**Memberships in Professional UPPS No. 06.04.01**

**Organizations Issue No. 9
 Effective Date: 02/22/2022
 Next Review Date: 04/01/2026 (E4Y)**

 **Sr. Reviewer: Associate Vice**

 **President for Financial Services**

**POLICY STATEMENT**

*Texas State University is committed to the orderly administration of individual and institutional memberships in professional organizations.*

**01. SCOPE**

* 1. The purpose of this policy is to set forth procedures concerning payments from Texas State University funds for institutional and individual memberships in professional organizations.

 **02. DEFINITIONS**

02.01 Individual Memberships – those for which a single university employee is named as the member of the professional organization as a representative of Texas State.

02.02 Institutional Memberships – those for which Texas State, or a department or division, is named as the member of the organization.

**03. MEMBERSHIP PAYMENT ALLOWANCE**

03.01 University funds may only pay for memberships in professional organizations recognized as such in the higher education field, academic discipline, or a related area of university employment. University funds, from any source (educational and general, auxiliary, designated, and restricted) may pay for institutional or individual memberships in professional organizations if the requirements of Sections 03.02 and 03.03 are met. Additionally, funding agencies must approve use of externally-funded grant monies for memberships in professional organizations.

03.02 In accordance with constitutional requirements, state agencies may pay a membership fee to a professional organization only if all of the following conditions are met:

a. the agency has specific or implied statutory authority for the payment (see Section 04.02);

b. the payment would serve a proper public purpose (see Section 05.01 a.); and

c. the agency would receive adequate consideration in exchange for the payment (see Section 05.01 b.).

03.03 A state agency may not use appropriated money (educational and general funds) to pay for membership in or dues for a professional organization unless the administrative head of the agency, or designee, first reviews and approves the expenditure. The president delegates authority for approval of professional memberships to each account manager.

03.04 State-appropriated funds may not pay for institutional or individual memberships to an organization that pays all or part of the salary of a person who is required by [Title 3, Subtitle A, Chapter 305, Government Code](http://www.statutes.legis.state.tx.us/Docs/GV/htm/GV.305.htm), to register as a lobbyist.

03.05 State-appropriated funds may not pay for a membership in a chamber of commerce (see [Texas Comptroller of Public Accounts expend-it State Purchasing Policies](https://fmx.cpa.texas.gov/fm/pubs/purchase/restricted/index.php?section=organizations&page=chamber_commerce)).

03.06 Each account manager is responsible for assuring that expenditures for memberships comply with all provisions of this policy and provide a valid public purpose, as required by the [State Constitution](https://tlc.texas.gov/docs/legref/TxConst.pdf). Additionally, employees for whom individual memberships are paid are responsible for assuring their membership benefits the university as required by this policy.

03.07 An account manager may not prorate an annual membership that spans two fiscal years. The fiscal year in which the membership begins will receive the charge for the total membership cost (unless the accounting records for that fiscal year are closed).

**04. PROCEDURES FOR PAYMENT OF MEMBERSHIPS**

04.01 Institutional or individual memberships in professional organizations are paid in one of the following ways:

1. P-Card – The department must retain supporting documentation with P-Card statements that include all the artifacts required in Sections 04.01 b. and 04.01 c.

b. Purchase Order – The framework purchase order must show the effective start and end dates of membership. An invoice or membership renewal notice must be attached to the purchase order. A justification statement or documentation supporting the conditions in Section 03.02 must be included in the purchase order.

c. Payment Request – These include requests for reimbursement to the individual employee (for individual memberships). A payment request must include a copy of an invoice or membership renewal notice, the effective start and end dates of the membership, and a justification statement supporting the conditions in Section 03.02.

04.02 Membership payments from externally-funded grants are subject to this policy’s provisions, plus additional approval from the funding agency to assure that the expenditures conform to the funding agency’s requirements. Refer to [UPPS No. 02.02.01](http://policies.txstate.edu/university-policies/02-02-01.html), Applying for Sponsored Programs, for further information.

**05.** **BENEFIT TO THE INSTITUTION**

05.01 Individual memberships paid with university funds must show a benefit to the institution, and the supporting documentation must include a justification explaining the benefit.

a. University funds may pay professional dues or memberships required to maintain an individual’s professional license or certification, which demonstrates the expertise level needed by the individual to effectively perform the required job duties (e.g., the American Institute of Certified Public Accountants, State Bar Association, or Society of Professional Engineers).

b. The university may pay for memberships in organizations in the individual’s name if the membership serves a public purpose worth more than the dues (i.e., a membership that saves Texas State money in terms of merchandise discounts or registration fees).

**06. REVIEWERS OF THIS UPPS**

06.01 Reviewers of this UPPS include the following:

Position Date

Associate Vice President for Financial April 1 E4Y

Services

Director, General Accounting Office April 1 E4Y

Director, Procurement and Strategic April 1 E4Y

Sourcing

**07. CERTIFICATION STATEMENT**

This UPPS has been approved by the following individuals in their official capacities and represents Texas State policy and procedure from the date of this document until superseded.

Associate Vice President for Financial Services; senior reviewer of this UPPS

Vice President for Finance and Support Services

President