

UNIVERSITY OF CALIFORNIA, SANTA BARBARA

INSTRUCTIONS FOR PROCESSING MEMBERSHIP AND PERIODICAL SUBSCRIPTION PAYMENT REQUESTS VIA FLEXCARD

POLICY: The Presidential Policy on University Membership in Organizations is a University-wide policy statement. Check with your Control Point for more restrictive procedures that may apply to your unit. The web address for the policy text is:

<http://www.ucop.edu/ucophome/policies/bfb/g43.pdf>

SCOPE OF APPLICATION: The policy covers a broad range of organizations from national educational associations to membership to discount department stores. Departmental memberships in the UCSB Faculty Club may only be used for official departmental business. Consult with your Control Point regarding delegations and approvals.

THE FORM: The form for processing memberships under the policies via FlexCard is **Memberships and Periodical Subscriptions – FlexCard APPROVAL FORM**. It is designed to accommodate the approval process and must be completed when paying for a Membership application or renewal via FlexCard.

SUBSCRIPTIONS involving no membership approval do not require this form. Such payments may be made as regular FlexCard transactions. Any publication received as a result of a University-paid membership becomes the property of the University of California and not the property of the organization member. Publications/periodicals associated with the organization must be addressed to an on-campus location.

APPROVAL: The authority to approve University membership in organizations is delegated to specific individuals for various amount limits and organizational categories. Verify the approval limit delegated to your department head or manager by your Control Point.

ADDITIONAL APPROVAL is required for amounts over the delegated limit. Depending on the amount and the organizational category, the additional approval is obtained at the Control Point level or from the Chancellor. The Chancellor's written approval must be obtained for memberships requiring initiation fees/dues, such as memberships in social organizations (e.g. business, athletic, social, luncheon, sporting, airport, and hotel clubs).

FUNDING SOURCES & OBJECT CODES: Generally, funding sources supporting activities that benefit from University memberships are appropriate for membership charges. **7220** is the appropriate object code for memberships and subscriptions in all categories listed in the Policy with these exceptions: memberships in community and social organizations where the **7720** object code must be used.



University of California, Santa Barbara
Memberships and Periodical Subscriptions – FlexCard APPROVAL FORM

*Important Notice: Departmental memberships in the UCSB Faculty Club may only be used for official departmental business. Memberships in social organizations (e.g., business, athletic, social, luncheon, sporting, airport and hotel clubs) require written approval from the Chancellor. All University memberships must be authorized and processed in accordance with **Business and Finance Bulletin G-43, Policy on University Membership in Organizations**.*

Membership to (name of organization): _____

For (individual or department/program): _____

Category: () organizational/accrediting, () professional/scholarly, () community, () other _____

Benefit to UCSB: _____

List other UCSB members: _____

Effective Dates: From: _____ To: _____

() **NEW MEMBERSHIP:** ADDITIONAL APPROVAL required for amounts that exceed the delegated authority of the approving official

() **RENEWAL MEMBERSHIP:** If the ADDITIONAL APPROVAL obtained on a previous membership request is Valid for subsequent renewals, and the only change is the effective dates, attach a copy of the previous APPROVAL FORM. Otherwise, follow procedures to obtain a new membership.

() **TO SECURE PERIODICAL** entitled: _____

Effective Dates: From: _____ To: _____

MEMBERSHIP / PERIODICAL SUBSCRIPTION COST: \$ _____

Account to be Charged: _____ - _____ - _____ - _____ - _____
Loc Account Fund Sub Object Code

Prepared by _____ Phone Ext. _____ Date _____

Approved by _____ Phone Ext. _____ Date _____
 (Approver with membership delegation)

Additional Approval by _____ Phone Ext. _____ Date _____

Valid for subsequent renewals? () YES () NO

This approval to be kept on file in the originating department as back-up documentation for FlexCard purchases.