# SMG OFFER LETTER TEMPLATE FOR INTERNAL CANDIDATES (Approved August 2023)

DATE

(NAME)

(ADDRESS)

(EMAIL)

DEAR:

As discussed, I am pleased to offer you the position of XXXX at (INSERT UC LOCATION) in (INSERT DEPT. OR ORGANIZATION) (INSERT ONLY IF APPLICABLE) subject to approval by [The Regents or the President of the University of California or the Chancellor or the Executive Vice President and Chief Operating Officer or the Laboratory Director (CHOOSE AS APPLICABLE)] and effective on or about your estimated start date of XXX (INSERT DATE). The recommended base salary for this position is XXXX monthly or XXXX annually.

Your appointment is part of the University’s Senior Management Group (SMG) personnel program. The SMG personnel program is reserved for those administrative executives in whom the management of the University is entrusted. Once approved, the terms of your compensation contained in this offer letter and as defined in [Regents Policy 7201: Principles for Review of Executive Compensation](http://regents.universityofcalifornia.edu/governance/policies/7201.html) will be available to the public. The systemwide personnel 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.

* As a University employee, you will continue to be required to comply with all applicable University policies, as may be amended from time to time. Federal, state, or local public health directives may impose additional requirements.
* The University of California offers a variety of health, welfare, and retirement benefits, as described on the [UC Net Benefits page](https://ucnet.universityofcalifornia.edu/compensation-and-benefits/index.html). Generally, your currently elected health, welfare, and retirement benefits will remain the same. However, benefit eligibility and the ability to make plan changes will be determined by the Group Insurance Regulations. You are also eligible for Senior Management Life Insurance as described on the [UC Net Life Insurance page](https://ucnet.universityofcalifornia.edu/compensation-and-benefits/disability-life-accident/life-insurance/index.html) and (DELETE IF CANDIDATE ALREADY HAS FIVE CONSECUTIVE YEARS OF SMG SERVICE), after five consecutive years of SMG service, Executive Salary Continuation for Disability as described on the SMG Benefits section of the [SMG policy page](https://policy.ucop.edu/manuals/smg-hr-policies.html). Vacation, sick, and other kinds of leaves are addressed in the Absence from Work section of the [SMG policy page](https://policy.ucop.edu/manuals/smg-hr-policies.html).
* INSERT ONLY IF APPLICABLE: In connection with your faculty appointment indicated below, you will continue to accrue sabbatical credits as a member of the faculty under the University’s sabbatical policy found in [PPSM II-50](https://policy.ucop.edu/doc/4010577/PPSM-II-50) and the Academic Personnel Manual at [APM-740](https://www.ucop.edu/academic-personnel-programs/_files/apm/apm-740.pdf) and [APM-758](https://ucop.edu/academic-personnel-programs/_files/apm/apm-758.pdf). After earning sufficient credits to qualify for a leave, you may be eligible to take sabbatical leave in accordance with these same policies.
* INSERT ONLY IF APPLICABLE AND REVIEW LANGUAGE if candidate comes from an existing faculty appointment at another UC location. There should be a conversation about which faculty position the CANDIDATE would return to when the candidate steps down and which location would fund it. Your appointment as (CURRENT RANK, STEP) in the (DEPARTMENT) at the University of California, (CAMPUS) will be reduced to zero percent time while you hold the full-time position as (SMG TITLE). Your faculty position will be available to you at 100 percent time beginning in the academic year when you step down as (SMG TITLE), and your compensation will be established at your current faculty compensation level plus any normal faculty salary increases between now and when you return to your faculty appointment full-time. This process will be executed by the appropriate campus administrators at the time you step down.
* INSERT ONLY IF APPLICABLE: The University may reimburse actual and reasonable moving and relocation expenses associated with relocating your primary residence to accept this appointment, subject to the limitations under Regents Policy 7710, Senior Management Group Moving Reimbursement found in the Business Expenses, Moving and Relocation section of the [SMG policy page](https://policy.ucop.edu/manuals/smg-hr-policies.html). If you voluntarily separate from this position prior to completing one year of service or accept an appointment at another University of California location within 12 months from your initial date of appointment as [INSERT THIS POSITION’S TITLE], you will be required to pay back 100 percent of these moving and relocation expenses.
* INSERT ONLY IF APPLICABLE: If you decide to maintain an active research program during your appointment as (SMG TITLE), the University will provide an annual allocation of ($XX,XXX) in (CAMPUS/UCOP) funding to you for your research program for the duration of your appointment as (SMG TITLE). You may use these funds in any manner consistent with policies and that supports your research needs. Unexpended funds remaining at the date of the end of your appointment as (SMG TITLE) would still then be available to you for subsequent use, if you are a member of the faculty of the University.
* You are eligible to participate in the University of California Employee Housing Assistance Program to assist you with the purchase of a primary residence near the (INSERT APPLICABLE LOCATION campus or Lab). Your participation is subject to all applicable program requirements. For more information, please visit [the UC Office of Loan Programs page](https://www.ucop.edu/loan-programs/) (INSERT IF DESIRED), the (INSERT LINK TO LOCAL WEBSITE), or contact (INSERT LOCAL CONTACT).
* Your appointment is “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. If your appointment is terminated for cause, the University reserves the right to institute disciplinary or dismissal proceedings from University employment pursuant to personnel policies applicable to members of the Academic Senate.
* Due to the critical nature of this position, this offer is contingent on the successful completion of a background check 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.
* As a designated official of the University, you are required to file periodic Statements of Economic Interests (Form 700s) pursuant to the California Political Reform Act of 1974. You will be contacted by NetFile.com, a third-party online filing system, to complete a Form 700 once your appointment begins and thereafter on an annual basis. If you already file an annual Form 700 with the University, the scope of your disclosure may change from that of your prior position. Information on the University’s designated officials and the scope of disclosure may be found here: [UC Conflict of Interest Code](https://www.ucop.edu/uc-legal/legal-resources/conflict-of-interest-code.html); additional Form 700 information may be found on the [UC Legal - Office of the General Counsel page](https://www.ucop.edu/uc-legal/legal-resources/index.html). Your Form 700 is a record subject to disclosure to the public. In addition, your position has prohibitions on from whom you may accept honoraria. More information on gifts and honoraria may be found in the guidance document titled: [“Acceptance of Personal Gifts and Gratuities by Employees under California’s Political Reform Act,”](https://policy.ucop.edu/doc/1200366/AcceptanceofGifts) dated January 1, 2019.
* You are subject to the policy on “Outside Professional Activities” (OPA), which provides for approvals, reporting, and/or limits on compensated and uncompensated board, advisory, editorial, or other services you may provide to an organization other than the University of California or its entities. Please note that compensated board activities must be fully approved before you can accept, provide or announce the service. There is a limit to service on two compensated boards of directors. The policy can be found in the Outside Professional Activities section of the [SMG policy page](https://policy.ucop.edu/manuals/smg-hr-policies.html). Your contact in regard to the process for review and approval of Outside Professional Activities is your local Senior Management Group Coordinator, who can be found on the [SMG Coordinators page](https://www.ucop.edu/human-resources/staff/compensation-programs-staff/smg-coordinators.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. Upon our receipt of your signature, we will proceed with securing formal approval by [The Regents/the President of the University of California the Chancellor/the Executive Vice President and Chief Operating Officer/the Laboratory Director] of your appointment and compensation.

If you should have any questions, please feel free to contact me or \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

Sincerely,

(HIRING MANAGER Name and Title)

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: