



MEMORANDUM

TO: Board of Supervisors
FROM: Thomas M. Miller, County Executive Officer
DATE: January 12, 2010
SUBJECT: County Mobile Communication Device Policy

Action Requested

Accept the Placer County General Policy for Mobile Communication Devices and the associated attachments.

Overview

The attached Mobile Communications Device policy is designed to establish guidelines for the authorization, distribution and appropriate business use of mobile communication devices (MCD) by County of Placer employees. The County of Placer acknowledges the necessity of MCDs as an integrated technology used for data as well as voice communication and provides this policy to contain costs, ensure departmental and personal responsibility and accountability, and to prevent improper use.

The policy covers mobile or cellular telephones, mobile messaging systems, Personal Digital Assistants (PDAs) including but not exclusive to Palm Pilot or BlackBerry devices, pagers, air cards, and other devices provided to employees for the purpose of communication while working in the field. The County's MCDs are provided to County departments and assigned to employees by the department for the purpose of conducting County business. Other general provisions in the policy include:

- It is the policy of the County of Placer to make appropriate use of County funds while taking advantage of improving communication technologies to promote operational efficiency, improve service levels, and to respond to emergencies.
- Employees may be issued an MCD if authorized by the Department Head based on sufficient County business need and departmental budgeted funds.
- Department Heads have the responsibility for the purchase and monthly expenses of MCDs (communication equipment), and implementation of a departmental usage policy for such equipment. In the absence of a departmental policy, a standard policy is available for use.
- At a minimum, the Department's usage policy will include (1) maintaining a current inventory list of equipment and users and (2) procedures for monitoring usage to ensure a demonstrated business need for equipment and that costs are appropriate
- MCDs shall be used when land-lines or radios are not available to employees, unless work is conducted primarily outside of the office.
- Use of MCDs in vehicles is subject to the policies established in the County's Vehicle Use
- Personal use or abuse can result in employee reimbursement for charges, loss of the use of the device, and/or disciplinary action.
- The County reserves the right to terminate MCD privileges for any reason.

Recommendation: Accept the Policy for Mobile Communication Devices and the associated attachments.

Attachment: Policy

PLACER COUNTY GENERAL POLICY FOR MOBILE COMMUNICATION DEVICES

PURPOSE

To establish guidelines for the authorization, distribution and appropriate business use of mobile communication devices (MCD) by County of Placer employees. The County of Placer acknowledges the necessity of MCDs as an integrated technology used for data as well as voice communication and provides this policy to contain costs, ensure departmental and personal responsibility and accountability, and to prevent improper use.

POLICY

MCDs include mobile or cellular telephones, mobile messaging systems, Personal Digital Assistants (PDAs) including but not exclusive to Palm Pilot or BlackBerry devices, pagers, air cards, and other devices provided to employees for the purpose of communication while working in the field. PDAs are provided primarily for the data use capabilities they provide and it is estimated that the business use of PDAs is predominately (85-90%) e-mail, with the remaining 10-15% of use being cell phone usage.

The County's MCDs are provided to County departments and assigned to employees by the department for the purpose of conducting County business. Personal use or abuse can result in employee reimbursement for charges, loss of the use of the device, and/or disciplinary action. The County reserves the right to terminate MCD privileges for any reason.

With Department Head approval, personally owned MCDs such as Blackberry, iPhone, and Windows Mobile devices may be allowed to be connected to the Placer County Email System in order to securely access County business related email messages and calendars.

MCDs shall be used when land-lines or radios are not available to employees, unless work is primarily outside of the office. Use of MCDs in vehicles is subject to the policies established in the County's Vehicle Use Policy.

The County cannot and does not imply, extend, or guarantee any "right to privacy" for voice calls and/or electronic communications placed over County provided MCDs, including but not limited to call detail records, logs, voice mail messages, data storage, text messages, emails, and address books.

GENERAL PROVISIONS

It is the policy of the County of Placer to make appropriate use of County funds while taking advantage of improving communication technologies to promote operational efficiency, improve service levels, and to respond to emergencies.

A. Responsibility

Department Heads have the responsibility for the purchase and monthly expenses of MCDs (communication equipment), and implementation of a departmental usage policy for such equipment. In the absence of a departmental policy, attachment 4 shall be utilized. A departmental policy shall be in no case less restrictive than attachment 4.

The County has developed a questionnaire (Attachment 1) to assist departments with purchasing applicable equipment and preferred service plans. This questionnaire should be submitted to the Telecommunications Division of the Administrative Services Department who shall be used as a resource to assist departments with their purchasing needs. Departments shall consider the recommendations of the Telecommunications Division when purchasing MCDs.

B. Issuance

County Issued MCD

Employees may be issued an MCD if authorized by the Department Head. Department Heads have the authority to approve a request based on sufficient County business need and departmental budgeted funds.

Employees using a County-issued MCD (utilizing Blackberry Enterprise Server) to access County Email will abide by all County and Department policies including the Placer County Voicemail, E-mail, Internet, and Computer Use Policy as it pertains to County Email access and use.

Employees using a County-issued MCD must complete a Mobile Communication Devices Policy Acknowledgement (Attachment 2). Non-management employees will also be required to complete the Placer County Mobile Communications Device and/or Web Email Access Agreement (Attachment 6).

Employee Owned MCD

Employees may be allowed to connect their personally owned MCD (i.e. Blackberry, iPhone, or Windows Mobile) to the Placer County Email System (utilizing Blackberry Enterprise Server or Exchange ActiveSync) in order to securely access County business related email messages and calendars. Department Head approval is required including County business justification for this access.

Employees conducting County business using a personal MCD to access County Email will abide by all County and Department policies including the Placer County Voicemail, E-mail, Internet, and Computer Use Policy as it pertains to County Email access and use.

Employees utilizing a personal MCD to access County email will be responsible for all costs, maintenance, and support of their personal MCD.

Employees authorized to use their personal MCD to access County email must complete the Personal Mobile Communication Devices Policy Acknowledgement (Attachment 5). Non-management employees will also be required to complete the Placer County Mobile Communications Device and/or Web Email Access Agreement (Attachment 6).

C. Accountability

At a minimum, the Department's usage policy will include (1) maintaining a current inventory list of equipment and users and (2) procedures for monitoring usage to ensure a demonstrated business need for equipment and that costs are appropriate.

The County has also developed guidelines to assist the department with developing their MCD Usage Policy (Attachment 3).

Employees are required to review their monthly statement, identify their personal calls and reimburse the County for the pro-rata share of the monthly charge and applicable overage charges due from personal calls.

The County reserves the right to audit/review communication bills. Appropriate disciplinary action including employee reimbursement of costs may be taken if an employee is found in violation of the County policy. Costs for replacing lost or damaged MCDs will be left to the discretion of the department and dependent on the circumstances of the loss.

Occasionally, employees who do not have a County-issued MCD may need to use their personal cellular phone for critical County business. These calls may be eligible for reimbursement by the County, provided no other option (i.e., pay phone or home phone) is available. Request for reimbursement and reimbursement procedures should be handled at the department level.

Employees utilizing either a County issued or personal MCD (utilizing Blackberry Enterprise Server or Exchange ActiveSync) to access County email must immediately notify Administrative Services – IT in the event that their MCD is lost. Administrative Services – IT will remotely wipe the MCD of all information in order to prevent unauthorized access to the County Network.

In the event that an employee recovers their lost personal MCD that has been remotely wiped of all information, the employee will be responsible for reloading their personal information and programs onto their MCD as well as any associated costs with the reloading process.

D. Termination

The Department is responsible for ensuring that terminated employee's equipment or equipment no longer needed is appropriately returned to the Telecommunications Division of Administrative Services.

- Attachment 1 – Mobile Communication Device (MCD) Service Questionnaire
- Attachment 2 – Mobile Communication Devices Policy Acknowledgement
- Attachment 3 – Guidelines for Developing a Departmental Mobile Communication Device (MCD) Usage Policy
- Attachment 4 – Departmental Sample Communications Device Policy
- Attachment 5 – Personal Mobile Communication Devices Policy Acknowledgement
- Attachment 6 – Placer County Mobile Communications Device and/or Web Email Access Agreement

Mobile Communication Device (MCD) Service Questionnaire

1. Which type of MCD service is being requested:

- County issued Cellular Blackberry (also complete Nextel/Blackberry Order Form and User Configuration Sheet)
- Other _____ Pager, air card, etc.

2. Explain why you are requesting a County-issued device. Will emergency response or employee safety be enhanced with a County-issued device? Please explain:

3. Describe the present system of communication and why the use of a device is necessary.

4. What is the average number of hours per day that your work requires you to be accessible by MCD?

5. In which areas of the County will the MCD be used?

6. How many MCD minutes a month do you expect will be used for County business? Please identify voice and data minutes separately.

7. If requesting a County-issued device, does your department currently have other existing service agreements for the same device?

8. Other features required or pertinent information:

Employee Name

Classification

Department Head Approval

Department Name

Recommendation of Telecommunications Division	
1. Device:	_____
2. Carrier:	_____
3. Plan:	_____
4. Other:	_____
5. Contact:	_____

Mobile Communication Devices Policy (MCD) Acknowledgement

I acknowledge receipt of this policy and understand and agree that I am bound by its contents:

1. _____ (hereinafter referred to as "the user") is being granted access to a County-issued mobile communication device.
2. The user has read and understands the County's Mobile Communication Devices Policy.
3. The user understands and agrees that the County-issued mobile communication device is assigned to the employees for the purpose of conducting County business. The user understands that all personal calls must be identified on each monthly statement and the County must be reimbursed for these calls.
4. The County reserves the right to terminate MCD privileges for any reason.

Employee Name

Signature

Work Phone

Department

GUIDELINES FOR DEVELOPING A DEPARTMENTAL
MOBILE COMMUNICATION DEVICE (MCD)
USAGE POLICY

PURPOSE

To provide guidelines to assist Departments in creating a Mobile Communication Device (MCD) Usage Policy to ensure that MCD-related County costs adequately support a demonstrated business need.

This document is meant to describe key elements that should be included in a departmental policy. However, each department may have specific circumstances relating to their unique business needs that require additions or deletions.

The Department's Usage Policy should be adequately documented and communicated to all MCD users, their managers, and those directly responsible for monitoring.

I. Justification

The Department's Usage Policy should document (1) the criteria for allowing the use of MCDs and (2) the procedures for obtaining proper authorization.

All purchases of equipment and associated accessories assigned to County employees must be approved by the Department Head. The Departments should maintain documentation describing the business need/justification and proper authorization for assigned equipment. The justification should be sufficiently descriptive, such as "the work assignment requires substantial travel, limiting the ability to use office phones," etc. It should also show a correlation between the usage plan minutes and the business need.

II. Current Inventory Listing

Each Department having users of County-owned MCDs must maintain a current inventory listing of all assigned equipment. This inventory should, at a minimum, include:

- (1) User Name
- (2) Phone Number
- (3) Description of Equipment
- (4) Justification (can be an abbreviated version of the one documented in Section I. above)
- (5) Name/Description of Plan (can include Carrier, Account Number, Minutes, etc.).
- (6) Date of Last Usage Review

Other optional information may include:

- Employee Classification
- Monthly Plan Costs
- Work Schedule
- Pooled/not Pooled

III. Procedures for Monitoring

Departments must implement procedures to demonstrate a continued business need which supports the use of County funds. Management should analyze existing plans and "pool" users to optimize County savings. The Telecommunications Division of Administrative Services should be used as a resource to assist Departments.

Management should document their approval of invoices, instances of inappropriate use of equipment and the follow-up actions taken with the user. The County Policy states that "Personal use or abuse can result in employee reimbursement for charges, loss of the use of the device, and/or disciplinary action." Employees must review their monthly MCD invoices/billing reports to identify any personal calls and reimburse the County for the pro-rata share of the monthly charge and applicable overage charges for all personal calls.

Departments also need to determine the frequency of their monitoring procedures, which should be performed on a quarterly basis at a minimum. These procedures and applicable management/staff responsibilities should be documented in the Department's Usage Policy.

Typical procedures would include management regularly reviewing MCD invoices/billing reports for the following charges, including but not limited to:

- Overages
- Long Distance/Roaming
- Personal Calls (exception allowed for limited use outside normal business hours where employees need to contact family, daycare, etc. in regards to work required overtime, schedule changes, etc.). Under all circumstances, personal calls will be limited to 5 minutes per day.
- Other Unusual Activity (forwarding calls from personal cell phones, purchasing ringtones/accessories, etc.)

The County reserves the right to audit communication bills to ensure compliance with County and Departmental Policy.



MEMORANDUM

TO: DEPARTMENT X STAFF

FROM: DEPARTMENT HEAD,

DATE:

SUBJECT: Telecommunications-Mobile Communications Device Policy

POLICY -GENERAL BUSINESS USE

The Purpose of this policy is to provide uniform guidelines for the use of telephone and mobile communication devices (MCDs). Access to and use of telecommunication systems and mobile communication devices is fundamental to completion of the department's mission, and to provide essential customer service, but like all county equipment and tools, use is intended for official County business only.

All business calls and data use should be appropriate to the individual job requirements. Employees should expect that telephone or cell phone calls that seem to be excessive in duration and made to locations that are inconsistent with job duties will require an explanation, and employees will be held accountable and charged for any abuses.

All assigned equipment will be documented in a current inventory listing that includes User Name, Phone Number, Description of Equipment, Justification, Name/Description of Plan, Date of Last Usage Review. The Administrative Services Officer will ensure that this listing is up-to-date.

GENERAL CRITERIA FOR REQUESTING AN MOBILE COMMUNICATIONS DEVICE (MCD)

Criteria for requesting an MCD includes:

- Nature of work assigned requires substantial travel and limits use of office or other departmental phones
- Personal safety issues will be considered or employees who work with clients in the field
- Frequent and prolonged time out of the office
- The nature of the work assigned requires the individual to be available outside normal office hours
- Nature of work assigned is critical to operations of the department and immediate response is required

POLICY -PERSONAL USE

The County's policy with regard to personal telephone use is:

Personal telephone calls are not to be made on County time if at all avoidable. If you must make or receive occasional personal calls at work, keep them to an absolute minimum in terms of frequency and length. Personal toll and long-distance calls must be charged to your

home telephone or calling card.

Although the County's policy is restrictive, it is realistic and reasonable to expect that employees may need to maintain contact with and check on their children or other family members during the course of working hours.

It will be expected that employees who need to make or receive calls to check on family members will keep calls to an absolute minimum in terms of frequency and length and will be expected to reimburse the County for any excessive calls. (Exceptions will be made for contacting family, daycare, etc. in regards to work required overtime, schedule changes, etc.) Under all circumstances, personal calls will be limited to 5 minutes per day.

If excessive personal calls persist, employees will be counseled, and if abuses continue, employees will be expected to use other non-County equipment.

On a monthly basis, department managers will receive and review the MCD reports for appropriate use of equipment and time, and wherever necessary will discuss issues with staff. Each user will be distributed an individual copy of their report to review and make any corrections, comments, or where necessary arrange for reimbursement. If reimbursement is required, a copy of the report and funds collected will be directed back to managers and then routed to the Administrative Services Officer, who will complete a deposit and provide a receipt to the employee.

I appreciate your cooperation in advance, and please let me know if you have any questions or comments.

Personal Mobile Communication Devices (MCD)
Policy Acknowledgement

I acknowledge receipt of this policy and understand and agree that I am bound by its contents:

1. _____ (hereinafter referred to as "the user") is being granted permission to connect their personally owned MCD (i.e. Blackberry, iPhone, or Windows Mobile) to the Placer County Email System in order to securely access County business related email messages and calendars.
2. The user has read and understands the County's Mobile Communication Devices Policy.
3. The user understands and agrees that access to the Placer County Email System from their personal mobile communication device is for the purpose of conducting County business.
4. The County reserves the right to terminate personal MCD email access privileges for any reason.

Employee Name

Signature

Work Phone

Department

PLACER COUNTY
Mobile Communication Device and/or Web Email Access
AGREEMENT

This document constitutes an agreement between Placer County and a non-management employee who has been assigned a mobile communication device or been granted access to County E-mail via a personal mobile communication device and/or has been given authorization to access County E-mail via the Internet.

County Issued Mobile Communication Device

I understand and agree to use the mobile communication device for the work-related purposes for which it was assigned to me.

I understand and agree that using this device during off duty days or hours may create an obligation of the County to compensate me with overtime pay. Therefore, I agree that I will not use the mobile communication device during off duty days or hours without advance approval from my supervisor.

Personal Mobile Communication Device

I understand and agree to access County E-mail via my personal mobile communication device for work-related purposes.

I understand and agree that using this device to access County E-mail during off duty days or hours may create an obligation of the County to compensate me with overtime pay. Therefore, I agree that I will not use the mobile communication device to access County E-mail during off duty days or hours without advance approval from my supervisor.

Web E-mail Access

I understand and agree that accessing County E-mail via the Internet during off duty days or hours may create an obligation of the County to compensate me with overtime pay. Therefore, I agree that I will not access County E-mail during off duty days or hours without advance approval from my supervisor.

Mobile Communication Device and/or Web E-mail Access

I understand and agree that while using the mobile communication device to access County E-mail or accessing County E-mail via the Internet that I will abide by all County and Department policies including the Placer County Voicemail, E-mail, Internet and Computer Use Policy as it pertains to County E-mail access and use.

I understand and agree that failure to comply with this Agreement may result in disciplinary action against me.

Employee Signature/Date

Dept. Head Signature/Date

January 2009

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