

Guidelines for Conference Proposals and Selection Requirements (Updated 7/9/2004)

The System Dynamics Society has a long tradition of international conferences in diverse locations. In the early years, when the Society was small, conferences were organized and run almost exclusively by local volunteers. As the Society has grown, however, the workload for organizing and running conferences has been shared by local hosts, Society officers, and the Society's Home Office. While this workload sharing generally works well, on occasion problems have arisen as a result of misunderstandings about the appropriate role of each of the participants on what it takes to deliver a successful conference. Unfortunately, these misunderstandings have caused financial losses to the Society. The Conference is an important source of income to the Society, and we need to better manage the risks associated with running the Conference while still encouraging participation of the diverse international community.

With this in mind, during 2003 and 2004 the Policy Council evaluated the process by which sites are selected for our annual conference, and the requirements for a successful conference. This document summarizes the results of that evaluation. Specifically, it outlines the Society's objectives for the annual conference and provides guidelines for the submission of proposals. It is the Policy Council's intent that these guidelines make it easier for prospective conference organizers to develop a proposal, and at the same time help the Society manage the risks associated with running the annual conference.

Conference Objectives and Site Selection Policy

Based on the consensus from the July 2003 PC meeting and subsequent discussions, the Policy Council concluded that:

1. The primary objective for the annual conference is to provide a high quality experience for attendees; specifically, the conference should foster:
 - ? presentation of the best work in the field;
 - ? opportunities for academics and practitioners to learn about the field and network with others, and
 - ? encouragement to students and others new to the field.

If the conference is successful in these goals, it will

- ? achieve a high and growing attendance;
 - ? achieve significant participation by experienced practitioners (thereby providing examples of high quality work, and the opportunity for constructive feedback to members new to the field); and
 - ? make a profit for the society at reasonable effort from the Society's Central Office.
2. Achieving a profitable conference with reasonable registration fees requires:
 - ? High attendance (affected by location, cost, and program content)

- ? Predictable and manageable program costs – the Program Guidelines developed by Robert Eberlein and scheduled to be approved by the Policy Council in July 2004 to the PC aim to achieve this
 - ? Predictable and manageable location costs – these depend on either a strong commitment by local hosts, and/or a clear and direct connection between the venue and the central office (e.g. Boston or other fixed site)
3. Conference sites should generally be in a location easily accessible to the centers of system dynamics activity.
 4. We will continue with the model of rotating, non-fixed conference sites with a local host and program chair, but will provide more specific guidelines for development of proposals and requirements for selection of conference sites in order to assure these objectives are met. These guidelines are detailed below.
 5. There will be a fixed alternative default site(s), currently Boston, should no local proposals meet the Society's requirements. Other default sites, particularly in other centers of SD activity such as England/Western Europe, should be developed if possible.
 6. While the idea of linking with the conference of a larger society offers some potential cost savings and attractiveness to academics with limited travel budgets, it was felt by the Policy Council that the price in terms of loss of flexibility and independence was too great. However, this does not preclude local hosts proposing a conference linked with that of another organization.

Considerations in Selecting a Conference Site

Conference venues will be selected on the basis of the attractiveness of the location, conference costs to attendees, program/facility features, and manageability of risk. The cost to attendees includes travel cost to the destination, accommodation cost, and the registration fee. Proposals for selecting a conference will be evaluated along these dimensions. While there are no hard cost limits which might exclude a proposal from being selected, cost is an important issue and must be carefully considered in the selection process. Details and requirements for each of the evaluation categories are explained below. Conference pre-proposals and proposals should explicitly address these criteria. The worksheet "Proposal Summary" in the attached spreadsheet "Conference Proposal Information" can be used to supplement the formal proposal document.

1. ***Unique/attractive features of proposed conference venue.*** What makes this particular venue attractive to the system dynamics community? E.g., a concentration of system dynamics practitioners, or related disciplines? Local sponsorship? Unique/interesting location? Strong local organization? Desire by local organizer for growth of program or chapter?
2. ***Travel cost and accessibility (travel time and mode).*** Proposals should include an estimate of airfare and other travel costs (e.g., taxis, trains or busses from airport to conference site) from Boston, Brussels, and Seoul as representative locations near centers of SD activity. These estimates should be in two parts: first, an estimate of travel cost from Boston/Brussels/Seoul to the nearest major airport to the conference venue (the SD Societies Central Office can provide these first estimates); and second; an estimate of travel time and cost from the airport to the conference venue (a description of the

transport methods and time required from the airport to the conference site should also be provided).

3. **Meal and accommodation costs for attendees.** Proposals should provide an estimate of the costs of hotel for four nights and meals as required based on specific conference arrangements (e.g., lunch provided as part of registration fee, banquet, etc.). These estimates should be made for two categories of attendees: first, “normal” attendees staying at the conference venue and paying the full member registration price; and second, student and low-income participants. As guidelines, the cost of Conference meals and accommodation should not exceed \$800 (4 nights) for normal attendees. Student and low-income participant accommodation must be provided at or near the conference venue at a cost not to exceed \$400; approximately 25% of attendees fall into this category. The worksheet “Sleeping Rooms” provides historical room and meals costs since 2002.
4. **Direct Conference Costs.** The registration fee for the conference pays for both central office activity and for the costs of using the venue and providing onsite events (including any facility charges, coffee breaks, AV equipment, posters, required local transportation, a banquet if proposed and any additional activities that are part of the conference proposal). In order to keep the registration fee low, the total of all these on-site costs need to be kept as small as possible and should be under US\$150/person. In some cases it may be possible to arrange for local sponsorship to offset these costs. Proposals should provide an estimate of these on-site costs based on discussions with the conference venue, and the attendance estimate used to derive the per person estimate. The worksheets “Questions to Ask” and “Meeting Rooms” can guide you in estimating these costs. The worksheet “Attendees” provides data on the number of conference attendees since 2000.

Central office costs, while not under the control of the conference organizer, are influenced by the completeness of the local arrangements and this is discussed under manageability of risk.

5. **Program Features.** Appropriate conference themes, special sessions, etc. should be indicated in any conference proposal and the details of these need to be worked out with the Program Committee following Society Program Guidelines. Social hours, the conference banquet, and any other social programs should be specified in the proposal subject to confirmed local sponsorship.
6. **Facility Characteristics.** As of 2004, we are looking for a conference site that can handle from 400 to 550 participants with a good plenary room and 8 breakout rooms, at least 3 of which can handle over 100 people. There also needs to be room available for exhibitors and poster presentations (this can be dedicated rooms or hallways and entry ways). Also important are the location of the meeting rooms relative to the accommodations and to one another. If the meeting rooms are spread out, what is the distance between them? If the accommodations are not in the same place what are the distances? A more detailed list of these facility questions and room requirements is attached in the worksheets “Questions to Ask” and “Meeting

Rooms”.

7. **Manageability of Risk.** There are three major sources of risk for the Society in any conference: (1) attendance; (2) local direct costs; and (3) the Central Office administrative costs of managing local arrangements. To minimize the attendance risk the venue needs to be attractive, easy to get to, and affordable. To minimize the local direct cost risk, services need to be firmly contracted, in US\$ if possible. To minimize the administrative risk, the effort necessary to manage local arrangements needs to be committed to as part of the proposal.
8. **Local Host.** The local host must be clearly identified as part of the conference proposal. This is an important part of the conference, and critical to its success. Roles and responsibilities of the local host are discussed in the next section.

Responsibilities of the Local Host

The primary role of the local host/conference chair for our conference is, in a nutshell, footwork - finding a shortlist of conference sites (sleeping room capacity, matching the program to the facilities, etc.), conducting "local research" (for example, looking into alternative housing for students, different modes of transportation, spouse programs, entertainment options, etc.) organizing local activities, and providing administrative support before and during the conference.

Proposal Stages

There are several stages in the hosting process: pre-proposal, proposal, pre-conference, and during the conference. At the pre-proposal stage, we are looking for an indication of interest and:

- ? Identification of the local host who will interface between the Society and the local venue,
- ? Identification of the venue choices - what locations seem most likely (hotel or university campus) and their attributes,
- ? Identification of the contracting process - who would the Society most likely contract with for facilities,
- ? Demonstration of superiority - preliminary evidence that the proposal will meet or exceed all the requirements for being selected as a conference site noted above, though exceptional standing on one dimension might compensate for modest shortcomings on another.

Pre-proposals should ideally be presented three years in advance of the conference. The spreadsheet “Conference Proposal Information” will serve as a guide for preparing the pre-proposal. At this stage, estimates of costs can be based on informal discussions with potential venues. An expression of interest at this point does not imply any commitment. It will just provide an opportunity to give the potential local host some feedback on what the Society thinks would make a great conference. Expressions of interest should be sent to the VP Meetings with a copy to the Central Office.

If the pre-proposal discussion looks mutually interesting, then the Society will ask the potential local host to prepare a detailed proposal addressing the criteria noted above, with a preliminary budget covering the expenses under the control of the local host. Again, the spreadsheet "Conference Proposal Information" along with these Guidelines will serve as the basis for the proposal. The primary difference between the proposal and the pre-proposal is one of detail and specificity of cost estimates.

The Policy Council will then select a site, usually two years in advance of the conference. If the site is selected, the local host will work with the central office and VP meetings to specifically define the location, negotiate with the conference venue, and prepare a final budget. Finally, during the conference the local host will provide administrative support. Some amount of administrative support is necessary before the conference and it is most helpful if there are volunteers (usually students, but not always) who can help out during the conference. In addition, the conference needs one "professional" person that can manage the registration desk and help coordinate the volunteers. Available local volunteer labor is a must for a successful conference.

The separation of effort between the Local Host and the Society's Central Office is not fixed, but it is necessary that the Local Host play a significant role in conference logistics. If the Central Office has to take on additional work they will require professional staff to do so, and this will require more revenue to meet overall Society needs. Some examples of Local Host activities are included here as a guideline. The appendix contains a list of typical things supplied by the local host during the conference.

An Example – 2003 Conference

As an example, in 2003 the local and co-local hosts were WPI, Fordham University and Allen Boorstein. They did a multitude of things. Fordham had a pre-conference seminar event at the Fordham Lincoln Center Campus and invited local business people. They also provided their own computer projectors and overhead projectors to help defray the cost of AV equipment, which is always a major line item in the budget. Allen Boorstein gave a pre-conference donation, in addition to his usual gift to the conference for the Dana Meadows Award. Both Allen and Nikko Georgantzas from Fordham helped in advance of the conference to line up local sponsors, and get special "deals" for our conference participants such as a free bottle of wine with dinner, and dinner discounts at certain restaurants. Helping to get local sponsorship is key to the financial success of the conference. They also were great about organizing evening outings with large groups of people, nothing formal, but they offered their knowledge of the city and events/places to go and then accompanied the groups.

Mike Radzicki from WPI was the "MC" during the entire conference, and Khalid Saeed from WPI gave the Welcome Address. WPI provided all the supplies and equipment for the conference office, all the photocopying of handouts, etc. The conference host traditionally has supplied these items (a complete list of these items is given below).

Everyone involved in the conference rounded up as much help (participants, volunteers, spouses, children, etc.) as possible for the satchel stuffing on the day before the conference. There were over 15 people, and the satchel stuffing took only about 1 hour!

It has become apparent that the conference needs a professional person to assist with the registration desk. It would be great if someone (not a student) could be available at the conference, especially during peak registration times. This person would be responsible for money and financial transactions. Students do a great job, but the registration desk needs a strong supervisor/manager.

Information for Preparing a Pre-proposal and Proposal

Approximate dates/timing of the event: Historically the conference occurs sometime during the last two weeks of July, and usually runs from Sunday through Thursday (but this is flexible):

- ? Pre-conference Saturday the Society office sets up. Need work space to “stuff” the conference satchel.
- ? Pre-conference Sunday: We need a pre-conference day for the policy council meeting (30), the PhD Colloquium (100) and perhaps one or two pre-conference workshops (75 each).
- ? Monday - Wednesday: The conference officially starts on Monday. There are three full days of conference meetings and some evening events.
- ? Thursday: On the fourth day we run the workshops. Attendance is reduced to about one third, although this may increase. Everyone is gone by 6 PM.

Number of attendees: 450 - 550 is an estimate, depending on location. 2003 NYC had 460 registrants. The worksheet “Attendees” in the spreadsheet “Conference Proposal Information” provides historical data on the number and breakdown of attendees. This is more information than needed, but you will see the conference attendance trends.

Types and numbers of meeting rooms required: Please see the worksheet “Meeting Rooms.” Note that it is desirable to have the break, poster, and exhibit areas close together.

Size of trade show space required: Plan on about 20 tables.

Other things to focus on at the pre-proposal and proposal stages: A huge advantage is to feel comfortable with the people you are dealing with – are they flexible, do they want our business? The System Dynamics Society is a good client, the best business a hotel could have. Are there informal places to gather? Are the elevators adequate, and the flow of space convenient? We are a non-profit, so cost (keeping it down for our attendees) is very, very important. A competitive room rate is indeed important as well as being able to share the room so students can save money. A brief summary of coffee break cost estimates and a banquet chicken dinner estimate would be helpful, but we recognize we are talking several years into the future.

Appendix: Traditional Host Supplies/Equipment/Copying

Provide a laptop computer and printer with paper for the conference site office.

Photocopying: Originals will be sent to the local host for copying. Host would be responsible to deliver to the conference site the day before the conference. All documents should be copied double sided: (as many as needed, based on attendance)

- Pre-conference surveys (about 20% of conference attendees get one)
- Conference surveys (multiple pages, one per participant)
- Time signs for session chairs (one set or 4 sheets per room)
- Signs for alphabetical registration lines
- Career Link Postings (about 15 sheets)
- AV Matrix (10 pages about 12 copies)
- Tasks and Duties Matrix (20 pages about 12 copies)
- Poster assignments on poster boards (one per poster presentation)
- Check-in sheets (about 20 pages)
- Workshop sign up sheets (one per workshop)
- On-site registration form (about 50)
- Program Schedule (about 15 pages, one per participant)
- Participant List (about 12 pages, one per participant)
- First day schedule (with floor map on reverse) (one page, one per participant)
- Room signs (one per session)
- Exhibitor table labels (about 20)
- Perhaps some other items

Provide the on-site supplies. Supplies not used (or lost) will be returned.

- 4 Narrow tip black permanent markers for replacement nametags (Sharpies)
- Break-over bell (to ring)
- Message pads, duplicating for calls and message board (for 200 messages)
- Transparencies, blank overhead (box)
- Transparency markers (2 sets each fine and broad tipped)
- Pens (12)
- Pen, red (6)
- 6 Post-it notes pads, medium size
- Scissors (2 pairs)
- 2 Staplers with extra staples
- 2 Scotch tape dispensers
- 2 rolls masking tape
- Plain paper for photocopies and printing (carton)
- Material to adhere posters (push pins, tape)
- Perhaps some other supplies