



County of Monterey

Item No.

Board Report

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

Legistar File Number: A 25-487

January 06, 2026

Introduced: 12/12/2025

Current Status: Agenda Ready

Version: 1

Matter Type: BoS Agreement

- a. Approve and authorize the Director of Health Services or designee to execute a renewal Order Form with Qualtrics, applying the terms and conditions of the parties' previously Board-approved General Terms and Conditions for Qualtrics Cloud Services dated September 1, 2022 ("Data Processing Agreement"), for continuation of vendor-hosted online survey platform subscription services and professional services as needed, extending the Data Processing Agreement for an additional three-year term retroactive to September 1, 2025 through August 31, 2028, for a revised total term of September 1, 2022 through August 31, 2028, and adding \$215,158 for a total agreement liability of \$375,158; and
- b. Authorize the Director of Health Services or designee to sign future Order Forms to this Agreement where the Order Forms do not significantly change the scope of work and do not cause an increase of more than 10% of the original contract amount (\$16,000) for a maximum aggregate agreement not to exceed \$391,158.

RECOMMENDATION:

It is recommended that the County of Monterey Board of Supervisors:

- a. Approve and authorize the Director of Health Services or designee to execute a renewal Order Form with Qualtrics, applying the terms and conditions of the parties' previously Board-approved General Terms and Conditions for Qualtrics Cloud Services dated September 1, 2022 ("Data Processing Agreement"), for continuation of vendor-hosted online survey platform subscription services and professional services as needed, extending the Data Processing Agreement for an additional three-year term retroactive to September 1, 2025 through August 31, 2028, for a revised total term of September 1, 2022 through August 31, 2028, and adding \$215,158 for a total agreement liability of \$375,158; and
- b. Authorize the Director of Health Services or designee to sign future Order Forms to this Agreement where the Order Forms do not significantly change the scope of work and do not cause an increase of more than 10% of the original contract amount (\$16,000) for a maximum aggregate agreement not to exceed \$391,158.

SUMMARY:

Qualtrics, LLC provides an online survey software platform that supports the diverse survey requirements of the County of Monterey Health Department (MCHD). The platform allows program staff to customize and develop surveys that are meaningful for strategic planning, including but not limited to, health initiatives and interventions, service satisfaction, program design or expansion, and decision-making input. This tool also supports MCHD in maintaining compliance with national public health accreditation standards. It is the recommendation of the Director of Health Services to approve Amendment No. 1 with Qualtrics, LLC to maintain these essential services.

DISCUSSION:

The Qualtrics survey platform provides unlimited survey creation, unlimited questions, unlimited responses, and secure email delivery, while incorporating security management features for staff who design and collect survey data. These capabilities allow MCHD to operate surveys on a large scale across staff, clients, patients, and community agencies that collaborate with the County in providing services to residents.

To ensure privacy and compliance, the solution includes ExpertReview - Compliance Assist, a proprietary feature that detects sensitive data, prevents its visibility in collected data, and warns respondents before submitting such information. This enables MCHD to maintain data security, safeguard respondent privacy, and meet accreditation requirements.

Approval of this request is on a retroactive basis. This is due to an interruption in contract negotiations when the vendor halted discussions, citing low annual spend. It was later determined that this assessment was made in error on the vendor's part. Once identified, negotiations resumed; however, during this delay the existing agreement expired. Approval of this renewal order form for subscription services will allow the County to reinstate and continue critical survey services without further interruption.

OTHER AGENCY INVOLVEMENT:

The Office of the County Counsel reviewed and approved this Data Processing Agreement as to legal form. The Auditor-Controller's Office reviewed the agreement but does not agree to the non-standard payment provisions.

FINANCING:

Appropriations for this Agreement are included in the Health Department's (HEA014-8438) Fiscal Year (FY) 2025-26 Adopted Budget. For the FYs out, provision will be made in the Requested Budget for the appropriate year.

BOARD OF SUPERVISORS STRATEGIC PLAN GOALS:

This agreement does not relate to one of the 4 Strategic Plan Goals.

X Administrative (This item does not fall directly under the Board of Supervisors' four Strategic Plan goals. Instead, it supports essential administrative functions of the Health Department by maintaining compliance with national public health accreditation standards, ensuring data security, safeguarding respondent privacy, and meeting accreditation requirements).

Prepared by: Roxann Seepersad, Supervising Public Health Epidemiologist, 755-4522

Approved by: Elsa Mendoza Jimenez, Director of Health Services, 755-4526

Attachments:

Board Report

Order Form

Board Order

Original Agreement

