Memberships, Dues, License or Certification Fees Guidelines

Purpose:
The purpose of this guideline is to set forth standardized expectations for how and when the purchase of memberships, dues, licenses and or certification fees can be paid.

Eligibility:
Eligibility is limited to PSU faculty and staff. The department Dean, Director, Supervisor or Chair is responsible for determining the business need based on the position requirements for any purchase of memberships, dues, licenses or certifications.

Responsibility:
It is the responsibility of the Deans, Directors, Supervisors or Chairs to determine business use and need as well as to ensure the purchase of memberships, dues, licenses or certification fees are done so equitably, consistently and according to these guidelines.

Membership or Dues Program:
The University may establish membership in organizations that encourage the advancement of education and research, enhance the knowledge or tools required by employees to carry out their job duties and responsibilities and/or facilitate favorable community-campus relationships. A membership can be obtained only after careful evaluation of the costs of the membership in relation to the demonstrated benefits to the University. When evaluating a membership request, the organizational unit must be sensitive to the availability of funds and the relevance of the membership to the role and mission of the organizational unit. The organizational unit should also determine whether a University membership already exists, so that unnecessary costs can be avoided.

If organizational memberships are offered, an individual membership cannot be purchased unless it demonstrates a clear benefit to the University and one or more of the following criteria are met:

1. The organization does not offer an organizational membership
2. Individual membership is necessary to meet a certain job requirement
3. There is a significant savings to attend a conference and or corresponding training
4. Individual memberships are required to achieve other benefit(s) desired by the University

No payment may be authorized for memberships in organizations that are primarily social, i.e., where the membership benefits the relationships of the employees, associates, and affiliates without making a direct contribution to the advancement of the University’s mission.

As an affirmative action/equal opportunity employer, the University prohibits the expenditure of its funds for membership in organizations that discriminate on the basis of race, religion, sex, age, color, national origin, orientation or individual disability.
License or Certification Fee Program:
Organizational units may designate unit resources for the payment of license or certification fees when all three of the following conditions are met:

1. The license or certification is required for University employment, meaning the license or certification is indicated as a mandatory criterion for employment. If the license or certification is indicated as preferred, there must be approval from Director of unit.
2. There must be an equitable provision of the licenses or certifications throughout the department.
3. There is a reasonable expectation that the license or certification will be used solely for the purpose of providing services to the University, and not for providing services to others for a fee or other compensation.

University funds may not be used for a license or certification that does not benefit the University and is solely for the professional development or advancement of an employee. Benefit to the University is measured through the receipt of support or information, as a result of having the license or certification, which is necessary to accomplish or foster the educational, research, or public service mission of the University.

Procedures:
The purchase of dues, memberships, licenses or certifications can be done so by procurement card, invoice or personal reimbursement. All purchasing methods require additional text to be indicated in FOATEXT stating the business need, how it meets the above conditions and who approved the purchase. All approvals must be kept on record within the department for retention purposes.