



County of Monterey

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

Board Report

File #: A 21-349, **Version:** 1

- a. Authorize the Director of the Information Technology Department to execute a non-standard agreement with DocuSign for Government and system support, retroactive to May 1, 2021 through April 30, 2024 for a total agreement amount of \$341,550; and
- b. Authorize the Director of the Information Technology Department to execute service order forms and such documents as are necessary to implement 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 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 Director of the Information Technology Department to execute a non-standard agreement with DocuSign for Government and system support, retroactive to May 1, 2021 through April 30, 2024 for a total agreement amount of \$341,550; and
- b. Authorize the Director of the Information Technology Department to execute service order forms and such documents as are necessary to implement 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 the prior year 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 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 continued automation of County business processes during and after the pandemic, significantly increased the County's DocuSign usage. The proposed Agreement increases the envelopes to 50,000.

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:

County Counsel does not approve the following provisions: Non-standard payment terms, non-standard termination provisions; absence of indemnity and insurance provisions.

FINANCING:

The required funds for FY20-21 of \$113,850 are included in the current year Adopted Budget for the Information Technology Department, ITD 1930, Appropriations Unit INF002. Fund requirements for future years are / will be included in all future year budget submittals.

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:

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

Attachments:

DocuSign Master Agreement
DocuSign Order Form

Attachments on file with the Clerk of the Board