University of Wisconsin-Superior

Policy Subject: Institutional/Organizational and Individual Memberships
Cabinet Division: Administration & Finance
Policy History: September 2017 (draft)
Effective Date: October 1, 2017

I. Background and Purpose

The University of Wisconsin-Superior recognizes the need to establish guidelines and consistencies in the area of membership purchases. Memberships in organizations may not always benefit the university, but rather the individual. This policy will assist with compliance and consistency in university policies. This policy applies to all university employees in any department as part of their university employment or as part of university activities.

II. Constraints

UW System Administrative Policy 328 “Memberships”
UW System BOR Policy 20-22 “Code of Ethics”
UPS Operational Policy: GEN 25 “Payment of Licenses”
https://www.wisconsin.edu/uw-policies/uw-system-administrative-policies/memberships/ “The State of Wisconsin Department of Administration Preaudit Policy Reference Guide prohibits the purchase of memberships from funds administered by the State if the primary beneficiary of the expenditure is the individual.
Professional License Memo from UW System, 2003

III. Definitions

“Organizational (or Institutional) Membership” – the membership is in the name of the University and the University is the primary beneficiary from the organization.

“Individual Membership” – the University is the primary beneficiary from the organization and the membership is in the name of a UW-Superior employee.

“Personal Membership” – the employee is the primary beneficiary and the membership is in the name of the UW-Superior employee.

“Professional Licenses” – a fee paid to maintain a license or professional credentials. Examples include, but are not limited to: Certified Public Accountant (CPA), Professional Engineer (PE), and Professional Equipment Operator (PEO).

IV. Policy Statement

UW System Policy Paper 328 governs the purchase of memberships. If an organization or institutional membership is offered, employees must purchase this option, unless this type of membership is not offered or the cost of an individual membership is substantially less than that of an institutional membership or other factors apply. In all circumstances, a University business address should be listed for all memberships.

V. Policy Procedure

Employee should discuss a membership opportunity with their direct supervisor. Decision to support and approve the purchase of the memberships should be analyzed using the following criteria:

1. Is the membership broad in scope or include the entire campus?
   Examples include, but are not limited to:
• Higher Learning Commission (HLC)
• Council of Public Liberal Arts Colleges (COPLAC)
• Association of American Colleges and Universities (AAC&U)
• Council on Undergraduate Research (CUR)
• The Development Association

2. Is the membership narrow in scope or apply only to specific areas on campus?
Examples include, but are not limited to:
• Chamber of Commerce Memberships
• International Association for Great Lakes Research
• International Association of Campus Law Enforcement Administrators
• College and University Professional Association for Human Resources (CUPA-HR)
• Central Association of College and University Business Officers
• Wisconsin Association of Collegiate Registrars and Admission Officers
• American Association of Collegiate Registrars and Admission Officers
• National Student Exchange

3. What are the typical benefits of an individual membership?
Examples include, but are not limited to:
• Cost is significantly less than an organizational/institutional membership
• Discounts on a conference or conferences which department personnel would normally attend
• Receipt of publications, notices, newsletters, or other mailings that are essential and would ordinarily be purchased at an additional cost

After discussion and approval of the membership between the employee and supervision, a purchase requisition is submitted to the Purchasing Office. The following information should be included on the requisition:
• A purchase requisition form completed including signatures
• A list of membership benefits/information from the organization (information from a web site or other printed documents)
• Membership registration form (if completed online, print and submit)
• An invoice from the organization or “check payable to” documentation provided by the membership organization

If a membership does not fit the criteria outlined in the flowcharts (see Appendix A), exceptions can be made by the Chancellor.

VI. Funding of Membership Costs

Membership costs will be paid for from either the department’s budget or from an institutional budget funded by the Provost. Purchasing cards (Procards) cannot be used to purchase a membership without prior approval from the campus Purchasing Agent. Memberships will be evaluated based on the flow charts in Appendix A to determine how a membership will be purchased.

Payment of professional licenses for faculty and staff is not allowable based on findings from an audit by the Legislative Audit Bureau and a memo from UW System. There are no exceptions to this policy. It is the view of UW System that the compensation paid to an employee is sufficient enough to attract and retain staff, and that license fees to maintain professional credentials are the personal responsibility of the employee, even if such credentials enhance their current position.

VII. Attachments – Appendix A- Decision Tree

[Signature]
Renee Wachter, Chancellor

Date: 11/1/17
Membership in an organization identified as essential by a campus department

Yes

Contact the Purchasing Office to purchase the membership

No

See flowchart below for how membership will be funded

Does the entity offer an organizational or institutional membership?

Yes

Is an individual membership offered? If yes, can others on campus benefit from the individual membership?

No

No

Campus funds cannot be used to purchase this membership

Yes

Contact the Purchasing Office to purchase the individual membership

In order for campus funds to be used to purchase a membership, the University must receive clear and distinct benefits from having the membership

Personal funds or Foundation funds must be used to purchase the membership
Membership in an organization identified as essential by a campus department

Is the entity/membership broad or narrow in scope?

Broad

This is a campus membership that will be paid for by the Provost

Narrow

This is a membership that needs to be covered by the department

If department funds are not available, Foundation funds may need to be used to pay for this