

## PPM 202: Membership in Organizations

<b>Responsible Officer:</b>	Business Operations Center Director
<b>Responsible Office:</b>	<a href="#">Business Operations Center (BOC)</a>
<b>Issuance Date:</b>	02/24/2020
<b>Effective Date:</b>	02/24/2020
<b>Last Review Date:</b>	06/29/2022
<b>Scope:</b>	UC ANR Funded Organizational Memberships

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**Note: For links to referenced documents see  
Section VI, *Related Information* below.**

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## I. POLICY SUMMARY

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- A. This section of the Policy and Procedure Manual (PPM) for the University of California (UC) Agriculture and Natural Resources (ANR) describes how the University Membership in Organizations policy (Business and Finance Bulletin No. G-43) is implemented in the UC ANR environment.
- B. This PPM 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 UC ANR regarding memberships in organizations. Questions regarding specific situations should be directed to the contact persons shown above.

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## II. DEFINITIONS

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- A. **Unit Head:** In the context of this PPM section the term “Unit Head” means the UC Cooperative Extension (UCCE) Director, the Research and Extension Center (REC) Director, the Statewide Program/Institute Director, and/or Directors of the administrative units.

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## III. POLICY TEXT

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Congruent with UC policy, it is UC 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 personnel and to facilitate favorable community-ANR relations.

- A. Types of Organizations
  - 1. Organizations of interest to UC 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 UC 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 Unit Head.
2. If properly justified and substantiated, Unit 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 Support funds. In the context of this PPM Section, “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.

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## IV. COMPLIANCE / RESPONSIBILITIES

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### Approval Authority

A. Individual Memberships

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

B. Institutional Memberships

The Associate Vice President and the Associate Vice President Business Operations may approve institutional (e.g., general) memberships.

C. Guidelines for Review of Membership Requests

Unit 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. 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.

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## V. PROCEDURES

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### Approval Process

- A. **Memberships for which financial support from UC-administered funds are requested must be approved by the Unit Head before the expense is incurred.**
- B. Initiation by Requestor
  1. UC 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 Unit 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 Unit Head
  1. The Unit 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 they may have.
    - a. The Unit 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 Unit Head has the authority and responsibility to determine which UC ANR employee(s) will be granted membership.
  - i. If the Unit Head does not approve the request, they should so inform the requestor and explain why it was not approved.
  - ii. If the Unit Head does approve the request, they should so indicate by signing the Approval Request Form approval.
  - iii. 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 or the BOC-Davis).

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## VI. RELATED INFORMATION

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

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## VII. FREQUENTLY ASKED QUESTIONS

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Not used.

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## VIII. REVISION HISTORY

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### July 2017:

Format updated.

### February 2020:

Revised for general updates (contact and title information, links, etc.).

### June 2022:

Format and personnel updated.