The SIOP Foundation 2012–2013 Annual Report and Honor Roll of Donors



Building the future of I-O psychology



The SIOP Foundation 440 East Poe Road, Suite 101 Bowling Green, OH 43402 www.SIOP.org/Foundation SIOPFoundation@siop.org 419-353-0032

Mission Statement

The SIOP Foundation provides financial support for the advancement of the field of industrial-organizational (I-O) psychology. In addition, the Foundation offers strategic leadership through the solicitation and use of its funds. The Foundation is a structure through which members of the Society for Industrial and Organization **Psychology (SIOP), and other donors, can express their tangible support for the field. The Foundation's re**sources are intended to further the outreach of both the practice and the science of I-O psychology so that those in this field can play an increasingly vital role in fostering a productive and prosperous workforce.

The IRS Determination Letter is available for those who need our tax exempt/public charity status letter.



SIOP Foundation Board of Trustees: Kathleen Kappy Lundquist, SIOP Financial Officer/Executive Board Liaison; Paul W. Thayer, Board Member; Richard Klimoski, Vice President; Milton D. Hakel, President; Nancy T. Tippins, Secretary; Leaetta Hough, Board Member; and Lyman W. Porter, Treasurer.

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(Honoring those who gave a minimum of \$1,000 during the SIOP Foundation charter year of 1996.)

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To make an online donation, visit www.siop.org/foundationdonation/

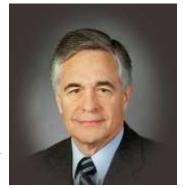


A donation form to include with your check is available at www.siop.org/foundation/donateform.pdf

President's Message

Dear Friends of the SIOP Foundation,

What a year of building this has been. We've launched the HRM Impact Award Program, in collaboration with SHRM and the SHRM Foundation (see <u>http://</u><u>www.hrmimpactawards.org/awardwinners.aspx</u>). We are also now organizing a working conference on assessment (see below). SIOP clearly has become the place to find science for working smarter.



Over the years, you have contributed ideas, talent, and effort to achieve SIOP's past and present successes. The result is that SIOP is the world's leader in researching and developing evidence-based practice for human resource management in private, public, and volunteer organizations.

Since 1996 the SIOP Foundation has been SIOP's partner in this venture. By providing SIOP's members and other contributors the opportunity to leverage contributions as tax-deductible gifts, the SIOP Foundation has been building for the future of our field. In the past year, the SIOP Foundation has received \$198,139 in contributions and an additional \$50,000 in pledges. Over our history, every pledge has been honored. Our total assets have grown 22% in the past 12 months, and now total \$2.9 million. Despite these still being turbulent economic times, we continue to build.

Some SIOP members have been able to be extraordinarily generous in helping to advance our mission. This year we recognize Dick Jeanneret. First Dick gave a major endowment, one which honors excellent research in the study of individual or group assessment. This year he added another gift, this one to fund a working conference on assessment. The overall goal is to stimulate R&D in our field, as described in a Foundation Spotlight column in *TIP* (www.siop.org/foundation/julyTIP.pdf). Keep an eye out for future issues of *TIP* and the Foundation *Building Blocks* e-newsletter for information about this initiative as it develops during the coming months.

We are continuing to build because 200 SIOP members have been able and continue to be delightfully generous. Undesignated contributions go into the Advancement Fund, which has garnered more than \$610,000 since its inception and paid out over \$155,000 for small grants. I hope that in the coming year we will realize major additions to our Advancement and Scholarship funds.

Foundations are able to grow their assets while simultaneously providing proceeds to support approved scientific, educational, and charitable causes. Since its beginning, the SIOP Foundation has provided support to SIOP of \$459,394, consisting of income from the endowment of the contributions. SIOP used all of this funding to provide scholarships, awards, and small grants, doing so without having to dip into member dues or **other revenues. Thus, your contributions to the Foundation extend SIOP's impact and effectiveness in build**ing our vital applied science community.

Help SIOP and the SIOP Foundation today to continue building. Contribute your ideas and expertise to SIOP as it works to foster evidence-based practice and to expand its impact throughout the world of work. Put a long range plan into place and make a pledge, or set aside a portion of your estate in a charitable bequest. **Or, donate cash, CDs, stocks or bonds to the SIOP Foundation's Advancement or Scholarship Funds.** Now is the time to contribute. It will take even more ideas, talent, effort, and resources to meet the challenges of the future. SIOP and the SIOP Foundation would like to be among your beneficiaries.

Milton D. Hakel

Milton D. Hakel, President

PS: If you will be making a mandatory IRA distribution, as do I and others of my generation, please save on your tax bill and direct a portion of it to the SIOP Foundation.



Jeanneret Working Conference Underway!

The SIOP Foundation is undertaking an exciting new initiative. The Steering **Committee has selected the topic, "Assessing Leaders of Leaders" for the** Jeanneret Working Conference, which will be held in February 2015. We are currently inviting members to serve on the practice panel, which will be tasked with identifying the focal questions for the conference.

Once the focal question is identified and refined, the Steering Committee will plan and conduct the Jeanneret Conference as an event with the specific objective of organizing and chartering a field research consortium to pursue the resolution of the topic. Principals in the event will be expected to contribute their time, although some travel and other out-of-pocket meeting costs could be covered. Any intellectual property resulting from the conference would be assigned to the public domain, to SIOP, or to the SIOP Foundation as might be consistent with the maintenance of its tax-exempt charitable status.

The Steering Committee will adopt these and other ground rules with the intention of assuring close collaboration among participating scholars.

After the Jeanneret Conference, an independent evaluator will provide a public report to the Foundation Trustees summarizing the lessons learned in this venture about whether and how better to (a) refine focused research questions and (b) foster their collaborative resolution. If what is learned from this pilot venture warrants further action, the Foundation Trustees will seek to establish a series of SIOP Praxis Consortia as ongoing initiatives.

Have a suggestion for a focal question around the topic of assessing leaders that you would like to see resolved? Email Nancy Tippins, Foundation secretary, at ntippins@executiveboard.com

Dick's generosity in making the \$50,000 contribution to conduct the Jeanneret Working Conference is an outstanding leadership example for each of us. Help to encourage excellence and innovation for the future of I-O psychology by making a donation to the Advancement Fund or funding the next event!

Dunnette Prize Nominations Open in 2014!

The SIOP Foundation is excited to announce that the Dunnette Prize, named for Marvin D. Dunnette, will accept nominations of deserving recipients in the coming year. This award honors living originators of fundamental advances focused on research, development, or application that has expanded knowledge of the causal significance of individual differences. The inaugural recipient will receive a \$50,000 cash award at the 2015 conference in Philadelphia.



Milt Hakel, Lowell Hellervik, and Bob Muschewske initiated this fund but SIOP members continue to build it. Marv Dunnette touched many lives during his long and illustrious career, and those he influenced are honoring his memory through their donations. Although Dunnette authored some of the most significant publications in the field of I-O psychology in the 20th century, he was most proud of his contributions to the lives of his students, 62 of whom received doctorates of psychology under his mentorship. Three of his students (John P. Campbell, Milt Hakel, and Leaetta Hough) were later presidents of SIOP. Dunnette received many accolades and honors during his professional career, including president of SIOP and recipient of its prestigious Distinguished Scientific Contributions award.

Please consider nominating someone for this prestigious honor. More details about deadlines and criteria will be posted on the SIOP Foundation webpage as they become available.

Call for Nominations and Funding Opportunities for 2015

The SIOP Foundation would like to invite you to submit a nomination or application for a 2015 Award, Scholarship, Fellowship, or Research Grant. Members can log in and nominate or apply for all available SIOP Foundation awards in one easy step. Nominations and applications for eligible opportunities will be accepted beginning in May 2014 and end June 30, 2014.

The following opportunities are expected to be available:

- William A. Owens Scholarly Achievement Award
- M. Scott Myers Award for Applied Research in the Workplace
- Raymond A. Katzell Award in I-O Psychology
- Wiley Award for Excellence in Survey Research
- Hogan Award for Personality and Work Performance
- Jeanneret Award for Excellence in the Study of Individual or Group Assessment
- Leslie W. Joyce and Paul W. Thayer Graduate Fellowship
- SIOP Small Grant Program
- Sidney A. Fine Grant for Research on Job Analysis
- Douglas W. Bray and Ann Howard Research Grant
- Adverse Impact Reduction Research Initiative and Action (AIRRIA)
 Research Grant
- Lee Hakel Graduate Student Scholarship
- Mary L. Tenopyr Graduate Student Scholarship
- George C. Thornton III Graduate Scholarship
- Irwin L. Goldstein and Benjamin Schneider Scholarships sponsored by The Macey Fund

Awards will be presented at the 30th SIOP Annual Conference in 2015 in Philadelphia. Additional information regarding program focus, eligibility criteria, and submission guidelines for each of these programs can be found at http://www.siop.org/siopawards/.

A portal for submission of online applications and nominations for the 2015 Awards will be available through the SIOP website starting in early May. A complete list of prior winners is available at <u>http://www.siop.org/awardwinners.aspx</u>

DEADLINE FOR RECEIPT OF APPLICATIONS AND NOMINATIONS: June 30, 2014





























The SIOP Foundation Trustees invite you to support I-O psychology by contributing your ideas, time, and financial resources to initiate projects such as these:

Internships

The program would be designed to provide financial support for deserving students currently enrolled in their 2nd year of an I-O graduate/doctoral program. The program would assist I-O departments in matching deserving students with credible work organizations who have a record of mentoring future I-O scientist– practitioners. The program must include qualified supervision, meaningful work, systematic mentoring, and feedback. The student should be involved in the production or presentation of a professional work product. The main goal would be to provide needed resources for I-O programs and talent for organizations.

Grants for Building I-O Programs

This would provide an annual or periodic grant to a university's I-O doctoral program to support its actions to make its program stronger, more competitive, and more sustainable. The criteria for this award will focus on the recent, demonstrated accomplishments of the program. The size of the program will not be a factor in selecting the grant recipient. The main goal would be to contribute to the long-term sustainability of the field of I-O psychology

Clinical Faculty/Visiting Professorships

The purpose of this project is to place I-O practitioners in I-O educational programs so that students are exposed to a practice perspective as well as an academic perspective. This could be accomplished by funding a group that would identify I-O practitioners who are capable and willing to serve as a visiting professor, then matching them with educational institutions. Another approach would be to consider funding the visiting professor positions to ensure that diverse perspectives are provided to I-O students. The Foundation Board **could work together with SIOP's E&T Committee to support the development of standards for this kind of** faculty role.

Midcareer Refreshment

The purpose of this program would be to offer professional development to midcareer practitioners and academics. The program would utilize an assessment center model that would offer followup development programs. The program could be run by SIOP volunteers serving as assessors and presenters. Another option might be to offer a training/certification program that might be co-branded with an organization with SIOP volunteers serving as presenters. The SIOP Foundation might provide some funding to allow for sabbaticals for practitioners or academicians to take part in the program. The assessment center might be held in connection with the SIOP conference with development to follow over the course of the year. The goal of the program is to strengthen the profession.

Field Research Consortia

The consortia would bring in experts and others in related fields, such as economics or law, to work with SIOP volunteers on a multidisciplinary topic. Once the topic/initiative is identified then a steering committee could reach out to companies that might be interested in funding the research on common problems. Another approach might be to contact companies and/or consultants to see what data would be available for analysis by members/students. The Foundation would lay the ground rules, seek a research site, and identify possible researcher(s).

Sustaining and Advancing I-O

The PhD Project

The purpose of this program would be to increase the racial and ethnic diversity among I-O psychologists by attracting I-O students from underrepresented groups, supporting their training, and aiding in the transition to careers. This would be accomplished by reaching out to graduate schools, offering financial and mentoring support to students during their study activities, and providing job search and coaching support as they transition to careers in I-O.

Future Summits

The idea behind this project would be to hold multiple 1–2 day summits focused on a particular competency that includes academic, practice, government, and/or international participants. The goal would be to address an issue of long-term and strategic importance that is affecting the profession. The goal of the summits would be to enhance strategies that I-O psychologists need to perform effectively in the future.

Your Ideas?

The Foundation Trustees believe our field can be sustained and advanced through development of the projects outlined here. The Jeanneret Working Conference is an example of a field research consortium initiative that is already getting underway.

Of course the projects described above are not the only potential ones, so we invite your ideas and creative imaginings. Your financial contributions, too. Every Trustee would be eager to talk with you.

We are here because others before us laid the foundations for our work. Let us continue to build for the future.

For more information contact a Trustee or Linda Lentz or Dave Nershi at the SIOP Administrative Office, 419-353-0032.

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Foundation Financials

Current Year Financials July 2012 to June 2013

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Income	
Endowment	
Contributions	198,139
Pledges	<u>50,000</u>
Total Endowment	\$248,139
Investment Results	
Investment Income	73,169
Realized Gains/(Losses)	3,352
Unrealized Gains/(Losses)	<u>276,869</u>
Total Investment Results	<u>353,390</u>
Total Income	\$601,539
Expense	
Grants Issued	\$65,040
Management Fees	
Administration Fees	15,395
Bank Fees	3,703
Recordkeeping Fees	292
Total Management Fees	\$19,390
Total Expense	84,430
Net Income	\$517,099

Cumulative Financials January 1996 to June 2013

Junuary 1770 to June 2010	
Income	
Endowment	
Contributions	1,745,017
Pledges	794,503
Total Endowment	\$2,539,520
Investment Results	
Investment Income	415,676
Realized Gains/(Losses)	110,451
Unrealized Gains/(Losses)	407,991
Total Investment Results	<u>934,118</u>
Total Income	\$3,473,638
Expense	
Grants Issued	\$459,394
Management Fees	
Administration Fees	92,314
Bank Fees	32,470
Recordkeeping Fees	<u>2,008</u>
Total Management Fees	\$126,791
Total Expense	586,185
Net Income	\$2,887,453

\$460,000 of Award, Scholarships, and Grants Issues and Given



Lifetime Gifts



Hugo Munsterberg Society (\$25,000 or more)

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Bowling Green, OH 43402-1355 **FOF** 91iu2 440 East Poe Road SIOP Foundation, Inc.

Join the Foundation in Hawaii!

May 14 at 3 pm local time at the Hilton Hawaiian Villages. Start the 29th Annual Conference off right by honoring your colleagues in a beautiful setting.

The presentation of SIOP Awards will be held on Wednesday,

More information will be sent your way as it becomes available.

Don't Miss It!