

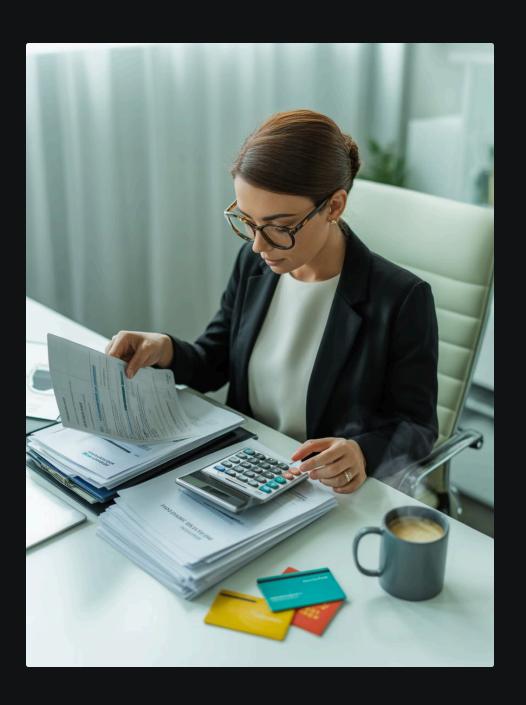
# Long Service Recognition Audit Checklist

Use this checklist to review and improve your long service recognition approach. For each item, rate your organisation as: **No**, **Partially**, or **Yes**.

### **Purpose and Impact**

- Do your recognition gifts celebrate the milestone in a meaningful, visible way?
- Do recipients perceive the gift as a lasting symbol of appreciation?
- Does the recognition experience reflect your company's culture and values?
- Is the recognition experience inspiring and influential for others in the organisation?
- Are long service moments publicly acknowledged (e.g., in team meetings, internal comms)?
- Do your gifts demonstrate care and intentionality not just convenience?

## **Tax & Compliance**



- Are you aware of the **FBT exemption rules** for long service awards?
- Do your long service gifts qualify for **Section 58X FBT exemption**?
- Are any cash-like benefits (e.g. gift cards) being used contrary to ATO guidance for FBT exemption?
- Is your recognition spend trackable and defensible for auditing and budgeting purposes?

## **Logistics and Execution**

#### Administration

Is your recognition program easy to administer across multiple locations or departments?

### **Tracking**

Do you have a clear system for identifying and tracking long service milestones?

#### **Employee Input**

Are employees given any input or choice in their gift?

#### **Presentation**

Are the gifts presented with ceremony, storytelling, or personalisation?

#### **Feedback**

Do you gather feedback on the experience to continuously improve the program?

### **Next Steps**

Use this checklist as the basis for an internal review, or HW Holdsworth can support you in conducting a full audit and enhancement of your recognition process — from FBT-compliant gift selection to delivery, presentation, and internal communications.

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