Memberships

Responsible Executive: Vice Chancellor-Administration

Responsible Office: Office of the Controller

Contact: Assistant Controller
controller@berkeley.edu, 642-3881

Policy Statement

Department heads (deans, directors, department chairs, etc.) are delegated the authority to approve memberships in organizations, other than social organizations, that promote the advancement of education and research, enhance the professional standing of administrative personnel, and facilitate favorable community relations. Memberships in social organizations generally are not allowed, but may be permitted if a genuine business purpose can be established. Only the Chancellor may approve memberships in social organizations. The authority to approve social memberships may not be redelegated.

Who Is Affected by This Policy

- Anyone who requests or holds a membership paid for with University funds.
- Anyone who initiates or approves expenses related to memberships paid for with University funds.

Who Administers This Policy

- Chancellor
- Controller’s Office
- Deans, Directors, Department Chairs, and Other Department Heads
- Faculty and staff who are membership holders or membership applicants
UNIVERSITY OF CALIFORNIA, BERKELEY
Policy on Memberships

Why We Have This Policy

As a public institution and steward of public funds, the University of California has an obligation
to closely review expenses such as memberships. The Universitywide policy on memberships
can be found at http://www.ucop.edu/ucophome/policies/bfb/g43.pdf. Section II of that policy
permits campuses to establish more restrictive procedures with respect to memberships. This
policy establishes Berkeley campus procedures for obtaining memberships in organizations that
promote the advancement of education and research, enhance the professional standing of
administrative personnel, and facilitate favorable community relations.

Responsibilities

Chancellor:

- Approves or denies applications for membership in social organizations.
- Notifies department heads in writing of decisions concerning faculty and staff
  applications for membership in social organizations.
- Provides copies of letters approving social memberships to the Vice President-
  Financial Management.

Controller’s Office:

- Administers and interprets this policy and revises it as necessary.
- Receives and reviews “Annual Reports of Personal Use of a Club”.
- Calculates and reports additional compensation (taxable benefit).
- Notifies individuals of amounts determined to be a taxable benefit.

Deans, Directors, Department Chairs, and Other Department Heads:

- Authorize faculty and staff memberships in organizations, other than social
  organizations, that promote the advancement of education and research, enhance the
  professional standing of administrative personnel, and facilitate favorable community
  relations.
- Ensure that all memberships under their jurisdiction conform to policy.

Faculty and Staff Who Are Membership Holders or Membership Applicants:

- Confirm that the organization in which they hold or wish to hold membership does
  not have discriminatory membership policies or practices.
- For social organization memberships, submit an “Annual Report of Personal Use of a
  Club” to the Disbursements Office. Failure to submit an annual report will result in
  the treatment of the membership cost as additional compensation to be included in the
  employee's income. Such compensation will be subject to withholding for income and
  applicable employment taxes.
Procedures

Things to Consider When Requesting or Reviewing a Membership Application:
1. Memberships must be used primarily for business purposes.
2. The cost of membership must be in proportion to the benefits the University expects to receive from the membership.
3. Membership in organizations that have discriminatory policies or practices is prohibited.
4. Federal funds may not be used for memberships in civic, community or social organizations. State funds may not be used for memberships in social organizations.
5. Departmental or individual memberships in either the Faculty Club or the Women’s 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. The membership itself may be subject to taxation depending on the extent of its use for non-business purposes.

Proposals for membership in state, national, and international organizations must be referred to the University President to determine whether the University as a whole should hold the membership.

Requesting a Membership Payment:
1. Departments prepare a Berkeley Financial System (BFS) purchase requisition using the membership purchase order type. Membership payments that carry any other purchase order type will be returned to the processing unit for cancellation.
2. Department heads sign all membership purchase orders in the appropriate field on the form. **Note:** Department heads cannot approve memberships in social organizations (see below), nor can they approve their own membership reimbursement requests.
3. Forward all purchase orders for social memberships to the Control Unit head for consideration.
4. Control Unit heads forward all social membership applications to the Chancellor for consideration.

Reporting Personal Use (Social Organizations):
An employee who has been granted membership in a social club must submit an “Annual Report of Personal Use of a Club” to the Disbursements Office covering the period from November 1 through October 31. **Note:** If the annual report is not submitted, the Disbursements Office will assume that the membership was entirely for personal use. Accordingly, the cost of membership will be treated as additional compensation and included in the employee’s income, subject to withholding for income and applicable employment taxes.

Web Site Address for This Policy
http://campuspol.chance.berkeley.edu/policies/memberships.pdf
Glossary

**Membership**: acceptance into a group of persons associated by some common tie and regarded as an entity.

**Social organization**: organizations which include, but are not limited to, athletic, luncheon, sporting, and airport and hotel clubs.

**Personal use**: Use of a social club or other facility for use not related to the conduct of official University business.

Related Documents


Revision History

September 21, 2009: The contact name on Page 1 was changed from Deborah Kallman to Assistant Controller. The contact email on Page 1 was changed from dkallman@berkeley.edu to controller@berkeley.edu.

March 25, 2009: The contact name on Page 1 was changed from Chris Schalck to Deborah Kallman.