**2014 Device Policy**

**Purpose and Summary**

All staff at ORGANIZATION require certain devices to be able to perform their job responsibilities. This policy intends to clarify the specific work roles of different staff and the devices required to accomplish their work.

In some cases, ORGANIZATION will purchase equipment directly for staff. This equipment is referred to as a Company Owned Device (COD). In other cases, ORGANIZATION will provide a device allowance to staff to purchase their own device. This equipment is referred to as a Bring Your Own Device (BYOD).

The device allowance, as any existing technology or other allowance, is taxable income, but it is not a part of salary. Staff are expected to use these allowance(s) to purchase the technology devices and services necessary to do their job.

**Work Roles**

For the purposes of this Device Policy, ORGANIZATION has three different work roles:

**I. Stationary staff**

These are staff who can complete the majority of their work at a single desk or location. (This does not rule out the possibility of allowing for flexible working from other locations.) This group includes: EXAMPLE 1, EXAMPLE 2,. Certain jobs are stationary by their nature and the distinction can be made by the supervisor.

Stationary staff may have a primary work location at the company’s office(s) or another location. Stationary staff may choose to work from an “alternate” location if it does not negatively affect their work. ORGANIZATION only takes responsibility for providing equipment at the primary location.

**II. Mobile staff**

These are staff who complete the majority of their work at more than one location, and are expected to visit multiple locations on a regular (daily/weekly) basis. This group includes: EXAMPLE 3, EXAMPLE 4.

**III. Managers and Executive Staff**

These are staff who provide a variety of management duties for the ORGANIZATION. At times, managers will be stationary in their work and at other times they will be mobile, both within and outside the office. Given the variety of demands and responsibilities of managers and their need to be available outside “normal” work hours, greater flexibility is required with regards to their devices. Nevertheless, ORGANIZATION only takes responsibility for providing a single device (rather than multiple devices at multiple locations).

**Device Policy per Work Role**

When considering the best approach (BYOD or COD) for each work role, it is important to consider four criteria.

1. Cost
2. Security
3. Inventory Management
4. Employee Flexibility

**I. Stationary staff**

Stationary staff benefit from having a greater level of access to sensitive information in order to accomplish their work. Sensitive information (e.g., financial information, HR info, complete client information) cannot be deployed to BYOD equipment and so COD is preferred. Managing stationary inventory is generally easier than managing mobile inventory and so COD does not add a significant administrative burden. Because of the nature of stationary work, it is more important for ORGANIZATION to be able to better define the equipment used and, as a result, purchase the equipment directly for staff.

For all of these reasons, it makes sense for Stationary staff to have Company Owned Devices. (COD)

**II. Mobile staff**

By virtue of their mobility and the nature of their work, it is not possible or desirable to deploy sensitive information and software directly to mobile devices. Furthermore, attempting to manage a large mobile inventory would increase the cost of using these devices. Finally, and perhaps most importantly, mobile staff have historically demonstrated a wide variety of the types of technology used to do their work. ORGANIZATION wishes to continue allowing mobile staff this flexibility, for which a BYOD policy preferable.

For all of these reasons it makes sense for ORGANIZATION to provide mobile staff with a device allowance that can be used to purchase BYOD equipment. This allowance is taxable income, but not considered part of salary.

It is important to note that mobile staff are accountable for equipping themselves with the devices required to do their job and will be held accountable for this responsibility by their supervisor.

**III. Managers and Executive Staff**

Managers require both flexibility in how they work and access to sensitive company information. In general, managers are encouraged to utilize COD equipment, but exceptions can be made when necessary.

**Implementation Plan**

This policy is effective PICK YOUR DATE.

The appropriate equipment will be purchased for ***stationary*** staff who do not currently have adequately functioning Company Owned Devices. Equipment needs will be determined by the person’s management team, in consultation with the IT department.

***Mobile*** staff will receive the “device allowance” of $XX per month starting with the first pay period of January 2014. Supervisors can help provide guidelines as to the types of equipment that would be helpful.

The appropriate equipment will be purchased for ***managers*** needing new or upgraded equipment. Managers wishing to utilize the BYOD allowance can do so with approval by the respective executive team member.

**Acceptable Use Policy**

The ORGANIZATION Device Policy is not meant to replace or supersede the Acceptable Use of Personal Computing Technology as defined in the Employee Handbook, which states…

*ORGANIZATION allows its staff to use personal computing technology devices (e.g., home computers, laptops, tablets, smartphones, mobile devices, etc.) to access and perform ORGANIZATION related work. Along with this privilege comes the responsibility to ensure that confidential data treated in the same way as it would be on a company owned device.*

*In addition, employees using personal devices are responsible for ensuring that the devices are free from viruses and other maladies so that ORGANIZATION’s network or a client’s network is not compromised. Any software needed for a personal device is the employee’s responsibility.*

**COD and Employee Responsibilities**

In those cases in which the COD is located at an employee’s home (e.g., PC for remote staff) or is a laptop, tablet, or other mobile device assigned to an employee, the employee and her/his supervisor will complete the attached agreement that addresses the employee’s responsibilities to protect the device, use it only in appropriate ways, and return the device in good working order as requested by management or upon separation from the company. The original signed agreement will reside in the employee’s personnel file, with a copy to Internal IT.

**ORGANIZATION**

Responsibilities Associated with Possession of Company Owned Equipment

This agreement is between the employee named below and ORGANIZATION regarding the employee’s possession and use of the equipment listed herein. This equipment is provided to the employee to facilitate the execution of her/his job responsibilities. The employee agrees to the following provisions:

* The equipment is owned by the ORGANIZATION and the ORGANIZATION retains all ownership rights.
* The ORGANIZATION’s purpose for providing the equipment to the employee is to facilitate completion of job responsibilities and that is to be its primary use.
* Any and all data stored on the device, including personal information, files, etc., are, by definition, the property of the ORGANIZATION.
* The ORGANIZATION may, at any time and without prior notice, recover the equipment and access any information stored therein. Employee agrees to cooperate in the timely recovery.
* Employee agrees to return the equipment to the ORGANIZATION, whenever that might be requested, in good working order and to provide any passwords or other means necessary to access and use the equipment.
* The employee agrees to use and utilize any ORGANIZATION owned equipment according to related policies in the company’s Human Resources Policies – Employee Handbook, noting in particular:
	+ C-6 – Confidentiality of ORGANIZATION Information and Client Information
	+ C-7 – Use of Information Technology and Related Tools
	+ Appendix 3 – Information Technology Tools and Usage Policy

ORGANIZATION equipment in possession of named employee:

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Type | Manufacturer | Model | Serial # | Machine Name | Price | Date purchase | Date to emp | Date returned |
|  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |

Employee: Supervisor:

Signature: Signature:

Date: Date: