



COUNTY OF SACRAMENTO

Office of Communications and Information Technology

TERRY SCHUTTEN
County Executive

PATRICK L. GROFF
Chief Information Officer

Date: March 23, 2004

To: Elected Officials, Agency Administrators, and Department Directors

From: Patrick Groff
Chief Information Officer

SUBJECT: Countywide Cellular Telephone Policy

Attached is the final version of the long awaited Countywide Cellular Telephone Policy. This Policy has an effective date of March 22, 2004. With some minor modifications resulting from the recently completed meet and confer process with the County's recognized employee organizations (REO's), the Policy has been recommended for approval by the Technology Review Group (TRG) and the Information Technology Policy Board (ITPB). The major components of the Policy are as follows:

- Guidelines as to which employees should be issued County cellular telephones.
- Instructions on how cellular telephones and services can be acquired.
- Information on the importance of regular monitoring to ensure that the cellular telephones are being used appropriately and that the employees are utilizing the appropriate service plan to meet their business needs.
- Assignment of cellular telephone coordinator duties to one or more employees in each department.
- General policy of the County to not reimburse employees for any charges billed to the employee's personal cellular telephone.
- Required reimbursement to the County for occasional personal use of County issued cellular telephones.
- Information regarding reimbursement for telephone use while in a travel status.

It is critical that departments monitor their cellular telephone charges and patterns of use on a case by case basis in order to ensure that the cellular telephones are being used appropriately and that the appropriate service plan is being utilized. In this regard, the Interim Cellular Telephone Procedures distributed by memo dated November 26, 2003, are now permanent. Following is a listing of these Procedures:

- OCIT has developed a new standard Cellular Telephone Service Request (CTSR) Form to assist departments in selecting the appropriate contract and service plan for each employee. Departments must use the new Form when requesting cellular telephone equipment and services. Departments may request cellular telephone equipment and services through OCIT or directly from a contracted vendor.

- OCIT will administer the monthly billing process for all of the cellular telephone contracts. OCIT will provide summary and detailed information for all of the cellular telephone contracts. Elected officials may opt to administer their department cellular telephone billing procedures internally.
- OCIT will provide monthly exception reports that will enable departments to more effectively manage their cellular telephone usage and costs. OCIT will work with the Departmental Cellular Telephone Coordinators to determine the most effective exception reporting criteria.

On January 16, 2004, the Purchasing Division of the Department of General Services and OCIT co-sponsored a very successful informational meeting with the identified departmental cellular telephone coordinators. At that meeting, the new cellular telephone contracts were discussed. In addition, the Draft Cellular Telephone Policy and the Interim Cellular Telephone Procedures were also discussed.

While it is recognized that departments may develop internal cellular telephone procedures to meet their business needs, those procedures shall not be inconsistent with the Countywide Policy. If you have any questions, contact me at 874-7825 or via e-mail at groffp@SacCounty.net or Alan Douma at 874-7180 or doumaa@SacCounty.net.

Concurrence:

Terry Schutten, County Executive

Attachment:

Cc: Members, Board of Supervisors
Robert A. Ryan, Jr.
Brian Chin
Andrew Hobson
Alan Douma
Sharon Lawrence
John Laino

COUNTY OF SACRAMENTO CELLULAR TELEPHONE POLICY

EFFECTIVE DATE: March 22, 2004

Background

Cellular telephones have become a valuable tool for County employees to enhance their productivity while working away from their offices. The cellular telephone has become a lifeline back to the office for the coordination of work or, in some cases, for assurance of personal safety.

Authorization to use Cellular Telephones

It is within the responsibility and authority of Agency and Department Heads to make the determination of whom within their respective units should depend on cellular telephones for official business needs, in a manner consistent with these policies.

It is incumbent upon Agency and Department Heads to ensure that cellular telephones are provided only to those employees with a demonstrated need for this type of communication. In order for the County to provide and assign a cellular telephone for an employee's use, the following criteria must be met:

1. The employee must be in a position where the preponderance of his/her time is spent out of the office during his/her normal work day; **and**
2. Use of a cellular telephone must be essential for the conduct of the employee's work; **or**
3. The employee is subject to being contacted for urgent or emergency purposes.

While occasional personal use is permitted, as outlined below, employees are expected to reimburse the County for costs associated with personal use of a County-issued cellular telephone.

When an employee no longer has a demonstrated need for the cellular telephone; or, when the employee terminates employment with the department authorizing the cellular telephone's use, that employee shall return all County-provided cellular telephone equipment to that department.

Departments having employees who have infrequent need for cellular telephone communications may establish a 'pool' phone that is provided to employees as needed. Controls should be established to account for who has the telephone and when they are authorized to use it. Pool telephones should be assigned for specific, limited periods such as during travel, or other special work-related events.

Acquisition of County Provided Cellular Phones

Departments may acquire cellular telephones for use by their staff by one of two means:

1. The Purchasing Division of the General Services Department has established numerous contracts for purchasing cellular telephone equipment and services. Departments determine their needs and order the required telephones by means of a CSO against one of the existing Countywide contracts.

2. Departments may request a cellular telephone through OCIT. OCIT will assist with setting up the appropriate billing plan, coordinate the delivery of the telephone, provide initial use instruction and assist with obtaining minor repairs whenever necessary.

Under either of the above-described options, departments are required to complete the standard Cellular Telephone Service Request (CTSR) Form.

Maximizing the Pattern of Use Flexibility

The County contracts for purchasing cellular telephone equipment and services provide significant flexibility so that departments can accommodate various patterns of cellular telephone use. Most County cellular telephone users utilize their equipment on a limited basis. Under these circumstances, service contracts are available that provide for a very low flat monthly charge with an additional per minute charge. In the case of limited use, subscribing to this lower flat monthly charge with an additional per minute charge actually results in financial savings as compared to the other available plans.

In those cases where the cellular telephone equipment is utilized on a more extensive basis, alternative plans are available that provide a higher flat monthly charge with various minute limits that are included in the higher flat monthly charge. An additional per minute charge is only applied if the specific monthly minute limit is exceeded. Depending upon the pattern of use for each particular user, subscribing to the higher flat monthly charge with a range of included minutes may actually result in significant savings. Departments should monitor their cellular telephone charges in such a way as to take advantage of the appropriate service plan.

Departmental Cellular Telephone Coordinators

Each department that utilizes cellular telephone equipment and services shall assign one or more cellular telephone coordinators. It shall be the responsibility of these coordinators to work with OCIT and/or the service providers (carriers) to manage cellular telephone usage within each department. This shall include, but not be limited to the following:

- (1) Ensuring that the employee's initial anticipated pattern of use is aligned with the appropriate carrier and monthly service plan.
- (2) Monitoring the ongoing cellular telephone usage to ensure that the telephone is being used for appropriate business use.
- (3) Monitoring the ongoing pattern of use to ensure that the appropriate carrier and plan are being utilized.
- (4) Act as a resource for employees regarding cellular telephone issues. Inform employees of the terms of their monthly service plan, and any changes.

Reimbursement for Personal Cellular Equipment

Employees who require frequent use of cellular telephones to conduct County business should utilize cellular equipment provided by the County. It is the general policy of the County to not reimburse employees for any charges billed to the employee's personal cellular telephone.

Under limited and extraordinary circumstances, reimbursement can be made with the approval of the department director and the Director of Finance.

Reimbursement for Personal Calls Using County Equipment

Employees should avoid making personal phone calls on County equipment. It is understood that occasional calls of short duration may be necessary. As an example, this would include contacting a family member to inform them that you will be arriving home later than expected. Personal calls placed on County cellular phones shall be reimbursed to the County if the personal calls result in any additional costs to the County. In such a situation, the cost to the employee would only be for actual personal calls made. Employees are permitted a minimum of 30 calendar days from receipt of the call detail to make reimbursement. Departments are permitted to exercise discretion in establishing a reasonable reimbursement schedule.

Reimbursement for Telephone Use While in a Travel Status

County Travel Policy permits reimbursement for reasonable telephone and facsimile (FAX) charges in connection with County business and for one personal telephone call a day for those employees on extended County travel of five or more consecutive days. Refer to the County's Travel Policy for more information. Employees should be advised that hotel phone charges are typically excessive. Travelers are **strongly discouraged** from making calls from hotel equipment. It is the department's responsibility to advise all travelers of this recommendation. Acceptable alternatives to hotel phone usage include the following:

- (1) **Cellular Phones.** Travelers are encouraged to use County-issued cellular phones, provided that long distance and roaming charges are included at no additional cost.
- (2) **County Pre-Paid Phone Cards.** On trips lasting more than one day, travelers may be provided a pre-paid phone card, at department expense. This card is to be utilized by the traveler for any phone calls (private or business related), FAX or internet access while traveling on official County business. Cards are intended for one-time issuance. Any balance of minutes remaining on a card will be available for the traveler's private use. Pre-paid phone cards may be obtained through the Departmental Travel Coordinator or through the Department of General Services, Central Stores.