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T. Memberships.

1. Purpose. To set forth regulations and procedures for requesting:

- Approval of a new membership in an organization;
- The renewal of memberships;
- The inclusion of amounts in the budget for the payment of memberships; and,
- The payment of or reimbursement of membership dues and associated fees.

2. Basic Organization Requirements.

2.1 University Mission Enhancement. The University shall only be a member of, and/or pay membership dues and fees to, organizations whose purpose and programs will enhance the University's accomplishment of its mission.

2.2 Non-Discriminatory. The University shall not be a member of or pay for membership in organizations which discriminate on the basis of race, color, religion, age, national origin, ancestry, disability, sex, marital or parental status, genetic information, sexual orientation, gender identity, or any basis prohibited by law or policy.

3. Individual Employee Memberships.

3.1 When Payment Permitted. The University shall be permitted to pay for individual Employee memberships when:

- The primary purpose of the membership is to further the interests of the University (public relations or community service, for example);
- It will directly enhance job-related skills; or,
- Membership is required as a part of the Employee's job.

3.2 Requests for Membership Transfer. Employees for whom individual memberships are paid by the University shall request of the organization that the membership be transferable to another University Employee.

3.3 Approval Process. The process for approving individual Employee memberships shall be the same as for University memberships.

3.4 When Payment Prohibited. Payment for individual Employee memberships having the primary purpose of personal or professional development of the Employee shall be the individual's responsibility.

4. New Memberships—During Annual Budgeting Process. Requests for new memberships for which the first payment or reimbursement of dues or other fees will be made in the ensuing fiscal year shall be included in the annual budgeting process.

4.1 Information Required. The request is to include the following material, information, and approval:

- The organization's application form completed and ready for mailing, and signed by the appropriate Area Head;
- Literature describing the purpose of the organization;
- A narrative justification for membership;
- A statement of the intended benefit to the University;
- A statement of the effect on the University if membership is denied;
- Whether membership is proposed for one year only or intended to be renewed for future years; and,
- The current annual cost of the membership.

4.2 Equal Opportunity Review. The application shall be forwarded to the Equal Opportunity office for review. The Equal Opportunity Director shall:

- Determine by appropriate means the organization does not unlawfully discriminate;
- Approve or disapprove for equal opportunity compliance;
- Return disapproved applications to the Area Head; and,
- Forward approved applications to Accounts Payable.

4.3 Funding Source. Funds to pay or reimbursement for the membership and any special fees or levied assessments shall be paid from the Department's OOE budget.

5. New Memberships—During the Current Fiscal Year. Following are the procedures when new membership costs, including any special fees or levied assessments, are to be first incurred in the current fiscal year.

5.1 Continuing Renewal Memberships. For memberships intended to be renewed for future years the information and material described in Sections 4.1 and 4.2 above are required.

5.1.1 Funds to pay or reimbursement for the membership and any special fees or levied assessments shall be paid from the Department's OOE budget.

6. Conference Fee Related Memberships. Memberships or reimbursements for memberships intended only to reduce the cost of attending a conference shall be permitted when:

- The conference attendance fees are substantially lower for members than for non-members; and,
- The membership is for current year only.

6.1 Procedure For Requesting. Submit the request for membership with the request for permission to attend the conference. Include a statement as to the reason for requesting the membership.

6.2 To Continue Membership. To request membership beyond the current year, the procedure for new memberships, Section 4 above, shall be followed.

7. Renewal Memberships—The Budgeting Process. Funds for renewal memberships are requested through the budgetary process.

7.1 Current List Provided. The Director of Budget Planning and Analysis shall provide each Area Head, or as otherwise directed by the President, with a current list of approved memberships for each Department.

7.1.1 The list shall include the current year appropriation for each membership.

7.1.2 Memberships not approved beyond the current fiscal year shall be noted on the list.

7.2 Area Head Review. Each Area Head is responsible for the review of the membership list.

7.2.1 Memberships may be deleted by the Area Head without President approval.

7.2.2 The membership list shall be forwarded by the Area Head to each Department Head as an attachment to the budget forms.

7.3 Department Head Review. The Department Head shall review the list and:

- Indicate memberships to be deleted, if any; and,
- Change the appropriation if the latest known membership fee amount is different.

8. Payment for Memberships. Board approval of the annual budget grants authority to pay or reimburse payment for memberships listed in the annual budget proposal.

8.1 Controller/Director of Accounting Responsibility. The Controller/Director of Accounting shall be responsible for control of payment for memberships.

8.2 Requests for Payment. Submit requests for payment or reimbursement on the Payment Voucher form to Accounts Payable.

9. Subscription Exception. Memberships automatically included with purchase of a subscription shall be permitted without complying with other portions of this policy when the:

- Purchase is made by one of the University's libraries;
- Purchase is for the sole purpose of the subscription; and,
- Cost is charged to a subscription expenses account.