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From: Chancellor's_Mailing_List@uclink4.berkeley.edu

Subject: Campus Memo: Policy on University Membership in Organizations

Reply-to: "Office of the Controller" <cntrollr@uclink.berkeley.edu>

Sender: owner-chanclist2a@uclink4.berkeley.edu

September 16, 2002

DEANS, DIRECTORS, DEPARTMENT CHAIRS, AND ADMINISTRATIVE OFFICERS

Re: Policy on University Membership in Organizations

This Administrative Memo summarizes current UC Berkeley policy on, and the delegation of authority to approve, memberships, including memberships in social organizations. It supersedes the Memo on this subject issued March 6, 1995.

Department heads (as defined by each control unit) are delegated the authority to authorize memberships in organizations that promote the advancement of education and research, enhance the professional standing of administrative personnel, and facilitate favorable community relations if the memberships will be used primarily for business purposes and the organization does not have discriminatory membership policies or practices. Each designated administrative official is responsible for ensuring that the memberships they approve comply with the requirements of Business and Finance Bulletin G-43, "Policy on University Membership in Organizations" (<http://www.ucop.edu/ucophome/policies/bfb/g43.html>) as revised on August 24, 2001. Department heads cannot approve memberships in social organizations (see below), nor can they approve their own membership reimbursement requests.

Office of Management and Budget's Circular No. A-21, "Cost Principles for Educational Institutions" (<http://www.whitehouse.gov/omb/circulars/a021/a021.html>), allows federal funds to be used for UC Berkeley membership in business, technical and professional organizations, however, the use of federal funds for memberships in civic or community organizations is not allowed. State or federal funds cannot be used under any circumstances to pay for memberships in social organizations.

The Membership PO type should be used when preparing a BFS purchase order for a membership. This PO type will produce a specialized purchase order form when printed. Any request for a membership payment that carries any other PO type will be returned to the processing unit for cancellation as the PO type cannot be changed once a PO is reviewed. All membership purchase orders must be signed in the appropriate field on the printed PO form.

Memberships in social organizations, such as business, athletic, luncheon, sporting, airport, and hotel clubs are generally not allowed. If a genuine business purpose can be established, exceptional approval may be granted by the Chancellor. The request for membership payment must first be approved by the department head and the control unit head (or his/her designated representative). The Disbursements Office is responsible for ensuring that all such requests are submitted quarterly to the Chancellor. Membership in the social organization may be revoked if the Chancellor determines that it is inappropriate. Membership in a social organization cannot exceed one year in duration.

Individuals granted social memberships must submit an Annual Report of Personal Use of a Club to the Disbursements Office (<http://fbs.berkeley.edu/DISB/default.htm>). Any personal use of such memberships is considered to be taxable income to the holder of the membership. If the annual report is not submitted, the Disbursements Office will assume that the membership was used entirely for personal use. The Disbursements Office can provide details on additional administrative procedures associated with memberships.

Departmental and individual memberships in the Faculty Club used exclusively for business purposes are not considered social memberships. However, any personal use of the membership must be paid for by the individual, and depending on the extent of its use for non-business purposes, the membership itself may be subject to taxation.

Questions regarding membership policy should be directed to the Office of the Controller at ctrlr@uclink4.berkeley.edu. Questions regarding non-business uses of social memberships and reporting requirements should be directed to the Disbursements Office at disburse@uclink.berkeley.edu.

James A. Hyatt
Vice Chancellor - Budget and Finance

Horace Mitchell
Vice Chancellor - Business and Administrative Service

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The Chancellor's Mailing List is maintained by the Office of the Vice Chancellor – Business and Administrative Services. Inquiries concerning the list should be directed to Laura Van Nostrand in the Office of the VC-BAS at laurav@uclink.berkeley.edu / (510) 642-3100.

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