11 July 2003

To: Jim Lyneis
From: John Sterman
Subject: SD conference format and location
XC: Respondents to query about conferences

Following our conversations about conference location and format, I asked a set of junior faculty in system dynamics their views on the issue. I received 5 responses. All these people are junior faculty members at various stages, and all are based in the US. I'll summarize their answers; the appendix provides my email to them and their full responses (with names removed; though some are willing to have their names used, others weren't). Many thanks to all who took the time to respond.

Key points (my subjective coding from their answers):

1. Preferred option:

Link to existing conference	3
Rotate among fixed sites	2
Current system	0

2. Factors affecting *their* conference attendance

Cost	3
Ease of travel	1
Link to family vacation/tourism	1
Networking with others in SD field	2
Networking with others outside SD field	3

3. If we link, which society would be the best partner?

INFORMS	5
AOM	0
Other	0

4. Other issues:

Our conference is getting large and long, so linking with another may not be practical.

A linked conference may be too long for people to stay for all.

INFORMS is in fall; hard to schedule in with teaching, especially if extended.

INFORMS is US based [but INFORMS does have international meetings].

Email I sent requesting people's views:

Folks,

I need your views on an important matter. The system dynamics society is exploring whether and how to change the way we select the location for the annual conference. The current system requires us (that is, Roberta Spencer) to organize a conference in a new location every year. It is expensive, time consuming, and has variable results. While Roberta is fantastic, she must rely on volunteer local organizers, who are tough to recruit. We end up having to locate the conference in places like New Zealand, Palermo, and other remote locales. While good for touristic purposes, the data are clear that conferences held outside north america or western europe have consistently had lower attendance and/or lost money. The society relies on the conferences for much needed revenue, and on high attendance of top quality people to build the field. Further, when, as occurred in Palermo, the local organizers are unreliable, the result is either a poor quality event or more gray hair on Roberta's head.

The policy council has created a committee to explore options to deal with these issues. What I would like is your view on what should be done to ensure that the conferences meet the following goals: generate revenue for the society; be organized without overtaxing the home office (Roberta and her team); and most importantly, attract the attendance of the key future leaders of the field, including junior faculty (most of you). What type of arrangement would make the conference more attractive to junior faculty seeking tenure?

Specifically, there are two proposals being considered:

1. Rotate the conferences among a small number of standard sites in North America and Europe. For example, alternate between e.g. Boston, LA, London. In this model, we could have a long-term contract with a hotel chain and hold the conferences at the same venues in each city, reducing setup costs and improving reliability. The conferences would still be stand-alone (just the SD society) and we would still pick the dates.

2. Form an alliance with an existing society such as INFORMS or the Academy of Management and piggy-back our conference to theirs. In this model, the SD conference would partially overlap in time with the INFORMS conference, say by 1 or 2 days, and then continue for a couple days afterwards. We would have almost no logistic/setup costs as we would be covered under the contract with whatever hotel INFORMS uses. We would get the same hotel rates and transportation discounts as INFORMS. The main advantage of this model is that we still get to have our conference, organized by us, with our program, but we would also be able to attend the INFORMS conference, have SD sessions or tracks in INFORMS, and benefit from the networking opportunities it provides. The Judgment/Decision Making society uses this model, piggy-backing on the conference of the Psychonomics Society, a large cognitive/experimental psych society. Psychonomics always ends on a sunday and JDM always starts that same day, with some overlapping sessions, then continues on till tuesday with its own schedule and program. Many psychologists who would not come to JDM if it were freestanding stay for it because they are already there for psychonomics, and JDM gets lower costs because it benefits from the large scale of psychonomics. The JDM organizers have little to do in local arrangements and can focus on the program.

What are your views about these options? What are the pros and cons? Would you be more likely to attend the SD conference if it was linked to a major conference such as INFORMS? If you like the linkage idea, is INFORMS the right society? What other societies should be considered? What else can be done to enhance the quality of the SD conferences and the leverage they can provide to junior SD faculty seeking tenure? I would love to have your input by July 7 so I can compile it and provide a summary to the committee examining this issue before the conference in NY. Please also let me know if you will be coming to NY, and, if not, why not, and whether you are willing to have me forward your comments to the committee with or without attribution.

Thanks, John

Respondent 1:

I really like the idea of piggy-backing on an existing conference, but I'm concerned that it might be a response too biased to increase participation of jr. faculty in the domain of the major conference. While the benefits of the economies of scale achieved by following a major conference would be transferred to all participants, the benefit of networking and making it a single trip would only be meaningful to a very small fraction of the current participants of the conference (faculty).

Having said that, linking the SD conference to a major society conference would ensure that the selected sites would have the infrastructure and overall appeal (ease of travel, etc.) for the majority of the current participants, thus also achieving the goals of your first proposal.   To me the second proposal [linking to an existing conference] dominates in all dimensions, I guess the only recommendation that I would make would be to link it to a US conference AND an European conference and alternate (perhaps at the suggested 2:1 ratio).

Respondent 2:

Thank you for the opportunity to contribute to this decision. Feel free to share my email and thoughts with the Committee, with or without my name attached, as you see fit. I will respond by describing: 1) my SD conference attendance criteria, 2) my assessment of the two alternatives you described, and 3) answers to other questions you posed.

MY SD CONFERENCE ATTENDANCE CRITERIA
1. Cost - If "money were no object" I would probably attend all the SD conferences. But travel funds prevent me from doing so. If I do not have the funds, I do not attend, regardless of other issues. For example, I have never attended a SD conference outside of North America and Europe for primarily this reason. My hardest justifications for use of my travel money (for ANY purpose)is to the trans-Atlantic SD conferences

2. Who will be attending - a primary reason for my attending SD conferences is to spend time with leading and peer SD people. A second important reason is for me to present my SD work to them and hear them present their work. So if there is any question in my mind or the cost is in the gray go/no-go zone, I check on who will be attending before I make a decision whether to go or not.

3. The attractiveness of the location (mostly John's "touristic purposes") - one of the reasons that I like being in academia is that I have the opportunity to visit interesting places that I likely would not get to visit otherwise. This happens primarily at conferences. So if the decision is in that gray go/no-go zone, this can definitely make a difference. This was apparently not lost on the organizers of the 2003 conference, who wisely choose NYC over Worcester, even though some of the organizers are at WPI. This is more of a factor if the travel costs are high. For example in late July in 2004 Laura and I will celebrate our 10th anniversary and three of our daughter's god parents live in England, so the conference in Oxford is 2004 is a "go" for me and we will stay before or after for family travel, etc.. Other past locations that have helped me say "yes" include Istambul and Palermo. FYI, London and Boston will always be attractive locations to me (but not LA particularly).

MY ASSESSMENT OF THE TWO ALTERNATIVES DESCRIBED
1. Rotating Conference location: I prefer a version of this alternative. See my recc.
PROS - SD controls conference dates (summer is good), SD can establish a range of rooming costs, London and Boston are always attractive to me, Attendees participate in more of the SD conference because the SD conference is not competing with the other conference for the participants time (see next alt).
CONS - Only two locations and the same ones will alienate some potential attendees who want the conference in their location, distance will tend to reduce ties to some SD communities (e.g. Orient) since fewer of them will be able to attend, perpetuates the "MIT mafia" image.
I recommend a modification of this alternative to allow or require that every X years (4-5?) a location other than the rotating ones will be used to address the need for global contact, etc.

2. Attach to another conference: I do not prefer this alternative

CONS

A. INFORMS would be the right conference, BUT...the combination of the two
conferences is too long to allow me to do both or to fully participate in
the SD conference. INFORMS is Sunday through Wednesday. If SD is Wed-Fri or
Thursday-Sat/Sun (over a weekend...no) I must be there for almost a whole
week (the invited sessions at INFORMS are earlier in the INFORMS Meeting).
It is difficult for me to be gone for one conference during the semester,
when INFORMS is. This would effectively prevent me from doing anything
except the minimums for either...very likely preventing me from attending
Policy Council meetngs, etc.

B. There is a second reason...both of these can be good "content rich,
network rich" conferences for me and both together would probably overload
my head and drain my energy to network.

C. INFORMS is expensive...the (only) hotel is always rather expensive.

D. The conferences are always in the United States!!!!!

PROS

A. Some INFORMS people will come to our sessions and learn about SD and the
Society, maybe.

B. The tours that INFORMS sets up

OTHER QUESTIONS

What else can be done to...In practice we must publish and make our work
known other places as well in SD Review. The most important thing that we
are not doing is building links with other OR methods and domains so that we
can publish in both SD and in our application domain or another OR journal.
SD is now (correctly) moving back toward collaborating with other OR
methods, etc. If there was a structure or mechanism for helping us do that
(not sure how...help in parallel writing of a SD and OTHER papers based on a
single research project??? Journal writing sessions sharing "best practices"
of our leading writers??? Linking with others outside strict SD???? Invite
OR or other editors to come to the conference and present nonSD work with a
SD link (panel discussion on linkages??) and give a session on publishing in
their journal???).

Respondent 3:

Q) What are your views about these options? What are the pros and cons?
A) Of the two options you've mentioned (regular rotation of an independent society meeting and a meeting linked to a larger group) I prefer the linked (latter) option.
Linking our conference to another should save time and money for those of us who need to attend both conferences.
More fundamentally, however, I believe this move would challenge the SD community's self conception and push us all to improve. There is a certain conceit to independence that may be holding us back. The effects of independence may be similar to those of national protectionism: we believe we are strong in areas where we are not and vice versa, we are not aware of the latest developments that we should be using in our own work, and we are satisfied to sell our ideas to one another without looking for additional markets that might appreciate our goods even more. Confronting ourselves with the comparative strengths and weaknesses of our methods and our scholarship would push us to adopt others' practices where they are better, develop links where they are fruitful, and focus on extending SD practices and applications where they are comparatively strongest.
The protectionism analogy might also be used against linking the conference; there might be a counter case for infant-industry protectionism (i.e., keep SD separate long enough to develop). However, I think the protectionism case is weak. SD has been around long enough to develop considerable comparative strengths. I don't think we do ourselves any favor by trumpeting our uniqueness at the risk of allowing it to degrade any more than I think that the main value of the conference should be evangelism or marketing.

Q) Would you be more likely to attend the SD conference if it was linked to a major conference such as INFORMS? A) Yes.

Q) If you like the linkage idea, is INFORMS the right society? What other societies should be considered?
A) Yes. At least, I think SMS (strategic management society) or AOM would be less appropriate than INFORMS. AOM may have a similar range of topics as INFORMS, but its methodological links with the SD Society are much weaker. In addition, INFORMS participation is far more flexible than AOM; people coming to the SD Conference can get on the INFORMS schedule at the last minute with only an abstract (and yet the quality is still generally quite good).

Q) What else can be done to enhance the quality of the SD conferences and the leverage they can provide to junior SD faculty seeking tenure?
A) Most of us aren't going to make tenure on methodology, on publishing in the SD Review, or on a contribution so unique that it can be developed and sold without working with its potential market. We need conference sessions that connect us to the latest debates in the areas where we are seeking tenure and to the people who will evaluate our work in journals such as ASQ, Mgmt Sci, Org. Sci. etc.

Q) Please also let me know if you will be coming to NY, and, if not, why not, and whether you are willing to have me forward your comments to the committee with or without attribution.
A) I'll be in NY for the Policy Council meeting but will not stay for the conference. Not staying for the conference is a tough decision. However, what I really need now is time to spend on research and to broaden my contacts to include a number of organization and strategy folks that need to know and respect my work if I am to be a credible tenure candidate here. I'm hoping that SMS and a number of smaller conferences (e.g., the Competition and Strategy one at Harvard) will be a good venue for integrating my research better with what others are doing outside of the SD world. You can certainly present my comments with attribution, or ask me to do so during the Policy Council meeting.

Respondent 4:

Thanks for raising the issue and seeking input from us. To start, both options being considered represent already an important improvement from the existing arrangement. Adoption of either would already reach the two initial goals on your list, i.e., generate revenue and not overtax home office.

In my opinion piggy-backing our conference with another one (INFORMS or AOM) would be a better option, because it would allow individuals to cover both conferences with reduced costs and logistics. This has a direct impact, for me, and potentially other junior faculty, since I have a budget of two conferences that I can expense every year. This option would also allow some folks from INFORMS and AOM to be a part of our conference in the future, which in my view is highly desirable. More broadly participation would allow SD to be more widely known and recognized by other academics in other fields.

I don't know which conference (INFORMS, AOM, WSC) would provide the best fit to SD. From the point of view of my research INFORMS would be more convenient. I do not know what would be the collective best for the field. AOM has a lot of potential since many social scientists have been warming to modeling approaches.

There are also disadvantages of the alliance model. The combined conferences would last much longer (lasting one week potentially more.) INFORMS takes place in late October or early November and conflicts with classes. More importantly, the combined conference could be very tiring and people could attend selectively, which could have the undesired effect of reducing attendance (from folks that would attend both.) Less important, with INFORMS always taking place at the US, this could reduce attendance from people in Europe, Asia, Australia, etc.

From the point of view of improving the quality of the conference, it would be desirable to increase the standards and limit the number of acceptances for parallel sessions. It would also be desirable to reduce the number of concurrent sessions to increase attendance in individual sessions. Improving the quality and number of reviews would also be desirable. Many of these policies have been implemented and improved upon in the last conferences I attended.

Respondent 5:

If the SD conference remains stand-alone, rotating it among three cities is fine (I'd certainly prefer most any Western city to LA--Seattle or Portland would be nicer). I have to admit, though, my favorite conferences (I've attended only a three) were in Quebec City and Bergen, not the one in Boston.

If the SD conference links itself to another conference, I believe INFORMS is a good choice. (I would vote against linking it with the Academy of Management.)

Pros--independent conference in the summer
- Preserves the opportunity for family-type trips in conjunction with the conference (I believe this is important to some people)
More relaxed than during school-year (for people who are teaching)
No competition with another conference's activities

Pros--symbiotic conference with INFORMS
Less expensive for people relying on academic funding

I don't yet have a strong opinion about whether the SD conference remains independent.

I am not attending the New York conference--primarily because I have limited funding from my institution (I can't afford to self-fund yet), and I decided to put my resources on two other conferences. Besides, I really don't like New York City.

You didn't ask, but I am planning to attend the conference in England next year, and I'm planning it as part of a vacation-type trip. I probably wouldn't attend a UK conference during the school year.