



# County of Monterey

Board of Supervisors  
Chambers  
168 W. Alisal St., 1st Floor  
Salinas, CA 93901

## Board Report

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**File #:** A 20-423, **Version:** 1

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- a. Authorize the Director of the Information Technology Department to execute Amendment No. 1 to the non-standard agreement with Carahsoft Technology Corporation to renew DocuSign Enterprise Program for Government and system support, renewing the agreement retroactive to September 17, 2020 and adding \$31,878 for a total agreement amount of \$51,858.
- b. Authorize the Director of the Information Technology Department to execute service order forms and such documents as are necessary to implement extension of the agreement; and
- c. Accept non-standard contract provisions as recommended by the Director of Information Technology; and
- d. Authorize the Director of Information Technology to sign up to three (3) renewals, of one (1) year each, of the agreement, provided additional costs do not exceed ten percent (10%) of the cost of Amendment No. 1 (\$3,188 maximum additional cost), subject to County Counsel review and provided the terms of the agreement remain substantially the same.

**RECOMMENDATION:**

It is recommended that the Board of Supervisors:

- a. Authorize the Director of the Information Technology Department to execute Amendment No. 1 to the non-standard agreement with Carahsoft Technology Corporation to renew DocuSign Enterprise Program for Government and system support, renewing the agreement retroactive to September 17, 2020 and adding \$31,878.00 for a total agreement amount of \$51,858.
- b. Authorize the Director of the Information Technology Department to execute service order forms and such documents as are necessary to implement extension of the agreement; and
- c. Accept non-standard contract provisions as recommended by the Director of Information Technology; and
- d. Authorize the Director of Information Technology to sign up to three (3) renewals, of one (1) year each, of the agreement, provided additional costs do not exceed ten percent (10%) of the cost of Amendment No. 1 (\$3,188.00 maximum additional cost), subject to County Counsel review and provided the terms of the agreement remain substantially the same.

**SUMMARY:**

In Fiscal Year 2019/2020, the Information Technology Department (ITD) implemented DocuSign electronic workflow and signatures to the Resource Management Agency (RMA), the Human Resources Department (HRD) and ITD to pilot the automation of manual, paper-based processes and increase the County's business operations efficiency. With successful conclusion of the pilot, ITD rolled out DocuSign to all County departments, with the addition of new HRD forms and workflows required to effectively support staff assignment and location changes in the County's workforce due to the COVID19 pandemic. The full rollout to all departments and increased demand due to the pandemic, significantly increased the County's DocuSign usage. The proposed Amendment will extend the term of the Agreement and increase the envelopes by 14,000.

**DISCUSSION:**

The 2019/2020 DocuSign pilot project to RMA and ITD demonstrated that use of DocuSign or a similar product increases speed to results, reduces costs, improves visibility and control, and provides excellent customer experiences. On March 24, 2020, the Board approved and adopted the Monterey County Policy on Electronic Signatures, citing DocuSign as one of the County's E-Signature Solution Providers.

As directed in the Monterey County Policy on Electronic Signatures, Contracts/Purchasing implemented and encouraged County suppliers and County staff to use electronic signature technology to process documents as permitted by law. In addition, physical distancing demanded by the onset of COVID-19 pandemic, required new HRD forms and workflows to process changes in work assignment, locations and requests for special/emergency leaves.

DocuSign is now in use in all County departments and continues to prove to be the solution to speed up processing results while providing County visibility and control with reduced costs and excellent customer experiences.

OTHER AGENCY INVOLVEMENT:

- a. County Counsel concludes that electronic signatures are legally enforceable and carry the same evidentiary weight as pen-to-paper signatures.
- b. Contracts/Purchasing has updated procurement process to utilize DocuSign for signatures.
- c. Human Resources Department website has been updated to provide self-service DocuSign forms for County staff use.
- d. County Counsel has reviewed does not approve non-standard terms.

FINANCING:

The funds for this service in the amount of \$31,878 have been included in the FY20-21 Adopted Budget for the Information Technology Department, ITD 1930, Budget Unit 8433, Appropriations Unit INF002.

BOARD OF SUPERVISORS STRATEGIC INITIATIVES:

The implementation of electronic signatures and automated workflow procedures streamlined County document processes.

- Economic Development
- Administration
- Health & Human Services
- Infrastructure
- Public Safety

Prepared by: Sandra Shaffer, Management Analyst III, 759-6957

Approved by:

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Date: \_\_\_\_\_  
Eric A. Chatham, Director of Information Technology, 759-6920

Attachments:

- DocuSign Master Agreement
- DocuSign Pricing
- DocuSign Renewal - Order Form

Attachments on file with the Clerk of the Board