Name of Policy: Membership dues and subscriptions

Policy Number: 3364-40-04

Approving Officer: Senior Vice President for Finance and Administration

Responsible Agent: Controller

Scope: All University of Toledo Campuses

Original effective date: March 1, 2010

☐ New policy proposal    ☐ Minor/technical revision of existing policy
X Major revision of existing policy    ☐ Reaffirmation of existing policy

(A) Policy statement

Membership dues and subscriptions may be paid with university funds providing they are appropriate for the individual’s position and duties and if the membership or subscription benefits the university.

(B) Purpose of policy

To ensure proper use of university funds in relation to membership dues and subscriptions

(C) Procedure

(1) Generally membership dues and subscriptions paid for using public funds should be issued in the name of the University of Toledo.

(2) The university may pay for memberships dues to professional organizations and subscriptions to professional journals or newspapers if they are appropriate for the individual’s position and duties and if the membership or subscription benefits the university.

(3) Each request for membership in a professional organization or subscription should be processed on a requisition or purchased using a University of Toledo purchasing card. The purchaser must document on the requisition or comment in the purchasing card system, the justification for the dues or subscription including the benefits received by the university, the appropriateness for an individual’s position, and/or the benefits to the individual’s professional development and job performance.

(4) To avoid duplication departmental coordination of subscriptions is encouraged.

(5) Union dues are not to be paid by the university.
(6) Generally private club memberships are not to be paid for with university funds. However, in certain instances, with the approval of the president, where it is determined that the membership is of clear benefit to the university, and where the ownership interest is in the name of the university, membership dues paid to private clubs can be permitted. Individual entertainment expenditures are subject to the approval and documentation required in the travel and business expense reimbursement policy 3364-40-03.

(7) Restricted funds – memberships and subscriptions are not generally allowable on a sponsored project. These costs are seldom directly necessary for the performance of a sponsored agreement and would not be paid by the sponsor as part of the facilities and administrative rate. However, under certain unusual circumstances, membership dues and/or subscriptions may be allowable under a sponsored agreement. Faculty and staff should contact the principal investigator and grants accounting before attempting to charge these expenditures to a sponsored project.

Approved by:

/s/ S. Scarborough
Senior Vice President for Finance and Administration

March 16, 2010
Date

Review/Revision Completed by:

Senior Vice President for Finance and Administration; Controller

Policies Superseded by This Policy:

01-007 Institutional Dues and Memberships(former Health Science Campus policy, previous review date July 1, 2003)

Initial effective date: March 1, 2010
Review/Revision Date:
Next review date: March 1, 2013