***11/2015 Version***

***SMG OFFER LETTER TEMPLATE***

DATE

(NAME)

(ADDRESS)

(EMAIL)

DEAR:

Welcome to the University of California (INSERT UC LOCATION).

As discussed, you are being offered the position of XXXX at (INSERT DEPT. OR ORGANIZATION) (INSERT ONLY IF APPLICABLE) subject to approval by [The Regents or the President (CHOOSE AS APPLICABLE)] and effective on or about XXX (INSERT DATE). The compensation for this position is XXXX monthly or XXXX annually. Your appointment is part of the University’s Senior Management Group (SMG) Program. The SMG Program is reserved for those administrative executives who work at the highest level of leadership at the University. Once approved, the terms of your compensation contained in this offer letter and as defined in the Regents Policy ([Principles for Review of Executive Compensation)](http://ucop.edu/operating-budget/_files/legreports/1011/2010-compensation-policies-practices.pdf) will be available to the public. The policies related to your appointment are outlined in the following link: [SMG Policies](http://policy.ucop.edu/manuals/smg-hr-policies.html). It is important that you familiarize yourself with these policies as they will guide your appointment at the University.

* A hiring bonus of XXXXX (MAXIMUM OF 20% OF STARTING SALARY. THE TOTAL HIRING BONUS AND RELOCATION ALLOWANCE OFFERED CANNOT EXCEED 30% OF THE PROPOSED STARTING BASE SALARY. ) is being offered to you as part of your total compensation package as noted in [Regents Policy 7705](http://policy.ucop.edu/_files/smg-docs/smg_hire.pdf). The hiring bonus is payable as a (CHOOSE LUMP SUM OR INSTALLMENTS) Lump Sum and paid within 30 days of your hire date or Installment Payments over a period of 2, 3 or 4 years at a monthly installment of XXX. Please note if you separate from UC, a repayment provision will be required and all future installment payments are forefeited.
* The University of California offers a variety of health, retirement, vacation and leave benefits and you are also eligible to participate in the Senior Management Life Insurance & Executive Salary Continuation for Disability Program. Information about these benefits may be reviewed online at: [UC Net.](http://ucnet.universityofcalifornia.edu/compensation-and-benefits/index.html)
* INSERT ONLY IF APPLICABLE: You will receive an annual automobile allowance of $8,916, which is paid out monthly in the amount of $743.00. This will be considered taxable income; appropriate deductions will be withheld. Review the policy here to determine eligible positions: [Regents Policy 7709](http://regents.universityofcalifornia.edu/policies/7709.pdf).
* INSERT ONLY IF APPLICABLE: The [Senior Management Supplemental Benefit Program](http://ucnet.universityofcalifornia.edu/compensation-and-benefits/retirement-benefits/senior-management-supplemental-benefits-program.html) provides for contributions to be made to the University’s Retirement Savings Program Plans. The University will contribute 5 percent of your monthly salary to this program. View the policy at the link above for full details.
* INSERT ONLY IF APPLICABLE: A temporary housing allowance is being provided for a maximum of 90 days in order to assist you with relocation. The maximum monthly allowance is XXXXX. The details of this policy allowance may be reviewed here [Regents Policy 7710.](http://policy.ucop.edu/_files/smg-docs/smg_move_reimburse.pdf)
* INSERT ONLY IF APPLICABLE: The University will pay for the actual and reasonable expenses associated with moving your household goods and personal effects from your current primary residence to your new residence. Eligible expenses and reimbursements are defined here [Regents Policy 7710.](http://policy.ucop.edu/_files/smg-docs/smg_move_reimburse.pdf)

***ALL RELOCATION ALLOWANCES MAY REQUIRE EXPLICIT APPROVAL FROM THE PRESIDENT***

**Relocation Allowance – Option 1: Relocation Lump Sum**

* INSERT ONLY IF APPLICABLE: You are being provided a relocation allowance to assist you with transitioning to your new location. The allowance is XX% (policy is up to 25%) of your base salary and will be paid to you in a lump sum within 30 days of your hire date. If you separate employment within two years of your hire date, you will be required to repay a pro-rated portion of the allowance as follows (INSERT SPECIFIC DETAILS OF REPAYMENT PROVISIONS). More information may be found here: [Regents Policy 7711.](http://policy.ucop.edu/_files/smg-docs/smg_relocate_allow.pdf)

**Relocation Allowance – Option 2: Installments**

* INSERT ONLY IF APPLICABLE: You are being provided a relocation allowance to assist with transitioning to your new location. The allowance is XX% or $ (policy is up to 25%) of your base salary and will be paid to you in installments over [two or three or four] years, as follows: XX % the first year, XX % second; XX third and XX fourth year. Any unpaid installments are forfeited if you separate employment. More information may be found here: [Regents Policy 7711.](http://policy.ucop.edu/_files/smg-docs/smg_relocate_allow.pdf)
* INSERT ONLY IF APPLICABLE: You are eligible to participate in the Mortgage Origination Program (MOP) to assist you with a purchase of a principle residence near (INSERT LOCATION). MOP is administered by the University’s Office of Loan Programs in Oakland, California. Certain restrictions apply. For more information, please visit the MOP website at: [Mortgage Origination Program.](http://www.ucop.edu/loan-programs/loan-programs/mortgage-origination-program.html)
* Your appointment is an “at will” which means that it can be terminated at any time with or without cause.(INSERT ONLY IF APPLICABLE) If your appoint­ment is terminated other than for cause, you will be able to exercise the retreat rights to your academic appointment.
* Due to the critical nature of this position, a background check is required prior to your start date. (INSERT ONLY IF APPLICABLE) You will receive an e-mail from the University’s background check vendor to begin the process.
* You are a designated official of the University for purposes of the California Political Reform Act of 1974. You will complete and file with the UC Office of General Counsel a Form 700 report once your appointment begins and thereafter on an annual basis. More information may be found here: [UC Conflict of Interest Code](http://ucop.edu/general-counsel/legal-resources/conflict-of-interest-code.html).

If you are in agreement with the terms and conditions of this offer, please sign this letter where indicated and return it to me at your earliest convenience.

Again, we look forward to welcoming you to the University of California. If you should have any questions, please feel free to contact me or \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

Sincerely,

(HIRING MANAGER)

I accept all of the terms and conditions of this offer and understand that I am subject to all applicable UC, Regents and SMG policies.

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Signature Date

Cc: