

TABLE of CONTENTS

	Page
Introduction	2
Town of Wellfleet IT Policy (Vision – Goals - Objectives)	3 – 4
Administrative Policies	5 - 6
Goals for Increased Efficiency & Reduced Costs	7
Appendix A: Terms & Definitions	8
Appendix B: Proper IT Documentation	9 – 11
Appendix C: Massachusetts State Policy	12 – 15

TOWN of WELLFLEET
COMPUTERIZATION POLICY

SCOPE of WORK:

Nov. 13, 2007:

MOTION: To move that the Board of Selectmen vote to have the Finance Committee move forward with a specific charge to recommend goals and areas for policy.

Motion by: Jacqui Beebe. Seconded by: Ira Wood.

Yea 5 Nay 0

Introduction

To accomplish this assignment, the Finance Committee formed a subcommittee composed of Patricia Foley, Arlene Kirsch, John Makely, and Sylvia Smith. This group conducted Town policy fact-finding interviews with the Director or Manager of Information Technologies in Brewster, Chatham, Eastham, Harwich, Truro, and Provincetown. We also studied the 2002 BOS Computer and Internet Use Policy.

In December 2007, follow-up surveys were sent to 11 department heads in eight Lower Cape communities, including Wellfleet. These surveys asked about content & frequency of Information Technology training, department uses of computers, software installed, perceived benefits to their department and their town, levels of authority, and the disposal of retired computers and their data.

Policy recommendations were solicited and received from five Information Technology service providers and consultants. Finally, the Information Technology policies of Brewster, Hingham, and Plymouth were reviewed.

The Computerization Policy of February 2008 is a living document subject to periodic revision.

It may be beneficial to designate an Information Technology chain of command and information within the Wellfleet Town government.

Town of Wellfleet Information Technology (IT) Policy

Vision - Goals - Objectives

The **vision** driving this policy is a migration from the current high-cost organizational model (user groups isolated from one another and unable to leverage knowledge and technology existing in other groups; widespread duplication of effort; software license issues; etc.) to a networked system that fosters cooperation, shared resources, and the simplicity/control inherent in a model designed with all Town offices' needs in mind.

Cost reduction is achieved by: 1) Simplicity: the system matches the scale of the Town government and the do-for-yourself independent mindset of our group leaders; 2) Sensible Centralization: creation of a system that allows for sharing things that everyone needs such as a website, a database, and ideas; and the overarching organizational scheme matching up with the financial organizational infrastructure.

As the Central Plan is incrementally implemented, the cost curve should decline, which should bring about savings by tracking and reporting at annual intervals.

The **goal** of supplying Town Employees with computer access and configuring the computers with software appropriate for the tasks to be performed is to improve employee productivity and improve customer service to residents and non-residents.

Objectives: The Commonwealth's IT policy states: "The Commonwealth has a responsibility to ensure that information technology solutions are selected based on best value after careful consideration of all possible alternatives including proprietary, public sector code sharing and open source solutions" [see Appendix C]. Similarly, the following policy — effective February 19, 2008 — is intended to facilitate the goal above in a way that will **maximize efficiencies and minimize costs** and that fits present IT needs and plans for future IT needs, including long-term solutions in the areas of Town data security, legal/liability issues related to an IT program, Town equipment security, website plans, re-establishment of a Computer Committee, maintaining an inventory of computer software and hardware, use and oversight of short-term contractors, access to Town IT-related data, an IT disaster plan [*to be developed*], and decisions for the Town Administrator. The policy also will protect the Town, the privacy of residents and non-residents, the Town's investments in IT, and the employees of the Town.

The technologies affected include, but are not limited to, computers, computer files, software, printers, scanners, servers and any other physical equipment, as well as electronic mail, voice mail, Internet and Intranet, and portable communication devices.

The Town of Wellfleet expects all employees to use these information technologies solely for business purposes. Employees should not assume that any computer equipment or technologies, such as electronic mail and data, are confidential or private. The Town (or its designated representatives) maintains the right and ability to enter these computer systems to access and review any information.

Disciplinary action will occur whenever a breach of security or hacking is detected and determined to be

intentional or negligent. Any employee found to have violated this policy may be subject to disciplinary action, up to and including termination of employment.

Managers and supervisors are responsible for ensuring that all of their employees using computers have read this policy and understand its applicability to their activities.

These regulations may be updated from time to time and amended at the discretion of the Board of Selectmen.

INFORMATION TECHNOLOGIES (IT) ADMINISTRATIVE POLICIES

1. A Town-owned computer inventory, including related equipment, and a maintenance log shall be maintained by the procurement officer or Town Administrator's office. The inventory must also include all software, including anti-virus, as well as Vendor support contracts for each computer. The TA and/or ATA are required to provide oversight to the IT professionals who will maintain the computer inventory and log in order to avoid conflict of interest. All Town-owned equipment will bear a numbered asset tag. [See Appendix B.]
2. Any bid package for IT services and/or new IT position proposal will define specifically the scope of work to be performed (*e.g.*, maximum hours per week; repairs/maintenance; networking; IT planning; etc.).
3. IT staff or contractors, through the nature of their duties, have access to most, if not all of the documents of Town staff (emails, computer files, discs, backups, etc). Any IT hire or contractor will be required to sign to a confidentiality agreement regarding Town documents.
4. Evaluations of any IT services will be performed annually in September. An evaluation form will be developed based on the Town's IT policy and on customer satisfaction (all departments).
5. The Town requires the IT personnel to ensure that all data is backed up regularly, at least weekly, using tested procedures including periodic off site storage. In addition, recognized quality anti-virus software will be installed on every PC computer.
6. The Town requires that confidential information have adequate, effective access controls including, but not limited to, user passwords and firewalls. Department heads who want administrative privileges [*to be defined by the Town Administrator*] can have them once they have received training. Employees must have written permission from their supervisors to take home computers. All computer repairs will be made on Town property, with limited exceptions, to ensure that confidential data has adequate controls. Town Administrator must give written permission for the removal of any computers from Town property.
7. Repair/Replacement: The Town will purchase computers from vendors of recognized quality (*e.g.*, Dell, HP, etc.) and obtain three-year onsite warranties and "bundled" software as appropriate to forego the need for additional installation charges. The Town will pay for repairs for a computer that is more than three years old (and post-warranty) if repair call time is two hours or less unless decided to be appropriate for reasons decided by Town Administrator. In some circumstances, if longer times for repairs are needed to service a machine, that machine will be recycled as appropriate. Recycled or rebuilt older computers may be moved to departments whose computing needs may be minimal (library public use, for example).

A minimum of two rebuilt or refurbished computers shall be available for emergency use in the event of a computer crash.

The Town will maintain standard PC categories for ordering new computers based on types of use, such as: basic users get configuration A, power configuration B, multimedia users (CAD/ graphics) get configuration C, etc. These configurations will be reviewed annually to ensure efficiencies, and updated as needed at that time.

8. Software development: Town staff shall move toward using standard, off-the-shelf software to avoid dependency on one person's expertise in perpetuity. If something should go wrong with the customized program after the author of a customized program is unavailable, the Town's services suffer.
9. The Town will cap the hours that it is willing to pay for the following services to two to four hours, with the ability to submit on a case-by-case basis pre-work justification for extending the cap:
 - ◆ Rebuild a PC after Windows Operating System corruption (hard drive is found to be okay) if the decision to rebuild is in keeping with this Policy (see # 6 above);
 - ◆ Time to troubleshoot whether a hard drive is defective;
 - ◆ Rebuild a PC after a hard drive failure if the decision to rebuild is in keeping with this Policy (see # 6 above);
 - ◆ Backup user data before rebuilding a PC;
 - ◆ Restore user data after rebuilding a PC;
 - ◆ Install software on a new PC if not bundled.
10. The Town will standardize a practice that recycles (or if necessary) discards, rather than repairs, older PCs. All hard drives that are earmarked for recycling or replacement will be wiped clean first. Town staff will exercise due diligence in discarding equipment in an environmentally appropriate manner.
11. The Town will standardize a practice that identifies IT-related training needs of its employees annually through:
 - a) a review of IT service calls per employee;
 - b) discussions between department heads and employees; and
 - c) written requests with justification by employees. The procurement officer will identify appropriate training venues using references to ensure effectiveness and inquiries regarding cost.

COMPUTERIZATION GOALS FOR INCREASED EFFICIENCY AND REDUCED COSTS

1. The Town Administrator, with input from Department heads and Selectmen, may consider bidding for and using more than one IT consultant, each of whom would perform different services appropriate to their expertise.
2. The Procurement officer, with assistance from IT personnel, will find sources for hosting the Town website at significant annual savings to the Town.
3. Bundled software should be purchased only after a determination that it is cheaper than multi-user licenses (taking into account installation fees by the local IT personnel). In addition, the procurement officer and Town Administrator shall investigate municipal software such as Munis and also Open Source software, and determine whether to begin their uses here.
4. The procurement officer shall review the age of programs in current use on Town-owned computers annually (see log in #1 under "IT Administrative Policies").
5. The Town will explore ways to increase connectivity among Town employee computers, ensuring that data is public to the widest extent possible while at the same time ensuring that confidential information has adequate, effective access controls.
6. The IT consultant will work with the Town Administrator to plan and implement new features such as hardware and security upgrades, converting from an older word processing program to a new one, etc.
7. Examine options for Internet connections, email, and phone service.
8. Work toward having all work backed up daily on servers.
9. Work toward having desktop support for all Town computer users.
10. After an audit of all computers and software, including anti-virus, has been completed, more goals may be added.

APPENDIX A: Terms and Definitions

Anonymizer: A privacy service that allows a user to visit Web sites without allowing a visited Web site to gather information about them, such as their IP address.

Cable Modem: Cable companies such as Comcast Broadband provide Internet access over Cable TV coaxial cable. A cable modem accepts this coaxial cable and can receive data from the Internet at over 1.5 Mbps.

DSL: Digital Subscriber Line (DSL) is a form of high-speed Internet access competing with cable modems. DSL works over standard phone lines and supports data speeds of over 2 Mbps downstream (to the user) and slower speeds upstream (to the Internet).

Email: The electronic transmission of information through a mail protocol such as SMTP. Programs such as Microsoft Outlook use SMTP.

Forwarded email: Email resent from internal networking to an outside point.

Hacking: Widely used to describe people who gain illegal entrance into a computer system.

Hardware: Computers, printers, scanners, servers and any other physical equipment.

Internet: Global network of computers used to communicate and provide information.

Network: The collaboration of computers and shared electronic information.

Open Source Software: Refers to software whose underlying code is available for inspection and modification by the licensee, may be available for re-distribution and may be deployed without a license fee.

Piracy: The illegal copying of software for personal or commercial use.

Sensitive information: Information is considered sensitive if it can be damaging to the Town of Wellfleet or its reputation, or standing.

Spamming: Sending copies of the same message to large numbers of newsgroups.

Spam: Unauthorized and/or unsolicited electronic mass mailings.

Unauthorized Disclosure: The intentional or unintentional revealing of restricted information to people who do not have a need to know that information.

User: Staff, vendor, or citizen employing the use of the information contained within the computer resources owned by the Town of Wellfleet.

Virus: Executable computer program that can attach itself to an item, such as a computer startup area (boot record), executable file or email. A virus may have a number of objectives – most are usually destructive.

APPENDIX B

Proper IT Documentation [*courtesy of Cristian Patapie*]

Information Technology logs should include all hardware, software, and systems to ensure a smooth transition to incoming IT consultants and contractors when turnover occurs.

Computers

1. main staff username; location;
2. is connected to domain / is single-pc mode; domain name;
3. manufactured or custom built?
4. if manufactured: manufacturer, year, model, serial, service tag, purchase date, vendor, warranty terms, warranty expiry date; vendor contact info and account number;
5. hardware specs: processor model and speed; RAM; maximum RAM; HDD(s) capacity, optical drive;
6. network adapter speed;
7. network: name, domain, workgroup; IP stack, DHCP or static;
8. network: network printers, servers, shares, and mapped drives;
9. backup: backup method and location;
10. if laptop: encryption software;
11. software: OS, version, license #, date purchased, vendor, update status and settings;
12. software: antivirus, version, license #, license expiry date, date purchased, vendor;
13. software: office suite, version, license #, date purchased, vendor;
14. software: list of other software;
15. Maintenance log: crashes, repairs, moves, hardware changes, upgrades.

Printers / copiers

1. location; networked or local;
2. if networked: IP stack, DHCP or static;
3. manufacturer, model, serial;
4. vendor, purchase date, warranty terms, warranty expiry date;
5. Maintenance log: crashes, repairs, moves, hardware changes, upgrades, page counts.

Network devices

1. location;
2. if networked: IP stack, DHCP or static;
3. manufacturer, model, serial;
4. vendor, purchase date, warranty terms, warranty expiry date;
5. speed, ports, managed / non-managed, Mac addresses, remote interfaces;
6. Maintenance log: crashes, repairs, moves, firmware upgrades;

Monitors

1. location;
2. manufacturer, model, serial;
3. vendor, purchase date, warranty terms, warranty expiry date;
4. Maintenance log.

Servers

1. main purpose; location;
2. is connected to domain / is single-pc mode / is domain controller; domain name;
3. manufactured or custom built?
4. if manufactured: manufacturer, year, model, serial, service tag, purchase date, vendor, warranty terms, warranty expiry date; vendor contact info and account number;
5. hardware specs: processor model and speed; RAM; maximum RAM; HDD(s) capacity, optical drive;
6. network adapter speed;
7. network: name, domain, workgroup; IP stack, DHCP or static;
8. network: network printers, servers, shares, and mapped drives;
9. backup: backup software;
10. software: OS, version, license #, date purchased, vendor, update status and settings;
11. software: antivirus, version, license #, license expiry date, date purchased, vendor;
12. software: office suite, version, license #, date purchased, vendor;
13. software: list of other software;
14. Maintenance log: crashes, repairs, moves, hardware changes, upgrades.

Network

1. network topology, listing location and connections of all servers, PCs, network-enabled devices, routers, switches, modems;
2. network names, VPNs, usernames and passwords;
3. wireless networks, protocol, security settings, usernames, access keys, locations;
4. ISP details for each Town office location: connection type, connection speed, account number, username / password, tech support contact.

Specialized Software

1. name, version, release date;
2. vendor, contact, license #, license terms, expiration date if applicable;
3. manufacturer, contact, tech support contact;
4. copies of config files, settings, owner's manuals and guides;
5. location of servers and workstations where installed, assigned users;
6. maintenance log: crashes, resolutions, updates and patches.

Telephony equipment

1. network topology, listing location and connections of switches, and other devices;
2. ISP details for each Town office location: connection type, connection speed, account number, username / password, tech support contact;
3. manufacturer, model, serial number of equipment;
4. vendor, purchase date, warranty terms, warranty expiry date;
5. specs, ports, interfaces;
6. documentation, manuals and guides, setting codes, voicemail and extension codes;
7. Maintenance log: failures, repairs, firmware upgrades.

PDA's and cell phones

1. manufacturer, model, serial number of equipment;
2. vendor, service provider, purchase date, warranty terms, warranty expiry date;
3. voice and data service plan terms;
4. name of staff member who uses it, or have used it in the past;
5. Maintenance log: failures, repairs, replacements, firmware upgrades.

Credit Card machines

1. manufacturer, model, serial number of equipment;
2. vendor, purchase date, warranty terms, warranty expiry date;
3. service provider, tech support contact, service terms and rates;
4. voice and data service plan terms ;
5. location, codes, authorized users.

Appendix C: Massachusetts State Policy

Policy Area: Application/Application Development	Policy #: ITD-APP-02
Title: Enterprise Information Technology Acquisition Policy	Effective Date: January 13, 2004

Issue Statement

The Commonwealth has a responsibility to ensure that information technology solutions are selected based on best value after careful consideration of all possible alternatives including proprietary, public sector code sharing¹ and open source solutions. The purpose of this policy is to ensure that those solutions that may not be otherwise represented by IT vendors during the procurement process are identified and evaluated by agencies as part of their best value selection of IT solutions.

Major terms used in this policy are defined as follows:

Best Value: The Commonwealth's procurement philosophy that states that it is in the best interest of the Commonwealth for solicitation evaluation criteria to measure factors beyond cost. Please see the *Procurement Policies and Procedures Handbook* for a more complete definition of Best Value. For IT investments, a best value evaluation should, at a minimum, consider total cost of ownership over the entire period the IT solution is required, fit with identified business requirements, reliability, performance, scalability, security, maintenance requirements, legal risks, ease of customization, and ease of migration.

Proprietary Software: Software typically subject to a use fee under a license that limits access to and modification of the underlying source code, and restricts redistribution to others.

Open Source Software: Refers to software whose underlying code is available for inspection and modification by the licensee, may be available for re-distribution and may be deployed without a license fee.

Public Sector Code Sharing: Software code that is owned by a public entity and is made available to other public entities for use and modification without royalties.

Applicability

Agencies within the Executive Department and vendors providing information technology goods and services to these agencies must comply with this policy.

Commonwealth's Position

IT investments should reduce the total cost of ownership to the Commonwealth while maximizing flexibility and reuse.

IT investments should facilitate the consolidation of platforms that provide the highest flexibility and scalability in order to achieve best value and economies of scale while meeting business requirements.

Policy Statement

Agencies must conduct a best value evaluation for IT investments. This evaluation should consider, at a minimum, total cost of ownership over the entire period the IT solution is required, fit with identified business requirements, reliability, performance, scalability, security, maintenance requirements, legal risks, ease of customization, and ease of migration.

For all prospective IT investments, agencies must consider as part of the best value evaluation all possible solutions, including open standards compliant open source and proprietary software as well as open standards compliant public sector code sharing at the local, state and federal levels.

Available online at:

http://www.mass.gov/?pageID=itdterminal&L=3&L0=Home&L1=Policies%2cStandards+%26+Guidance&L2=Enterprise+Policies+%26Standards&sid=Aitd&b=terminalcontent&f=policies_standards_it_acquisition_policy1&csid=Aitd

Massachusetts Law

There are three major ways in which Mass. Law and policy impacts email:

- ◆ **Open Meeting:** Email is subject to the Open Meeting law. From the state guidelines: “conversations held in person or over the telephone, e-mail conversations among a quorum of members of a governmental body that relate to public business violate the Open Meeting Law, as the public is deprived of the opportunity to attend and monitor the e-mail “meeting.” Thus it is a violation to e-mail to a quorum messages that can be considered invitations to reply in any medium, and would amount to deliberation on business that must occur only at proper meetings. It is not a violation to use email to distribute materials, correspondence, agendas or reports so that committee members can prepare individually for upcoming meetings.”
- ◆ **Public Record:** Email is a public record and subject to public records access. This means that anyone can request access to your email messages.
- ◆ **Document Retention:** If a document is required to be retained on paper, it is required to be retained if it is part of an email message. You are responsible for printing it out and saving it.

Computer and Internet Use Policies

◆ **Software Licensing & Compliance**

All software used by Town of Wellfleet employees and/or installed on computers belonging to the Town of Wellfleet must be fully licensed and used according to license terms.

Software may not be brought home for use on home computers, even if being used for Town business.

Software may not be brought in from home unless the software is donated to the Town of Wellfleet and properly accepted by the Board of Selectmen and that such donation is in compliance with the licensing terms of the software.

To ensure licensing compliance, purchases of computer hardware and software must be made through the Computer Committee and the Information Technology Department.

Any software that is not properly licensed must be reported to the Computer Committee or IT Department for removal.

◆ **Internet**

The Town of Wellfleet provides access to the Internet for employees. Because the Town provides Internet access to assist you in the performance of your job, you should use it for official business.

Employees should be aware that other town employees, particularly Information Technology employees may access e-mail, documents on servers and local drives, web access records, and other materials as an incidental part of their duties. This includes investigations of

misuse of resources for unacceptable purposes, such as, but not limited to those below. Workstations may be temporarily reassigned, providing other employees with access to the contents of a local drive.

All computer resources, including e-mail, are property of The Town of Wellfleet and no guarantee of privacy is made.

Use of the Internet or Town of Wellfleet computer resources of any kind for the following activities is forbidden:

- ◆ Distribution of destructive programs (i.e., viruses and/or self-replicating code)
- ◆ Hateful, harassing, or other anti-social behavior
- ◆ Sending unsolicited commercial e-mail (i.e., SPAM)
- ◆ Intentional damage or interference with others (for example, hacking and distributing viruses)
- ◆ Dissemination or printing of copyrighted materials (including articles and software) in violation of copyright laws
- ◆ Sending, receiving, printing or otherwise disseminating proprietary data or other confidential information of The Town of Wellfleet or the Town citizens in violation of town policy or local, state, or federal law
- ◆ Making publicly accessible obscene files
- ◆ Offensive or harassing statements or language including disparagement of others based on their race, national origin, sex, sexual orientation, age, disability, religious or political beliefs
- ◆ Sending or soliciting sexually oriented messages or images
- ◆ Operating a business, usurping business opportunities or soliciting money for personal gain
- ◆ Engaging in any other activity that would bring disrepute to The Town of Wellfleet
- ◆ Engaging in any other activity in violation of the law
- ◆ Failure to abide by these guidelines will result in disciplinary measures up to and including termination.