

 Tucson, Arizona GOVERNING BOARD POLICY	REGULATION TITLE: Cell Phone Stipend
	REGULATION CODE: EJD-R

Applicability: To all TUSD employees who, by nature of their duties and responsibilities, are expected to remain in communications with other TUSD employees at a predetermined level.

Effective Date: July 1, 2011. District paid cell phone services will be terminated June 30, 2011.

Background: Due to the rigorous regulations by the IRS that require tracking, documenting and institutional reimbursement, Tucson Unified School District will eliminate cell phone contracts and provide a monthly stipend.

Guiding Principles:

This regulation is established as a guide for employees who routinely use mobile communication devices in the performance of their job. Based on job responsibilities, eligible employees may qualify for a taxable stipend to cover the business use of personal cell phones. Employees with work related cell phone requirements will carry and be responsible for their own contracts and receive a stipend based on anticipated business use of their personal device.

Department managers shall be responsible for determining which position is eligible for either voice or data stipends, annually reviewing the employee’s tasks to determine eligibility, monitoring and reviewing such usage periodically to verify that each authorized employee needs to use a cell phone for business purposes. The Chief Financial Officer, Chief Human Resources Officer, and Chief Information Officer will develop, implement and review annually procedures and provide oversight on stipend amounts, payments, and departmental allocations.

Stipend Requirements

District contributions for employee owned services are not to be based on a particular title or position. Approved stipend amounts shall be based on the actual job requirements of the individual faculty or staff member. Approval for a District cellular stipend must be based on a valid, District related need and meet at least one of the following criteria.

- **On-Call availability:** Employee is required to be on call a majority of the time to be contacted in the event of an emergency or service need.

Departments shall consolidate to one District owned on-call phone when appropriate where employees take turns on-call.

- **Frequent mobility:** The job requires considerable time outside the office during working hours and it is imperative to the functioning of the District that the employee be immediately accessible to receive and/or make frequent business calls during those times.
- **After hours availability:** The job requires the employee to be immediately accessible to receive and/or make frequent business calls outside of working hours. Employee must be readily accessible due to the specific nature of their duties and must be available for emergency responses or time sensitive consultation after normal office hours.
- **Departmental eligibility criteria:** this can be more (but not less) restrictive than the District criteria stated above.

Stipend Levels:

- Level 1- Minimum service requirement is voice. Stipend amount per year for 12 month employee is \$520.00
- Level 2 – Service requirement is voice and data. Stipend amount per year for 12 month employee is \$910.00

Employee Responsibilities

Recipients of a District cell phone stipend have the following responsibilities:

- Purchase cellular phone service and equipment and assume responsibility for vendor terms and conditions. The employee can select any service provider, plan, and features that meet the requirements of the job responsibilities as specified by the supervisor and approved by the budget manager that, at a minimum, meet the level of plan and services that the stipend is intended to cover. The employee is responsible for plan choices, calling areas, service features, termination clauses, and paying all charges associated with the cellular service and device.
- Purchase, repair, maintain, insure and/or replace phone equipment and accessories, including lost, damaged, or stolen equipment and accessories.
- Ensure the carrier selected has service in required usage areas, such as on District and/or at home as required by the department. Take advantage of trial/return time frames offered by most carriers.
- Establish himself/herself as the billing party.
- Maintain an active service contract for the duration of the stipend.
- Notify your approving authority within 5 working days if the eligibility criteria are no longer met, if your service is cancelled, or when your phone number, carrier, or plan eligibility changes.

Change or Cancel Existing Stipend

If the employee resigns, is terminated, transfers departments, changes job duties, no longer requires telephone services, or otherwise no longer qualifies for an institutional stipend the employee's budget manager is responsible for submitting a PAF to discontinue stipend. A copy of the PAF must be kept on file with the department. Human Resources will also keep approved PAFs on file and available for internal or external audit. In the event that an employee leaves the position, he/she continues to be responsible for the contractual obligations of the cellular service plan.

District Provided Cell Phone Exceptions

There are limited circumstances in which a department can own a phone and line of service. Requests with proper justification must go through the Superintendent/ Designee for approval. For all District owned cell phones and services, departments must ensure that cell phone use is documented and that phones are used for District business only or employees must reimburse the District for the personal calls. At the discretion of the District, a department may be permitted to continue purchasing cell phones and service where the phone is used only for District business purposes in the following situations:

- **Shared department cell phone:** Arrangement involving multiple individuals sharing one cell phone that does not leave the District and is turned in by each employee at the end of his/her shift. This phone must be used for business purposes only. Phone log documentation is required.
- **On call department cell phone:** Used for business purposes only, this arrangement involves multiple individuals that take turns being on call and share one phone.

For District owned devices, the District will provide cell phone service and equipment. The TUSD authorizing Department will arrange for service and phone equipment, process the carrier invoices for payment, and bill the department for all service and equipment associated with their lines. Billing summary statements for monthly service charges are emailed to Department Budget Managers. Billing statements for equipment are mailed to the requestor. Call detail for each departmental line will be distributed to the department. Department Budget Managers are responsible for reviewing detailed billing statements monthly, preventing phone misuse, and ensuring that payment is received.

Adopted: August 24, 2010
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Review:
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CROSS REF: