2013 - 2014 ANNUAL REPORT
AND HONOR ROLL OF DONORS
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 resources 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.

The Board of Trustees oversees the operations of the Foundation.

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

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A Message From the President

The SIOP Foundation has always been about preparing today for what will be happening tomorrow. Founded in 1996, the SIOP Foundation applied for public charity status under section 501(c)(3) of the Internal Revenue Service tax code. The request was granted, and two large endowments were immediately created: the Scholarship Fund and the Advancement Fund.

In addition to these funds, many awards and scholarships, familiar to SIOP’s members, have been created: the Bray-Howard Research Grant; the Owens Award for Scholarly Achievement; the Myers Award for Applied Research in the Workplace; scholarships named for Lee Hakel, Mary Tenopyr, George Thornton, Ben Schneider, and Irv Goldstein; and the Joyce and Thayer Graduate Fellowship. New in the coming year will be the first Dunnette Prize, to be awarded at the SIOP Conference in Philadelphia during the Opening Plenary on Thursday, April 23, 2015.

Each of these awards is endowed, meaning that each has a corpus of assets invested in conservative funds that generate income. Grants and awards are limited to the income yielded by the endowed principal, which itself is never spent.

Present in the original purposes of the SIOP Foundation, however, and approved by the IRS, is a provision for what are called “term gifts.” Term gifts may be given for approved scientific, educational, or cultural purposes allowed under section 501(c)(3), and they need not be endowments. They are what I would call pass-through funding; that is, the tax-deductible gift is given to the SIOP Foundation, which, in turn, immediately passes the funds through to the entity that will enact the approved purpose of the gift.

The SIOP Foundation has already received three such term gifts. The first set up a pilot project workshop for psychology teachers. Detailed planning is now underway for the second, the Jeanneret Working Conference on Assessing Leaders of Leaders, to be held in February 2016. The third provided support for the Map of I-O Science, presented by Tammy Allen in her presidential address given in Honolulu last May.

Recognizing that term gifts may be attractive to potential donors, including individuals, partnerships, corporations, trusts, or foundations, the Trustees have now created the Fund for the Future. It is our hope that this fund can attract significant revenue. Its advantage to you as a donor is that the benefit of the gift is realized in the immediate future, rather than in the distant future after an endowment has generated sufficient income to fund the project or event.

The SIOP Foundation Trustees welcome your calls and messages about the Fund for the Future, as well as any of our endowed programs. We are intent on building for the future, tomorrow and beyond. SIOP and the SIOP Foundation would like to be among your beneficiaries.

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 your distribution to the SIOP Foundation.
Current Year Gifts

Hugo Musterberg Society ($25,000 and above)

Estate of Barbara Ramsey Owens

Patrons ($5,000 to $9,999)
Gene and Sue Mayfield

Sponsors ($2,500 to $4,999)
Jennifer and Rick Jacobs
SWA Consulting Inc.

Supporters ($1,000 to $2,499)
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Laura Koppes Bryan
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Howard J. Klein
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Cara Lundquist
Kathleen Lundquist
Manchester University
Adam Massman
S. Morton McPhail
Metrus Group
Frederick Morgeson
Lorin Mueller
Rose Mueller-Hanson
Lyman W. Porter
Frank L. Schmidt, Professor Emeritus
Mark J. Schmit
Garnett Stokes

Making a tax-deductible donation is easy!
Just visit www.siop.org/foundationdonation
Current Year Gifts
Contributors (up to $249)

Kimberly Adams
Juliet Aiken
Terri Arnell
Neal Ashkanasy
Stephen Atkins
Marcia Avedon
Becca Baker
Millicent Baker
Janet Barnes-Farrell
Tara Behrend
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**Gifts in Honor of...**

Tammy Allen  
by Mark L. Poteet/Organizational Research & Solutions

Class of 2013-2014 Wayne State MS in I-O Psychology  
by Reginald Ronald Shepps

Milt and Lee Hakel  
by Robert G. Jones

I-O Program at Mankato State  
by Douglas H. Reynolds

Liberty Munson  
by the Microsoft Matching Gift Program

Benjamin Schneider  
by Marc Sokol

Milt Hakel and Lyman Porter  
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by CEB Gift Matching Program

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Jack Wiley  
by Psychology Dept. of Manchester University

**Gifts in Memory of...**

Marvin Dunnette  
by Leaetta Hough and Thomas H. Stone (for Marvelous Marv)

Irv F. Goldstein  
by Seymour Adler, Wayne F. Cascio, Arlene (Micki) Goldstein, Rick Guzzo, Susan E. Jackson, Nancy Jagmin, Stan Silverman, Paul W. Thayer, and Marti and Shelly Zedeck

Paul S. Goodman  
by Denise M. Rousseau

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by Leslie Hammer, Elizabeth (Beth) Franklin Freeman, and The Guion Family

J. Richard Hackman  
by Rick Guzzo, Rosemary Hays-Thomas, and Edwin P. Hollander

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by Lew Albright
**Lifetime Gifts**

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- ASSESS Systems
- Cristina G. Banks
- Douglas W. Bray (D)
- Sandra L. Davis
- Development Dimensions International Associates
- Robert Eichinger
- Sidney A. Fine (D)
- Milton D. and Lee Hakel
- Michelle (Mikki) Hebl
- Lowell Hellervik
- Robert and Joyce (D) Hogan
- The Home Depot Foundation
- Leaetta Hough
- Ann Howard
- Richard Jeanneret
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- Mildred E. Katzell
- Frank Landy (D)
- William H. Macey
- Eugene C. and Suzanna B. Mayfield
- Susan S. Myers
- Barbara R. Owens (D)
- Personnel Psychology, Inc.
- SIOP Members
- Lillian Tenopyr
- Jack Wiley

**Benefactors ($10,000 to $24,999)**

- Howard C. Carlson
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- Raymond Hedberg
- Rick and Jennifer Jacobs
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- Douglas and Kimberly McKenna
- Robert Muschewske
- PDI Charitable Giving Fund
- David B. Peterson
- Lyman W. Porter
- Paul and Pat Sackett
- Snyder Leadership Group
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- Stroller Tod White
- Marti and Shelly Zedeck

**Patrons ($5,000 to $9,999)**

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- Michael A. Campion
- Wayne F. Cascio
- Stephen J. Cerrone
- Ronald G. Downey
- Richard D. Draper
- Edwin A. & Pauline S. Fleishman
- Robert Guion (D)
- Keith Halperin & Karen Grabow
- A. Catherine Higgs (D)
- John R. Hinrichs
- Raymond A. Katzell (D)
- Richard Klimoski
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- Joel Moses
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- Frank L. Schmidt

**Sponsors ($2,500 to $4,999)**

- Lewis Albright
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(D) indicates that the donor is deceased. Italics indicates that the donor is new to that level of giving.
Cumulative Financials

July 2013 to June 2014

Income
Endowment
Contributions 159,384
Contributions - Operating 0
Pledges 0
Total Endowment 159,384
Investment Results
Investment income 70,423
Realized Gains/(Losses) 3,434
Unrealized Gains/(Losses) 466,956
Total Investment Results 540,814
Total Income 700,198

Expense
Grants Issued 65,705
Management Fees
Administration Fees 16,072
Bank fees 3,779
Recordkeeping Fees 292
Total Management Fees 20,144
Total Expense 85,849
Net Income 614,349

January 1996 to June 2014

Income
Endowment
Contributions 1,904,003
Contributions - Operating 398
Pledges 794,503
Total Endowment 2,698,904
Investment Results
Investment income 486,099
Realized Gains/(Losses) 113,886
Unrealized Gains/(Losses) 874,947
Total Investment Results 1,474,932
Total Income 4,173,836

Expense
Grants Issued 525,079
Management Fees
Administration Fees 108,386
Bank fees 36,099
Recordkeeping Fees 2,300
Total Management Fees 146,785
Total Expense 671,864
Net Income 3,501,971

Total Funding from the SIOP Foundation of $517,000

- Awards for Excellence
- Research Funding in Support of Science & Practice
- Graduate Support for Outstanding Students in I-O
Inaugural Dunnette Prize to Be Awarded at SIOP 2015

The Dunnette Prize recognizes living individuals who have made significant and lasting contributions to understanding (assessing, predicting, and explaining) human behavior and performance by explicating the role played by individual differences. Such contributions can be in the form of basic research, applied research, or applications in practice. Marv did not see these as distinct entities; each informs the others.

As you read this, the inaugural recipient of the $50,000 Dunnette Prize will have been selected. The award recipient will be announced at the opening Plenary of the 2015 SIOP Annual Conference in Philadelphia on April 23, 2015. During the conference, the recipient will give an invited address on the achievements that led to the award. The invited address will be listed in the conference program but the winner’s name will not be revealed until the plenary. We hope you will make plans to join us in Philadelphia for what is sure to be a momentous occasion.

Please visit http://www.siop.org/SIOPAwards/Dunnette.aspx for full details on this exciting award.

The Dunnette Prize Charter Group remains open and we welcome your tax-deductible contributions to the Dunnette Fund. At present the size of the endowment permits the Dunnette Prize to be offered only every few years, and there are many I-O psychologists whose research and applications warrants recognition with this premier prize in our field.

We welcome contributions to this or any of the funds of the SIOP Foundation.

Charter Contributors to the Dunnette Fund

- Cristina G. Banks
- Michael Beer
- Thomas and Pauline Bouchard
- Harry Brull
- David Campbell
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- Victor Vroom
- Stroller Tod White
- Marti and Shelly Zedeck
Call for Nominations and Funding Opportunities

Opening May 2015! The SIOP Foundation would like to invite you to submit a nomination or application for a 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 2015 and end June 30, 2015. The following opportunities are expected to be available:

**Awards for Excellence**

**William A. Owens Scholarly Achievement Award**

This annual award is given to the author(s) (at least one of which is to be a SIOP member) of the publication in a refereed journal judged to have the highest potential to significantly impact the field of I-O psychology.

**M. Scott Myers Award for Applied Research in the Workplace**

This annual award is given to an individual practitioner or team of practitioners who have developed and conducted/applied a specific project or product representing an example of outstanding practice of I-O psychology in the workplace.

**Raymond A. Katzell Award in I-O Psychology**

Do you know a SIOP member who has shown the public the importance of I-O? The Katzell Award is given for addressing social issues, for research that makes a difference for people. The work must have an impact on society’s well-being (e.g., making organizations better places to work, more satisfying to workers, more efficient, or creating a service beneficial to the public).

**Wiley Award for Excellence in Survey Research**

This annual award, honoring Jack Wiley, is given to a member of SIOP or team (with at least one member who is a SIOP member) whose work or research has been shown to advance the survey research field.

**Hogan Award for Personality and Work Performance**

This annual award, honoring Joyce and Robert Hogan, is given to the author(s) of a paper or chapter, published or not, judged to have the highest potential to further the understanding of personality as it relates to work performance.

**Jeanneret Award for Excellence in the Study of Individual or Group Assessment**

This annual award, honoring P. Richard Jeanneret, is given to the author(s) (one of whom is to be a SIOP professional member) of a paper or chapter, published or not, judged to have the highest potential to further the understanding of individual or group assessment especially when such assessment supports the creation of a diverse workforce.

**Research Funding in Support of Science & Practice**

**SIOP Small Grant Program**

The SIOP Small Grant Program provides tangible support from SIOP to its members for research-related activities, helps guide research activities in areas of interest to both practitioners and academicians, and fosters cooperation between academicians and practitioners by supporting research that has the potential to advance both knowledge and practice in applied areas of interest to all members of SIOP.

**Sidney A. Fine Grant for Research on Job Analysis**

This grant is for research on analytic strategies to study jobs and is designed to support research that will further the usefulness of analytic strategies to study jobs, especially as to the nature of job content and organizational structures in which work is performed.
The 2016 awards will be presented at the 31th SIOP Annual Conference in Anaheim, CA. 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 2016 Awards will be available through the SIOP website starting in early May 2015. A complete list of prior winners is available at http://www.siop.org/awardwinners.aspx.
Help us build for the future!

Make your donation now!

Simply click HERE to make your tax-deductible gift. You can donate any amount and can also make a pledge that can be paid over several years.

Not comfortable with online donation? Send your check, made payable to the Toledo Community Foundation/SIOP Fund to:

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