

Guidelines for the Programs of the System Dynamics Society

V0.09 December 19, 2022

Society Programs Oversight Committee (SPOC)

The SPOC is a Standing Committee of the System Dynamics Society (SDS) that is charged with recommending future Program Chairs, session types and formats, topics and application areas, and other items related to the scholarly content of conferences. The SPOC is responsible for overseeing the performance of conference Program Committee members, including Program Chairs, Thread Chairs, and Workshop Chairs. The SPOC consists of 6 members serving staggered 3-year terms to provide continuity. There are 4 rotating members, at least 2 of whom are past program chairs. The VP Publications and VP Meetings shall serve as ex officio members. The VP Meetings shall serve as the ex officio SPOC chair. The SPOC may designate an alternative member to be chair by majority vote. Membership is on a calendar year basis.

Document Purpose

The purpose of these program guidelines is to provide clear standards for the quality of programs that are offered by the SDS. This document captures the lessons and insights of the chairs involved with planning, development, and publication of these programs so that this knowledge can easily be transferred to their successors. This document may be updated by any current SPOC member or Program Chair as new issues and resolutions emerge, but changes to policy and practices should be supported by a majority of the full SPOC. While all topics related to SDS programs could be captured in this document, its main focus should be on the preparation of content for scientific and professional programs to advance the field.

Table of Contents

SPOC Functions	2
Program Chair Duties	2
Conference Submission Types	4
Conference Session Types	5
Conference Session Planning	6
Conference Workshops	8
Selection Process	9
Conflicts of Interest	10
Managing Threads and Thread Chairs	11
Reviews	12
Conference Record	12
Ongoing Issues	12
Appendix A: Conference Threads	13
Appendix B: Program Planning Timeline	15
Appendix C: Version History	17

SPOC Functions

The SPOC performs the following functions during each calendar year:

1. At least once each year at a Policy Council Meeting, the SPOC chair will report out on activities and guideline updates, and record into the minutes as supporting material a copy of these guidelines as they have been revised from the previous version. Significant changes to this document should be approved by a Policy Council vote.
2. Before April, select the Workshop Chairs for the conference to be held the following year.
3. By the time of the Summer Conference, recruit Program Chairs for the conference at least 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, a SPOC member or past Program Chair must also agree to mentor and support them as needed.
 - b. Potential Program Chairs may be identified from recent Thread Chairs.
 - c. Once they have agreed to serve, the Program Chairs selected by the SPOC will be approved by a vote of the Policy Council.
4. After the program development experience, hold an electronic debriefing in order to discuss program-related issues and gather together comments from the Program Committee as a basis for rationalizing Thread management and updating this document.
5. Select the set of Threads and related Focus Areas to be included in the upcoming conference and approve Thread Chairs (more details on this below). This needs to be completed by October so that the Web Portal can be updated.
6. Recruit new rotating SPOC members. Rotating SPOC members shall be appointed by the Society President or other officer with the approval of the Policy Council. An incoming Program Chair should 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.
7. Approve the modification of this document based on the changes from the debriefing and the updated Thread list.

Program Chair Duties

This section exists to guide the conference Program Chairs in their duties and to help potential candidates decide whether they are willing to be Program Chairs. The largest part of the work of Program Chairs is concentrated between March and May, when the papers are reviewed, approved, and placed into cohesive sessions. See Appendix B for an approximate timeline of program tasks.

1. Come up with the conference 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, leaving some spots open for high-quality paper submissions (see *Plenary Sessions* below).

4. Add features to the program as appropriate. These may come from outside people sending proposals (e.g., in 2015, someone proposed to place a set of high quality visualizations around the conference).
 - a. 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.
5. Determine the overall program timing, in consultation with the organizing committee and Office.
6. Participate in creating communications from the Office about the conference.
 - 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 valid for the submissions, and rate reviewer quality in the Web Portal. Some Program Chairs read all the submissions, 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 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.
10. Open 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, in addition to any announcements delivered live. Communication with conference attendees should be managed in collaboration with the Office.
11. Attend the post-conference debrief (generally held on the last day of the conference).
12. Optional: Write a few SDS blog posts to increase public awareness and excitement about the conference. Others may help. Beginning in 2021, a [Conference Highlights Blog](#) team was formed by the Policy Council for this purpose.

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

Conference Expectations

The International System Dynamics Conference (ISDC) is generally held on a Sunday through Thursday, or Monday through Friday, in late July or early August. The Student-Organized Colloquium is generally held on the day prior to the main conference program (Sunday or Monday) as well as the Policy Council meeting. Workshops are generally held on the last day of the conference (Thursday or Friday). Decisions about the exact timing are contingent upon site constraints and costs.

The conference is traditionally known as the International Conference of the System Dynamics Society, and this longer name continues to appear in the Conference Record. However, the decision was made in 2021 to standardize the shorter name and ISDC abbreviation for communication and promotional purposes.

Virtual and Hybrid Conference Delivery

The COVID-19 pandemic necessitated that the 2020 and 2021 conferences be held virtually. The capability of delivering virtual conferences provides opportunities for future hybrid conferences that combine an in-person conference component with an engaging online experience. The first fully hybrid conference was held in 2022. Many design choices enter into the planning of a virtual conference, but an overriding principle is to retain the integrity of the session formats.

Most material presented at hybrid conferences will be recorded, with the notable exception of in-person interactive sessions (posters and table talks). Session recordings will be made available for a sufficient period following the conference to allow participants to view them. The availability of the conference website extends through September, when the permanent Conference Record is finalized.

Upon submission, 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. 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 Submission Types

1. **Research Papers** of approximately 5000 words (and not to exceed 7500 words), 5 to 30 pages long, 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. **Practitioner Applications** consisting of 10 to 30 presentation slides, including an abstract slide (not for presentation) and a bibliographic slide. Practitioner Applications 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 (WIP) Descriptions** consisting of extended abstracts (two-page document, plus a bibliography) describing the work being conducted and preliminary results, if any. WIP descriptions will be considered for WIP and Feedback Sessions. WIP submissions will be subject to blind peer review, selection by Thread Chairs, and final disposition by the Program Chairs. Review comments by the Thread and Program Chairs are encouraged, especially for work placed in Feedback Sessions.
4. **Workshop Proposals** require an abstract (~250 words) and descriptions or information on: format, background expectations, and facility requirements. Workshop Proposals are reviewed and approved directly by the Workshop Chairs.
5. **Other Submissions** based on an abstract (~250 words) for material that is of interest to the SD community but does not conform to the norms for conference presentations. This may include roundtable proposals, model exposition proposals, work done by K-12 students, or activities of chapters and SIGs. This work may be considered for Specialized Presentations (roundtable, parallel, poster or another format). Other activities are not part of the standard review process (i.e., blind review and Thread Chair evaluation), but instead are reviewed and approved directly by 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. Research Papers and Practitioner Applications should include results and outcomes. Preliminary results are encouraged but not required for WIP descriptions.

Conference 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. There would be 3 talks in a 90 minute session or 2 talks in a 1-hour session. Plenary sessions will be recorded.
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. Parallel sessions will be recorded.
3. **Interactive Sessions** for quality work that lends itself well to discussion. Interactive sessions include table talks and poster sessions.
 - a. Table talks are held in person with 3 presenters, a moderator, and audience members sitting around a large table. After a round of introductions, each presenter will have 7 minutes to talk followed by 8 minutes of discussion. Additional time in each 1-hour session will be used for general discussion. Table talks are held without AV and will not be recorded.
 - b. In-person poster sessions are 90 minutes long and enable attendees to circulate among a selection of posters at assigned locations. In-person poster sessions will not be recorded.
 - c. Virtual poster sessions will be conducted as lightning talks with up to 6 papers in a 1-hour session, where each talk is 5 minutes long, followed by 5 minutes of discussion. The moderator controls the slide deck and should prepare remarks that help foster discussion. Virtual poster sessions will be recorded.
4. **Work in Progress (WIP) Sessions** for discussing work in progress that is of general interest. Each WIP presentation is 5 minutes, followed by 5 minutes of discussion. There would be up to 6 presentations in a 1-hour session. WIP sessions should be organized around a unifying theme that may cut across threads. The moderator controls the slide deck and should prepare remarks that help foster discussion. WIP sessions will be recorded.
5. **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. Feedback sessions will be recorded.
6. **Lightning Talks** for quality work that can be presented quickly. This can include virtual poster sessions, 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. Lightning talks will be recorded.
7. **Model Exposition** for interesting models that can be shared with others interactively.
8. **Roundtable Discussion 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. Roundtable sessions will generally be recorded.

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.
10. **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.

Plenary, Parallel, Interactive, WIP, and Feedback sessions will be offered at all conferences. Program Chairs choose whether to offer other session types based on submitted material and logistical constraints communicated by Organizing Chairs.

Conference Session Planning

Plenary Sessions

The selection of plenary speakers is at the discretion of the Program Chairs. Plenary sessions are critical to the success of the conference program. As such, plenary sessions deserve special planning and consideration from the Program Chairs. Following are some guidelines for structuring plenary sessions.

1. Program Chairs should be proactive in inviting plenary speakers. Invited speakers can serve to shape the conference around the conference theme. Early identification of plenary speakers is important for marketing the conference.
 - a. Inviting plenary speakers can begin well before the conference submission system opens. However, it is advisable to allow room in the program for high quality submissions to be included to plenary sessions. Plenary-worthy submissions will be designated as parallel+ by Thread Chairs (see below).
 - b. The expectation is that all presenters, including 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. 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.
3. Since many conference attendees seek to learn about methodology, it is advised that at least some plenary presentations focus in particular on methodology.
4. Efforts should be made to increase the diversity of speakers and moderators in the plenary sessions. This consideration should be made not just within a given year, but also in light of plenary speakers who have already been featured at prior conferences.
5. Have fewer plenaries if there are difficulties recruiting plenary speakers or identifying enough 'plenary quality' submissions to constitute compelling plenary sessions.
 - a. The number of plenary sessions may be reduced to allow for additional parallel sessions.
 - b. Shorter plenary sessions may be planned, so that there is a 60 minute plenary session with 2 talks rather than a 90 minute session with 3 talks.
6. When selecting a paper for a plenary session, please keep in mind that a great paper does not necessarily mean a great presentation. If a speaker of unknown quality is being considered, the program chairs should try to arrange a meeting or obtain references from colleagues.
7. Program Chairs should help plenary speakers structure their presentation so that it is more effective in the context of the other presentations in the same plenary session. 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.

- a. Program chairs should review presentation materials for plenary speakers in advance to make sure the presentation suits the context of a plenary talk and will fit in the time available. Program chairs should not seek to alter the substance of these presentations (unless there is objectionable, misrepresented, or inappropriate material).

Thread Chair Program Suggestions

Most of the conference program (parallel, interactive, WIP, and feedback sessions) is organized by thread. As such, the Program Chairs (PCs) rely on the Thread Chairs (TCs) to organize submissions into recommended sessions for their thread. Specifically,

1. TCs recommend to the program chairs whether a paper submitted to their thread should be accepted or rejected on the basis of plagiarism or lack of relevance. If accepted, the TCs should indicate whether the submission deserves a status of feedback, work in progress, interactive, interactive+(usable in a parallel session), parallel, or parallel+ (worthy of consideration by the PCs for a plenary session). Classification of paper status should align with the approved session categories. Instruction on what are the acceptable categories should be clearly communicated to TCs (see section on the *Selection Process*).
2. TCs should provide a justification (one or two sentences) for the allocation decision by leaving a Program Committee note for the submission in the Web Portal. 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, TCs should provide a review for the authors that corresponds to that recommendation.
3. By their nature, the sessions created by TCs will be incomplete and will not consider overall optimization of the conference program. It is the responsibility of the PCs to resolve all the conflicts, decide on the final allocation of papers for the plenary sessions, and structure all the parallel, WIP, and Feedback sessions.
4. The PCs are responsible for the final decision on all submissions and may alter a TC recommendation.
 - a. The rationale for placement decisions that deviate significantly from these recommendations should be communicated to the TCs and documented in the Web Portal as a Note to the Program Committee.
 - b. PCs should add Program Committee reviews that correspond with their decisions if they differ from other reviews and TC recommendations.

Parallel Sessions

TCs should provide a grouping of papers into parallel sessions and a justification (one or two sentences) on the reason or theme behind the grouping using the Session Notes field in the Web Portal. In structuring these parallel sessions, the TCs should take care to do the following:

1. Create a meaningful title for the session to be listed in the program schedule.
2. Consider only papers that indicate their thread as the primary thread.
3. Consider only papers that have been deemed worthy of a parallel session (parallel and parallel+ status), i.e., don't fill the required number of papers on a parallel session with papers

originally classified as feedback, WIP, interactive, or interactive+. The role of the interactive+ classification is to allow the PCs to complete a session in case of withdrawal from an author in a parallel session. As such, interactive+ submissions should be of enough quality to be in a parallel session but are probably not there due to a lack of fit.

4. Ensure that all parallel and parallel+ papers are included in a parallel session.
5. All parallel sessions should include three submissions. 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. Parallel+ papers should be prioritized in complete sessions.
6. All interactive+ papers should be assigned as backup papers for one or more parallel session.

Interactive Sessions

Interactive sessions include table talks and poster presentations. Table talks are 1-hour long and will be held in person with three presenters, a session chair, and audience members seated around a large table. After a round of brief introductions, each table talk will be 7 minutes long followed by 8 minutes of discussion time. Table talks will be given without AV support. In-person poster sessions are 90 minutes long and involve placement of authors with their posters in assigned locations to interact with conference attendees. Images of the posters may be viewed through the conference website. Virtual poster presenters will be assigned to a 1-hour online lightning talk session. Each virtual lightning talk will be 5 minutes long followed by an equal length of discussion time. Virtual lightning talks adhere to a slide template with the presentations compiled and managed by the session chair.

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 with the presentations compiled and managed by the session chair. The Program Committee may need to coordinate across threads in creating coherent WIP sessions.

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.

Conference 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. Workshop Proposals undergo blind review by Workshop Chairs, who select which workshops are approved for the conference program. Workshop Chair decisions are based upon the quality of the proposal and the level of interaction anticipated. Workshops do not need approval of the Program Chairs. Once approved, the scheduling of Workshops is handled by the Office and organizing team, to ensure that they do not exceed the available space and time slots.

Up to four 90-minute workshops are allowed per proposing organization, constituting a full day's worth of workshops. Longer workshops may be scheduled in parts (e.g., a 3 hour workshop may be scheduled in 2 parts with a break in between). In-person workshops are generally scheduled for the last day of the conference (Thursday or Friday). For a hybrid conference, an online workshop day may be scheduled outside of the in-person event (during the week before or after), featuring online-only workshops and allowing in-person workshop facilitators the opportunity to present their material directly to an online audience. Each workshop presented in person may also be offered online for hybrid conferences.

Selection Process

(for Research Papers, Practitioner Applications, and Work in Progress Descriptions)

All submissions will be to a predefined thread and 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 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 Interactive 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 by program chairs to develop strong sessions.

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. This limitation applies only to the author who is a designated presenter. Co-authors who are not designated presenters may be listed on more than two presentations.

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 a designated convener who will organize and chair the session. In that case, the designated convener would solicit and review submissions to the indicated session. This process needs to be communicated with TCs of the relevant thread and planned well in advance to avoid rework.

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 their 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 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 and Focus Areas.
 - 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.
7. The PCs and SPOC should review and update the [TC instructions](#) on the SDS webpage as appropriate.
8. Threads can be aligned with specific focus areas. Focus areas may be designated in the Web Portal submission system as a basis for program review and placement.
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 TC recommendations.
 - b. The guidelines for the TC recommendations articulated in the previous section.

- c. A reminder that the TC is a shared position and that all co-chairs should agree on the recommendations. If there are any issues with TCs, the PCs should keep a record to inform the SPOC.

Note that this information should also be included in the thread chair instructions web page referenced in 7, available to TCs in the Web Portal menu and at the following link: <https://webportal.systemdynamics.org/documents/ThreadChairInstructions.docx>

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 submissions 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://systemdynamics.org/submission-instructions/#conference-record>

Research papers and practitioner applications presented in Plenary, Parallel, and Interactive (Poster or Table Talk) sessions will optionally have a paper, extended abstract, poster, or set of slides (for practitioner applications) 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.

Ongoing Issues

There are several ongoing issues regarding SDS programs that are revisited regularly and should be resolved in future versions of this document. These are summarized below:

1. Resolving tradeoffs in the formation of sessions between the need to have coherent sessions and fill the sessions with sufficient numbers of submissions.

- a. Suggestions are offered in the detailed Thread Chair Instructions, such as assigning secondary threads to sessions and communicating with other TCs.
 - b. 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 guidelines to add to this document:
 - a. Guidelines for curating and releasing material from the video archives of virtual and hybrid conferences after the conclusion of the event as a member benefit or for promotional purposes.
 - i. A committee co-chaired by the VP Publications and VP Meetings, has been established to approve the release of selected material.
 - b. Guidelines for the System Dynamics Summer School and Seminar Series.
 - i. The Summer School has been online-only as of 2020, and occurs 2 weeks prior to an in-person conference.
 - ii. The Seminar Series has offered webinars on a regular basis since 2020.
3. Review process: There is an ongoing concern about consistency of review quality and whether the review process should be open to anyone who wants to do it. However, a challenge of screening reviewers is the likelihood of not having enough reviewers. The standing policy is that any member of the SD community can serve as a reviewer. To address the issue, a mechanism is in place to allow the Thread or Program Chairs to rate reviewers and/or block unhelpful reviews from being displayed to authors. The reviewer ratings are used to inform future review assignments, so that submissions are not solely evaluated by poor-quality reviewers. The issue remains of whether 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.
4. Issues that may warrant further consideration and require elaboration:
 - a. What is included in the Conference Record. Paper files (extended abstracts, slides, or full papers) and supplemental material are allowed only for authors of poster, parallel, or plenary presentations. These authors must submit files for the record to be included.
 - b. Having an ISBN for Conference Proceedings. The online Conference Record does not have an ISBN, but the ISDC proceedings available from Curran do have an ISBN.

Appendix A: Conference Threads

Current ISDC threads are as follows (see also <https://systemdynamics.org/conference/threads>):

1. **Business and Strategy:** Features applications of System Dynamics in businesses and organizations including strategy development, profitability, marketing, competitive dynamics, product launches, project dynamics, and accounting.
Focus Areas: Competitive Dynamics; Marketing; New Business Models; Product Development; Project Management; Strategy Development
2. **Diversity:** Features applications of System Dynamics on topics such as gender, race or ethnicity, class, age and ability, etc.; racial justice work that addresses issues including, but not limited to, structural racism, interpersonal discrimination, or institutional bias; and submissions that demonstrate diverse experiences with System Dynamics.

- Focus Areas:** Age and Ability; Equity and Inclusion; Gender and Sexuality; Racial Justice
3. **Economics:** Features papers improving understanding of economic dynamics including macroeconomics, microeconomics, trade, business regulation, economic development, economic policy, insurance, and risk management.

Focus Areas: Business and Financial Organization; Economic Growth and Development; Equity and Income Distribution; International Trade and Finance; Macroeconomics; Microeconomics
 4. **Environment and Resources:** Emphasizes dynamics of natural resource management and policy for the environment including food, water, energy and climate change, pollution, environmental laws and regulation, and ecology.

Focus Areas: Agriculture and Food; Air, Water, and Land Use; Climate Change; Ecology and Biodiversity; Energy and Fuels; Environmental Regulation; Pollution and Waste Management
 5. **Health:** Applies System Dynamics to issues related to health and health care including health policy, health services research, population health, and physiology.

Focus Areas: COVID-19; Epidemiology; Health Disparities; Health Service Delivery; Physiology; Population Health; Treatment and Disease Management
 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.

Focus Areas: Community Dissemination; Interactive Activities; Learning Experiments; Pedagogy and Curriculum
 7. **Methodology:** 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.

Focus Areas: Artificial Intelligence; Graphical Presentation Formats; Hybrid Modeling Approaches; Model Analysis; Model Development; Qualitative Methods; Validation
 8. **Operations:** Includes business and other process operations including capacity management, quality control, operations management, supply chains, workflow, queuing, and workforce planning.

Focus Areas: Capacity Management; Project Management; Quality Control; Service Operations; Supply Chains; Workflow; Workforce Planning
 9. **Psychology and Human Behavior:** Explores the dynamics within and between social groups, including social environments or individual psychological factors, and spanning families, organizations, and societies.

Focus Areas: Cognitive Science; Community Development; Historical Dynamics; Organizational Behavior; Social Psychology; Social-Environmental Decision-Making
 10. **Public Policy:** Covers issues including governance, social welfare, equity, justice, political science, urban dynamics, and infrastructure.

Focus Areas: COVID-19; Equity and Justice; Governance; Infrastructure; Political Science; Social Welfare; Urban Dynamics
 11. **Security, Stability, and Resilience:** 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.

Focus Areas: Conflict, Defense, and Military; Crime and Policing; Cybersecurity and Disinformation; Disaster Management; Food-Energy-Water Security; Rule of Law and Social Resilience

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.

Focus Areas: Community Outreach; Games and Flight Simulators; Group Model Building; Participatory Activities

13. **Transport and Mobility:** 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.

Focus Areas: Accessibility and Equity; Decarbonization and Sustainability; Freight and Logistics; Infrastructure Planning and Policy Design; New Technologies and Services; Non-Car and Multi-Modal Transport; Public Health and Traffic Safety

Appendix B: Program Planning Timeline

Table B-1 provides an overview of the annual program timeline with key program tasks indicated by month. Additional, ongoing program tasks include the following:

1. Identify and invite plenary speakers
2. Review messages to TCs, authors, reviewers, session chairs, and attendees
3. Coordinate with the conference organizing committee to align plans
4. Monitor and track conference submissions and allocations by type and thread

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

Table B-1. Approximate Timeline of Key Program Tasks

Month	Task	Program Chairs	SPOC
May to June of year prior	Determine conference theme and suggest any Thread changes	Propose theme and thread changes	Approves theme and thread changes
August	Review Thread descriptions and Focus Areas	Propose changes	Approves changes
September	Identify and invite Thread Chairs	Propose changes	Approves TCs
	Review and revise online Thread Chair Instructions	Propose changes	Approves changes
October	Update Review Guidelines and Questions	Propose changes	Approves changes
	Draft Block Schedule Overview of Program	Propose to organizing committee	

Month	Task	Program Chairs	SPOC
	Finalize Thread Chairs	Recruit alternatives as needed	Approves changes
November	Estimate maximum paper capacity to advise TC allocations by category (plenary/parallel/poster/WIP/feedback)	Coordinate with organizing committee	
	Review and update Submission System Instructions for Authors and Reviewers	Propose changes	Approves changes
	Prepare invitations for potential session conveners who may be contacted to organize special sessions	Approve messages	
December	Identify and invite session conveners	Recruit conveners	
	Review and revise post-conference survey	Provide input	
January	Conference registration opens	Test functionality	
	Communicate paper allocation guidance to Thread Chairs	Communicate with TCs	
	Web Portal submission system opens	Test functionality	
	Prepare letters of acceptance and rejection	Approve messages	
February	Manage TC activities – send reminders and hold TC meetings as needed	Communicate and attend meetings	Communicate and attend meetings
	Start to review and evaluate submissions	Check submissions and reviews	
March	Record distribution of submissions by type and thread after submissions close	Save submission file	
	Review any special session proposals sent directly to Program Chairs. In Web Portal, review Program Notes in Special/Other Sessions	Communicate with proposers as needed	
April	Thread Suggested Program due from Thread Chairs	Evaluate TCs	
	Program Chairs finalize placement decisions after reviewing the Thread Suggested Program	Assign session backups	
	Develop internal program schedule	Resolve conflicts	
May	Notify Authors of Acceptance/Rejection and Presentation Format	Edit and approve messages	
	Program overview by thread posted on the web	Adjust as needed	
	Edit and send Thread Chair thank you notes (with request for input on experience)	Approve messages	Gather input on TC experience

Month	Task	Program Chairs	SPOC
	Follow up with authors, send info on presentation format, tasks, and deadlines	Review and approve messages	
June	Ensure all sessions have chairs	Suggest chairs	
	Final program schedule available conference website opens	Check content	
	Prepare plenary speakers so that their presentations will be effective in the context of other presentations in the same plenary session	Review plenary material and meet with speakers as needed	
July	Conference Opening and Closing Ceremonies	Plan and Present	
	Conference Debriefing	Attend meeting	Attend meeting
	SPOC post-conference debriefing to gather information for updating these program guidelines	Attend meeting	Host meeting
August	Provide information for conference report, including survey results, reviews, threads, papers per thread, and lessons learned	Provide information to SPOC	Report to Policy Council
	Follow up with authors to submit material for the permanent Conference Record	Approve messages	

Appendix C: 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.
<https://bit.ly/isdcProgGuide>

- V0.07 February 16, 2022. Prepared by Camilo Olaya (SPOC Chair). Added workshop details to unresolved issues. Updated links and thread descriptions, added focus areas, and removed list of ISDC 2021 threads.
- V0.08 August 31, 2022. Prepared by Sara Metcalf (VP Meetings) and Camilo Olaya (SPOC Chair). Updated committee structure per revised SDS Policies to include VP Publications and VP Meetings as ex-officio members. Reduced redundancy and removed outdated information. Streamlined schedule in Appendix B and added columns to indicate PC and SPOC roles. Created Appendix C for version history. Clarified that Policy Council approval should be sought for significant changes to this document.
- V0.09 December 19, 2022. Prepared by Sara Metcalf (SPOC Chair). Added details about Interactive sessions, which include Table Talks and Poster sessions.