

Procedure Clarification for recognizing birthdays - Kevin Walker (Director of Regulatory Accounting and Reporting)

From: Kevin Walker <klw@byu.edu>
Sent: Monday, February 24, 2025 4:53 PM
To: Russell Nielson <russell_nielson@byu.edu>
Subject: RE: Using University funding for recognizing birthdays?

Russ,

Thank you for the email. As we've discussed many times, I wish there was a way to include/anticipate every potential outcome/choice/behavior that someone could execute on this campus, and either allow or disallow it per policy. We obviously can't and if we tried, it would make the law of Moses look like a reader's digest condensed pamphlet by comparison!

Given that, the current policy reads:

It is not appropriate for university departments to use university funds to purchase gifts for employees other than through authorized university programs. Occasional special recognitions with a valid business purpose may be provided as outlined in the [Cash and Cash Equivalents Policy](#).

Knowing how the wording for the current policy was written, to try to be a little more general than the previous iteration that you have referenced below and knowing some practices that have stopped being done centrally (we don't send out birthday or Christmas cards anymore, nor flowers except for funerals) to better comply, I agree 100% with your assessment. The wording in the referenced version below is STILL the intent of the policy, i.e. "it is not appropriate".

If there are "Sunshine funds" that others have contributed to (and that don't come from "University Funds"), then that should be fine.

Does that help?

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From: Russell Nielson <russell_nielson@byu.edu>
Sent: Monday, February 24, 2025 9:49 AM
To: Kevin Walker <klw@byu.edu>
Subject: Using University funding for recognizing birthdays ?

Kevin,

Recently the question came up in our college for recognizing staff and faculty members with a coupon to Jamba Juice for their birthdays. To seek understanding as to whether it is appropriate to do this, I reviewed the current versions of the policies and procedures as noted below:

- [Meals and Hosting Policy](#)
- [Meals & Hosting Procedure](#)
- [Business Gifts and Entertainment Policy](#)

The above policies and procedures didn't seem to address the question, but when I referred to the below "older version" of the policy it seems there is more of a direct effort to educate others for the careful use of university funding.

Controllers Group Minutes March 2009.pdf.

TOPIC	DISCUSSION/CONCLUSION
Employee Recognition Policy - <i>John Gardner</i> Director, Regulatory Accounting & Reporting	John Gardner read to financial assistants the Meals and Hosting Policy and the College and Department Awards (found under the University Awards Policy) from the university handbook. The Meals and Hosting Policy states that "It is not appropriate for departments to use university funds to purchase gifts or refreshments for individual recognition, including: farewell or retirement parties (except as provided in the Retirement Policy), resignations or terminations, birthdays, births or weddings, boss or secretary remembrances, and class parties or meals with students."

As I step back, it seems to me that the above referenced policy is appropriate, even though it is outdated. Will you please weigh in on the questions of using university funding for personal recognition of birthdays?

We realize that our dean's office agency fund does allow for personal event recognition as noted below for those that contribute to the Sunshine fund.

Agency (Sunshine) Account purpose:

This agency account is for the purpose of collecting employee personal funds to facilitate and disburse as directed by the employee group's officers for the purpose of providing employee personal gifts or flowers for family births, weddings, deaths, hospitalizations, personal events, or parties. More information can be found at [Agency Account Sunshine Procedures](#)

I look forward to your response. Thank you so much for your help.

Russ