

2014–2015
SIOP Foundation
Annual Report and
Honor Roll of Donors



Building for the Future

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 Organizational 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.

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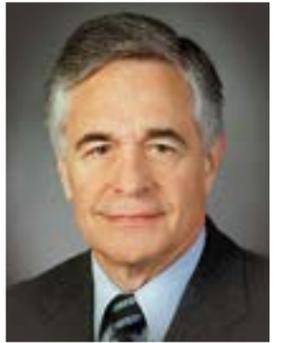
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A Message From the Foundation President

Leading off this year's Annual Report is the establishment of the Outtz Fund, a \$50,000 endowment that will support the James L. Outtz Grant for Student Research on Diversity. Grant applications will be received for the first time in 2016, with the first award to be made in 2017. Diversity means much more to our applied science than just humanitarian values and outcomes. See the full discussion in the [July 2015 issue of TIP](#).



Next, the third set of HRM Impact Awards were announced in Boston at SIOP's Leading Edge Consortium. The Awards are a joint undertaking of the Foundation with SHRM, the SHRM Foundation, and SIOP. This year's winners are Huntington Bank and Bank of America. They join previous winners Cargill, Sears Holdings, FBI, ATF, Frito-Lay, North Shore-LIJ Health System, and P&G on the honor roll of organizations that have documented the impact of human resource management practices through evidence-based, data-driven analyses. Further information is online at <http://www.hrimpactawards.org/Winners>.

This year the SIOP Foundation is 2/3rds of the way to achieving its goal to bestow \$1,000,000 by 2020 in grants, awards, and scholarships to SIOP's members.

The SIOP Foundation has always been about preparing today for the challenges and opportunities of tomorrow. Founded in 1996, the SIOP Foundation quickly received public charity status under section 501(c)(3) of the Internal Revenue Service tax code.

Two large endowments were immediately created: the Scholarship Fund and the Advancement Fund. In addition to these endowments there are many awards and scholarships familiar to SIOP's members: Dunnette Prize; Bray Howard Research Grant; Owens Award for Scholarly Achievement; 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. Each is endowed, meaning that each has a corpus of assets invested to 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 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 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. 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. We want term gifts to grow significantly. Its advantage to donors 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.

Now, some sad news. The SIOP Foundation lost one of its founding Trustees this year. Lyman W. Porter died on July 2, 2015, in Irvine, California. He served the Foundation continuously since its creation in 1996, most recently as Treasurer. His wisdom, charm, and generosity are sorely missed. (See Dr. Porter's obituary at <http://www.siop.org/tip/oct15/532/files/198.html>.)

The Trustees of the SIOP Foundation have elected William Macey and Adrienne Colella to membership on the Board. Bill and Adrienne bring abundant focus and energy, as seen in their career achievements. These are qualities that will help to keep the Foundation on track in advancing our unique field of applied organizational science.

The SIOP Foundation Trustees welcome your calls and messages about the Fund for the Future, the Advancement and Scholarship Funds, and any of the other endowments. We are intent on building for the future. Please make the SIOP Foundation one of your current and future beneficiaries.

President

PS: If you will be making a mandatory IRA distribution, as do I and others of my generation, please direct a portion of your distribution to the SIOP Foundation. Or in your will, record a bequest to the Foundation.

The Outtz Fund



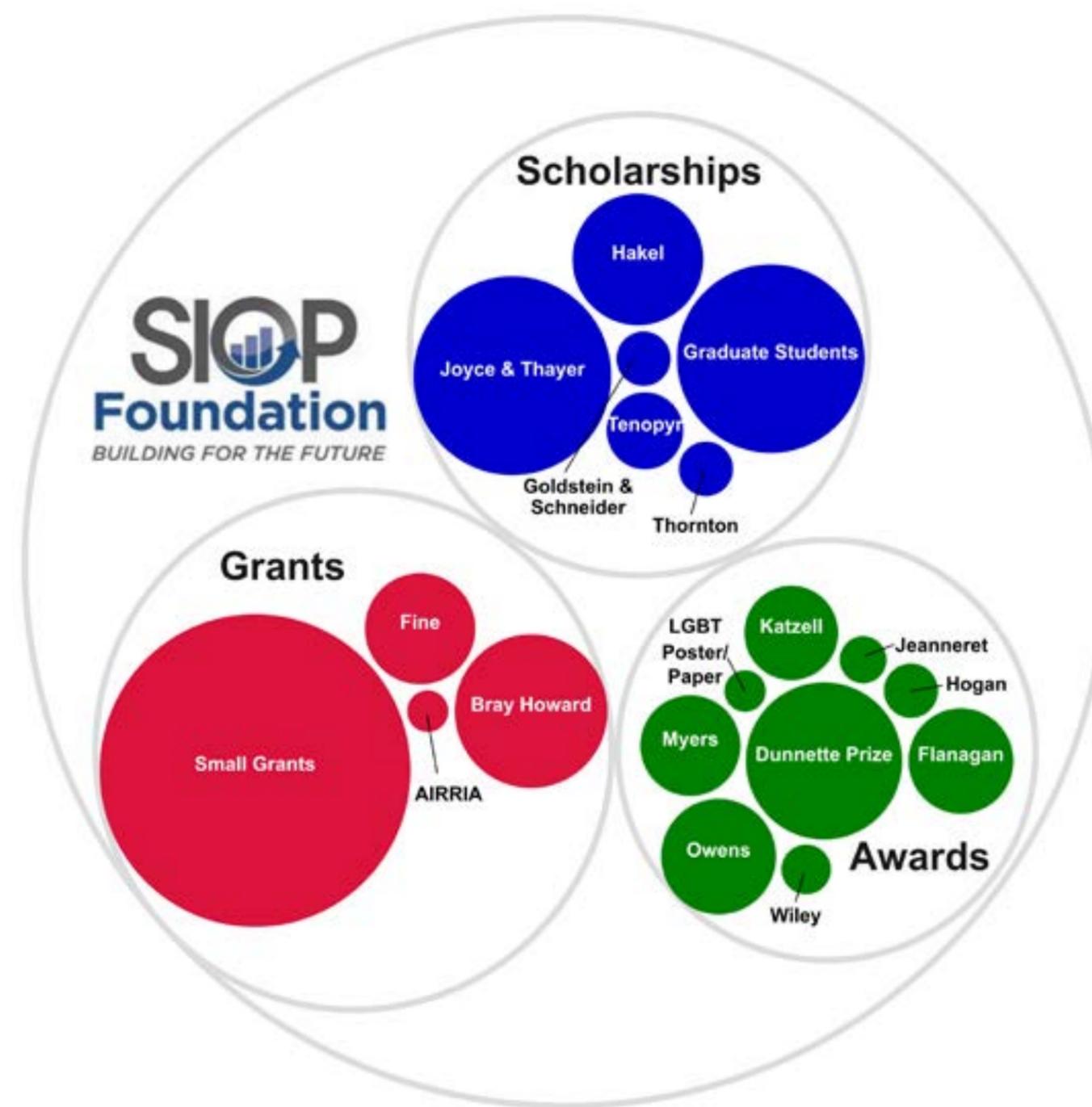
“Diversity of thought is a necessity in the refinement of constructs.”

Grant applications for the James L. Outtz Grant for Student Research on Diversity will be received for the first time in 2016, with the first award to be made in 2017. When asked why he wanted to fund a grant and not an award, Dr. Outtz explained that awards go to people who are already on their way, grants for student research provide recognition and support very early in a career, at a point where there is much diversity. He added that at the SIOP Conference, the poster sessions are where one sees the full diversity of research in our field; that is where one is most likely to encounter creative refinements to our field’s constructs.

The Outtz Fund has just been established, and its principal is \$50,000. It needs to grow; demand for research support is far larger than can be met by an annual 4% yield, \$2,000. We are asking all SIOP members to help double this endowment before Dr. Outtz begins his presidential year at the next SIOP Conference in Anaheim, April 14–16, 2016.

Contribute or make a pledge at
<http://www.siop.org/foundation/donate.aspx>.

Awards, Scholarships, and Grants Issued



Awards	155,500
Grants	287,845
Scholarships	211,000
Total	\$654,345

Cumulative Financials

July 2014 - June 2015

Income	
Endowment	
Contributions	\$99,370
Contributions - Operating	0
Pledges	48,000
Total Endowment	147,370
Investment Results	
Investment Income	82,754
Realized Gains/(Losses)	1,342
Unrealized Gains/(Losses)	22,207
Total Investment Results	106,303
Total Income	253,674
Expense	
Grants Issued	129,129
Management Fees	
Administration Fees	18,453
Bank Fees	1,739
Recordkeeping Fees	293
Total Management Fees	20,484
Total Expense	149,613
Net Income	\$104,060

January 1996 - June 2015

Income	
Endowment	
Contributions	\$2,003,374
Contributions - Operating	398
Pledges	842,503
Total Endowment	2,846,274
Investment Results	
Investment Income	568,854
Realized Gains/(Losses)	115,227
Unrealized Gains/(Losses)	897,154
Total Investment Results	1,581,235
Total Income	4,427,510
Expense	
Grants Issued	654,345
Management Fees	
Administration Fees	126,839
Bank Fees	37,989
Recordkeeping Fees	2,592
Total Management Fees	167,419
Total Expense	821,765
Net Income	\$3,605,745

Current Year Gifts

Hugo Munsterberg Society (\$25,000 and above)

James L. Outtz

SIOP Members

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

James Campbell Sharf, PhD

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

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Friends (\$250 to \$999)

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Mark Sokol

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Sara P. Weiner

Philipp Werenfels

Brenda Wood

Cheryl Wyrick

Current Year Gifts

Contributors (up to \$249)

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Steve N. Ashworth

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Richard Kopelman

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James Longabaugh

Debra Major

Val Markos

Suzanne Masterson

David Mayfield

Klaira McIntire

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Alberto Melgoza

Logan Michels

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Linda Montgomery

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Irene Sasaki

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Michelle Verquer

Sandy Wayne

Kenneth Wexley

Michael Woodward

David Youssefnia

Stephen Zaccaro

Michael Zickar

Gifts in Honor



BGSU I-O Faculty
by Jerel Slaughter

Susan Coverdale
by Friends and colleagues at CEB
(in honor of her retirement)

Milt & Lee Hake
by Edward Levine

Tracy Kantrowitz
by CEB Matching Gift Fund

Abe Korman
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Frank Schmidt
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Neal Schmitt
by Phyllis Mellon

Paul W. Thayer
by Laura Koppes Bryan
Tracy Kantrowitz

Nancy T. Tippins
by CEB Matching Gift Fund

Gifts in Memory

Norma and William Barnes
by Janet L. Barnes-Farrell

Doug Bray
by Manuel London

Marvin D. Dunnette
by Philip Bobko,
George and Joni Graen
Frank L. Schmidt

Frank Erwin
by Elizabeth Kolmstetter
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by Wayne J. Camara
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Arlene (Micki) Goldstein

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by Rodney Lowman

Robert M. Guion
by The Guion Family
Leslie Hammer
Deirdre Knapp

J. Richard Hackman
by Rosemary Hays-Thomas

Lawrence R. James
by Atlanta Society of Applied Psychology
Tammy Allen and Mark Poteet

Ray Katzell
by David A. Rodriguez

Frank Landy
by Katherine L. Bittner

Robert Lee
by Allen Kraut

Charles A. "Skip" Lowe
by Maureen A. Conard

James N. Mosel
by Murray J. Mack

Dr. William Owens
by Robert Morrison

Nambury Raju
by Roya Ayman

Michael C. Rush
by Tammy Allen and Mark Poteet

C. Michael York
by Nancy T. Tippins



Lifetime Gifts

Hugo Munsterberg Society (\$25,000 and above)

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Cristina G. Banks
Douglas W. Bray (D)
Sandra L. Davis
Development Dimensions
International Associates
Robert Eichinger
Sidney A. Fine (D)
Milton D. and Lee Hake

Michelle (Mikki) Hebl
Lowell Hellervik
Robert and Joyce (D) Hogan
The Home Depot Foundation
Leaetta Hough
Ann Howard
Rick and Jennifer Jacobs
Richard Jeanneret
Leslie W. Joyce
Mildred E. Katzell (D)
Frank Landy (D)

William H. Macey
Eugene C. and Suzanna B.
Mayfield
Susan S. Myers
James L. Outtz
Barbara R. Owens (D)
Personnel Psychology, Inc.
SIOP Members
Lillian Tenopyr
Jack Wiley

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

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Irv (D) and Micki Goldstein
Raymond Hedberg
Jeffrey McHenry
Douglas and Kimberly McKenna
Robert Muschewske
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David B. Peterson
Lyman W. Porter (D)
Paul and Pat Sackett
James C. Sharf
Snyder Leadership Group
SWA Consulting Inc.
Paul W. Thayer

Nancy T. Tippins
Valtera
Stroller Tod White
Marti and Shelly Zedeck

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

Walter C. Borman
Michael J. Burke
Michael A. Champion
Wayne F. Cascio
Stephen J. Cerrone
Ronald G. Downey
Richard D. Draper

EB Jacobs and Staff
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
William H. Mobley
Joel Moses
James D. Myers
PreVisor
Dr. & Mrs. James Campbell Quick
Frank L. Schmidt

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

Lewis Albright
Michael Beer
Laura Koppes Bryan
David P. Campbell
*Chesapeake Institutes for
Behavioral Research*
Adrienne Colella & Angelo DeNisi
James L. Farr
Deborah L. Gebhardt
Paul Green

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Allen I. Kraut
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Howard McFann Memorial
S. Morton McPhail

Microsoft Matching Gift Program
Robert F. Morrison
Rose Mueller-Hanson
Freddy & Simi Ronen
RTJC Hogan Family Foundation
Benjamin & Brenda Schneider
Rob Silzer
Mary L. Tenopyr (D)

(D) indicates that the donor is deceased. Italics indicates that the donor is new to that level of giving.

Call for Nominations and Research Funding Opportunities

The SIOP Foundation invites you to submit a nomination or application for a 2016 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 2016 and ending June 30, 2016.

The following opportunities are expected to be available:

AWARDS

- 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

FELLOWSHIPS

- Leslie W. Joyce and Paul W. Thayer Graduate Fellowship

GRANTS

- 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
- James L. Outtz Grant for Student Research on Diversity
- SIOP International Research and Collaboration (IRC) Small Grant

SCHOLARSHIPS

- Lee Hake! Graduate Student Scholarship
- Mary L. Tenopyr Graduate Student Scholarship
- George C. Thornton III Graduate Scholarship
- Two Graduate Student Scholarships
- Irwin L. Goldstein and Benjamin Schneider Scholarships sponsored by The Macey Fund

**DEADLINE FOR RECEIPT OF APPLICATIONS AND NOMINATIONS:
June 30, 2016**



Annually, SIOP, SHRM, and their foundations seek applications for the HRM Impact Award. Organizations are invited to submit their most effective evidence-based HR practice or initiative for recognition. Applications accepted February 1 through April 30.

Read more at www.hrimpactawards.org

2015 Foundation Awards Presentation



Charter Group members Marti and Shelly Zedeck, pictured with Rhonda Gutenberg (C), have supported the Foundation since the beginning.



Rick and Jennifer Jacobs are long-time supporters of the Foundation and initiated the AIRRIA Fund.



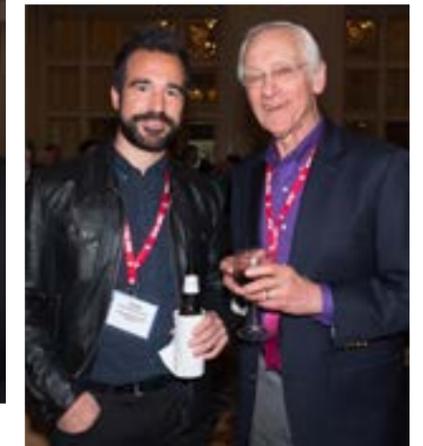
Former SIOP Administrative Office Director Lee Hake! and Foundation Board member Paul W. Thayer enjoy the event.



Foundation Sponsor Rob Silzer chats with former SIOP presidents Leaetta Hough and Doug Reynolds



2016 Awards Chair Kristl Davidson (L) and 2015 Awards Chair David Baker welcome Andrea Amodeo.



The 2015 Raymond A. Katzell Award in I-O Psychology award winner, Tomas Chamorro-Premuzic shares a drink with Foundation Sponsor Allen Kraut.



Ben Schneider (L) helps present the scholarship that bears his name to Tao Yang (C), during the awards presentation hosted by Foundation President Milt Hake! (R).



Foundation Sponsor Mort McPhail and his wife Suzanne are all smiles!



Frank Schmidt receives a round of applause when it is announced that he is the inaugural winner of the Dunnette Prize!

SLOP Foundation

440 East Poe Road
Suite 101
Bowling Green, OH 43402



44

Research teams, with a focus on academic/practitioner partnership, have received combined grant funding of \$198,000

145



Number of people treated to a lovely Foundation Awards presentation and reception each year thanks to the generosity of CEB.

\$50,000

Amount awarded to Dr. Frank Schmidt, inaugural winner of the Dunnette Prize, the largest award in Foundation History



2015

The inaugural Benjamin Schneider Scholarship of \$3,000 was given to Tao Yang.



40

Number of students who have received scholarship funding of \$119,000 between 2004 & 2015



5

Number of research teams who have received funding through the Bray Howard Research Grant for a total of \$47,770.

16



Teams awarded prize money totaling \$20,500 thanks to a memorial gift from Mrs. Susan Myers to honor the memory of her husband, Dr. M. Scott Myers.



1996

Foundation is established