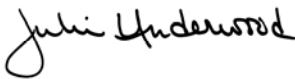





MEMORANDUM (VIA EMAIL)

March 30, 2009

From: Julie Underwood, Interim Provost 
Jocelyn Milner, Director of Academic Planning and Analysis 

To: Academic School/Colleges Deans and Directors

Subject: 2008-09 Report on Faculty Retention/Outside Offers

Copies: Eden Inoway-Ronnie, Margaret Harrigan, Steve J. Stern, School/College Contacts

Please note that the instructions have changed since last year's request.

In recent years we have engaged in an annual collection of detailed information on outside offers. We ask that you compile and submit the 2008-09 report by August 18, 2009. This information is used to better understand the amount of retention pressure and major reasons behind successful or unsuccessful retention efforts (e.g., could not match salary, teaching load too high, partner offered faculty position, etc.). **The information you provide will be used in making decisions about distributing funds earmarked for faculty retention.**

Include in your submission outside offers made to those in tenured/tenure track faculty positions. Also report activity related to CHS faculty, clinical faculty or other academic staff if you are feeling retention pressure and if you recruit for these positions nationally.

In response to your input, we have simplified the data collection forms. The focus is on three pieces of information: the name and unit of the person who is at risk of leaving as a result of outside recruiting pressure, whether he or she stayed or left, and the major issues that were important in his or her final decision. Report all *bona fide* outside offers and any probable outside offers that you responded to in order to convince the person to withdraw from the search before any formal offer occurred. This report is narrowly focused on those actions that are in response to outside recruitment attempts. It is not meant to include all preventive efforts. We recognize that units engage in efforts every day to keep our faculty contented and productive members of the community and it is beyond the scope of this report to collect all of those activities.

See the section on instructions below. The collection spreadsheet and answers to Frequently Asked Questions are attached. This memo and those attachments they are also posted at http://apa.wisc.edu/Faculty_Recruiting_Retention/index.htm. Please submit your response via

email to Jocelyn Milner. If you have questions, please contact Jocelyn Milner (jlmilner@wisc.edu, 263-5658) or Margaret Harrigan (harrigan@vc.wisc.edu, 263-7141).

This information has proved useful when discussing faculty retention with the Board of Regents and legislators and has proved essential to making the case for high-demand faculty retention funds. Thank you for making sure the information gets to us in a timely and complete manner.

2008-09 Instructions for Preparing Outside Offers/Retention Pressures Report

Population to be considered:

Include tenured and tenure track faculty positions: instructors, assistant professors, associate professors, and full professors. Also include CHS faculty, clinical faculty or other academic staff positions if you are feeling retention pressure and you recruit for these positions nationally.

Types of Retention Cases:

A. Actual Outside Offer:

Individuals who have received an actual outside offer verbally or in writing. Include 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. This category may include individuals who leave for positions that are significantly different from their current faculty appointment, such as senior administrative posts or industry positions.

B. Probable Outside Offer:

Individuals who are considering leaving and are being actively courted by another university or other organization. The offer is still in the development phase – the individual has been invited by another institution or organization to interview or give a talk but may or may not receive an eventual job offer. Although no offer has been tendered yet, the unit is acting to head off an offer before it takes place.

C. Purely Preventive Action:

Individual is of great value to UW but is not currently being courted or responding to any invitations from other institutions. He or she has likely been sought after in the past and will be again. The person may have received a market or high demand faculty salary adjustment to maintain a competitive salary, help with partner employment, or other non-salary inducements to keep him or her happy and productive at UW.

D. None:

Individual has received an offer from another institution, but we have no desire to retain the person. He or she may have been unable to earn tenure at UW, was fired for cause, or other reason. If this is an individual whose appointment we would have terminated or if we were encouraging this person to move on, do not include in the report. If we wanted the person to stay, but we did not provide a counter offer, this person should be included in A (actual outside offer) above.

Classification of Retention Cases:

The distinction between actual offers, probable offers, and preventive efforts may be difficult to draw in some cases; please use your best judgment.

We are particularly interested in cases A (actual outside offer) and B (probable outside offer). These are the cases that we will include in our reports to the Board of Regents and legislators. Cases C and D are defined to help you draw the line between what data should be reported and what are not required. Although we don't require you to report purely preventive efforts, please provide it if you think this information is important for us to have. If you are not sure about whether to include a case, please report it.

Requested Data:

- Person's name and department
- Name of institution or organization actively recruiting our employee
- Type of recruitment case:
 - *Actual outside offer*: verbal or written offer was received or was in the final stages.
 - *Probable outside offer*: we acted before the decision to make an offer had been made by the competing institution.
 - *Purely preventive*: individual is not currently responding to any overtures from other institutions. We acted now to prevent future competitive offers.
- Whether a counter offer was made
- Whether the person stayed or left
- Key issues important to the decision
- Anything else you want to tell us about the offer or counter offer

In recording the key issues important to the decision, we are interested in as much information as you are able to provide. For example, in years past units have reported: salary was the most important issue, the person left for a leadership opportunity that could not be matched here, the primary issue was the promise of a tenure-track position for the individual's spouse, a professor stayed because he valued the opportunity to work with his colleagues here, an individual left to live closer to extended family because of family health issues.