



County of Monterey

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

Board Report

File #: A 23-106, **Version:** 1

- a. Authorize the Chief Information Officer or his designee to execute Amendment No. 1 to the non-standard agreement with DocuSign, increasing the contract by \$50,000 for a total not to exceed \$414,318; and
- b. Authorize the Chief Information Officer to execute service order forms and such documents as are necessary to implement the amendment; and
- c. Accept non-standard contract provisions as recommended by the Chief Information Officer; and
- d. Authorize the Chief Information Officer to sign up to three (3) amendments or renewals of one (1) year each, of the agreement, provided additional costs do not exceed 10% of the cost of the prior year 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 Chief Information Officer or his designee to execute Amendment No. 1 to the non-standard agreement with DocuSign, increasing the contract by \$50,000 for a total not to exceed \$414,318; and
- b. Authorize the Chief Information Officer to execute service order forms and such documents as are necessary to implement the amendment; and
- c. Accept non-standard contract provisions as recommended by the Chief Information Officer; and
- d. Authorize the Chief Information Officer to sign up to three (3) amendments or renewals of one (1) year each, of the agreement, provided additional costs do not exceed ten percent (10%) of the cost of the prior year subject to County Counsel review and provided the terms of the agreement remain substantially the same.

SUMMARY:

The Information Technology Department manages the County's DocuSign electronic workflow and signature automation business operations. The proposed Amendment increases the total envelope allowance under the master agreement by 70,000 to meet the needs of the County.

DISCUSSION:

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.

DocuSign's electronic signature technology is in use in all County departments to speed up processing with County departments and with County vendors. The usage for these envelopes by the County is exceeding our expected use requiring an increase to this agreement. One such increase in usage is due to the Health Department's decision to use DocuSign to gather signatures on patient and other medical forms enabling the Health Department to streamline their workflows and improve electronic record keeping.

Thus, an allowance of an additional 70,000 envelopes is needed to ensure continuing operations and to avoid wasteful overage fees.

OTHER AGENCY INVOLVEMENT:

County Counsel approves the agreement as to form.

FINANCING:

Required funds for this increase will be covered by other agreement savings in the FY22-23 Adopted Budget for the Information Technology Department, ITD 1930, Appropriations Unit INF002, so there is no impact on the General Fund. Fund requirements for future years will be included in all future year budget submittals.

BOARD OF SUPERVISORS STRATEGIC INITIATIVES:

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

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

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

Approved by:

_____ Date: _____
Eric A. Chatham, Chief Information Officer, 759-6920

Attachments:
DocuSign Master Agreement
DocuSign Order Form