

# MANAGEMENT MEMO

SUBJECT: <b>MANAGEMENT OF PERSONAL COMMUNICATIONS DEVICES (PCDs)</b>	NUMBER:  DATE ISSUED:
REFERENCES: <b>STATE ADMINISTRATIVE MANUAL SECTIONS 4510 AND 4530</b>	EXPIRES: ONE YEAR FROM ISSUE DATE ISSUING AGENCY: DEPARTMENT OF GENERAL SERVICES

**Introduction and Purpose** It is good business practice to require efficient and cost-effective deployment and use of personal communication devices (PCDs). This Management Memorandum provides the governing policy for appropriate management of PCDs. PCDs include but are not limited to: cellular phones, pagers, personal digital assistants (PDAs), and related items or configurations that permit remote communication and/or messaging.

For purposes of this Management Memorandum, “agency” means agencies, departments, boards, commissions, and other state entities that report to the Executive Branch of government. Other agencies are encouraged to follow these same practices.

**Background** Workforce reductions and other cost savings measures may have reduced the number of active PCDs your agency requires. Also, vendors update rate plans regularly in this competitive marketplace, and agency needs may change. Regular evaluation is needed to help ensure the most efficient and cost effective management of PCDs. For example, last year an agency requested a rate plan analysis for cellular phone accounts from its cellular providers. The rate plan analysis and subsequent evaluation was pursued to assure that maximum savings are realized through volume discounts, cancellation of needlessly expensive plans, adjusting cellular phone plan minutes to closely coincide with actual usage minutes, deactivating unused or unneeded phones, and pursuing readily available consolidated discounts. This type of analysis and evaluation is beneficial for all types of PCDs.

**Policy** Agencies shall:

- Provide oversight to ensure that PCDs are acquired, assigned, used, and managed in an efficient and cost-effective manner.
- Establish and adhere to specific policies, procedures and controls related to PCDs.
- Evaluate the assignment and usage of PCDs on a regular basis, and take appropriate actions.
- Request periodic agency rate plan analyses from PCD vendors, and make needed plan adjustments.

## STATE ADMINISTRATIVE MANUAL

The following information is important to include when developing agency specific policies.

### Acquiring PCDs and Service Plans

Centralized contracts and master service agreements allow the state to spread the costs for lease and operation of the services over a large base of users, and should result in the lowest overall cost to the state. These contracts and agreements should be used to acquire PCD services whenever possible:

- If not already done, consider centralizing the acquisition and management of PCDs in your agency to help maintain standards and polices and to leverage better deals.
- Regularly compare rates and services to help assure the best choice for the particular requirements of your agency, and for specific programs and employees.
- Review the terms and conditions of PCD service plans, and select plans that correspond to actual usage levels. **For example**, if an employee is a light cell phone user, the volume discount plan for that phone may not be cost effective. It may be better to pay a lower monthly rate and pay by the actual minute or get fewer plan minutes, than to pay a higher monthly rate for more plan minutes that will most likely not be used.
- Where latitude exists, negotiate with providers for lower rates and/or better plans.
- Avoid long-term agreements that reduce flexibility to adjust rate plans or to switch to lower cost providers.
- Current statewide PCD acquisition resources are: the Western States Contracting Alliance (WSCA) which includes cellular phones and PDAs at <http://www.pd.dgs.ca.gov/wsca/default.htm>; the California Multiple Award Schedule (CMAS) at <http://www.pd.dgs.ca.gov/colas>; and the DGS Pager Master Service Agreement at <http://www.pd.dgs.ca.gov/masters/pagers>.
- Generally these resources offer attractive rates and should be the first option for comparing rates and plans. However, if other resources are available with cheaper rates or better, more cost effective plans that meet agency needs, use them.

### Issuing PCDs

PCDs should be issued only when required for the specific functions performed by the employee, and after thoroughly considering the various communications requirements and alternatives (such as using a pager instead of a cellular phone). Consider having a “general use” pool for PDAs that can be “checked-out” by employees only when needed for specific purposes.

## STATE ADMINISTRATIVE MANUAL

The following justification criteria are recommended situations for the issue (or temporary use) of PCDs.

- **Public Safety** – Immediate direct communication is required with local police, fire and/or emergency medical units (9-1-1) or immediate communication is required with the agency, where absence of communication would be clearly detrimental to the state or the public.
- **Emergencies or Disasters** – Immediate communication is required to notify or provide status updates in a natural disaster (e.g., earthquake, floods, etc.).
- **Personal Safety** - Employee is traveling a significant amount of time, travels to rural or remote areas, or is working in a dangerous or hazardous work environment where no other viable communication is available.
- **Operational Efficiency** – Direct communication or notification is required to conduct necessary state business, and access to a conventional telephone system, payphone, or computer with e-mail is not practical or not easily available the majority of the time.

### Using PCDs

- As with conventional telephones, PCDs are for state business related activities.
- Set standards for the use and care of the PCDs, including what to do in the event they are lost, stolen or damaged.
- Discourage excessive connection times that may generate additional charges or prematurely deplete plan minutes.
- Limit or ban out-of-state or overseas usage as applicable.
- Establish safety criteria. **For example:** Conducting phone calls or utilizing PDAs while driving can be a safety hazard due to the distraction and the difficulty to maintain a high level of attention to traffic. Emphasize that drivers should use PCDs while parked or out of the vehicle.

## STATE ADMINISTRATIVE MANUAL

### Managing PCDs

- Regularly evaluate the assignment and use of PCDs; review and analyze the associated service plans with the vendor. A rate plan analysis can help identify plans that better align with actual usage.
- When evaluating the results of a rate plan analysis, look for cost related or usage factors for each PCD. **For example:** Check whether few or no airtime minutes are being used, or if service plans do not coincide closely with actual usage. Also, consider ways to avoid costly roaming charges – if an employee regularly travels to the same specific area of the state, a PCD with a second phone number (or sole phone number) from that area could be of benefit.
- Consider switching to another vendor that offers more cost effective plans, and/or includes the PCDs with regular replacements or upgrades for no extra charge.
- Establish a practice for managers and supervisors to regularly review PCD bills for adherence to usage guidelines established by the agency, and to help detect fraud and abuse. **For example:** Excessive usage and a wide variety of area codes on the bills may indicate that a PCD has been misused or “cloned.” Cloning occurs when the service number is replicated on an unauthorized PCD, which may lead to unauthorized usage and charges.
- Regularly identify and eliminate all inactive PCD accounts. A surprising number of unused devices continue to remain active when employees leave or transfer. Establish procedures that will help ensure timely retrieval of PCD equipment and deactivation of these accounts.

### DGS Contacts

For more information on acquiring PCDs from the pager master agreement or CMAS, contact the DGS-Office of Procurement at (916) 375-4390. For information on the WSCA agreements, contact DGS – Office of Procurement at 916-375-4429 or 916-375-4430.

For more information on utilization and management of PCDs, contact the DGS-TD Office of Network Services at (916) 657-9903 or 1-800-807-6755 and ask to speak to a Customer Account Manager. Also, see the ONS homepage at <http://www.dgs.ca.gov/td> click on STMM (State Telecommunications Management Manual) on the left.

### Signature

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