

Responsible Officer:	Cherie McDougald, Director
Responsible Office:	Office of the Controller and Business Services
Issuance Date:	08/22/11
Effective Date:	08/22/11
Last Review Date:	07/20/06
Scope:	Organizational membership

Contact:	Cherie McDougald
Title:	Director, Business Operations Center
Email:	cmcdougald@uckac.edu
Phone:	(559) 646-6518
Contact:	Sally Harmsworth
Title:	Associate Director, Business Operations Center
Email:	sharmsworth@ucanr.edu
Phone:	(530) 750-1372
Contact:	Jennifer Bunge
Title:	Associate Director, ANR Budget Office
Email:	jennifer.bunge@ucop.edu
Phone:	(510) 987-0102

TABLE OF CONTENTS

I. POLICY SUMMARY	2
II. DEFINITIONS	2
III. POLICY TEXT	2
IV. COMPLIANCE / RESPONSIBILITIES	3
V. PROCEDURES	3
VI. RELATED INFORMATION	4
VII. FREQUENTLY ASKED QUESTIONS	5
VIII. REVISION HISTORY	5

I. POLICY SUMMARY

- A. This section of the Administrative [Handbook](#) for the University of California (UC) division of Agriculture and Natural Resources (ANR) describes how UC policy on Memberships in Organizations (Business and Finance Bulletin No. G-43, [University Policy on Memberships in Organizations.pdf](#)) is implemented in the ANR environment.
- B. This [Handbook](#) section focuses on professional memberships requiring payment of initiation fees and/or annual dues with UC-administered funds. **Memberships for which financial support from UC funds are requested must be approved before the expense is incurred.**
- C. The information presented here is general, and cannot address all the unique concerns that could arise within ANR regarding memberships in organizations. Questions regarding specific situations should be directed to the contact persons shown above.
- D. In the context of this document the term “Department Head” means the UC Cooperative Extension (UCCE) Director, the Research and Extension Center (REC) Director, the Statewide Program Director, and/or Directors of administrative units.

II. DEFINITIONS

III. POLICY TEXT

Congruent with [UC policy](#), it is ANR’s policy to consider establishing memberships in organizations designed to promote the advancement of teaching, education and research, to enhance the professional standing of its administrative personnel, and to facilitate favorable community-ANR relations.

A. Types of Organizations

1. Organizations of interest to ANR personnel will usually fit into one of the following four (4) categories:
 - a. Organizations of institutional service agencies and administrative officers (e.g., Western Association of College and University Business Officers),
 - b. Scholarly societies (e.g. Ecological Society of America, Society for Range Management, American Society of Animal Science, Soil Science Society of America, etc.),
 - c. Community organizations (e.g., Chambers of Commerce, Rotary Club), and
 - d. Organizations where memberships are required to receive desired periodicals or office supplies and equipment (e.g., membership discount stores).

2. General (e.g., institutional) memberships may be preferable to individual memberships if they offer greater value as compared to cost.

B. Support of Membership Cost

1. For both academic appointees and staff personnel, to the extent that membership in an organization is required by a licensing agency, by the ANR job description, and/or by a similar mandatory professional requirement; ANR will support membership in one scholarly society or professional organization per ANR employee with approval by the Department Head.
2. If properly justified and substantiated, Department Heads may approve membership in more than one organization.
3. Fund Source
 - a. Professional membership costs may be charged to an appropriate UC ANR fund source, including Various Donors and ANR Program Development funds. In the context of this section of the *Handbook*, “appropriate” fund sources have all of the following three characteristics:
 - i. The requestor (and/or the requestor’s supervisor) has authority over the subject fund source.
 - ii. There is no restriction on the fund source prohibiting its use for the purpose of supporting professional memberships.
 - iii. The balance of the fund source is sufficient to fully support the entire cost of the professional membership.

IV. COMPLIANCE / RESPONSIBILITIES

Approval Authority

A. Individual Memberships

ANR Department Heads may approve individual memberships in organizations. The BOC-Kearney, the BOC-Davis, or the Oakland ANR Budget Office will provide Confirmation of appropriate fund sources.

B. Institutional Memberships

The ANR [Associate Vice President for Academic Programs and Strategic Initiatives](#) and the [Associate Vice President Business Operations](#) may approve institutional (e.g., general) memberships.

C. Guidelines for Review of Membership Requests

Department Heads should consider the following when reviewing a request for membership.

1. The extent to which the membership might (or might not) support the requestor’s

- programmatic and/or administrative responsibilities.
2. The programmatic and/or administrative value of the membership as compared to its cost, particularly considering any budgetary restrictions that may apply.
 3. The nature of the organization's mission in relationship to the requestor's programmatic and/or administrative responsibilities.
 4. Note that general (e.g., institutional) memberships should be considered if they offer greater value as compared to individual memberships.
 5. Community organization memberships should be approved only when there is a demonstrated need to enhance local relationships.
 6. Requests to join an organization solely for its publications (periodicals, etc.) should be approved only if the requestor demonstrates the value of such publications, and verifies that there is no other way to obtain them.
 7. Memberships in airline and airport clubs are prohibited.

V. PROCEDURES

Approval Process

A. Memberships for which financial support from UC-administered funds are requested must be approved by the Department Head before the expense is incurred.

B. Initiation by Requestor

1. ANR personnel wishing to request such approval must complete an *Approval Request for Organization Membership Dues to be Paid with UC Funds Form*, and forward it to their supervisor and Department Head for signature. Information supplied on the Approval Request Form must:
 - a. Explain how membership would support the requestor's professional responsibilities,
 - b. Explain how membership would be programmatically and/or administratively beneficial to UC, and
 - c. Identify an appropriate fund source, the balance of which is adequate to fully cover the proposed expense.

C. Approval by Department Head

1. The Department Head will review the Approval Request Form in accordance with the guidelines provided above, as well as with any other applicable concerns (e.g., budget restrictions, etc.) that s/he may have.
 - a. The Department Head has the authority and the responsibility to approve membership payments from UC ANR funds (see Item No. IV.C. above) or to

withhold their approval if membership is not programmatically and/or administratively beneficial to ANR.

- b. Certain general (institutional) memberships may limit the total number of allowable participants. In such a situation, the Department Head has the authority and responsibility to determine which ANR employee(s) will be granted membership.
 2. If the Department Head does not approve the request, s/he should so inform the requestor and explain why it was not approved.
 3. If the Department Head does approve the request, s/he should so indicate by signing the Approval Request Form approval.
 4. The unit should then forward the signed Approval Request Form, along with the completed UC Check Request/Direct Charge Form and the organization's membership application for processing to the appropriate administrative office (the [BOC-Kearney](#), the [BOC-Davis](#), or the [Oakland ANR Budget Office](#)).

VI. RELATED INFORMATION

- University of California, Office of the President:
- University of California Business and Finance Bulletin G-43, [University Policy on Memberships in Organizations](#) University of California, Agriculture and Natural Resources:
Approval Request for Organization Membership Dues to be Paid with UC Funds Form
- University of California, Davis:
- UCD Policy and Procedures Manual, Section 330-75, University Payment of Membership Fees

VII. FREQUENTLY ASKED QUESTIONS

VIII. REVISION HISTORY

July 2017:

Format updated.