

**System Dynamics Society**  
**Strengthening the Field Fund**  
**Description and Application Guidelines**  
January 10, 2013; revised June 24, 2022

## **I. Historical Background**

The development of the chapters of the System Dynamics Society (SDS) is critical to the Society's health and growth. To that end, the Society's Policy Council approved a motion at the 2010 meeting providing a limited amount of funds to support chapters in development activities. The goal of this effort was to develop chapters' "capacity" in System Dynamics. The initial focus of the "capacity development" was connected to advanced aspects of System Dynamics practice, rather than System Dynamics fundamentals or topics outside the System Dynamics domain. In recent years the possibility to apply to the StFF program was also extended to SIGs and member groups within the Society to support and underwrite meetings or development of region-specific SD materials.

Based on the discussion at the 2012 Policy Council summer meeting, the responsibility of the "Strengthening the Field Fund" (StFF) was placed under the control and direction of the "Strengthening the Field Committee" (StFC).

In 2021, the StFC recognized the need for a restatement of its goals and purpose, which follows below.

## **II. Purpose**

The Strengthening the Field Fund (StFF) allocates funding for activities of chapters, SIGs, and member groups that promote the growth of the System Dynamics field. The Fund is allocated from the annual SDS budget designations and gifts to the society. Proposals for funding are vetted by the StFC committee based on specific evaluation criteria that are reviewed periodically. These criteria are specified in Section VI below.

The StFF will be used to strengthen the ability of Chapters, SIGs, and SDS member groups to support the development of capacity in System Dynamics.

Goals of the Strengthening the Field Fund include the following:

- Increase membership of the System Dynamics Society
- Develop and maintain members' capabilities in System Dynamics
- Enable knowledge sharing and dissemination on System Dynamics topics
- Facilitate community building and collaboration among SDS members
- Support interest and enthusiasm around System Dynamics topics
- Make it easier for SDS members to learn and share experiences
- Facilitate SDS Chapter and SIG activities

- Improve linkages to other professional or academic societies

Examples of activities that may be funded include, but are not limited to, the following:

- Development of materials enabling students and other learners to keep on improving their capabilities (videos, self-study guides, books, etc.).
- The development of a Chapter or SIG's capacity in System Dynamics through training opportunities for members.
- Activities that strengthen the relationship of specific Chapters or SIGs, or the SDS in general, with other related organizations, such as through joint or adjacent meetings,
- Scholarships to the International System Dynamics Conference, etc.
- Sponsorships and awards for special competitions or challenges held by Chapters or SIGs.

The following limitations apply to activities that may be supported by the Strengthening the Field Fund:

- Formal activities are preferred to general marketing materials. Examples of formal activities include conferences, competitions, and localized learning materials. General marketing materials are expected to be developed through the Home Office.
- Funds will not be awarded for activities that duplicate existing resources and/or activities of the SDS Home Office, including outreach and marketing of System Dynamics.
- Funds may not be used for reimbursement of activities conducted before the application date.
- Activities that have a revenue component can be supported through cost-sharing and reimbursement to the fund if feasible. Chapters that charge for activities, dues, or products and apply to StFF are expected to document in their proposal how they intend to contribute financially to their proposed activity.

### **III. Funding Policy**

StFF funds are a grant from System Dynamics Society in support of an activity organized by any member group. Applications may be proposed by Chapters, SIGs or any other (even informal) group constituted by SDS members. The recommended format and guidelines to submit a StFF proposal are described in section VI below. Acceptance of StFF funding includes written acknowledgement of the responsibilities listed below:

1. A proposed activity should be for a period of no more than 12 months. Multi-year activities require separate applications for each year.
2. Payment will be made to the organization or group (if constituted under appropriate law), a collaborating not-for-profit organization, or to a vendor, as specified in the application. Direct payments for individual services, such as honoraria, must be made through the

proposing organization. Expenses to volunteers may be included but will only be reimbursed with complete documentation.

3. The Society will under no circumstances make guarantees beyond the approved award amount and does not directly engage in the organization of activities supported by the grant.
4. Activities funded through StFF are the responsibility of the proposing organization and not the SDS.
5. The grant request will be considered and evaluated based on the submission of a complete and accurate proposal. The content for proposals includes the items specified in Section VI of these StFF Guidelines.
6. The requesters must provide the SD Society with a complete list of the current elected or appointed leaders in their proposing organization, as well as documentation (to be included in the proposal) of any payments to its leadership, in order to highlight potential related party transactions.
7. The proposing organization is responsible for filing any tax related documents and fulfilling legal requirements within the reporting windows required by relevant legal authorities.
8. The StFF recipients agree to provide and license text, photos, or videos for SDS social media and newsletters without fee. The recipients will also distribute information on how to become SDS members and other marketing materials to activity participants.
9. StFF recipients must comply with established privacy requirements. They must also solicit the release of personal information and privacy of participants as required by relevant law.

#### **IV. Committee Structure**

The Strengthening the Field Committee consists of the VP Chapters & SIGs (ex officio chair), VP Meetings, VP Membership, and VP Finance. The committee may designate an alternative chair by majority vote of the committee members. The committee may invite others for consultation.

The main task of the committee is to evaluate proposed activities based upon the criteria set in Chapter V: Submission and Decision Procedure. Committee members are expected to identify conflicts of interest associated with proposals and recuse themselves from voting, though they may participate in discussions.

The StFC will meet at least quarterly to make decisions about submitted proposals or other policy questions. It will report to the Policy Council periodically on the use of the StFF funds.

The Committee will seek a vote of the Policy Council to approve any updates to these guidelines as needed.

#### **V. Submission and Decision Procedure**

1. The availability of StFF funds will be advertised periodically through the Home Office.
2. Proposals to the StFF are made through a formal request submitted to the attention of (and decision from) the StFC.
3. Proposals will be tracked through a repository provided by the SDS Home Office.

Committee members will access the repository to review and download application materials, archive email responses, add comments about the proposals, and render a vote, including a recommendation for provisional acceptance.

4. All proposals must be submitted electronically by using an application form provided by the Home Office, to be filled out by the requester. The form requires the information outlined in Section VI of this document.
5. Applications should be submitted at least three (3) months prior to the event or activity proposed for funding.
6. The StFC is responsible for reviewing and making approval decisions on all proposals for the Strengthening the Field Fund (StFF). These decisions may include accepting the proposal, rejecting the proposal, or recommending changes to the proposal.

The committee's process is:

- a. Within 30 days of initial receipt, the committee will review the application and contact the requesters if more information is needed, with a timetable for revisions.
- b. Decision criteria will include:
  - i. Alignment with intended purposes of the funds as stated in Section II
  - ii. Anticipated quantitative and qualitative benefits to the Society and its members in line with the intended purposes of the fund, as stated in Section II
  - iii. Consideration of any potential conflict of interest
  - iv. Capacity of the applicants to complete the activity
  - v. Completion of reporting requirements on previous StFF grants by the applicant.
7. Once an application has been approved by the committee by a majority vote, the StFC chair will send an email notification of approval to the applicant with a link to a form maintained by the Home Office that the recipient will need to complete in order to receive the funds.
8. StFF funding comes from the annual budget of the SDS. Once all available funds for the year are allocated, the StFC can request additional funds.
9. StFF funded activities may span calendar years but no more than 12 months. If approved, funding is held based on the original proposal schedule. If the approved activity is delayed beyond the end of the plan indicated in the proposal, the applicant must contact the committee to request that the funds are rolled over to the following year. Rollovers are not guaranteed.

## **VI. Application Form**

Applications should be submitted through a link on the SDS website, and should contain the following information at a minimum:

1. Identification of requesters
  - a. The Chapter, SIG, or member group proposing the initiative/activity, if applicable

- b. The individual(s) or organization and contact information for those responsible for the custody and use of the activity and the funds
2. Description of the proposed initiative/activity
  - a. Dates
  - b. Location
  - c. Details of the planned initiative/activity, including intended participants and their roles
3. Anticipated impacts, including measurable indicators, of the proposed initiative/activity on the StFF goals, as identified in Section II
4. Budget
  - a. Breakdown of estimated costs. Examples include (but are not limited to):
    - i. Conference registration fees and travel costs
    - ii. Rental space/equipment
    - iii. Travel and per diem for instructors
    - iv. Instructor compensation
    - v. Workshop or other materials
    - vi. Translation costs
    - vii. Reviewing and editing costs
    - viii. Other
  - b. Breakdown of any estimated revenues. Examples include (but are not limited to):
    - i. Expected revenue from participants (number \* fee)
    - ii. Expected local sponsorship (in kind and funds)
    - iii. Expected revenues from sales (if applicable)
    - iv. Support from the Society's Strengthening the Field Fund
  - c. Break-even analysis, if applicable. Examples include (but are not limited to):
    - i. Number of participants necessary for the event to break-even financially
    - ii. Anticipated Chapter/SIG surplus from the activity, if the planned (or higher) number of persons participate
    - iii. If the activity generates revenue, a proposal for returning surplus funds to the Strengthening the Field Fund
5. Supporting documentation, as needed. Examples include (but are not limited to):
  - a. Agreements with organizations or individuals outside the SDS
  - b. Already sustained expenses aimed at preparing/executing the initiative
6. Any required or desired interaction from the Home Office or Society
7. Describe how the SDS's funding will be acknowledged in the activity
8. Acknowledgment that ultimate responsibility for the activity and associated risks rests with the proposers.

SAMPLE ACKNOWLEDGEMENT FOR CONSIDERATION



Underwritten by the  
System Dynamics  
Society

## **VII. Reporting**

Within 30 days of completion of the activity, StFF recipients must prepare and submit to the StFC a full report of the supported activities and events. The report should include the number of participants, contact information of participants if possible, indicators of success/failure, financial outcomes, and planned follow-up activities. It should also include an acknowledgement from the organizers that they have or will complete all legal or regulatory reporting within their jurisdiction.