



## **Fiscal Policy – Rule 03-140-503**

# **Memberships, Dues and Subscriptions**

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## **1. Summary**

- 1.1. Membership fees, dues for governmental and professional organizations, or annual subscriptions must support a university business purpose and receive approval from authorized budget personnel.
- 1.2. This fiscal rule provides guidelines pertaining to expenditures for memberships and subscriptions that the university community must follow.
- 1.3. Any employee whose job duties would benefit from membership in another organization or a professional subscription should be informed and understand this rule.

## **2. General Requirements**

- 2.1. **None**

## **3. Required Process**

### **3.1. Membership Fees or Dues**

- 3.1.1. Professional memberships must be associated with the job duties of a university employee and are subject to supervisory approval and budgetary limitations when paid from university funds. Often this type of membership allows interaction with like-minded individuals from government, private and commercial fields that may be a benefit to the institution because of knowledge gained or publications received.
- 3.1.2. Membership in an organization made up of public officials and administrators should generally be institution-related and a benefit to the institution.
- 3.1.3. Institutional membership in the local chamber of commerce is specifically authorized; however, payments for memberships in civic organizations (.e.g. Rotary, Kiwanis and Lions) are usually not allowable.
- 3.1.4. Whenever possible, memberships should be institutional rather than individual. No more than one full institutional membership should be purchased per association. When the association charges the full rate for an initial membership and lower rates for associate memberships, duplicate memberships may be paid from institution

funds. Institutional memberships should not remain with a faculty/staff member after employment termination.

- 3.1.5. Personal memberships in social or sports clubs for the purpose of public relations are a taxable perquisite of the member, recorded with account code 10240 Unclassified Perquisites. The amount will be reported to Payroll as a taxable fringe benefit. Examples include Arlington Club in Portland, Broken Top Club in Bend and the Corvallis Country Club. If the purpose of the membership is to seek donations, the cost should be charged to gift funds through the Foundation.
- 3.1.6. Library invoices for minor membership fees or dues primarily for the costs of association publications are allowable.
- 3.1.7. No payment of membership fees or dues may be authorized for organizations that discriminate on the basis of race, religion, sex, national origin or handicap.
- 3.1.8. Memberships that include the cost of receiving publications and/or subscriptions as part of the cost of the membership are still coded as memberships.

### 3.2. Subscriptions

- 3.2.1. Multi-year renewals are allowable when there are substantial savings, except on grant funds with termination dates prior to the subscription expiration.

## 4. Related Information

- 4.1. [University Policy 03-100 Fiscal Policy Program Authority](#)
- 4.2. Please refer to all other policies, standards, fiscal rules and related guidelines that may be applicable, including but not limited to the following:
  - 4.2.1. None
- 4.3. Please check with your supervisor unit-level procedures related to this rule.
- 4.4. Following are forms and other resources related to this policy:
  - 4.4.1. None
- 4.5. [Fiscal Policy Program Definitions of Terminology](#)
- 4.6. [Fiscal Policy Program Frequently Asked Questions](#) (FAQs)

## 5. History

- 5.1. Original Issue Date: 01/2003 (FIS 410-06 Memberships & Dues; FIS 410-14 Subscriptions)

- 5.2. Last Version: 12/2014 (FIS 410-06 Memberships & Dues); 12/2008 (FIS 410-14 Subscriptions)
- 5.3. Last Review Date: 06/2018
- 5.4. Next Scheduled Review Date: 06/2021

## 6. Contacts

- 6.1. Policy Steward: Director Vendor Payment Strategies ([contact info](#))
- 6.2. Program: Fiscal Policy Officer ([contact – for program inquiries only](#))
- 6.3. Link to full list of [Fiscal Policy Program Contacts](#)