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Date: October 22, 2004

To: Academic Deans and Directors of Faculty Members in United Academics

From: Beth Behner, Director
Statewide Office of Labor and Employee Relations

Re: Retention Offer Criteria

I am writing to remind U.A. administrators about the U.A. retention offer process. The criteria for retention offers have been utilized in the retention offer process with the union's awareness since that time. The collective bargaining agreement (CBA) in effect January 1, 2004 through December 31, 2006 continues to provide for retention offers which are adjustments to the salaries of unit members. During negotiations that led to the 2003-2006 CBA, the parties specifically discussed the continuation of the same process for retention offers that has been utilized under the former CBAs.

There is no requirement that a unit member have an actual "offer in hand" before being awarded a retention offer. However, a bona fide retention risk must be presented before the University awards a retention offer. Retention risk is defined as a documented offer of other employment or a documented offer of other employment that a particular faculty member could leave University employment. While a documented offer of other employment is not necessary, it is acceptable documentation. Other risk factors that you may be able to document include but are not limited to:

- Active job search
- Interest expressed by other employers
- Demand for persons in the field
- Opportunities for professional growth elsewhere
- Opportunities for/ties of other family members in this or other communities
- The faculty member's sensitivity to salary as an indicator of worth
- Non-faculty opportunities in the community
- Impact of financial rewards available in faculty member's field
- Strength of financial and non-financial ties to this or other communities

communities

• Stature/recognition in field

In some cases, documentation of significant factors will be sufficient to show a retention offer of

reduced risk that an employee will leave university employment if a retention offer is given should also be considered and documented. Please note that documentation of risk factors may, but does not necessarily consist of documents from third parties. Possession of personal knowledge may be sufficient.

If you wish to make a retention offer, please forward a draft memo to your provost, copied to labor relations, that:

1. documents the retention risk for that faculty member, including his/her active job search

candidate;

2. provides the reasons why the faculty member should be retained, including the value he/she brings to the university;

applicable to equally qualified individuals.

Following review and any feedback, the memo can be finalized for approval by the provost and Labor and Employee Relations.

Please note that retention offers will be reviewed and approved based on factors as described above. Retention offer requests that are not based on retention risks but instead assert justifications based on market, cost of living, or merit considerations will not be approved. Thus you should not advocate from the perspective of awarding any adjustments based upon these specific factors. Market data, however, may be used to support a retention offer.

found to be justified.

I let me know if you have questions.

cc: United Academics