

Guidelines for Conference Proposals and Selection Requirements (Updated 24 April, 2006)

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. This document is a tool to avoid misunderstandings and to help outline roles. The Conference is an important source of income to the Society, and we need to continuously improve managing 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 and site selection policy for the annual conference, provides guidelines for the submission of proposals, and outlines the responsibilities of the local host. 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.

Key Dates in the Proposal Process

Spring, Conference Year Minus 3: VP Meetings issues a "Call for Conference Pre-Proposals" (via Newsletter, Chapter and SIG representatives, and the Society ListServe) during the Winter 3 years ahead of the Conference year (for example, Spring 2008 for 2011 Conference). Prospective bidders are advised of proposal selection guidelines and key selection criteria.

Summer PC Meeting, Conference Year Minus 3: Formal pre-proposals are due May 31, 3 years ahead of the conference year, for presentation and discussion at the Summer PC Meeting. The result of the pre-proposals is feedback on concerns regarding the proposal, additional information required, likelihood of success, and request for formal proposal. To the extent that there are insufficient expressions of interest or inadequate pre-proposals, the VP Meetings will work to correct the problem

Winter PC Meeting Conference Year Minus 2: Full proposals are due November 30, 3 years ahead of conference, for discussion and vote at the Winter PC meeting (so for example for 2011 Conference, November 31, 2008 proposals are due for discussion at Winter 2009 PC Meeting).

Spring, Conference Year Minus 2: Site visit by Executive Director of SD Society with intent of identifying any major issues, negotiating and signing a contract with the Conference Venue, and finalizing a conference budget with the local hosts.

Summer PC Meeting Conference Year Minus 2: Discussion of any issues that arise from site visit, and review of budget. Budgets should be in hands of VP Meetings by May 31, Conference Year minus 2 (so May 31, 2009 for 2011 Conference).

Summer, Conference Year Minus 1: Announce conference theme and provide "Call for Papers"

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 approved by the Policy Council at the Winter 2005 meeting, 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, at a time when many can attend. The last two weeks in July have worked best, as this is after school ends and before the summer holidays for those in the Northern Hemisphere.
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. Conferences will generally rotate between North America (with Boston as default site) and Western Europe (with possible default site to be determined). We will look to occasionally holding a conference in another location (for example Asia/Pacific) roughly in proportion to membership (which might now be once every 5 to 10 years for AP), and subject to an acceptable proposal from someone in the region.
7. 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.
8. The Society encourages Chapters or other local organizations to hold regional or national conferences, as for example the UK Chapter does twice a year.

Guidelines for the Submission of Proposals

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" should be used to supplement the formal proposal document (note that the spreadsheet contains numerous comments that clarify the information being requested).

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 Society's Head Office will provide these first estimates); and second; an estimate of travel time and cost from the major 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), as well as the frequency of transport. One of the biggest factors affecting attendance other than cost is the time required to get to the conference destination.
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, "regular" 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 regular 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 costs since 2002.
4. **Program Features.** Appropriate conference themes, special sessions, etc. should be indicated in any conference proposal, following Society Program Guidelines. Proposals also need to identify a Program Chair, subject to the approval of the Policy Council. Social hours, the conference banquet, and any other social programs should be specified in the proposal subject to confirmed local sponsorship or included in the registration fee. If there are invited speakers who are to receive a fee or travel reimbursement, these costs need to be included in the program budget as

noted under Direct Conference Costs below.

5. **Direct Conference Costs.** The registration fee for the conference pays for: (1) the costs of using the venue and providing onsite events (including any facility charges, AV equipment, posters, required local transportation); (2) the costs of mandatory and optional program features; (3) head office activity preparing for and managing the conference; and (4) a surplus to contribute to other Society costs. These last two cost categories are discussed further below. This section of the proposal deals with the Facility and Program costs.

In order to keep the registration fee low, the total of all the on-site costs needs to be kept as small as possible and should be under US\$200/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.

Facilities: As detailed in the "Proposal Summary" worksheet of the spreadsheet Conference Proposal Information, there are three general categories of facilities charges – (1) Meeting Rooms, (2) AV Equipment, and (3) Supplies, Printing & Other. The spreadsheet also provides information on which to base your cost estimates. For comparison, historical data for costs from recent conferences are indicated at the right of the Proposal Summary worksheet. A list of meeting rooms is given in the spreadsheet. In recent conferences, meeting rooms have been free at the conference site hotels given the large number of sleeping rooms that we have booked. Negotiating free meeting rooms is one way to hold down costs and the registration fee. AV equipment needs are also listed in the "Meeting Rooms" worksheet. These costs can be reduced by borrowing equipment from a local university or host. Finally, the costs of supplies and printing for the conference (see Appendix for a list) can be reduced if the local host can provide these materials and services.

Program Costs: Program costs fall into two categories, "mandatory" and "optional." The mandatory costs are dictated by the Society and include pre-conference brochures, printed copies of the program and abstracts, and pre-conference meetings. An estimate of these mandatory costs is provided by the Society. Optional program costs are under the control of the Program and Conference Chairs. They must be identified in the proposal and budgeted for in advance. Once the proposal is accepted by the Policy Council, additional program costs cannot be incurred without approval of the VP Meetings *and* Executive Director, acting on behalf of the Council. Optional program features can include invited speakers (who might receive a fee and/or travel reimbursement), any "souvenirs" such as bags, pens or pads, a welcome reception, a banquet, and coffee breaks. Again, historical cost data in these categories for recent conferences is included to the right in the "Proposal Summary" worksheet. Sponsorship can be used to offset these costs. However, be sure to co-ordinate any sponsorship funds that offset these optional program costs with estimates of general sponsorship used to offset general conference expenses as discussed in the "Cost Summary" section below.

6. **Facility Characteristics.** As of 2006, we are looking for a conference site that can handle from 400 to 550 participants with a large plenary room and 8 breakout rooms, at least 3 of which can handle over 100 people. There also needs to be room or space available for exhibitors and poster presentations (this can be dedicated rooms or hallways and entry ways). Ideally, space for poster sessions and exhibitors should be near the coffee break areas so attendees can easily migrate to the poster sessions during and after the coffee breaks. For planning purposes, at the 2004 Oxford Conference, with 400 registrants, we had 30 simultaneous poster sessions and 16 exhibitors. 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 Head 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. Once the proposal has been accepted by the Policy Council, any changes or decisions, especially those that might affect revenues or increase costs, must be approved by the Executive Director **and** VP Meetings acting on behalf of the Policy Council.
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. One of the most important roles of the local host is to provide (usually) student volunteers to help out at the conference. Ideally, we would need 12 volunteers to provide necessary coverage and give the students some free time to attend most of the conference. Additionally, it is very helpful for the local host to provide names of trusted vendors for the satchels and pens, on-site copying, Printed Abstracts printing, etc. These items are usually purchased locally.

Cost Summary. The final section of the “Proposal Summary” worksheet provides a cost summary and an estimate of registration fees.

Head office costs, while not under the control of the conference organizer, are influenced by the completeness of the local arrangements as discussed under manageability of risk. An estimate of head office costs are provided in the worksheet. The conference provides a contribution to other society costs. This contribution is budgeted at \$25,000. The conference is also asked to subsidize the registration fee for students, and provide free rooms for up to 10 students and other low-income attendees. The Society recognizes that some conference venues, attractive on most other conditions, may have difficulty meeting this full contribution (and that some venues return more than the budgeted contribution). With this in mind, the Society looks at conference budgets over a multi-year horizon and may in some cases reduce the budgeted contribution to a specific venue. This decision is made by the VP Meetings, VP Finance, and Executive Director under the guidance of the Administrative Committee and Policy Council.

Finally, sponsorship can be used to offset conference costs. The Society and the conference have many regular sponsors. In addition, local conference hosts often solicit local sponsorship. This is an excellent means of reducing the registration fee. An estimate of regular sponsorship is provided in the worksheet, but this estimate should be discussed with the VP Meetings and Executive Director before submitting your proposal (again remember if sponsorship is used to reduce optional program costs, it may not be available to cover general costs). Sponsorship funds are not guaranteed, and we need to work to obtain them, and to obtain local support.

Total conference costs are then divided by attendance (adjusted for any discounts) to determine the projected registration fee. The Society provides an estimate of attendance, based on location and growth trends, that can be used in your proposal. If you feel special circumstances might change this estimate, please discuss with the VP Meetings and Executive Director. For your information, the worksheet "Attendees" provides data on the number of conference attendees since 2000. Given that many costs are "fixed," attendance is one of the most critical factors in determining the financial success or failure of a conference. Cost and location (accessibility) are key factors affecting attendance. Note that our estimating algorithm is for total attendance, and that approximately 15% of attendees come free (for example because they are sponsors). As a result, the calculation of projected registration fee takes this into account, as well as the student discount.

Responsibilities of the Local Host

Other than preparing the pre-proposal, proposal, and other documents, 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: expression of interest, pre-proposal, proposal, pre-conference, and during the conference.

The VP Meetings issues a "Call for Conference Pre-Proposals" (via Newsletter, Chapter and SIG representatives, and the Society ListServe) during the Winter 3 years ahead of the Conference year (for example, Spring 2006 for 2009 Conference). Prospective bidders are advised of proposal selection guidelines and key selection criteria. 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.

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,
- Identification of Program Chair (subject to approval by Policy Council)
- 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. Estimates of costs and conference details should be provided in the "Proposal Summary" tab of the Conference Proposal Information spreadsheet.

Pre-proposals should be presented three years in advance of the conference at the Summer PC Meeting. 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.

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 and one-half years in advance of the conference (i.e., at the Winter Policy Council Meeting). 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 (due 05/31/conference year minus 2). Once the proposal has been accepted by the Policy Council, any changes or decisions, especially those that might affect revenues or increase costs, must be approved by the Executive Director acting on behalf of the Policy Council. Finally, during the conference the local host will provide administrative support, noting that this may entail professional tasks as well as carrying boxes. In the midst of a busy conference, all must be prepared to do whatever it takes to make the conference seem flawlessly organized to participants. 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 half, although this may increase. Everyone is gone by 6 PM.

Number of attendees: 400 - 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)

- Printed Abstracts
- 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