

**2007-08 Outside Offers / Faculty Retention
Frequently Asked Questions**

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| <p>What is the information on outside offers used for?</p> | <p>This documentation has proved useful when discussing faculty retention with constituencies like the Board of Regents and legislators. UW System Administration now requires that we provide a report on this information annually.</p> <p>When special funds are available for retention efforts these reports are among the information that are used in making determinations about distribution of funds.</p> <p>If we can better understand the significant reasons behind a successful or unsuccessful retention effort (e.g., could not match salary, teaching load too high, partner offered faculty position, etc.) we are better able to implement or amplify successful approaches.</p> |
| <p>Who should fill out the spreadsheet?</p> | <p>The spreadsheet should be filled out by someone who is familiar with what happens with all cases of retention. In larger units, one person may need to collect information from a range of people.</p> |
| <p>I want to look at prior year reports – how do I get access to them?</p> | <p>Reports are posted at http://apa.wisc.edu/Faculty_Recruiting_Retention/index.htm. This FAQ and related information is at the same web site.</p> |
| <p>Who should I contact if I have other questions?</p> | <p>Jocelyn Milner (jmilner@wisc.edu, 263-5658) Margaret Harrigan (harrigan@vc.wisc.edu, 263-7141) Eden Inoway-Ronnie (etinoway@wisc.edu, 265-5975)</p> |

Faculty Retention/Outside Offers

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| <p>What are outside offers?</p> | <p>Sometimes faculty are invited to take a position at another university or organization. This is an outside offer. Please report outside offers in these three categories: responsive offers, pre-emptive offers, and those who did not receive a counter-offer.</p> |
| <p>What positions exactly should we include?</p> | <p>Include cases when you were considering retaining tenured/tenure track faculty ranks: instructors, assistant, associate, and full professors.</p> <p>If you have CHS and/or clinical faculty in your unit, please include cases in which they received an outside offer.</p> <p>Beginning with the 2007-08 report, include cases in which an academic staff member was involved in an outside offer because they operate in a *nationally competitive market*. This is optional; report all cases or no cases of such activity for your unit.</p> |

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| <p>What information are we looking for?</p> | <p>We are interested in the outcome of the outside offer, the type of counter offer (whether responsive, pre-emptive, or no counter offer), and what factors were important in the individual's decision. Report whether the person accepted or rejected the offer or is still thinking about it and tell us the key elements of the offer. Let us know the aspects of the offer that were crucial in the person's decision to accept or reject (position for partner, reputation of department, salary, teaching load, location, etc.).</p> |
| <p>What counts as a responsive offer?</p> | <p>"Responsive" offers are cases when you have made a counter-offer to a faculty member who has received an actual outside offer, either orally or in writing, or are about to receive such an outside offer. This is the category of people who are considering another faculty position and whom you would like to retain.</p> <p>Also count as "responsive" cases of faculty members who you wanted to retain but to whom you didn't actually make a counter-offer because the faculty member indicated they didn't want a counter-offer or because the outside offer was so attractive that it clearly could not be matched.</p> |
| <p>What counts as a pre-emptive offer?</p> | <p>"Pre-emptive" retention offers are made to faculty who you know are "looking around," and so you do something explicitly to keep the faculty member here (e.g., increased salary, more space) even though they may not have received an actual offer or even have gone for an interview.</p> <p>Also included as pre-emptive offers are those cases when you take an action intended to keep a faculty member who you think might be at risk of leaving (e.g., increased salary, more space, etc).</p> <p>The distinction between responsive and pre-emptive offers may be difficult to draw in some cases; please use your best judgment and try to make the distinction in a way that is consistent over time.</p> |
| <p>What should we put in the "no counter-offer" category?</p> | <p>"No counter-offer" refers to cases in which the individual has an outside offer but you didn't make a serious counter-offer because you didn't really want to retain them.</p> <p>Also consider as no counter-offer those who were leaving for a clear career change or to pursue opportunities that are distinctly different from what could be in a responsive offer. Examples are faculty who leave to take an administrative position elsewhere (dean, director, provost, president, etc.).</p> |
| <p>How should we report faculty who left for a different kind of position, for example dean position or senior leadership position?</p> | <p>Include them in the no counter-offer category.</p> |

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| <p>Should I report cases when a faculty member received a market or equity base adjustment?</p> | <p>Yes for market adjustments. No for equity adjustments. Faculty members who received a market adjustment should be included in the report if the salary increase was related to retaining that person. Do not report any equity adjustments as pre-emptive or responsive offers; equity adjustments are a response to inequity rather than to market forces.</p> |
| <p>How should I report faculty who retired and took a job somewhere else?</p> | <p>If they retired to take a position elsewhere and they would have continued to work in their regular position otherwise, count them as “responsive” or “no counter-offer” depending on the circumstances. If they had already announced plans to retire and then took up an opportunity elsewhere, report as for other retiring faculty.</p> |
| <p>How should I report faculty who retired and did not take up a position elsewhere?</p> | <p>If you made them a pre-emptive offer to get them to stay on, report them in that category. Otherwise, report them as “no counter-offer” and note that they retired.</p> |
| <p>One of our faculty members changed tenure home and went to a different school/college at UW-Madison. Should we include them?</p> | <p>No. Don't report these cases.</p> |
| <p>How should we report faculty who left because they didn't get their 3-year contract renewed or didn't get tenure or were encouraged to leave?</p> | <p>Report as “no counter-offer” and note the circumstances.</p> |
| <p>My report to you included more people than your summary report for my college did. Why is that?</p> | <p>We ask you to report about all faculty members who are being recruited away or are at risk of leaving. However, for purposes of our report to UW System Administration, we do not include faculty for whom no counter offer was appropriate – either because we did not want to retain them or because they were moving on to a distinctly different position. We will use the information about “no counter offers” in another report.</p> |
| <p>How should I report cases which are still in negotiation?</p> | <p>If there is an outside offer on the table and the faculty member has not yet decided whether to take it, report the case as pending. If negotiations are preliminary, and no details of the outside offer or counter offer are available yet, report the case next year when information about the situation is available.</p> |