



2015–2016 Annual Report

A Message From the President



What will be your legacy? Hmmm—that's a brutally direct way to start an annual report. Oh well, here goes.

Founded in 1996, the SIOP Foundation quickly received public charity status under section 501(c)(3) of the Internal Revenue Service tax code. Founding contributions came in, and the first awards were given in 1998. This year the SIOP Foundation is 76% of the way to achieving its goal to bestow \$1,000,000 by 2020 in grants, awards, and scholarships—that's a fine legacy for an outfit that has just gotten out of its teens.

The first endowment in the SIOP Foundation was created with a \$25,000 gift from Bill and Barbara Owens. It funds the William A. Owens Scholarly Achievement Award, given each year to the author(s) of the publication in a refereed journal deemed to have the greatest possibility to significantly impact the field of I-O psychology. The advances made by the winners are awesome contributions to science for smarter workplaces—see the list at <http://www.siop.org/Foundation/Winnerslist.aspx#owens>.

The second endowment in the SIOP Foundation was also created in 1996. Susan Myers established it to fund the M. Scott Myers Award for Applied Research in the Workplace, an annual award recognizing a specific project or product representing an outstanding practice of I-O psychology. Scott helped Texas Instruments to achieve record growth and profits by involving employees in management decisions and giving employees greater freedom to plan and control their own work. Here, too, the advances are awesome—see the list at <http://www.siop.org/Foundation/Winnerslist.aspx#myers>. I am delighted to report that this year Susan has added a provision to her estate plan that will be a significant bequest to the Myers endowment fund.

Betsy Shoenfelt has taken a similar step by adding a provision to her estate plan for a bequest to endow a scholarship fund. The Elizabeth L. Shoenfelt Graduate Student Scholarships will go to graduate students in terminal master's programs in a Department of Psychology or Psychological Sciences, with preference given to students working in applied areas.

What will your legacies be?

Funds within the SIOP Foundation support many awards and scholarships familiar to SIOP's members. Contribute directly to any of them: the Dunnette Prize; the Bray-Howard Research Grant; scholarships named for Lee Hakel, Mary Tenopyr, George Thornton, Ben Schneider, and Irv Goldstein; and the Joyce-Thayer Graduate Fellowship.

There is another way to impact the field—contribute a “term gift.” 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. 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. The Jeanneret Symposium on Assessing Leaders of Leaders, held last February, is a superb example of how a term gift can benefit the field.

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



Milton D. Hakel, 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.

Give today at my.siop.org/Foundation/Donations

Hebl Grant for Reducing Gender Inequities in the Workplace



Using the Incubator Fund, Dr. Michelle (Mikki) Hebl has fully endowed a research grant fund in support of student research. The Hebl Grant for Reducing Gender Inequities in the Workplace is designed to support and encourage students in pursuing excellence in gender-related research and scholarship.

Dr. Hebl's goal for this grant is to not only extend knowledge of gender-related issues but also to create a solid connection between research and practice in this area. Thus, the grant is meant to award projects with a sound basis in science and practice.

The first call for this grant will be made in 2017 and the grant recipient will be announced at the 2018 conference in Chicago, IL.

The Incubator Fund currently has one initiative underway: the Graen Grant for Student Research on the Development of New Professional Knowledge Workers. The fund is designed to support a graduate student's masters thesis or doctoral dissertation research that addresses new workforce design thinking with obvious, direct practical application.

Other funds that were begun using the Incubator fund were the James L. Outtz Grant for Student Research on Diversity, Best Lesbian/Gay/Bisexual/Transgender (LGBT) Research Award, George C. Thornton III Graduate Scholarship, and the Adverse Impact Reduction Research Initiative and Action (AIRRIA) Research Grant.

The SIOP Foundation has many other named funds, which support:

- 11 awards**
- 4 grant programs**
- 3 scholarships**
- 1 fellowship**

(List can be found at <http://www.siop.org/foundation/information.aspx>)

***Which one will you support
with your donation this year?***

my.siop.org/Foundation/Donations

Financials

Current
July 2015 - June 2016

Cumulative
January 1996 - June 2015

Income		Income	
Endowment		Endowment	
Contributions	\$126,372	Contributions	\$2,129,996
Contributions - Operating	0	Contributions - Operating	398
Pledges	<u>63,000</u>	Pledges	<u>905,502</u>
Total Endowment	189,372	Total Endowment	3,035,896
Investment Results		Investment Results	
Investment Income	74,582	Investment Income	643,436
Realized Gains/(Losses)	11,006	Realized Gains/(Losses)	126,234
Unrealized Gains/(Losses)	<u>-97,215</u>	Unrealized Gains/(Losses)	<u>799,939</u>
Total Investment Results	<u>-11,627</u>	Total Investment Results	<u>1,569,609</u>
Total Income	177,745	Total Income	4,605,505
Expense		Expense	
Grants Issued	101,921	Grants Issued	756,266
Management Fees		Management Fees	
Administration Fees	21,849	Administration Fees	148,687
Bank Fees	1,331	Bank Fees	39,320
Recordkeeping Fees	<u>307</u>	Recordkeeping Fees	<u>2,899</u>
Total Management Fees	<u>23,487</u>	Total Management Fees	<u>190,906</u>
Total Expense	125,408	Total Expense	947,173
Net Foundation Assets	\$52,337	Net Foundation Assets	\$3,658,332

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.

Current Year Gifts

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116

The number of
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a donation with just
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In appreciation for the Psychology and
Work video project team: Tammy Allen,
Jose Cortina, Alicia Grandy, Steve Hunt,
Ruth Kanfer, Eden King, Kurt Kraiger, Jeff
McHenry, Julie Olson-Buchanan, Mark
Poteet, Ann Marie Ryan, Eduardo Salas,
Evan Sinar, Enrique Washington, and Brian
Welle
by Talya Bauer, Berrin Erdogan, and
Donald Truxillo

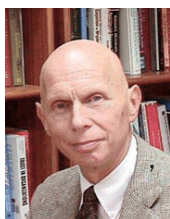
\$351,000

Amount of grant money awarded
through the SIOP Small Grant
Program, AIRRIA, Bray-Howard,
and Fine Grants, as well as the
Map of Science and Jeanneret
Symposium grants.

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49

Number of Graduate Student Scholarship Awards given since 2004

(including the Lee Hakel, the Mary Tenopyr, and the George C. Thornton III, as well as the Irwin L. Goldstein and the Benjamin Schneider Scholarships by The Macey Fund).

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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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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, 2017.

**Read more at
www.hrmimpactawards.org**