CITY OF HAMILTON

CORPORATE SERVICES DEPARTMENT
Information Services Division

TO: Mayor and Members
   Committee of the Whole

WARD(S) AFFECTED: CITY WIDE

COMMITTEE DATE: October 12, 2010

SUBJECT/REPORT NO:
Corporate Cellular Device Management Policy (FCS10090) (City Wide)

SUBMITTED BY:
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Finance and Corporate Services

PREPARED BY:
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SIGNATURE:

RECOMMENDATION:

(a) That the Corporate Cellular Device Management Policy, attached as Appendix A
to Report FCS10090 be approved;

(b) That staff be directed to implement The Corporate Cellular Device Management
Policy (CORP-CCDM-00) for all Corporate Cellular Device Users.

EXECUTIVE SUMMARY

The award of the Corporate Cellular Services and Devices contract to Bell Mobility was
approved at Council on September 15, 2010, via report FCS10029(a). Report
FCS10029(a) included a recommendation “that staff be directed to report back on a
Wireless Devices Management Policy at the October 12, 2010, Committee of the Whole
meeting”. At the September 15, 2010, Council meeting, Council approved that the
responsibility for all cellular services will be consolidated into the Information Services
Division of the Corporate Services Department.

The City currently has approximately 1,850 cellular devices under contract with Bell
Mobility and approximately 360 cellular devices with Telus Mobility. Cellular devices are
a combination of cell phones (1121), smart phones (546), air cards (220) used in laptops to allow for staff mobility for work that is conducted outside the normal office environment and cellular in-vehicle modems (356) used in areas such as the Public Works Department, Municipal Law Enforcement and Emergency Medical Services for vehicle location and vehicle tracking. The vehicle modems also allow for the capture of data required by Provincial Ministries.

With the consolidation of cellular services into the Information Services Division, it is essential that all existing policies be reviewed and updated and also that a Cellular Management Policy be created outlining responsibilities for Management, Cellular Device Users and Information Services staff. Information Services staff are also creating detailed procedures to clarify various processes which will be linked back to the over-arching policy.

The over-arching policy, ‘Corporate Cellular Device Management Policy’, is attached as Appendix A. This policy outlines that the purpose of Cellular Devices are for business communication and related activities and will only be acquired when they provide increased efficiency, increased effectiveness and a financial benefit to the corporation.

The ‘Corporate Cellular Device Allocation Procedure’ is attached as Appendix B. This document provides guidelines for allocating a specific device type with the standard criteria in each category being ‘job function requires the employee to be away from the primary work site more than 50% of the time’.

Information Services staff, in collaboration with the business units, have also created the Corporate Cellular Device Use Agreement which is attached as Appendix C.

It is important to note that there is currently a Device Allocation Criteria established for cellular devices, as well as, a Cellular Use Agreement. The proposed policy is an update to these documents which will be used as a means to educate staff on the corporate expectations of any user of a corporate cellular device.

Alternatives for Consideration – N/A.

**FINANCIAL / STAFFING / LEGAL IMPLICATIONS** (for Recommendation(s) only)

**Financial:** None.

**Staffing:** The responsibility for all cellular services will be consolidated into the Information Services Division of the Corporate Services Department. Currently, cellular services are managed by a combination of the Purchasing Section for establishing a standard device for and ordering of cell phones and the Information Services Division which is responsible for establishing a standard for and ordering Blackberry devices and
cellular modems. Neither group is responsible for managing the contract, monitoring usage, or enforcing policies. Consolidating all cellular service management into a single area will:

- reduce costs through appropriate plan management,
- ensure policy adherence; and
- reduce administration costs with the implementation of a cellular management solution.

Allocation of devices will be the responsibility of the operating departments and will be done in consultation with Information Services staff.

This will address a recommendation approved by Council through report AUD10009 and approved by Council as a result of a telecommunications audit conducted in 2009.

Management of the cellular devices and services will require a staff person to verify the savings that are anticipated through cellular contract management, as well as, those savings anticipated for the other major Information Services contracts (i.e., printers, desktops etc). The intent is for this position to transition into full-time after an initial 12 month temporary posting, subject to Council approval. The position would also be directly involved in the deployment of the new cellular equipment ensuring that:

- Regular reporting and trend analysis of cellular usage are provided to management, including semi-annual reports to the City Manager and General Managers.
- Cellular needs assessments are completed and required cellular equipment is provided to business units.
- Customer satisfaction is monitored and addressed appropriately for cellular services.
- Requests for new cellular equipment are received and managed in accordance with the new Cellular Management Policy.
- Mandated service performance is managed.
- Cellular services and charges associated with them are verified.

As indicated in report FCS10053 "Office Printing Equipment and Related Support Services and Supplies Contract, RFP# C12-03-10", a temporary 12 month Information Services position has been created to manage the Office Printing Equipment and Related Support Services and Supplies Contract (Print Contract) funded from existing resources in the approved capital project budget. This individual will also be responsible for managing the Cellular Contract and related support services.

The request for this position will be submitted to the 2011 budget process.

Legal: None.
HISTORICAL BACKGROUND (Chronology of events)

The award of the Corporate Cellular Services and Devices Contract to Bell Mobility was approved at the September 15, 2010, Council meeting via report FCS10029(a). Report FCS10029(a) included a recommendation “that staff be directed to report back on a Wireless Devices Management Policy at the October 12, 2010, Committee of the Whole meeting”. At the September 15, 2010, Council meeting, it was also approved that the responsibility for all cellular services will be consolidated into the Information Services Division of the Corporate Services Department.

The City currently has approximately 1,850 cellular devices under contract with Bell Mobility and approximately 360 cellular devices with Telus Mobility. Cellular devices are a combination of cell phones (1,121), smart phones (546), air cards (220) used in laptops to allow for staff mobility for work that is conducted outside the normal office environment and cellular in-vehicle modems (356) used in areas such as Public Works, Municipal Law Enforcement and Emergency Medical Services for vehicle location and vehicle tracking. The vehicle modems also allow for the capture of data required by Provincial Ministries.

With the consolidation of cellular services into the Information Services Division, it is essential that all existing policies be reviewed and updated and also that a Cellular Management Policy be created outlining responsibilities for Management, Cellular Device Users and Information Services staff. Information Services staff are also creating detailed procedures to clarify various process which will be linked back to the over-arching policy.

The over-arching policy – ‘Corporate Cellular Device Management Policy’, is attached as Appendix A. This policy outlines that the purpose of Cellular Devices are for business communication and related activities and will only be acquired when they provide increased efficiency, increased effectiveness, better customer service and a financial benefit to the corporation. The purpose of this policy is:

- to govern the purchase, usage, maintenance, administration and invoicing of cellular communication devices
- to ensure proper equipment is allocated in a fiscally responsible manner
- in response to recommendations made in Council report AUD10009.

The objective of this policy is to:

- To develop criteria to ensure that all qualified individuals covered by this Policy receive a City supplied cellular device that best meets their needs in fulfilling their job functions and expectations.
- To develop a procedure for the acquisition of new devices and replacement of devices when appropriate.
- To develop a “Corporate Cellular Device Use Agreement” that will be signed by all those covered by this policy prior to receiving a cellular device.

This policy governs the use of cellular devices procured by the City including:

- Cellular Phones
- Pagers
- Devices with integrated wireless communication ability (Smart Phone/Blackberry)
- Air Cards/USB Internet Sticks
- Vehicle Mounted Wireless Data Modems

The ‘Corporate Cellular Device Allocation Procedure’, is attached as Appendix B to report FCS10090. This document provides guidelines for allocating a specific device type with the standard criteria in each category being job function requires the employee to be away from the primary work site more than 50% of the time.

Information Services staff, in collaboration with the business units, has also created a Corporate Cellular Device Use Agreement, attached as Appendix C, which those covered by this policy must agree to abide by and sign prior to receiving a cellular device.

The contract award report for cellular services (FCS10029(a) noted that the contract will result in annual savings of $134,000 based on current usage patterns excluding the contract incentive payments from Bell Mobility and Bell Canada. Overall savings are estimated at $1.5 million over 4 years with proper management and incentive payments. Consolidating the management of and responsibility for Cellular Management to a single division and the creation of the appropriate Policy and Procedures will provide further savings by ensuring, as a minimum, the following:

- guidelines are adhered to for device acquisition
- Staff are allocated the appropriate device
- Personal use is reimbursed by staff
- Device use is properly monitored
- Regular reporting is provided to management
- Devices are cancelled when no longer required
- Devices are suspended when they will not be required for a length of time
- Appropriate plans are created and allocated based on individual needs
- Appropriate device training is provided
- Staff are educated around the various plans and when additional charges will be incurred
- Plans are adjusted to accommodate changing usage patterns.

It is important to note that there is currently a Device Allocation Criteria established for cellular devices, as well as a Cellular Use Agreement. The proposed policy is an
update to these documents which will be used as a means to educate staff on the corporate expectations of any user of a corporate cellular device.

**POLICY IMPLICATIONS**

This will be a new policy. The existing Cellular Use Policy and Device Allocation Policy have been updated to be implemented to supplement the award of the cellular services and device contract prior to any new devices being ordered.

**RELEVANT CONSULTATION**

Corporate Services Department, City Treasurer and Treasury Services, Financial Services Division, Purchasing Section; Corporate - Information Services Working Committee (ISWC); Corporate - Cellular Working Team, business unit representation from all departments.

**ANALYSIS / RATIONALE FOR RECOMMENDATION**

(include Performance Measurement/Benchmarking Data, if applicable)

The contract award report for cellular services (FCS10029(a)) noted that the contract will result in annual savings of $134,000 based on current usage patterns, excluding incentive payments. Consolidating the management of and responsibility for Cellular Management to a single division and the creation and enforcement of the appropriate Policies and Procedures will provide further savings.

**ALTERNATIVES FOR CONSIDERATION:**

(include Financial, Staffing, Legal and Policy Implications and pros and cons for each alternative)

None.
CORPORATE STRATEGIC PLAN  (Linkage to Desired End Results)


Skilled, Innovative & Respectful Organization

• More innovation, greater teamwork, better client focus
• An enabling work environment - respectful culture, well-being and safety, effective communication

Financial Sustainability

• Financially Sustainable City by 2020
• Delivery of municipal services and management capital assets/liabilities in a sustainable, innovative and cost effective manner

Growing Our Economy

• An improved customer service

Environmental Stewardship

• Reduced impact of City activities on the environment

APPENDICES / SCHEDULES

Appendix A – Corporate Cellular Device Management Policy – CORP-CCDM-00
Appendix B – Corporate Cellular Device Allocation Procedure – CORP-CCDM-01
Appendix C – Corporate Cellular Device Use Agreement
Corporate Cellular Device Management Policy - CORP-CCDM-00

Purpose
The purpose of this policy is:
• to govern the purchase, usage, maintenance, administration and invoicing of cellular communication devices;
• to ensure proper equipment is allocated in a fiscally responsible manner;
• in response to recommendations made in Council report AUD10009

Scope
This policy applies to all City of Hamilton staff, and elected officials that are directed to participate in the centralized procurement, use and administration of cellular devices and services.

This policy applies to all Agencies, Boards and Commissions that are directed or choose to participate in the Corporate Cellular Contract.

This policy governs the use of cellular devices procured by the City including:
• Cellular Phones
• Pagers
• Devices with integrated wireless communication ability (Smart Phone/Blackberry)
• Air Cards/USB Internet Sticks
• Vehicle Mounted Wireless Data Modems

City Strategic Commitment
Cell Phone and wireless communication devices are provided by the Information Services Division and are required in the normal course of conducting business. The Cell and Wireless communication infrastructure represents a significant investment for the City and must be managed with the intent of maximizing the value of that investment and ensuring there is no unnecessary increase in cell phone and wireless communication costs.

The purpose of Corporate Cellular devices is for City business communication and related activities. Corporate Cellular Devices will only be acquired when they will provide increased efficiency, increased effectiveness, improved customer service or a financial benefit to the corporation.

Occasional or incidental personal use of IT Resources is permitted within reasonable limits, provided it does not conflict with business use of time, impact negatively on other staff, or on technology resources or adversely affect an individual's performance of work duties and responsibilities. Staff are responsible for exercising good judgment regarding the reasonableness of personal use. It is the employee’s responsibility to reconcile and reimburse any charges such as personal long distance.

This policy will support the City’s Strategic Plan by providing effective and sustainable growth management of the wireless communication environment.

Objective
To develop criteria to ensure that all individuals covered by this Policy, if qualified to receive a City supplied cellular device, are allocated the device that best meets their need in fulfilling their job functions.

To develop a procedure for the acquisition of new devices and replacement of devices when appropriate.

To develop a “Corporate Cellular Device Use Agreement” that will be signed by all those covered by this policy prior to receiving a cellular device.
## Definitions

<table>
<thead>
<tr>
<th>Term</th>
<th>Description</th>
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<tbody>
<tr>
<td>Cellular</td>
<td>Telecommunication with devices that do not rely on land lines for connectivity</td>
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<tr>
<td>Cellular Phone</td>
<td>A mobile device that is traditionally used for voice communication</td>
</tr>
<tr>
<td>Cellular Device</td>
<td>Any mobile device that captures or transfers information for transmission over a service provider's wireless network.</td>
</tr>
<tr>
<td>Smart Phone/Blackberry</td>
<td>A mobile phone that offers more advanced computing ability and connectivity than a basic cellular phone. Provides ability to transmit/receive email, access the internet, and access software applications.</td>
</tr>
<tr>
<td>IDEN</td>
<td>Integrated Digital Enhanced Network developed by Motorola that provides users with the benefits of trunked radio and cellular telephone. Often deployed in the first responder community or where voice communication to a large number of people is required. This network is used for Push to Talk devices.</td>
</tr>
<tr>
<td>Push to Talk</td>
<td>Push-to-talk (PTT), also known as Press-to-Transmit. Similar to a walkie talkie, this device allows a message to be distributed to multiple users simultaneously.</td>
</tr>
<tr>
<td>Push to Talk Group</td>
<td>A predefined group of Push to Talk devices that can have a single message transmitted to simultaneously. Allows a single message to reach a large number of Push to Talk users in the same push to talk group.</td>
</tr>
<tr>
<td>Air Cards</td>
<td>Devices that can be inserted into hardware such as a Personal Computer that allows the computer to become connected to the internet wirelessly.</td>
</tr>
<tr>
<td>Wireless Data Modem</td>
<td>A device that encodes digital computer signals into analog/analogue telephone signals and vice versa and allows computers to communicate over a wireless infrastructure.</td>
</tr>
<tr>
<td>Vehicle</td>
<td>Car, truck etc. that is owned by the City, as well as a personal vehicle operated by an employee while conducting City business.</td>
</tr>
<tr>
<td>Roaming Charges</td>
<td>Additional charges that are incurred when using a cellular device is used outside of Canada. Roaming charges may also be incurred when using a cellular device near the border where the cellular signal is picked up from the United States.</td>
</tr>
<tr>
<td>Authorized Users</td>
<td>Individuals who have been given permission to use a Corporate cellular device</td>
</tr>
<tr>
<td>Value Added Reseller (VAR)</td>
<td>An affiliate of a cellular service provider that provides wireless hardware, accessories, and associated equipment for use on the service provider’s wireless network.</td>
</tr>
<tr>
<td>Service Provider</td>
<td>Means a provider of wireless communication services including airtime, paging, and data transfer services. The service provider is also referred to as the cellular carrier.</td>
</tr>
<tr>
<td>Acceptable Cellular Use Agreement</td>
<td>An agreement, to be reviewed and signed by each employee allocated a City owned Cellular device, outlining the acceptable use of a City owned cellular device.</td>
</tr>
<tr>
<td>Land Line Device</td>
<td>Corporate office phone used by City staff.</td>
</tr>
</tbody>
</table>

## Administration

The IS Division will implement appropriate management and administrative processes to ensure compliance with this policy. IS shall monitor the cell and wireless device usage to ensure optimal performance of the cell and wireless communication for business advantage. The IS Division will provide Departmental Senior Management with regular usage reports on a monthly basis allowing for better management at a section/division/departmental level.

## Responsibilities

### Management Responsibilities:

- Departmental Management must, in consultation with Information Services, determine the appropriate corporate standard device type based on the Corporate Cellular Device Allocation Procedure CORP-CCDM-01.
- Authorize the eligibility of staff for a cellular device of any type.
- Review monthly usage reports.
- Assign a cost centre for each device as part of the ordering process.
- Pay for all costs related to their department/division/section cellular devices including all charges, such as long distance, roaming, overage, phone accessory cost and device replacement and repair cost.
- Ensure that staff adhere to the “Corporate Cellular Device Use Agreement”
• Ensure that reimbursement for personal use is recovered from staff and processed as outlined in procedure CORP-CCDM-02.
• Acquire any necessary accessories for cellular devices through Information Services.
• Ensure that devices are cancelled when no longer required

User Responsibilities:
• All users of City of Hamilton’s cellular devices must read, acknowledge and agree to abide by the “Corporate Cellular Device Use Agreement” by signing the agreement prior to receiving a device.
• The primary purpose of Corporate Cellular devices is for City business communication and related activities. Cost for personal use must be reimbursed to the City as per the “Corporate Cellular Device Use Agreement” via procedure CORP-CCDM-02.
• All requests for service and acquisition are to be processed through the Information Services Division.

Information Services Responsibilities:
• Break/fix service to all cellular devices
• Training on devices
• Respond to questions around the cellular contract and specific device functions
• Acquisition of the corporate standard cellular device into the appropriate plan
• Manage cellular related contracts and agreements in place with external service providers.
• Ensure all invoices are electronically received and processed.
• Ensure all required management reporting is completed and distributed to management monthly.
• Advise users on appropriate plans and acquire user specific plans as necessary.
• Ensure users are provided new and replacement cellular devices in a timely manner.
• Work with departments to adjust individual plans minimizing communication plans while meeting user’s functional requirements
• Report abnormal use to appropriate manager
• Maintain a web page on eNet with Cellular information and FAQ’s
• Establish Corporate Standard for each device type
CITY OF HAMILTON
CORPORATE CELLULAR DEVICE ALLOCATION PROCEDURE

DEVELOPED BY: Information Services PROCEDURE # CORP-CCDM -01
DATE: 2010-SEP-23 APPROVED BY: Senior Management Team

The purpose of this procedure is to provide guidelines for the allocation of any Corporate Cellular Device.

II. SCOPE AND RESPONSIBILITY:

This procedure applies to all City of Hamilton staff, and elected officials that are directed to participate in the centralized procurement, use and administration of cellular devices and services.

This procedure applies to all Agencies, Boards and Commissions that are directed or choose to participate in the Corporate Cellular Contract.

This procedure governs the use of cellular devices procured by the City including:

• Cellular Phones
• Pagers
• Devices with integrated wireless communication ability (Smart Phone/Blackberry)
• Air Cards/USB Internet Sticks
• Vehicle Mounted Wireless Data Modems

DEFINITIONS:

REFER TO CELLULAR DEVICE MANAGEMENT POLICY CORP-CCDM-00

Responsibility:

Management Responsibility

• Departmental Management must, in consultation with Information Services, determine the appropriate corporate standard device type to meet the specific users needs
• Authorize the corporate standard device type to be allocated based on the approval level outlined in the procedure.
• Regularly review device type allocation and usage making the necessary modifications should employee duties change.
• Complete the Cellular Device order form, provide the necessary approval signatures and forward to the Information Services division for ordering.
• Each department will be responsible for all costs for a Cellular Device of any type.
### III. ALLOCATION CRITERIA

**Principles:**
- It must be established that the employee work efficiency and effectiveness will increase if allocated a Corporate Cellular device.
- The Guidelines for Cellular Device selection require an employee meet one or more of the criteria outlined for each device type.
- Meeting a single criterion in any device category does not require the employee to be allocated a specific device type.

### Cellular Selection Guidelines

<table>
<thead>
<tr>
<th>Device Type</th>
<th>Criteria</th>
<th>Authorization Level</th>
</tr>
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</table>
| Standard Alpha-numeric pager | • Job function requires the employee to be away from their primary work site more than 50% of the time  
  • Job function requires employee to be available to receive text communication on an immediate or continuous basis | Director Level Approval Required |
| Standard Cell Phone with Camera functionality (ruggedized) | • Job function requires the employee to be away from their primary work site more than 50% of the time  
  • Job function requires employee to be available for voice communication on an immediate or continuous basis  
  • Job function requires employee to communicate via voice with others to complete their job function on an ongoing or continuous basis | Director Level Approval Required |
| Standard Smart Phone/Blackberry (includes camera functionality) | • Job function requires the employee to be away from their primary work site more than 50% of the time.  
  • Job function requires the employee to attend a number of meetings away from their primary work site.  
  • Job function requires employee to be available to receive voice and email communication on an immediate or continuous basis  
  • Job function requires employee to communicate via voice or email immediately with others to complete their job function on an ongoing or continuous basis.  
  • Job function may require employee to access the internet for information while away from the primary work site.  
  • Job function requires employee, while away from primary work location, to schedule/coordinate meeting dates and determine availability. | General Manager Level Approval Required |
<table>
<thead>
<tr>
<th>Job function</th>
<th>Description</th>
<th>Approval</th>
</tr>
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<tbody>
<tr>
<td>Job function includes the frequent need for the employee to capture images to be sent electronically.</td>
<td>Director Level Approval Required</td>
<td></td>
</tr>
<tr>
<td>Air Card</td>
<td>Job function requires the employee to perform their duties outside of the standard office environment on a regular basis. Job function requires employee to have a corporate laptop. Job function requires employee to be able to log on to the corporate network while performing normal duties away from the primary work location.</td>
<td>Director Level Approval Required</td>
</tr>
<tr>
<td>Modem</td>
<td>Corporate vehicle is using an Automated Vehicle Location solution requiring data to be captured and or transmitted.</td>
<td>Director Level Approval Required</td>
</tr>
<tr>
<td>Blue Tooth Hardware</td>
<td>Job function must meet device type criteria and have a need to use the device type while driving on a regular basis.</td>
<td>Director Level Approval Required</td>
</tr>
<tr>
<td>Push to Talk Technology</td>
<td>Job function must meet device type criteria and require two way radio communication with 3 or more staff simultaneously.</td>
<td>Device Type Approval Applies.</td>
</tr>
<tr>
<td>Text Messaging Plan</td>
<td>Job functions requires the employee to send more than 250 text messages per month</td>
<td>Director Level Approval Required</td>
</tr>
</tbody>
</table>

1. Corporate Standard models will be established by Information Services for each device type.
2. Cellular plans will be selected based on usage requirements in order to minimize costs. Usage and plans will be reviewed regularly and changed as required.
3. Any non compliant request can be appealed by the Departmental Director through the General Manager of Finance and Corporate Services