

MANAGEMENT MEMO

NUMBER:
MM 04-10

SUBJECT:

MANAGEMENT OF PERSONAL COMMUNICATIONS DEVICES (PCDs)

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REFERENCES: STATE ADMINISTRATIVE MANUAL SECTION 4510

ISSUING AGENCY:

DEPARTMENT OF GENERAL SERVICES

INTRODUCTION AND PURPOSE

It is good business practice to require the efficient deployment and use of personal communication devices (PCDs). This Management Memorandum is a reminder to pursue good business practices in this area, and 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.

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 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 revealed that consolidating accounts and increasing oversight of cellular phone plans would achieve considerable savings.

Specifically, the analysis showed that only half of the department's cellular phones received a consolidated volume discount (that was currently available), and some of the cellular phones indicated no airtime minute usage, or needlessly expensive plans. Savings were achieved by 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.

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

STATE ADMINISTRATIVE MANUAL

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 policies 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/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/cmas>; 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.

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/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/remote areas, or is working in a dangerous/hazardous work environment where no other viable communication is available.

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- **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 PDAs while parked or out of the vehicle.

Managing PCDs

- Regularly evaluate the assignment and use of PCDs, and review/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, such as little or no airtime minutes are being used, or service plans do not coincide closely with actual usage. **For example:** Consider roaming charges – if an employee regularly travels to the same specific area of the state, a second number (or sole number) from that area could be of benefit.
- Consider switching to another vendor that offers more cost effective plans, and/or that include 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 determine early on if a communications device has been cloned (the service number is replicated on an unauthorized PCD).
- 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.

CONTACTS FOR INFORMATION

For more information on acquiring PCDs, contact the DGS-Office of Procurement at (916) 375-4400 or 1-800-559-5529, or see <http://www.pd.dgs.ca.gov/Home>; click on the Master Agreements link on the right. 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 Representative. Also, see the ONS homepage at www.dgs.cas.gov/td click on STMM (State Telecommunications Management Manual) on the left.

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