

# Guidelines for the Program of the International System Dynamics Conference

V0.06 October 31, 2021

Link to this document: <https://bit.ly/isdcProgGuide>

## 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 January, 2019 Prepared by Karim Chichakly (SPOC Chair). Changed program chair requirements to allow three inexperienced chairs. Merged 2017 approved session changes. Added draft list of Program Chair duties. <https://bit.ly/isdcProgGuide5>
- V0.06 October 31, 2021. Prepared by Sara Metcalf (SPOC Chair). Created Table of Contents for ease of reference. Clarified Program Chair and SPOC duties. Updated description of different session types. Clarified options for contributions to the conference record. Added details regarding virtual conference format. Updated list of unresolved issues. Added some edits previously suggested by Andreas Größler (then SPOC Chair) in a February, 2016 version of this document. Added appendix with updated Thread list and monthly program timeline.

## Document Purpose

The purpose of this document is to capture the lessons and insights of Program Committees involved with planning and development of the annual International System Dynamics Conference (ISDC), so that this knowledge 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 and professional program to advance the field.

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## SPOC (Society Program Oversight Committee)

The SPOC is a Standing Committee of the System Dynamics Society charged with overseeing and providing guidance to the Program Committee. The Society Program Oversight Committee shall recommend future Program Chairs to the Policy Council. The SPOC is responsible for overseeing and reviewing the performance of Program Committee members and conference Thread Chairs, the types and nature of sessions to be presented at the conference, and the threads and topic areas around which conferences are organized. The SPOC performs the following functions during each calendar year:

1. Each year at a Policy Council Meeting prior to the Conference, the SPOC will report out on 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. This is usually prompted by the Central Office.
3. By the time of the Summer Conference, recruit Program Chairs for the conference 2 years into the future. The SPOC should generally seek to recruit a team of 3 Program Chairs, at least one of whom has prior experience as a Program Chair.
  - a. Two or more Program Chairs should be identified if at least one of them has previously served as a Program Chair. Three or more Program Chairs should be identified if none have previously served as a Program Chair. For a docket of all inexperienced Program Chairs to be accepted, the Program Chairs from the previous year must also agree to mentor and support them as needed.
  - b. Potential Program Chairs may be identified from recent Thread Chairs.
4. Once they have agreed to serve, the Program Chairs selected by the SPOC will be approved by a vote of the Policy Council.
  - a. Note that this activity may be carried out more than 2 years in advance for earlier approval by the Policy Council if deemed appropriate.
5. (Optionally) During or after the conference, the SPOC may have a meeting to discuss program-related issues. This meeting, if held, would be the first part of the SPOC debriefing.
6. After the program development experience, hold an electronic debriefing in order to gather together comments from the Program Chairs, Thread Chairs, Workshop Chairs, and Conference Executive as a basis for rationalizing Thread management and updating this document.
7. Select the set of Threads and related Focus Areas 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 so that Thread Chair invitations can go out.
8. Recruit new SPOC members, particularly from past, present, and planned Program Chairs.
9. Approve the modification of this document based on the changes from the debriefing and the updated Thread list.

The Society Program Oversight Committee shall consist of 6 members, 3 of whom are former or current Conference Program Chairs, serving staggered 3 year terms to provide continuity. The SPOC chair and members to fill vacancies on the SPOC shall be appointed by the Society President or other officer with the approval of the Policy Council. Though the SPOC does not have any ex-officio members, it is recommended that one of the incoming Program Chairs be appointed to the Committee the year prior to their tenure, and remain on the Committee through the year after their conference occurs. This will ensure that the SPOC always has a representative of the current year's conference, the next year's conference, and the previous year's conference. When feasible, the SPOC Chair will normally be the previous year's Program Chair. Membership is on a calendar year basis.

## Program Chair Duties

This section exists to help the SPOC choose appropriate Program Chair candidates, to help those candidates decide whether they are willing to be Program Chairs, and to guide the Program Chairs in their duties.

1. Come up with the theme and write a paragraph or two around that theme in time for the one year in advance call-for-papers brochure, website. This is critical for marketing.
2. Work with SPOC to review threads and Thread Chairs (see [Managing Threads and Thread Chairs](#) below).
3. Pick plenary topics and recruit keynote speakers for most of them (leave a few spots open for paper submissions; others will open when invited speakers decline – see more details under [Plenary Sessions](#) below).
4. Add things to the program as you see fit, which may come from outside people sending proposals or from yourselves (e.g., in 2015, someone proposed to place a set of high quality visualizations around the conference and we added the post-banquet dance).
5. Determine what the program will look like, which is mostly set, but you could, for example, rearrange the poster sessions to make them more effective.
  - a. Additional programming considerations are necessary for [virtual conference](#) participation across time zones.
6. Participate in creating communications from the office about the conference (your name will be on them).
  - a. Review and approve office communications in advance of upcoming deadlines. See the [appendix](#) for an overview of the annual program planning timeline.
7. Review the reviewers' comments to make sure they are appropriate and also check if they are valid for the papers; some Program Chairs read all the papers, but this is not strictly necessary to determine the quality of the reviews.
8. Arrange the papers into cohesive sessions based on the thread chair recommendations and reviews (see more details under [Parallel](#) and [Poster Sessions](#) below).
9. Ensure all sessions have chairs. Recruit session chairs with assistance from the Office. Note: for the plenary session chairs, be sure to select someone who knows about the chosen theme and session, and for the feedback session chairs, be sure to select someone who can ensure a good learning experience.
  - a. PCs may wish to identify dedicated individuals to serve as WIP, Feedback, and Roundtable Coordinators who can support overall session organization, session chair recruitment, and oversight for these relatively new formats that depend more heavily on session chairs for moderation than traditional parallel sessions.
10. Kick off the conference, make announcements each morning, and close the conference.
  - a. For virtual and hybrid conferences, daily morning announcements should be sent by email to attendees. Communication with conference attendees should be managed in collaboration with the Central Office.
11. Go to the post conference debrief (noon on workshop day of an in-person conference; the week following a virtual conference)
12. Optional: Write a few SDS blog posts to increase public awareness and excitement about the conference.
  - a. Others may help. In 2021, a [Conference Highlights Blog](#) team was formed by the Policy Council, led by an Editor in Chief, with significant volunteer coordination among writers, editors, and the Society marketing team. The blog was made available beginning in August and finished by early September, with 7 entries.

All conference organizers must agree to the conference dates and planning schedule, which may be generated by the Central Office on the basis of prior conferences. Program Chairs are encouraged to make suggestions to the schedule, and will at a minimum want to ensure that they have sufficient time to review the [Thread Suggested Program](#), as submitted by Thread Chairs, prior to sending author acceptance letters. Note: Program Chairs will need to review any late submissions that have been granted.

The largest part of the work of Program Chairs - outside of the conference itself - is concentrated between September-November, when they recruit thread chairs and keynote presenters, and March-May, when the papers are reviewed, approved and placed into cohesive sessions. See [Appendix B](#) for an approximate timeline of program tasks.

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 to be able to implement the new idea at the conference.

## Submission Types

1. **Research Papers** of approximately 5000 words (and not to exceed 7500 words) properly formatted with an abstract and bibliography. These papers are considered for all session types. Research papers will be subject to blind peer review, selection by Thread Chairs and have their disposition finalized by the Program Chairs. Comments by the Thread and Program Chairs are encouraged, especially for work not selected for standard presentation.
2. **Application Presentations** consisting of 10 to 30 presentation slides including an abstract slide (not for presentation) and a bibliographic slide. Application presentations are considered for all session types. Presentations will be subject to blind peer review, selection by Thread Chairs and final disposition by the Program Chairs. Comments by the Thread and Program Chairs are encouraged, especially for work not selected for standard presentation.
3. **Work-in-progress Descriptions** consisting of extended abstracts (two-page document, plus a bibliography) describing the work being conducted and preliminary results, if any. Work-in-progress (WIP) descriptions will be considered for WIP and Feedback Sessions. Work-in-progress submissions will be subject to blind peer review, selection by Thread Chairs, and final disposition by the Program Chairs. Comments by the Thread and Program Chairs are encouraged, especially for work placed in Feedback Sessions.
4. **Workshops** require an abstract (~250 words) and descriptions or information on: format, background expectations, and facility requirements. They are selected by the Workshop Chairs or Central Office with the approval of the Program Chairs.
5. **Model Exposition** consisting of an abstract (~250 words) describing a model exposition idea. Model exposition proposals are not part of the review process (i.e., blind review and Thread Chair evaluation), but instead are managed by the Central Office with the approval of the Program Chairs.
6. **Other Activities** based on an abstract (~250 words) for material that is of interest to the community but does not conform to the norms for conference presentations. This would include work done by K-12 students as well as the activities of chapters and SIGs. This work will be considered for Specialized Presentations (roundtable, parallel, poster or another format). Other activities are not part of the review process (i.e., blind review and Thread Chair evaluation), but instead are managed by the Central Office with the approval of the Program Chairs.

All submissions in the first three categories should include 1) a clear statement of the dynamic problem or methodological issue; 2) why the author is addressing this important problem with SD or how the methodology will advance SD practice; 3) methods used (e.g., GMB, client process); 4) a bibliography; 5) research papers and application presentations should include results and outcomes. For work-in-progress submissions preliminary results are encouraged, but not required.

## Session Types

1. **Plenary Sessions** for high-quality work that is of broad general interest. Each presenter will have approximately 20 minutes with 10 minutes for discussion.
2. **Parallel Sessions** for quality work that lends itself well to oral presentation. Each presenter will have approximately 15 minutes with 5 minutes for discussion. There would be 3 papers in a 1-hour session.
3. **Lightning Talks** for quality work that can be presented quickly. This can include updates to work that has been previously presented, simple model insight lessons, and proposed activities for which the presenters want to invite contributions. Lightning talks require strong moderation and a clear theme for the entire session. There would be up to 6 papers in a 1-hour session.
4. **Poster Presentations** for quality work and promising work in progress that lends itself well to interactive one-on-one discussion. There will be one or more times at which posters are presented.
5. **Work in Progress (WIP) Sessions** for discussing work in progress that is of general interest. There would be less time devoted to presentation and more time devoted to discussion relative to a parallel session. Work in progress sessions, even more than other presentation sessions, require a clear unifying theme, whether it be application area, methodological approach, geography, or something else the presentations have in common. The moderator would need to prepare remarks that help foster discussion both with members of the audience and with different presenters. The real goal of these sessions is to get groups of people working on related issues talking amongst themselves. There could be up to 6 presentations in a 1-hour session.
6. **Feedback Sessions** for work that needs support and guidance to bring it to the standards of the conference. All presentations will be done by a moderator with suggestions and ideas of things that might be done. Authors would be encouraged to attend. They will not present but should have the opportunity to share in the discussion during the moderator's presentation. There would be up to 6 papers in a 1-hour session based on scheduling requirements.
7. **Model Exposition** for interesting models that can be shared with others interactively. These sessions would occur during specified times and be unmoderated.
8. **Roundtable Sessions** may be organized to engage participants in interactive conversations on a specific subject. The format of roundtable discussions will vary depending on the nature of the submission. For example, in 2020 and 2021 roundtables were organized for peer mentoring groups, volunteer networking, and discussion of critical topics such as sustainability and structural racism.
9. **Dialog Sessions** may be organized to create dedicated time for discussion of a given topic related to presentations that have been given at the conference. These relatively unstructured sessions are recommended for virtual and hybrid conferences, and are analogous to hallway conversations or after-dinner meetings at an in-person conference.
10. **Echo Discussion Sessions** may be organized for virtual and hybrid conferences to allow dedicated time for live discussion of previously presented material. In 2020, these were

called Echo Sessions and were held in opposite time zones for each of the live plenary, parallel, and WIP sessions. In 2021, they were called Discussion Sessions and only scheduled for plenary sessions.

11. **Specialized Presentations** may be made for material that is of interest but does not conform to the norms of other submissions. For example, panel discussions, career fairs, talent shows, and Pecha Kucha style rapid presentations.

Normally, all session types will be offered at a conference, though the Program Chairs and Conference Organizers may choose to drop some of them based on submitted material and logistical constraints. Plenary, parallel, and poster sessions will be offered at all conferences. Specific considerations for virtual conferences are discussed below.

## Virtual Conference Delivery

The COVID-19 pandemic necessitated that the 2020 and 2021 conferences be held virtually. The capability of delivering virtual conferences can provide opportunities for future conferences that combine an in-person conference component with an engaging online experience. Many design choices enter into the planning of a virtual conference, but an overriding principle is to retain the integrity of the session formats.

For hybrid and virtual conferences, most sessions involving remote attendees should be scheduled between 8:00 AM and 8:00 PM Central European Time.

Most of the material presented at virtual conferences will be recorded, including plenary, parallel, WIP, feedback, and discussion sessions. The recordings of live virtual and hybrid sessions will be made available for a sufficient period following the live conference to allow participants to view them. In 2020, the conference website was available to view recordings up to 2 weeks after the end of the conference. In 2021, the conference website was available for a month after the end of the conference (through August 2021). In 2022, the availability of the conference website may extend into September, when the permanent Conference Record is finalized.

Presenting authors indicate agreement to the temporary availability of conference recordings, and may agree to or decline to allow further use of recorded material by the Society. Conference attendees may opt out of being included in the recording by remaining on mute with video off. Special requests to be removed from a recording or to replace a recording may be handled at the discretion of the Society Office.

Presenting authors are invited to create a recording of their work to share via the conference website. This pre-recording may be used in lieu of a live presentation if such a presentation is not feasible due to technical mishaps or time zone incompatibility.

## Conference Session Planning

### 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. 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 Program Chairs need to take a proactive role in inviting guest speakers for plenary sessions. These invited speakers are also a good way to shape the conference around the desired conference themes. The fraction of invited plenary talks in past conferences has varied from 40% to almost 100% (25<sup>th</sup> and 35<sup>th</sup> anniversary conferences in Boston, 2007 and 2017). The expectation is that all invited speakers will pay to register for the conference. Any exceptions need to be reflected in the conference budget, which is part of the overall Society budget that is approved by the Policy Council one year in advance.
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 program chair 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 program chair 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 program chairs should review these to make sure the presentation suits the context of a plenary talk, will fit in the time available, and so on. 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.
5. The following types of talks should NOT be featured in a plenary session:
  - a. Pontification and commiseration about the state and future of the field.
  - b. Talks by people who know something about an area that seems like it should be of interest - but fundamentally has nothing to do with System Dynamics.

### Thread Suggested Program

Most of the conference program (parallel, poster, WIP, and feedback sessions) is organized by academic threads. As such, the Program Chairs (PCs) rely on the Thread Chairs (TCs) to structure a Thread Suggested Program (TSP). Specifically,

1. TCs recommend to the program chairs whether a paper allocated to their thread should be accepted or rejected on the basis of plagiarism or lack of relevance. If accepted, the TSP should indicate whether the paper deserves a status of feedback, work in progress, poster, poster+, parallel, or parallel+ (i.e., worthy of consideration by the PCs for a plenary session) contribution. Classification of paper status should align with the session categories approved by the PCs. For instance, some time ago we used the category 'research session.' Those sessions have been discontinued and should not be used. Instruction on what are the acceptable categories should be clearly communicated to TCs (see section on the [Selection Process](#)).



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 or assign it to a feedback session, and none of the reviews support that position, the thread chair must also include a brief review for the authors.
3. By their nature, the TSPs will be incomplete and will not consider overall optimization of the conference program. It is the responsibility of the PCs and any identified session coordinators to resolve all the conflicts, decide on the final allocation of papers for the plenary sessions, and structure all the parallel, WIP, and Feedback sessions. See next section for guidelines on how to manage the thread chairs.
4. The PCs are responsible for the final decision on all papers and should only take the TSPs as recommendations.

### **Parallel Sessions**

TSPs should 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 do the following:

1. Create a title for the session to be listed in the program schedule.
2. Consider only papers within their thread.
3. Consider only papers that have been deemed worthy of a parallel session, i.e., don't fill the required number of papers on a parallel session with papers originally classified as feedback, WIP, 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 session. As such, poster+ papers should be of enough quality to be in a parallel session but are probably not there due to a lack of fit.
4. 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 incomplete sessions and let the PCs fill them with papers from other threads or by reallocating papers into the parallel status.
5. All poster+ papers should be assigned as backup papers in a parallel session.

### **Poster Sessions**

Poster sessions will vary in size based upon the constraints of the physical venue and/or the design of an online conference. For an online conference, images of the posters may be viewed through the conference website. Poster sessions involve placement of authors in assigned physical or virtual locations to interact with conference attendees. Presenting authors are encouraged to share the poster on their screen in the virtual conference format. The length of a poster session should be sufficient to allow attendees to see/visit other posters being displayed during the same time slot. Virtual posters may not be feasible in a hybrid conference where there is an in-person poster session, and could instead be assigned to a WIP session.

### **Work in Progress Sessions**

Work in Progress (WIP) sessions will consist of up to 6 brief 5-minute presentations followed by an equal length of discussion time. All submission types will be considered for Work in Progress sessions. WIP presentations adhere to a slide template that is managed by the session chair. A WIP Coordinator may be named to work with the Program Committee in creating coherent WIP sessions, even when they may cut across threads.

## Feedback Sessions

Feedback sessions will be organized for submissions that need guidance. An experienced SD practitioner will chair the session to summarize and provide feedback on up to 6 submissions. All submission types will be considered for Feedback sessions. A Feedback Coordinator may be named to organize Feedback sessions and identify appropriate session chairs. Feedback sessions are designed to grow the field through constructive mentorship.

## Selection Process

(for Research Papers, Application Presentations, and Work in Progress Descriptions)

All submissions will be to a predefined thread. Research papers will be sent out for blind peer review based on the selected thread. Thread chairs will review submissions and make recommendations for placement and session formation. Program chairs are responsible for final selection and session creation based on the recommendation of the Thread Chairs. Session scheduling may be done by the Central Office or the Web Portal administrator in collaboration with the Program Chairs.

Research Paper and Practitioner Application Submissions not put into a Plenary, Parallel, or Poster session should have a written comment from either the Thread or Program chairs explaining the reason for the disposition. Feedback to authors may include a reiteration of the standard the different types of work are to be held to (with reference to guidelines in the [documentation](#)).

Submissions that are plagiarized or not related to system dynamics will be rejected by the Program Chairs based on the recommendation of Thread Chairs.

Work that has been submitted to, accepted for, or already presented at a different conference, or accepted but not yet published in a journal or as a book, will be considered. Special exceptions may be made by the Program Chairs to meet program needs.

Works not of sufficient quality or completeness for plenary or parallel presentation should be put into the appropriate session format to maximize the potential for authors to learn. Work in Progress sessions are appropriate for promising work not yet complete, and Feedback sessions are appropriate for work that needs significant guidance. Reasonable Work in Progress Descriptions should be assigned to WIP sessions, but if these submissions warrant substantial feedback, they should instead be assigned to Feedback discussion sessions. The time spent per paper in a WIP or Feedback session is the same, but the difference is whether the author presents their own work (in a WIP session) or whether it is presented by the session chair (in a Feedback discussion session). The greater number of papers (up to 6) in WIP and Feedback sessions pose additional challenges for session coherence and completeness, requiring coordination across threads. Therefore, the Program Committee may name a WIP Coordinator and Feedback Session Coordinator to develop strong sessions and recommend appropriate moderators.

The Program Chairs will inform the Thread Chairs of significant disposition changes they intend to make and discuss those changes. Note: there is no target rejection rate. Significant changes include changing rejection status (i.e., newly rejecting submissions or re-introducing submissions into the program), movement into plenary session if not so recommended, or movement into or out of Work in Progress or Feedback sessions. The decision of the Program Chairs will be final, but they will in

all cases consider the comments of the Thread Chairs. When the Program Chairs make a significant change to the disposition of a submission, they will provide written comments on it.

Comments from the reviewers, Thread Chairs, and Program Chairs will be made available to authors when decisions are sent out. Thread Chairs and Program Chairs may also mark a peer review comment as blocked, so that it will not be shown.

Authors are limited to the presentation of up to two papers at the conference.

### **Invited Papers and Convened Sessions**

The Program Chairs may invite authors to submit papers and presentations on specific issues. Such work will be submitted to threads but will be marked as invited. The Thread Chairs understand that they are invited papers. The Thread Chairs may, but are not required to, review the invited papers and provide the Program Chairs with feedback. Invited papers should conform to the standards of research papers or application presentations. Invited work does not need to undergo peer review; it may be sent for review at the discretion of the Program Chairs.

Papers may be invited as part of convened sessions led by an organizing chair. In that case, the designated convener would solicit and review submissions to the indicated session. This process needs to be planned well in advance to avoid rework of the TSP.

Convened sessions may also be proposed for special session types such as panels, Lightning Talks, and Roundtable discussion sessions. The Program Chairs should proactively invite certain convened sessions as appropriate to their program needs.

### **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 reviewers' names are never shown to a listed author, the Thread Chair should not view the program committee page for his or her paper. If there are two or more Thread Chairs, the other Thread Chair(s) should make a recommendation by email (not using the submission system) to the Program Chairs and they will make the decision. If there is only one Thread Chair, or if all Thread Chairs are co-authors, then they should send a note to the Program Chairs informing them of the paper number for which they are recusing themselves.

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. In addition, the named Program Chair should not view the program committee page for the paper. The Program Chairs should not submit any papers 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.

A Program Chair who has previously been a Thread Chair may continue to be a Thread Chair with approval from SPOC, the other Program Chairs, and the other Thread Chair(s).

## Managing Threads and Thread Chairs

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 PCs can effectively set the expectations and manage the TCs. Here are some basic guidelines for that process.

1. At least two TCs are appointed for each Thread.
2. TCs will normally serve a term of four years with two years of overlap between each pair when possible. Exceptions to this norm may be made on the basis of performance (both good and bad) and contingencies. Adherence to this rotation plan requires a queue of potential TCs to be identified by the SPOC and incoming conference PCs.
3. PCs should keep a log of interactions with TCs that highlight good and bad experiences, points of confusion, or suggestions to improve the coordination of Thread and Program experiences.
4. The System Dynamics Society should send a 'thank you' note (from the PCs) to all the TCs after their work is completed (in June or July) and, with it, solicit feedback from the TCs on their 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 SPOC and 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 work with SPOC to propose the list of Threads, Thread Definitions, and TCs. Formal approval will require a vote of the SPOC only if there are significant concerns expressed or changes made.
  - a. New threads and focus areas can be proposed by anyone for consideration by the SPOC and PCs, but these will be considered temporary until it is determined by the SPOC that they are useful to retain.
  - b. Thread imbalances may necessitate changes, and threads with low interest should be retired or revised. There were 14 threads from 2013-2019. For the purpose of planning, a smaller set of 10-12 threads is more helpful than a larger set of threads (from 14 to 16 as of 2021) in achieving the desired room mapping (generally up to 8 or 9 events in parallel). 13 threads are planned for 2022 (see [Appendix](#)).
7. The PCs and SPOC should review and, if desired, update the [TC instructions](#) on the SDS webpage.
8. Threads can be aligned with specific focus areas. For example, Structural Racism was a special focus area in 2021. Focus areas may be designated in the Web Portal submission system as a basis for program review and placement in lieu of (or in addition to) secondary threads.
9. Once threads and TCs are approved by the full 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 PCs sign that message to signal the TCs realize that this is a new appointment under 'new

management.' This appointment of the team of TCs should be done by September or October so that promotional materials can include this information.

10. By January, 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/all of the co-chairs should agree on the TSP before submitting it. There have been problems with this issue so it is important to remind them. If there are any issues with TCs, the PCs should keep a record to inform the SPOC of whether a TC should be reinvited.

Note that this information should also be included in the thread chair instructions web page referenced in 7.

## Reviews

Thread Chairs should rate reviewers using the star rating system, and they should take special 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 reviews in order to start adjusting this star rating (this is an exponential smooth of recorded ratings). For reviews that seem particularly inappropriate, TCs should use the Web Portal mechanism to block the written review from being displayed to the authors of the paper (authors do not see the reviewers' quality ratings, but TCs and PCs do). If appropriate, TCs can also send targeted feedback to reviewers through the Web Portal.

While the main responsibility of the PCs 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. 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 at least one constructive review.

## Conference Record

All material presented at the Conference will have the title, authors, and abstract included as part of the Conference Record. All contributors will be able to provide a hyperlink to a full paper or related content. Information about the Conference Record is available at the following link:  
<https://webportal.systemdynamics.org/documentation/Default.htm#cshid=1007>

Research papers and application presentations presented in Plenary, Parallel, and Poster sessions will optionally have a paper, extended abstract, or set of slides (for application presentations) included in the conference record. Work from these sessions may also include models and other supplementary material useful for understanding the results presented along with a link to separately hosted content related to the author or paper.

### Research Paper Format for Conference Record

It is recommended, but not required, that research papers included in the conference record be submitted as two-page extended abstracts with an attached bibliography. Whatever is submitted to the conference record should never prevent the author from publishing elsewhere.

## 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 many years, workshops were managed almost completely separately from the main conference program. Though this worked well, the Program Committee is encouraged to find ways of making the combination of the two parts of the conference appeal to managers, policy makers, and others who might not normally attend the conference. In recent years, Workshop Chairs have been identified to review and approve workshop proposals for the conference program. Workshop Chair decisions do not need approval of the Program Chairs. In the traditional conference format, workshops are scheduled for the last day of the conference (Thursday). For the virtual format, workshops have been extended over the last 2 days of the conference, with the opportunity to repeat the workshop live in a different time slot.

## Unresolved 'Issues'

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

1. 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.
  - a. Detailed Thread Chair Instructions are available in a separate document. Because the sessions are only finalized after authors have registered for the conference, Program Chairs often must rebalance sessions that span across threads.
2. Other details to add to this document:
  - a. System Dynamics Summer School - online only as of 2020
  - b. Student-Organized Colloquium - name and scope
  - c. Guidelines on conference days of week - Sun-Thurs norm, Mon-Fri alternative
  - d. Standardization of conference name as International System Dynamics Conference (ISDC) in messaging, rather than the full International Conference of the System Dynamics Society

### Major issues (probably requiring Policy Council approval)

1. 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.



- a. As of 2021, anyone who submits a paper to the conference is invited to become a reviewer as part of gaining access to the Web Portal. A challenge of screening reviewers is the likelihood of not having a sufficient number of reviewers.
- b. Partial Resolution: A mechanism is in place to allow the Thread or Program Chairs to block unhelpful reviews from being displayed to authors through the Web Portal.
2. Issues that may warrant further consideration and require elaboration:
  - a. Policies for use of recordings during and after virtual or hybrid conferences
  - b. What is included in the Conference Record
  - c. Whether there should be an ISBN for Conference Proceedings

## Previous 'Issues' that have been Resolved

1. 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.
  - a. Resolution: There is no target rejection rate since the introduction of feedback sessions in 2018. Rejections should only be based upon lack of relevance or plagiarism. Therefore, advice to the TCs should be based upon targets for feedback sessions, rather than outright rejection.
2. 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.
  - a. Resolution: A program planning timeline has been [appended](#) to this document.

## Appendix A: Conference Threads

For the 2022 conference, the threads are as follows (see also <https://bit.ly/isdcThreads>):

1. **Business and Strategy** (Revised for 2022): Features applications of System Dynamics in businesses and organizations including strategy development, profitability, marketing, competitive dynamics, product launches, project dynamics, and accounting.
2. **Diversity** (Special thread for 2022): Features applications of System Dynamics on topics such as gender, race or ethnicity, class, age and ability, etc., and submissions that demonstrate diverse experiences with System Dynamics.
3. **Economics**: Features papers improving understanding of economic dynamics including macroeconomics, microeconomics, trade, business regulation, economic development, economic policy, insurance, and risk management.
4. **Environment and Resources** (Revised for 2022): Emphasizes dynamics of natural resource management and policy for the environment including energy and climate change, pollution, environmental regulation, and ecology.
5. **Health**: Applies System Dynamics to issues related to health and health care including health policy, health services research, population health, and physiology.
6. **Learning and Teaching**: The manner in which system skills are taught and learned including pedagogy, learning experiments, curriculum development, workshop design, and interactive activities designed to be part of an educational experience.
7. **Methodology** (Revised for 2022): Welcomes contributions to System Dynamics modeling and simulation including quantitative and qualitative aspects of model development, model analysis, validation, graphical presentation formats, computational techniques, and integration of System Dynamics with other approaches such as Artificial Intelligence and Predictive Analytics, among others.

8. **Operations:** Includes business and other process operations including capacity management, quality control, operations management, supply chains, workflow, queuing, and workforce planning.
9. **Psychology and Human Behavior** (Revised for 2022): Explores the dynamics within and between social groups, including social environments or individual psychological factors, and spanning families, organizations, and societies.
10. **Public Policy:** Covers issues including governance, social welfare, equity, justice, political science, urban dynamics, and infrastructure.
11. **Security, Stability, and Resilience** (Revised for 2022): Investigates issues related to security, stability, and resilience, including defense, social and international conflict, military operations, insurgency, counterinsurgency, cybersecurity, disinformation, safety, disaster management, peace engineering, justice, (financial and economic) crime, policing, incarceration, socioeconomic inequality, and food-energy-water security.
12. **Stakeholder Engagement:** Emphasizes engaging and influencing stakeholders through participatory activities such as group model building, facilitation, facilitated modeling, games, and management flight simulators, with emphasis on assessing the impact of the engagement.
13. **Transport and Mobility** (New for 2022): Covers all aspects of transportation systems and mobility, including transport and urban planning policies; new services, technologies or business models; decarbonization and sustainable mobility; transport and health; and freight and logistics.

This Thread structure is streamlined so that Strategy is merged with Business, and Resources is merged with Environment. Transport and Mobility is a new Thread for 2022. Diversity is also a new Thread, intended only for 2022 in keeping with the conference theme. The Artificial Intelligence and Data Analytics, COVID-19, and Information and Knowledge Threads are being retired. These topics will be integrated with other Threads through the Focus Area system. Security and Human Behavior Threads have been renamed and redefined in keeping with the scope of the associated SIGs.

For reference, there were 16 conference threads in 2021, defined as follows:

1. **Artificial Intelligence and Data Analytics** (New for 2020): Features issues or methodologies related to the application or integration of System Dynamics with Automated Intelligence, Big Data, Data Science, Predictive Analytics, or Machine Learning.
2. **Business:** Features applications of System Dynamics in businesses and organizations including profitability, marketing, competitive dynamics, product launches, project dynamics, and accounting.
3. **COVID-19** (New for 2021): Covers all aspects of the pandemic and its consequences, including disease dynamics, economic impacts, human behavior, business impacts, resource and security implications, social disruptions, and other related topics.
4. **Economics:** Features papers improving understanding of economic dynamics including macroeconomics, microeconomics, trade, business regulation, economic development, economic policy, insurance, and risk management.
5. **Environment:** Emphasizes dynamics of and policy for the environment including climate change, pollution, environmental regulation, and ecology.
6. **Health:** Applies System Dynamics to issues related to health and health care including health policy, health services research, population health, and physiology.
7. **Human Behavior:** Explores the dynamics in the social environments of families, communities, organizations, culture, and society including individual and social psychology.

8. **Information and Knowledge:** Includes the dynamics of knowledge management, information systems, social network analysis, research & development, invention and innovation.
9. **Learning and Teaching:** Explores the manner in which system skills are taught and learned including pedagogy, learning experiments, curriculum development, workshop design, and interactive activities designed to be part of an educational experience.
10. **Methodology:** Welcomes contributions of System Dynamics modeling and simulation including model development, model analysis, validation, graphical presentation formats, and computational techniques.
11. **Operations:** Includes business and other process operations including capacity management, quality control, operations management, supply chains, workflow, queuing, and workforce planning.
12. **Public Policy:** Covers issues including governance, social welfare, equity, justice, political science, urban dynamics, infrastructure, and transportation.
13. **Resources:** Addresses the understanding and management of resources including energy, electricity, fuels, food, metals and other renewable and nonrenewable resources.
14. **Security:** Investigates issues related to security including defense, conflict, military, insurgency and counterinsurgency, social unrest, disaster management, crime, policing and incarceration.
15. **Stakeholder Engagement:** Emphasizes engaging and influencing stakeholders through participatory activities such as group model building, facilitation, facilitated modeling, games and management flight simulators with emphasis on assessing the impact of the engagement.
16. **Strategy:** Focuses on the development, communication and implementation of strategy, including strategic thinking, goal definition, and outcome measures for public and private organizations.

In June 2021, a [thread review](#) was held by the SPOC, with input from TCs and SIG representatives, in which the following modifications were suggested:

- Consolidation into fewer (10-12) threads to facilitate balance and program planning
  - For 2022, 12 core threads will be offered, plus the special Diversity thread
- Distinguish between threads and focus areas
  - Authors could identify focus areas by thread, rather than secondary thread
- Consideration of new threads for Diversity, Structural Racism, and Transportation
  - Structural Racism was a contributed focus area for 2021 with convened sessions
  - Diversity will be a temporary thread
  - Transport and Mobility is a new thread for 2022
- Retirement of AI/Data Analytics and Information/Knowledge threads
  - Merge topics with other threads and/or include as focus areas
- Alignment of Environment/Resources with Sustainability/Resilience
  - Potential to consolidate or reconfigure
- Alignment of threads with SIGs where appropriate
  - Human Behavior would become Psychology and Human Behavior
  - Logic for Transportation thread

## Appendix B: Program Planning Timeline

Table B-1 provides an overview of the annual program timeline with key program tasks indicated, to be completed by Program Chairs with support from SPOC and the Central Office. Additional, ongoing program tasks include the following:

- Identify and invite potential plenary speakers
- Review and revise planned communication to TCs, authors, reviewers, and attendees
- Keep a log of interactions with TCs that highlight good and bad experiences, points of confusion, or suggestions to improve the coordination of Thread and Program experiences
- Keep notes from program experience to share with SPOC and next Program Chairs

The information below is illustrative and intended to be used as a guide. Specific deadlines and timelines will vary by year. Responsibility for completing these tasks is shared between the Program Committee, the SPOC, and the Central Office. A detailed SDS task list with specific deadlines will be actively maintained by the Program Committee during the current conference year.

Table B-1. Approximate Timeline of Key Program Tasks

Timing	Task
September	Select the set of Threads to be included in the upcoming conference, review descriptions, and identify potential thread chairs.
	Evaluate and Identify KNOWN potential thread chairs from previous year.
	Identify NEW potential thread chairs from specific nominations by Program Chairs.
	Compose Thread Chair invitations for upcoming conference with updated duties and expectations.
October	Review and revise online Thread Chair Instructions and organization guidelines
	Send Thread Chair invitations for upcoming conference, including TC instructions
	Recruit plenary speakers
	Identify awards to include in CFP/brochure; Program Chairs to decide on Best Poster Award
	Assemble Registration Brochure information, including identified plenary speakers, session conveners, etc.
	Update and disseminate final Call for Papers
November	Secure TC Roster - Finalize Thread Names/Chairs to include in Registration Brochure, conference literature
	Review/update SUBMISSION SYSTEM INSTRUCTIONS for authors, Program Chairs, thread chairs, award chairs.
	Create and include Schedule Overview in Table Format for Registration Brochure
	Prepare invitations for potential session conveners who may be contacted to organize

	special sessions
December	Review and revise post-conference survey
	Submit updated Program Guidelines to Policy Council as a report to be recorded into the minutes
	Review AUTHOR GUIDELINES for final submission requirements, post on web.
	Update Conference Paper Review Guidelines
	Identify special session coordinators (WIP, Feedback, Roundtable) and invite session conveners
January	Assemble and disseminate Registration Brochure
	Estimate maximum paper capacity to advise allocations by category (plenary/parallel/poster/WIP/feedback)
	Announcement / reminder of submission deadline (Include MAW announcement, awards, registration and Conference Scholarship info.)
	Prepare letters of acceptance and rejection, including for early decision due to visa issues
February	Review AUTHOR GUIDELINES for final submission requirements, post on web.
	System open to receive all types of submissions. Start continuous review/evaluation process, Program Chairs, thread chairs to access system simultaneously with reviewers (rolling reviews)
	Manage/evaluate thread chair activities - hold TC orientations
March	Communicate paper allocation guidance to Thread Chairs
	Record distribution of submissions by type and thread after submissions close
	Review and update Program Guidelines as appropriate during the programming experience.
	Review Special Session Proposals sent directly to Program or Thread Chairs. In Web Portal, review Program Notes - Look for Special Sessions or Other (Program Menu - Papers listed by author name then Show only papers with notes to program committee)
April	Evaluate reviews and send feedback to reviewers
	Identify some potential parallels from posters & potential plenaries from parallel (in case of withdrawals).
	Thread Chairs identify probable interest or concerns for each session for the Program Chairs
	Thread Suggested Program due from Thread Chairs
	Review letters to invite/assign plenary, parallel, WIP, feedback, and other chairs.
May	Program Chairs finalize the decisions of the Thread Chairs

	Notify Authors of Acceptance/Rejection and Presentation Format
	Program Schedule: Post draft program overview by thread on the web
	Record distribution of decisions by type and thread after acceptances sent
	Program Chairs evaluate performance of thread chairs and threads for planning next year's conference
	Edit and send Thread Chair thank you (with request for input on experience).
	Follow up with Authors on presentation details, send info on presentation, length, AV, etc.
June	After the program development experience (starting before the conference), hold an electronic debriefing to gather comments from all program related roles
	Program Chair Program Planning - help plenary speakers structure their presentations so that the presentations become more effective in the context of other presentations in the same plenary.
	Tentative Schedule on the web (including all meetings - Chapters, SIGs etc)
	For parallel session chairs: Invite thread chairs first, winnowed list second, then individually
	Prepare conference status report for Summer Policy Council Meeting, including allocation and rejection numbers.
July	Final version of program on web
	Onsite meeting with local host
	Attend Newcomer Orientation and Welcome Reception
	Conference Opening Ceremony
	Conference Closing Ceremony
	Attend Conference Debriefing Meeting
August	Hold a SPOC debriefing meeting at or after the conference to gather input from the Program Chairs, Thread Chairs, Workshop Chairs and Conference organizers as a basis for updating the program guidelines
	After the conference, start the process for updating the NEXT YEAR'S thread list and definitions, thread chair evaluation (for invitations). Program Chairs to share information with SPOC for review.
	Update information for conference report, including survey results, reviews, threads, papers per thread, etc. Submit report to Policy Council and review with SPOC.
	Follow up with Authors to submit material for the Conference Record.