

Gift Policy

Purpose

The purpose of this policy is to ensure that institutional and state guidelines are followed when giving Gifts to employees, volunteers, and other individuals as well as when reimbursements are issued for Gifts.

Policy Statement

It is the policy of The University of Texas MD Anderson Cancer Center (MD Anderson) to reimburse for departmental courtesies such as flowers for employee appreciation, illness, sympathy, or the birth of a child. In addition, it is the responsibility of faculty, trainees/students, and other members of MD Anderson's workforce to safeguard and enhance MD Anderson's resources. To that end, all faculty members, trainees/students, and other members of MD Anderson's workforce should make reasonable efforts to conserve MD Anderson funds with respect to request for reimbursement for Gift-related expenses related to official MD Anderson business. To be eligible for reimbursement, all institutional and State guidelines should be followed and the appropriate source of funds chosen. In select circumstances, a Courtesy or Gift may be extended to a Non-Employee as a thank you (e.g., institutional donor or volunteer). All Gift purchases for Non-Employees must have the prior approval of the Controller's Office with the exception of donor Gifts by the Development Office. Finance Approval will be based on adherence to any restrictions placed on the source of funds chosen, as well as spending limits stated in the guidelines.

Scope

This policy applies to all institutional funds and to all faculty, trainees/students, and other members of MD Anderson's workforce who desire to extend a Courtesy or Gift to either (1) another faculty member, trainee/student, or other member of MD Anderson's workforce or (2) Non-Employees with a direct relation to MD Anderson such as a donor or volunteer. This policy does not cover charitable contributions to external organizations (for more information, please see [Charitable Activities, Charitable Expenditures, and Solicitation Policy \(UTMDACC Institutional Policy # ADM0115\)](#)).

Compliance with this policy is the responsibility of all faculty, trainees/students, and other members of MD Anderson's workforce.

Target Audience

The target audience for this policy includes, but is not limited to, all faculty, trainees/students, and other members of MD Anderson's workforce.

Definitions

Courtesy: Refers to flowers, plants, and fruit baskets for an occasion.

Finance Approval: Approval of expense and Fund Source by authorized individuals; required for all check requests.

Fund Source: The type of fund chosen to charge for reimbursements/vendor payments (*i.e.*, the chartfield string).

Gift: Refers to gift cards or mementos.

Non-Employee: An individual who is not employed by MD Anderson such as a donor or volunteer.

Procedure

1.0 Allowable Employee Gift Purchases

1.1 Allowable Gift and Courtesy purchases are listed below:

- A. Flowers.
- B. Plants.
- C. Fruit baskets.
- D. Mementos.
- E. Gift cards.

1.2 All gift card purchases for employees should be reviewed by Compensation prior to purchase.

Note: Please contact the Controller's Office for those items not listed above to confirm if the Gift or Courtesy is allowable and complies with fund guidelines.

2.0 Allowable Employee Occasions

Allowable occasions for which Gifts may be purchased and provided to employees are listed below:

- 2.1 Births.
- 2.2 Deaths.
- 2.3 Illnesses.
- 2.4 Retirements.
- 2.5 Employee Recognition.

Note: Please contact the Controller's Office for those occasions not listed above to confirm if occasion is allowable.

3.0 Methods of Payment

- 3.1 An employee should submit an expense reimbursement request through the Travel and Expense Management Tool for approval and reimbursement of the Gift.
- 3.2 Any requests for payment to a vendor should be arranged through the purchase order process.
- 3.3 The following documentation is required to support the expense reimbursement to the employee or the payment to the vendor:
 - A. Gift recipient name.

B. Purpose of the Gift.

4.0 Account Number

- 4.1 Official Business Expenses: 53102 Courtesies.
- 4.2 Award Employee: 53051 Gifts.
- 4.3 Award Gift Cards: 53052 Gift cards.

5.0 Spending Limits

The total cost of a Gift or Courtesy must not exceed \$150 per employee or Non-Employee, per event. This includes any charges for taxes, shipping, delivery, or other add-on costs.

Note: The limit is \$50 per employee, per event if using E&G (Fund Group 10) or Tobacco funds (Fund Type 36).

6.0 Non-Employee Gifts

- 6.1 Prior approval from the Controller's Office must be obtained when purchasing a Gift or Courtesy for a Non-Employee to ensure funds will be reimbursed.
- 6.2 Prior approval from PRS must be obtained if funding source is from Fund Group 40.
- 6.3 Non-Employee Gifts include the following:

A. Donor Gifts:

Development Office Gifts, such as thank you Gifts that involve outside parties (e.g., donors) and are paid from Development Office funds, are exempt from this requirement. The spending limits stated in the Spending Limits section of this policy still apply.

B. Volunteer Gifts:

Engraved certificates, pins, or mementos of a similar nature, with a value that does not exceed \$75 for each volunteer, may be purchased to recognize special achievement and outstanding service.

Note: If using E & G (Fund Group 10) or Tobacco funds (Fund Type 36), then the limit is \$50 per volunteer.

7.0 Appropriate Funds

Please see [Fund Expenditure Guidelines](#) for appropriate funds to use towards Gifts or courtesies.

Attachments/Links

[Check Request.](#)

[Fund Expenditure Guidelines.](#)

[State of Texas Purchase Policies and Procedures Guide.](#)

Related Policies

[Charitable Activities, Charitable Expenditures, and Solicitation Policy \(UTMDACC Institutional Policy # ADM0115\).](#)

Joint Commission Standards / National Patient Safety Goals

None.

Other Related Accreditation / Regulatory Standards

None.

References

None.