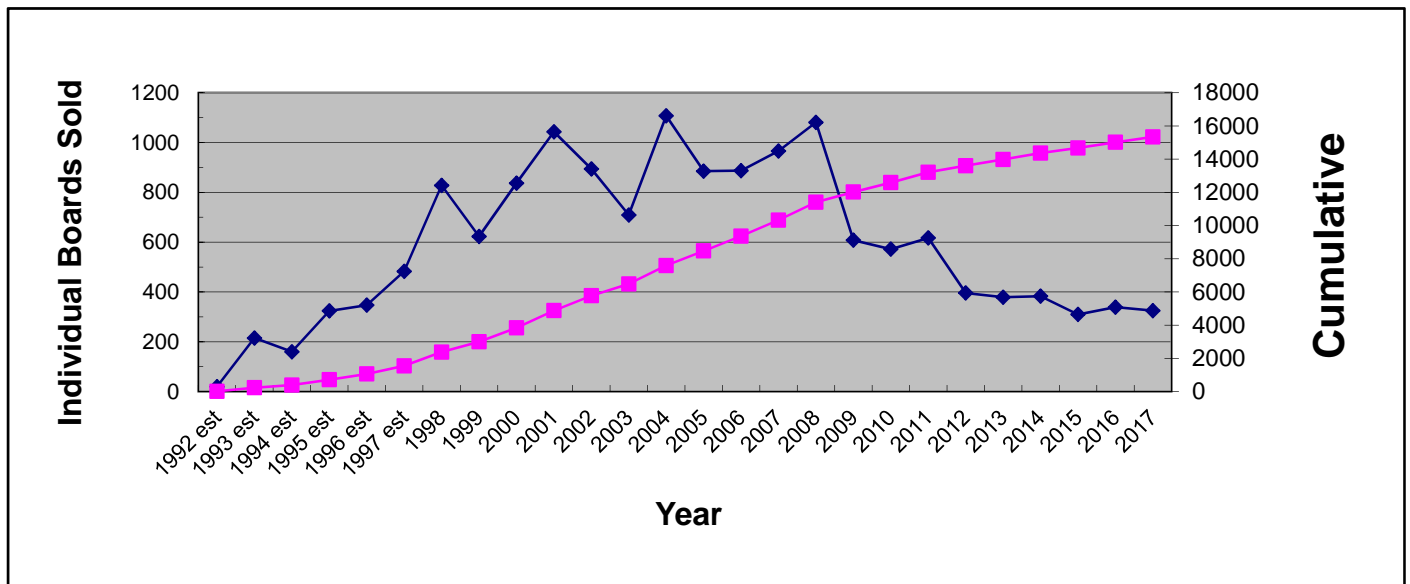
source: rls folders\statistical information\attachforye-report\bibrecordsbyyear

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 slightly decreased in 2017; the Society sold 325 boards in 2017 after selling 351 in 2016. The all-time record for sales was 1,107 games sold in 2004.

Beer Game Boards Sold, 1992 – 2017 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. In 2017 we continued to stock copies of back issues of the *Review*. Access to past journals through our publisher using the Wiley Online Library website has reduced the sales. The last of the complete sets of back issues were sold during a special sale in 2010.

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

Social Dynamics is a new collection of papers identified by Jay W. Forrester in 2015 and 2016. Work on this project occurred in 2017 and the web-based book will be available in 2018.

In 2017, the \$21,858 net income from the Book and Non-Book sales cost center helped support all operations offered by the Society office. The number is up slightly from 2016.

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

Web Presence

During most of 2017, we continued to use Word Press, a content management system, to manage the Society and Conference sites. Website header space was available to our sponsors.

Beginning in September, planning began to transition to MemberClicks, an association management software platform. Mike Breslin (Home Office), Brian Buff (CHMS), Warren Farr (VP Marketing & Communications), and Bob Eberlein (VP Electronic Presence) collaborated with an implementation manager from MemberClicks to transfer the Society website to the new format. In December 2017, the MemberClicks website was launched.

The new website platform allows integration with the member database and facilitates member interactions with registration to join the Society and to attend the conference, purchase of Society publications, and communication via the Discussion Forum.

Our web presence includes a Facebook page as well as Twitter and LinkedIn accounts. The Facebook page and the Twitter accounts have gained in popularity. We reached 4,440 likes on our Facebook page by the end of December 2017. Our social media sites are used to share news about member activities and repost information from many sources. Posts are done frequently to engage interaction among various stakeholder groups.

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 42 Society sponsors that sent a gift or traded services, there were five new sponsors in 2017. Our sponsors are very committed, 26 of our 2017 Society sponsors have been sponsors for three consecutive years or more.

Of the 45 Conference sponsors that sent a gift or traded services, there were 24 new (including six non-consecutive) sponsors in 2017. Our Conference sponsors are also very committed, 18 of our 2017 Conference sponsors have been sponsor for three consecutive years or more.

The Society office performs a systematic Society sponsorship program contacting all past Society sponsors and conference sponsors, inviting them to continue their support. In addition, we identify and email messages to repeat customers, to organizations with numerous members and to other consulting firms owned by members. This mailing is not only to solicit, but also to cultivate a relationship, embracing our members and others in the field of System Dynamics.

With Society sponsorship, a sponsor receives up to three personal memberships and can purchase additional memberships at a discount. A total of 118 new or renewed members joined the Society for the calendar year 2017 as a result of the Society Sponsorship incentive.

With Conference sponsorship, a sponsor receives many benefits including complimentary registrations for the conference; the number depends on the level of sponsorship. In 2017, there were a total of 55 complimentary registrations available to sponsors.

Governance

We continue to operate under a revised version of the Society Bylaws which was passed in 2012 and became effective on January 1, 2013.

Under the advisement of our CPA, we continue to develop and review guidelines that address items on the long IRS Form 990. These guidelines deal with records retention and destruction as well as conflict of interest issues and are consistent with the operation of the Society as a not for profit organization. A mandate by the New York Non-Profit Revitalization Act of 2013, effective July 2014, led to the creation of a formal Conflict of Interest (COI) guideline which was approved by the Policy Council at the 2015 Winter Meeting. The Conflict of Interest Report can be found on the Governance web page of the Society website.

In November of 2016, the membership voted for wording changes to Bylaw V; effective January 1, 2017:

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

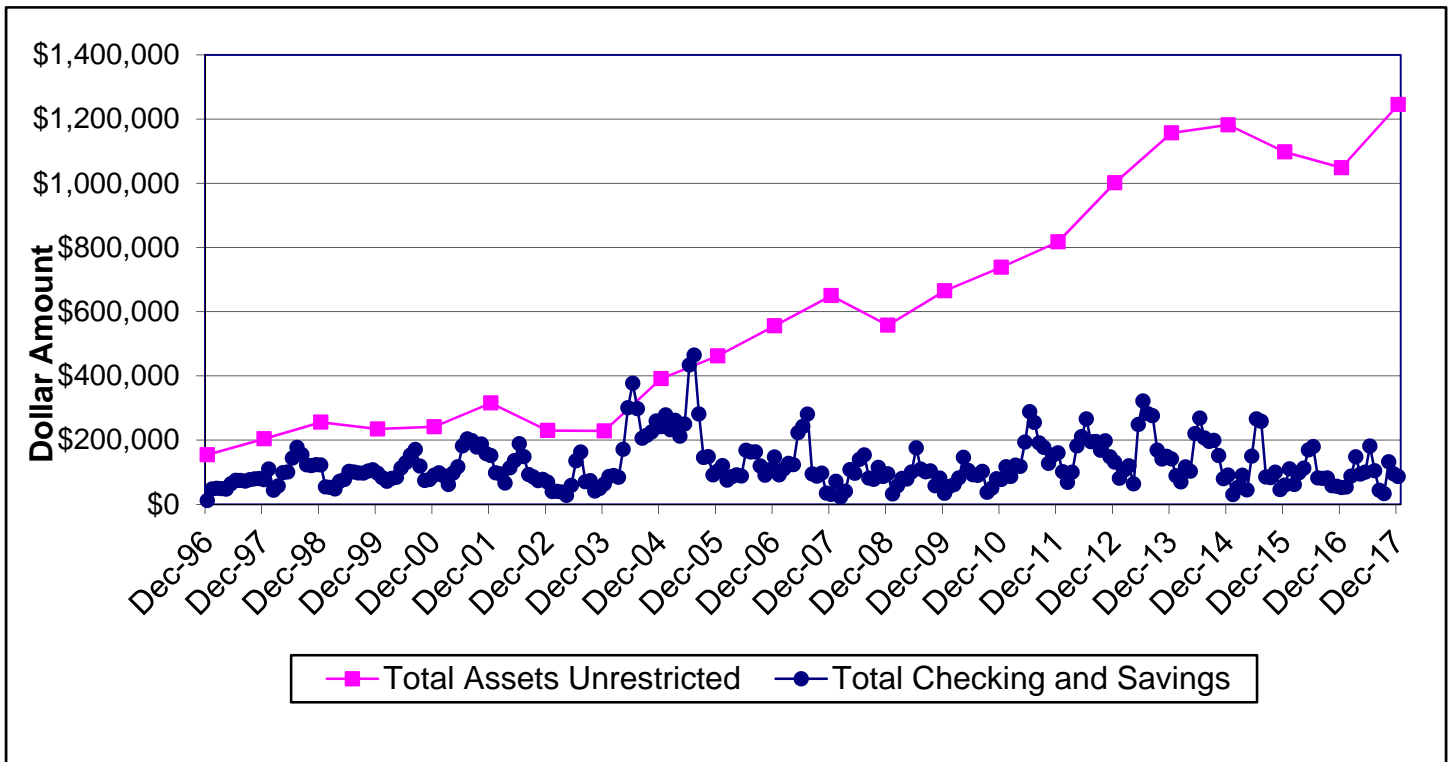
Finances

As stated on page one, the Society is managed around five cost centers (with sub-categories): conference (summer school), core operations, publications, sales (book and non-book) and web presence. Please refer to the Vice President of Finance report for full details. All bookkeeping files are maintained in QuickBooks with monthly and annual reconciliation performed by accounting technology advisors from 25th Hour Accounting Solutions. The Society continues to work with CPA, Tom Hosey of Marvin and Company, P. C. 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.

I would like to thank David Andersen for his steadfast commitment as VP Finance, and also welcome Eliot Rich to this position.

Year-end Balances for Non-Investment Accounts & Unrestricted Net Assets, 1996 – 2017



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

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

Part 2: Supporting Attachments

Attachment I – Conference

A-Conference Attendance Statistics

Conference Attendance by Year, since 1983

Year	Location	Attendees	Guests	Year	Location	Attendees	Guests	Year	Location	Attendees	Guests
2017	Cambridge, USA	527	34	2006	Nijmegen, Netherlands	475	29	1994	Stirling, Scotland	257	0
2016	Delft, Netherlands	399	22	2005	Boston, MA USA	521	39	1993	Cancún, Mexico	121	0
2015	Cambridge, USA	490	38	2004	Oxford, England	388	45	1992	Utrecht, Netherlands	146	0
2014	Delft, Netherlands	485	62	2003	NYC, USA	460	58	1991	Bangkok, Thailand	159	0
2013	Cambridge, USA	543	43	2002	Palermo, Italy	372	83	1990	Chestnut Hill, MA USA	191	0
2012	St. Gallen, Switzerland	455	47	2001	Atlanta, GA USA	352	22	1989	Stuttgart, Germany	122	0
2011	Washington DC	550	36	2000	Bergen, Norway	359	55	1988	LaJolla, CA USA	71	0
2010	Seoul, Korea	305	15	1999	Wellington, New Zealand	307	27	1987	Shanghai, China	99	0
2009	Albuquerque, NM USA	478	43	1998	Québec City, Canada	331	51	1986	Seville, Spain	122	0
2008	Athens, Greece	386	52	1997	Istanbul, Turkey	228	0	1985	Keystone, CO USA	125	0
2007	Boston, MA USA	586	55	1996	Cambridge, MA USA	275	0	1984	Oslo, Norway	55	0
				1995	Tokyo, Japan	165	0	1983	Chestnut Hill, MA USA	120	0

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

Conference Attendance by Continent Representation, 2008 – 2017

		2017 Cambridge	2016 Delft	2015 Cambridge	2014 Delft	2013 Cambridge	2012 St. Gallen	2011 WDC	2010 Seoul	2009 ABQ	2008 Athens
Africa	%	2	3	4	3	1	1	1	6	3	10
N America	%	56	18	59	21	54	23	61	17	62	22
C/S America	%	6	4	4	6	8	4	5	3	5	5
Asia	%	14	16	11	15	10	16	10	45	8	5
Pacific	%	3	3	2	1	2	3	2	4	2	4
Europe	%	19	56	20	54	25	53	21	25	20	54
Total	%	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+country

Conference Registration Fee Structure, 2008 – 2017

	2017 Cambridge	2016 Delft	2015 Cambridge	2014 Delft	2013 Cambridge	2012 St. Gallen	2011 WDC	2010 Seoul	2009 ABQ	2008 Athens
Member Registration - Early	\$575	\$590	\$555	\$555	\$525	\$525	\$500	\$450	\$450	\$450
Non-Member Registration - Early	\$675	\$750	\$650	\$650	\$625	\$620	\$595	\$525	\$525	\$525
Additional Cost for Membership	Dependent on Dues Tier									
Half year membership	1196	1040	1029	1,088	1,109	1002	1,064	984	950	1,016
Memberships through registration	91	82	67	90	82	66	69	34	84	78
New members through registration	63	64	47	47	55	21	45	11	40	43

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

Conference Attendees by Type of Payment/Support, 2008 – 2017

	2017 Cambridge	2016 Delft	2015 Cambridge	2014 Delft	2013 Cambridge	2012 St. Gallen	2011 WDC	2010 Seoul	2009 ABQ	2008 Athens
Paying Members	246	172	216	201	246	207	247	102	196	171
Paying Non-Members	39	27	41	51	59	58	68	48	73	44
Supported Members	115	22	21	24	30	29	18	21	19	13
Paying Day Passes	1	3	5	26	6	3	3	3	7	3
Paying Students	20	102	109	109	105	87	94	76	82	105
Educator Scholarships	5	0	6	0	13	0	20	0	32	0
Organizers/Volunteers/Awards	28	28	30	27	27	22	25	31	25	16
Program Invite	7	1	4	5	0	8	0	1	2	1
Conference Scholarship	10	11	12	10	10	11	10	10	10	10
Sponsor Complimentary	55	31	46	30	47	30	61	13	32	23
TOTAL	527	399	490	485	543	445	550	305	478	386

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 Call for Papers brochures, conference information and registration brochures, including electronic formats
- Contact conference sponsors including generating new contacts
- Conference sponsor management
- Create and maintain conference budget
- Monitor the memorandum of understanding (MoU) if appropriate
- Maintain office and site finances in QuickBooks and Excel; project management for two to three working years
- Manage registrations
- Organize and schedule meetings and events, including assignment of chairs
- Use Web Portal to:
 - manage all aspects of submissions and review
 - manage the tentative and final program
 - schedule session chairs, room assignments and AV equipment arrangements
- Produce the conference booklet and web proceedings
- Support award committees, manage as needed: submissions, ceremonies, scheduling and handouts to recipients for Dana Meadows Student Prize Award, Jay W. Forrester Awards, Applications Award, Outstanding Service Award, Lifetime Achievement Award; and assist with outside awards.
- Event Insurance Coverage
- Design overall conference sponsor information (benefits, web page, etc.)
- Organize outsourcing for specialty work
- Organize the Poster Symposium
- Assist with all social program items including transportation
- Maintain the conference website
- Negotiate and work directly with the conference venue
- Work with Program Co-chairs as needed
- Work with local host as needed
- Assist in implementing any new program features
- Organize all pre-conference and during-conference outside contractor and volunteer labor
- Assist participants with: any attendance issues, including funding transfer issues and letters of invitation for visas; roommate contacts; finding appropriate lodging; and manage other unique site-specific challenges.
- Provide support for pre-conference Summer School
- Work with organizers of the PhD Colloquium

Attachment II – Core Operations

A-Membership Statistics

Membership over Time, since 1984

Year	Society Database	Wiley-Blackwell	At June 30th	Regular/Student-Subsidized
2017	1245		1196	774/501
2016	1149		1042	738/344
2015	1097		1029	771/326
2014	1145		1028	798/347
2013	1159		1109	831/328
2012	1082		1002	794/288
2011	1125		829	819/306
2010	1067		984	783/284
2009	1043		950	807/236
2008	1106		1016	863/243
2007	1152		1056	888/264
2006	1070		977	839/229
2005	1052		994	852/200
2004	976	972	875	770/206
2003	953	952	844	750/202
2002	883	885	761	676/209
2001	1003	835	737	657/178
2000	946	814	720	643/171
1999	995	760	655	592/168
1998	808	683	600	547/136
1997	680	579		457/122
1996	572	552		443/109
1995		504		461/43
1994		484		400/84
1993		487		400/87
1992		406		320/89
1991		418		332/70
1990		413		328/85
1989		396		328/67
1988		354		307/47
1987		258		n/a
1986		323		277/46
1985		167		143/24
1984		104		86/18

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

Membership Distribution by Sector, 2008 – 2017

Year	Academic	Military	Private	Public	Other
2017	58	1	23	7	8
2016	54	1	26	7	8
2015	52	1	28	7	7
2014	54	1	27	6	7
2013	55	1	28	7	9
2012	55	1	29	7	8
2011	52	1	31	12	4
2010	52	1	30	12	4
2009	51	1	32	11	5
2008	52	1	31	11	5

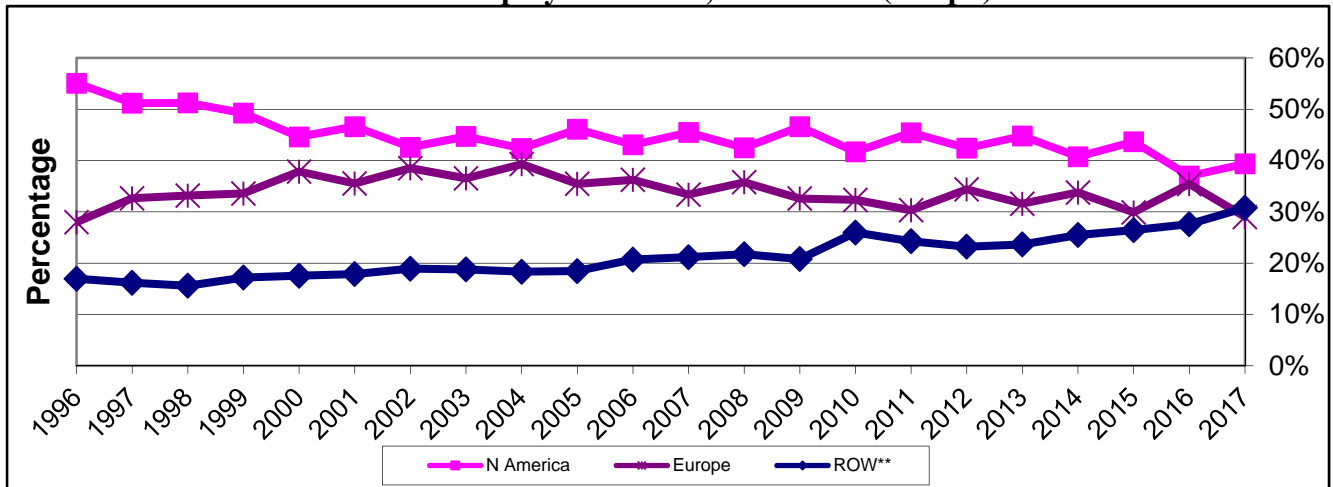
Before 2003, based on the institution name listed in the membership directory. 2003 on, self-reported by members.
 source: \rsl folders\statistical information\growth indicators\membership stats.xls\membysector

Membership by Continent, 2008 – 2017 (List)

		2017	2016	2015	2014	2013	2012	2011	2010	2009	2008
Africa	%	3	3	3	3	2	2	2	2	2	2
N America	%	39	37	44	41	45	42	45	42	46	42
S & C America	%	7	6	7	6	6	5	6	6	5	4
Asia	%	18	15	12	13	12	12	12	14	9	12
Europe	%	29	35	30	34	32	34	30	32	33	36
Pacific	%	4	3	4	4	4	5	4	5	5	4
# of countries		81	78	73	78	73	70	72	69	70	71

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

Membership by Continent, 1996 – 2017 (Graph)



**ROW - other than N Amer. & Europe

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

Geographic Distribution, ten years through 2017: 81 Active of 106 Total Countries*

Country	2017	2016	2015	2014	2013	2012	2011	2010	2009	2008
Albania	1	2	0	1	0	0	0	0	0	0
Argentina	12	7	9	7	6	5	4	4	4	3
Armenia	0	0	0	1	0	0	0	0	0	0
Australia	38	30	37	36	40	36	36	39	39	33
Austria	5	7	7	10	7	9	8	6	5	6
Bahrain	0	0	1	0	1	0	0	0	0	0
Bangladesh	3	1	0	0	0	0	0	0	0	1
Barbados	0	1	1	1	2	0	0	0	0	0
Belgium	7	7	6	6	3	3	6	9	8	10
Bermuda	0	0	0	0	0	0	0	0	0	1
Bolivia	1	0	0	0	0	0	1	1	1	1
Bosnia	0	0	0	0	0	0	1	1	0	0
Botswana	0	0	0	1	1	1	2	0	0	0
Brazil	36	36	43	32	27	25	30	23	19	16
Bulgaria	1	1	2	3	1	0	1	1	0	0
Cambodia	0	0	1	1	1	1	0	0	0	0
Canada	28	26	33	27	31	29	28	25	27	29
Chile	3	1	6	4	4	3	4	4	5	5
China	25	26	25	26	26	25	30	32	13	16
Colombia	21	15	20	15	16	13	15	15	14	11
Costa Rica	1	2	2	1	2	2	1	1	1	1
Crete	0	0	0	0	0	0	0	0	0	1
Croatia	5	6	0	6	5	6	8	8	9	14
Cuba	0	0	0	0	0	1	1	0	1	0
Cyprus	0	0	1	3	2	2	2	2	2	3
Czech Rep	6	8	5	5	4	6	6	3	5	6
Denmark	5	5	7	3	5	5	6	6	4	4
Ecuador	0	1	0	0	1	0	1	0	0	0
Ethiopia	3	3	0	0	0	0	0	0	0	0
Egypt	2	3	4	3	4	9	13	8	5	7
Finland	1	3	2	6	6	3	4	2	3	4
France	12	9	11	11	8	11	15	13	14	9
Georgia	1	1	0	0	1	1	1	0	0	0
Germany	49	54	48	55	46	55	47	50	55	56
Ghana	0	0	0	0	1	0	0	1	1	0
Greece	3	6	4	7	8	5	8	13	12	14
Hong Kong	0	1	0	0	1	0	0	0	3	3
Hungary	0	0	0	3	2	4	1	0	0	0
Iceland	7	6	4	2	4	3	1	1	1	1
India	28	23	15	10	11	15	15	17	15	14
Indonesia	31	20	15	19	18	13	10	12	7	6
Iran	11	10	5	5	6	7	6	6	5	11
Ireland	5	5	2	4	3	3	2	2	1	1
Israel	2	2	1	1	1	2	1	1	1	2
Italy	27	32	22	25	26	21	19	21	20	25
Jamaica	0	0	0	0	0	0	0	1	0	0
Japan	31	27	25	24	25	20	20	20	19	24
Jordan	0	0	0	0	2	0	0	0	0	0
Kazakhstan	1	1	0	0	1	1	0	0	0	0
Kenya	4	2	2	3	0	0	0	0	0	0
Kosovo	2	1	1	1	1	1	0	0	0	0
Kuwait	1	2	2	1	0	0	0	0	0	0
Latvia	2	0	1	3	4	3	11	4	2	0
Lebanon	4	2	3	3	1	1	1	1	1	1

Continued next page

System Dynamics Society Annual Report on Home Office Operations, Fiscal Year 2017

Country	2017	2016	2015	2014	2013	2012	2011	2010	2009	2008
Liechtenstein	0	0	0	0	0	0	0	0	0	1
Lithuania	1	1	1	1	1	1	0	1	0	0
Luxembourg	1	1	0	0	0	0	0	0	0	0
Macao	0	0	0	0	0	0	0	1	1	2
Macedonia	0	1	0	0	0	0	0	0	0	0
Malaysia	6	6	5	8	9	5	7	6	4	6
Mauritius	0	0	1	1	0	0	1	2	0	1
Mexico	9	15	13	17	17	11	8	8	14	12
Morocco (NEW)	1									
Myanmar	0	1	1	0	0	0	2	0	2	0
Nepal	7	8	0	0	0	0	0	0	1	0
Netherlands	37	52	39	49	45	42	30	27	30	36
New Zealand	16	10	10	11	11	13	12	11	10	13
Nigeria	5	6	7	5	5	3	2	2	2	3
Norway	46	44	27	23	25	28	21	28	18	24
Pakistan	12	10	9	8	0	1	1	1	1	9
Panama	1	0	0	2	0	0	0	0	0	0
Papua New Guinea	0	0	1	0	0	0	0	0	0	0
Peru	3	2	1	4	3	3	4	5	2	2
Philippines	4	2	2	4	3	4	4	4	1	2
Poland	4	7	7	7	7	7	8	10	6	8
Portugal	5	5	2	2	2	3	2	0	3	5
Puerto Rico(not counted)	0	0	0	0	0	2	3	3	4	2
Romania	3	3	2	2	1	1	0	0	0	1
Russia	6	9	5	9	12	10	7	7	10	11
Rwanda	2	1	1	1	0	0	0	0	0	0
Saudi Arabia	1	2	2	2	2	3	3	4	3	3
Scotland	0	1	1	1	0	0	0	0	0	0
Senegal	0	0	0	0	0	0	0	0	0	1
Serbia	2	0	1	1	0	0	0	0	0	0
Singapore	24	10	9	9	11	12	11	9	4	5
Slovak Republic	0	0	0	0	0	1	2	2	1	2
Slovenia	1	2	1	2	3	2	2	3	3	2
South Africa	17	17	16	15	12	5	8	8	7	8
South Korea	9	6	8	14	6	10	9	16	6	11
Spain	8	12	6	7	11	14	18	19	19	22
Sweden	9	7	10	10	9	12	8	12	14	14
Switzerland	23	25	30	37	35	37	28	32	24	29
Taiwan	8	6	4	6	5	5	7	9	7	7
Thailand	6	1	1	2	1	1	2	3	1	3
Trinidad	1	0	0	0	0	0	0	0	1	0
Turkey	10	9	10	9	10	10	13	10	6	8
Uganda	1	2	1	2	0	0	0	0	1	1
Ukraine	1	2	0	2	1	2	2	0	0	0
United Arab Emirates	3	5	0	1	3	3	2	3	4	2
United Kingdom	65	73	57	70	68	61	53	52	65	79
United States	453	384	433	423	471	417	472	409	441	426
Uruguay	1	0	0	1	1	1	2	2	2	1
Venezuela	2	1	1	1	3	1	2	2	1	3
Vietnam	3	1	2	1	1	1	2	1	1	1
West Indies	0	0	0	1	0	0	0	0	0	0
Yemen	0	0	1	0	0	0	1	1	1	1
Zimbabwe (NEW)	1									
Totals	1245	1149	1097	1146	1159	1082	1125	1066	1043	1106

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

* Active countries for report year

B-Chapter and Special Interest Group (SIG) Statistics

Chapters since 1990 (year approved)

Year	New Chapter Name
2017	ASEAN
2016	N/A
2015	Iran
2014	Africa Regional, South Africa
2013	N/A
2012	Canada
2011	Benelux
2010	India
2008/09	N/A
2007	German
2006	Psychology* (This chapter became a SIG in 2009)
2005	Russian, Pakistan
2004	Swiss, Economics
2003	Brazil
2002	Student, Latin America, Hellenic, Egypt
2000	South Korea
1999	UK, Australasia
1996	Italian
1990	China, Japan

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

Special Interest Groups since 2002 (year approved)

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

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
 - Beer Game
 - Back issues of Proceedings
 - Back issues of *System Dynamics Review*
 - PhD Seminar Series
 - MIT Literature Collection
 - Electronic Oracle
 - Fireside Chat
 - Books (see **Book Sales by Title** page 19)
- Bibliography and updates: maintain and post to Bibliographic Updates page as new references are added
- Respond to all inquiries including general member inquiries / member services / non-member questions
- Receive and record all new and renewal memberships and send information to Wiley to distribute the journal
 - Membership maintenance, recruitment, and yearly retention analysis
 - Record and calculate payments to our publisher
- Archive systems: records retention and preservation
- Maintain, improve and monitor website and related social media
- Manage campaigns for growth
 - Membership, new and renewal
 - Society sponsorship solicitation and subsequent management
 - Library campaign for institutional subscriptions
 - Conference sponsorship
 - Volunteer campaign
 - Other as needed, for example, the Dana Meadows Endowment
- Maintain on-line membership directory
- Maintain SD Career Link on the website and as a job message board at each conference
- Maintain a list of Courses in SD on the website
- Produce and distribute *System Dynamics Newsletter* up to four times per year (electronic and hard copy)
- Manage Administrative Calendar and Processes (see Attachment V, page 21)
- Assist with all aspects of conference management
- Continuously strive for less use of paper and postal services
- Update the Conference Guide after each conference

Attachment III – Sales

Sales, Ten years through 2017

Items Sold	2017	2016	2015	2014	2013	2012	2011	2010	2009	2008
Beer Game Boards including loaner boards	325	351	310	383	379	396	617	557	608	1,082
Proceedings	0	0	12	0	0	0	4	105*	0	2
<i>System Dynamics Review</i>	0	0	1 set	0	0	0	8 single 0 sets	19 single 6 sets*	19 single 1 set	6 single 0 sets
Forrester PhD Seminar	9 singles 1 set	6 single 2 sets	6 sets	2 sets	5 single 6 sets	5 single 2 sets	1 single 7 sets	11 single 16 sets*	8 single 2 sets	5 single 2 sets
MIT Literature Collection	0	3	4	4	7	11	16	14	15	19
Electronic Oracle	4	1	3	12	2	5	3	59*	2	9
Fireside Chat	11	0	1	11	2	2	4	30*	0	4
Books	42	37	94	190						
Fish Banks Ltd	18	19	26	2						

* increase due to special sale

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

Book Sales by Title

Book Title	2017	2016	2015
Alternatives to Growth	1	0	1
Collected Papers of JW Forrester	2	0	19
Dynamics of Commodity Production Cycles	0	1	5
Dynamo User's Manual	1	0	1
Electronic Oracle	4	1	3
Elements of the System Dynamics Method	4	2	6
Feedback Thought in Social Science	8	3	11
Industrial Dynamics	0	0	3
Introduction to System Dynamics Modeling	7	2	5
Introduction to Urban Dynamics	0	0	1
Managerial Applications of System Dynamics	1	0	3
Principles of Systems (Electronic Version)	2	2	3
Readings in Urban Dynamics, Volume 1	0	1	4
Study Notes in System Dynamics	0	3	8
Toward Global Equilibrium	3	1	2
Urban Dynamics	4	5	4
World Dynamics, 2nd Edition	5	11	14
Totals	42	32	93

source: \rls folders\statistical information\product sales history\book sales

Attachment IV – All Sponsors by Type

Society and Conference Sponsors 2014 through 2017

Corporations:

3EDGE Asset Management¹
 AIMS IIc & ConfluentC IIc
 Analytic Services Inc/ASysT
 AnyLogic North America, XJ Technologies^{1,2}
 Argonne National Laboratory^{1,2}
 The Boeing Company
 Bolide Pty Ltd
 BTN²
 Allen L. Boorstein^{1,2}
 Bobo's Oat Bars³
 Building the World/ Center for the Study of Success¹
 The Cooper SD Network¹
 Copernicos Group^{1,2}
 Crispy Green^{2,3}
 Creative Learning Exchange^{2,3}
 Credit Human (formerly SACU)^{1,2}
 Crunchmaster³
 Dynamic Operations²
 DynamicVu (formerly Informed Dynamic Systems)^{1,2}
 Dynaplan AS¹
 EVER Bar^{2,3}
 Forio Online Simulations²
 Greenwood Strategic Advisors AG²
 Health Warrior³
 Homer Consulting¹
 Honest Weight Food Co-op³
 HTxA-High Tech x Agency³
 Hyatt Regency Cambridge³
 Idaho National Laboratory
 Informed Dynamic Systems¹
 International Society for the Systems Sciences (ISSS)^{2,3}
 isee systems^{1,2}
 Jantz Management LLC
 Krishna Pendyala Family Charitable Fund²
 Lane Press of Albany^{2,3}
 Leverage Networks Inc
 Lexidyne, LLC²
 Lundberg Family Farms^{2,3}
 The Manufacturing Game®/Ledet Enterprises
 Mary's Gone Crackers³

Mindseye Computing, LLC²
 The MITRE Corporation^{1,2}
 Natural Balance Foods³
 Nature's Bakery³
 Northwater Capital Management, Inc.¹
 Overit²
 PA Consulting Group^{1,2}
 Patni Holdings, LLC
 Policy Microworlds¹
 Powersim Software AS
 Primal Kitchen^{2,3}
 RawRev³
 Sandia National Laboratories²
 Semantum
 SoL, the Society for Organizational Learning^{2,3}
 Strategy Dynamics Ltd²
 Systems Thinking Collaborative¹
 Tecnologico de Monterrey²
 transientis management consulting GmbH & Co. KG
 Uncommon Catalyst (& BSIG)^{2,3}
 Ventana Systems, Inc.^{1,2}
 Ventana Systems UK¹
 ViaSim Solutions^{2,3}
 Whole Systems Partnership^{1,2}
 Wiley^{2,3}
 Windhaven Business Management, Inc.
 Anonymous¹

Individual Sponsors:

Jay W. Forrester¹
 Dr. Don Frazier
 Gary B. Hirsch¹
 John Richardson¹
 Edward B. Roberts²
 Anonymous^{1,2}

Individual Donors:

Anonymous^{1,2}

Universities and University Centers:

EMSD: Erasmus Mundus European Master Programme in System Dynamics²
 Faculty of Technology, Policy and Management at Delft University)
 Frankfurt School of Finance and Management
 Georgia Health Policy Center, Georgia State University²
 Policy Analysis Group, Faculty of Technology, Policy & Management, Delft University of Technology^{1,2}
 Social System Design Lab
 Washington University in St. Louis^{1,2}
 System Dynamics Group, Massachusetts Institute of Technology^{1,2}
 System Dynamics Group
 Nijmegen School of Management, Radboud University Nijmegen¹
 System Dynamics Group
 University at Albany^{1,2,3}
 System Dynamics Group, University of Bergen^{1,2}
 System Dynamics Group, Institute of Management, University of St. Gallen³
 System Dynamics Program, Worcester Polytechnic Institute^{2,3}
 TU Delft Aula Congress Centre
 UAlbany Graduate Assistants since 1999¹
 University at Buffalo¹
 Widyatama University²
 Worcester Polytechnic Institute (WPI)^{1,2}

Key:

¹ 2017 Society Sponsor

² 2017 Conference Sponsor

³ In-kind Sponsor (in one or more year)

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
- Work with Society Transition Committee to prepare for move to Capitol Hill Management Services in September 2018

Attachment VI – Finances

Balance Sheet Comparison, 10 years through 2017

including year-end adjusting entries	2017	2016	2015	2014	2013	2012	2011	2010	2009	2008
ASSETS										
CURRENT ASSETS										
Cash & cash equivalents (ckg/svg/PayPal)	\$ 159,100	65,866	126,664	153,439	167,525	155,804	179,969	80,850	34,781	95,538
Investments	\$ 969,555	950,460	946,035	972,583	898,711	752,541	616,709	603,166	560,117	460,374
Accounts receivable	\$ 80,966	54,527	61,952	61,830	60,545	62,653	0	0	30	1,171
Contributions receivable	\$ 22,601	0	0	0	0	0	0	0	0	0
Inventory (at cost)	\$ 14,227	22,032	16,800	23,009	26,220	19,843	25,970	20,807	23,447	10,695
Prepaid expenses	\$ 87,320	45,492	35,023	51,271	74,889	81,782	54,558	82,904	68,024	32,294
Total Current Assets	\$ 1,333,769	1,138,377	1,186,474	1,262,132	1,227,890	1,072,623	877,206	787,727	686,399	600,072
PROPERTY (Fixed Assets)										
Furniture and equipment	\$ 651	651	651	651	651	1,263	1,263	1,263	11,046	11,046
Less: Accumulated depreciation	\$ -651	-651	-651	-651	-651	-1,263	-1,263	-1,263	11,046	11,046
Total Property (Fixed Assets)	\$ 0	0	0	0	0	0	0	0	0	0
OTHER ASSETS										
Restricted Investments	\$ 157,042	130,737	116,806	117,205	104,465	92,242	83,661	76,386	71,657	67,437
Contributions receivable, net of current portion	\$ 23,500									
TOTAL ASSETS	\$ 1,514,311	1,269,114	1,303,280	1,379,337	1,332,355	1,164,865	960,867	787,727	686,399	600,072
LIABILITIES & NET ASSETS										
CURRENT LIABILITIES										
Accounts payable and accrued expenses	\$ 22,668	34,460	12,402	4,012	903	1,742	5,574	2,863	612	1,282
Membership Subscriptions liability	\$ 7,752	7,717	9,211	11,567	12,825	12,466	10,679	13,287	12,517	19,957
Deferred revenue (conf/cust)	\$ 47,174	43,150	59,794	55,572	48,124	47,166	43,583	32,164	3,393	15,900
Custodial account liability	\$ 4,475	4,625	7,525	9,075	9,225	9,900	0	0	0	0
Misc. liabilities (sales tax, etc)	\$ 0	0	0	0	0	0	0	184	65	314
Royalty Advance	\$ 0	0	0	0	0	0	0	0	5,000	5,000
Total Liabilities	\$ 82,069	89,952	88,932	80,226	71,077	71,274	59,836	48,498	21,587	42,453
NET ASSETS										
Unrestricted - including board designated	\$ 1,245,200	1,048,425	1,097,542	1,181,906	1,156,813	1,001,349	817,370	738,480	664,812	557,619
Temporarily Restricted	\$ 187,042	130,737	116,806	117,205	104,465	92,242	83,661	77,135	71,657	67,437
Total Net Assets	\$ 1,432,242	1,179,162	1,214,348	1,299,111	1,261,278	1,093,591	901,031	815,615	736,469	625,056
TOTAL LIABILITIES & NET ASSETS	\$ 1,514,311	1,269,114	1,303,280	1,379,337	1,332,355	1,164,865	960,867	864,113	758,056	667,509

source: \rls folders\executive director & vpf reports\2018annual report\ multi yr balance sheet comparison thru 2017.xlsx

Revenue and Expenses Comparison, 10 years through 2017

		2017	2016	2015	2014	2013	2012	2011	2010	2009	2008
Ordinary Income/Expense											
Income	INC Conferences	\$ 346,560	235,168	307,502	294,654	303,765	327,607	303,463	173,561	233,148	156,401
	Journal Income	\$ 79,815	68,263	85,173	84,621	81,676	84,889	85,514	56,292	51,963	43,499
	Membership Dues	\$ 61,335	59,872	61,249	65,909	64,487	59,968	63,636	58,741	57,389	61,696
	Other Income	\$ 23,326	17	0	668	725	0	0	0	0	-165
	Products	\$ 49,133	46,435	48,937	53,908	49,828	47,170	75,106	69,590	71,654	126,685
	Shipping and Handling Income	\$ 7,053	7,045	8,155	9,032	7,320	9,829	11,394	17,691	13,878	25,010
	Sponsor Dues and Donations	\$ 44,164	32,378	46,590	36,350	33,150	40,106	41,001	18,500	30,125	44,375
	Summer School Income	\$ 11,380	39,157	9,300	0	0	0	0	0	0	0
	Total Income	\$ 622,766	488,335	566,906	545,142	540,950	569,569	580,114	394,374	458,157	457,501
	Less Cost of Goods	\$ 11,660	7,994	9,830	7,915	10,249	11,161	14,246	10,214	3,564	14,874
Gross Profit		\$ 611,106	480,340	557,076	537,227	530,701	558,408	565,868	384,160	454,593	442,627
Expense	Awards-Dana Meadows	\$ 2,000	0	2,000	1,500	750	1,200	1,200	1,200	1,200	1,200
	Awards-Others	\$ 5,850	5,480	9,776	1,220	0	6,021	0	6,900	0	5,097
	Bank & CC Fees	\$ 18,711	17,353	14,440	9,729	12,528	13,034	13,609	9,598	15,092	14,865
	Field Dev (\$20K Max)	\$ 11,155	3,500	12,500	17,500	6,405	0	4,000	0	0	0
	Contracted Expenses at UAlbany	\$ 341,029	358,872	341,827	332,483	298,280	277,709	279,400	261,719	253,739	190,610
	Contracted Expenses CHMS	\$ 25,500	0	0	0	0	0	0	0	0	0
	Depreciation Expense	\$ 0	0	0	0	0	0	0	0	0	21
	EXP Conferences	\$ 140,461	103,044	140,954	141,518	132,079	148,823	120,314	61,376	92,004	98,777
	Insurance	\$ 5,866	3,767	5,313	5,218	4,645	5,595	2,013	1,354	0	0
	Journal Expense	\$ 20,000	20,000	20,000	20,000	20,000	20,000	19,763	20,000	20,000	20,000
	Marketing (Sponsor Trade)	\$ 2,000	2,000	2,000	2,000	0	0	0	0	0	0
	Membership Directory Exp	\$ 0	0	0	0	615	2,340	2,170	2,074	1,958	1,872
	Membership Services	\$ 0	0	0	0	0	0	0	1,060	2,765	1,220
	Miscellaneous Expense	\$ 446	883	712	1,144	683	2,444	829	1,898	331	437
	Office Expense	\$ 6,379	3,181	5,818	5,280	4,416	3,354	5,235	4,571	14,417	26,200
	Officer Expenses (=Travel CPA)	\$ 7,832	12,839	4,644	10,228	9,871	9,614	9,420	5,417	5,854	5,153
	PHD Stud Chapt Support @ Conf	\$ 4,396	0	2,982	837	2,204	0	1,553	974	851	0
	Product Dev.	\$ 0	0	0	0	0	0	0	0	0	64
	Professional Fees	\$ 86,342	68,249	50,096	42,484	35,132	40,314	38,940	32,326	40,264	35,584
	Summer School Expense	\$ 0	32,872	7,710	0	0	0	0	0	0	0
	Total Expense	\$ 677,966	632,040	620,773	591,140	527,606	530,448	498,446	410,467	448,475	401,100
Net Ordinary Income		\$ -66,860	-151,700	-63,697	-53,912	3,095	27,960	67,422	-26,307	6,118	41,527
Other Inc	Legacy Fund Income	\$ 83,351	0	0	0	0	0	0	0	0	0
	Investment Income	\$ 176,805	113,908	-23,517	89,580	161,659	96,556	27,865	102,963	103,461	-142,709
	DMA2	\$ 30,000	0	0	0	0	0	0	0	0	0
	DM Investment Inc	\$ 2,785	2,605	2,452	2,164	2,933	3,673	2,826	2,490	1,833	3,073
	Designated Inv Inc	\$ 27,000	0	0	0	0	0	0	0	0	0
	Total Other Income	\$ 319,942	116,512	-21,065	91,745	164,593	100,229	30,691	105,453	105,294	-139,636
Net Income		\$ 253,082	-35,187	-84,762	37,832	167,688	128,189	98,113	79,146	111,412	-98,109

source: \rls folders\executive director & vpf reports\2018\annual report\ multi yr revenue & expenses comparison thru 2017.xlsx