Digitizing processes for employees and citizens.

Sonoma County encourages accountability and cost savings on government approvals with help from Adobe Sign.

"With Adobe Sign, we can deliver fast and accountable approval workflows that will help us serve constituents with much greater efficiency and lower cost."

Carolyn Staats, Records Manager and Project Manager, Sonoma County

SOLUTION

Adobe Document Cloud including Adobe Sign and Adobe Acrobat Pro DC

RESULTS

$209K **SAVED ANNUALLY** by reducing the time needed to review and approve reimbursement requests

Staff requests submitted in minutes vs. days; reimbursement to staff in **THREE WEEKS** vs. three months

ZERO TRAINING needed for thousands of employees to learn Adobe Sign workflows

Adds **ACCOUNTABILITY** to submissions with a signing record attached to each document

County of Sonoma, California

Established in 1850

Employees: 4,200

Population: 483,000

Santa Rosa, California

sonomacounty.ca.gov

CHALLENGES

· Get the most value out of constituents' tax dollars by reducing government administrative costs

· Demonstrate accountability by keeping clear records of signed documents

· Encourage adoption of digital workflows and electronic signatures by exposing technology to stakeholders

USE CASE

· Digital Workflows

Transforming government with digital processes

Just a short drive north of San Francisco lies Sonoma County. Known for its world-class wineries, the County is perfectly positioned as a hub for both agriculture and tourism. The Sonoma County government works to provide services for its nearly half a million residents as well as the millions of tourists who explore the area every year.

Sonoma County records all interactions—both internal and with the public—to provide an auditable record of services and expenditures for constituents. However, over the years the costs of creating, printing, and storing paper-based forms and records became extremely high. Sonoma County decided to cut costs by going digital and started by converting many of its forms to fillable PDF forms using Adobe Acrobat Pro DC.

The digitized forms included internal documents such as HR forms and reimbursement requests, as well as forms submitted by citizens to governmental agencies. Although people could fill out these forms digitally, they needed to print the forms to sign them, and then either mail or scan the signed forms to submit them.

"The first step was digitizing documents, but to fully transform the government, cut costs, and provide more efficient services, we need to completely digitize processes," says Carolyn Staats, Records Manager and Project Manager at Sonoma County.

The County decided to implement electronic signatures as a way to fully digitize these processes. After exploring multiple vendors for electronic signatures, Sonoma County decided to implement Adobe Sign, the electronic signature solution within Adobe Document Cloud.

Because Sonoma County was already using PDF forms created with Adobe Acrobat, it felt confident that Adobe Sign would integrate smoothly into its digital workflow. But just as importantly, the County was impressed by the strong support it received from Adobe.

"Adobe is very committed to continuing to work with us on Adobe Sign now and in the future," says Staats. "Some companies provide mainly sales support, but Adobe has provided legal, technical, and ongoing support as we start rolling out Adobe Sign across Sonoma County."

Reimbursement in weeks instead of months

Often organizations are advised to start small pilots with easily attainable wins for quick returns. Sonoma County decided to ignore these low-hanging fruits and roll out pilots for Adobe Sign that would touch a large number of stakeholders. After raising awareness of Adobe Sign and generating enthusiasm for its ease of use, Sonoma County plans to turn Adobe Sign over to individual departments to implement on smaller, more specific use cases.

> "The response to the use of Adobe Sign for the Staff Development reimbursement has been overwhelmingly positive. It feels great that our team can use this tool to help improve business processes and offer seamless transitions in shifting from paper to digital transactions."
>
> *Deborah Lindley, IT Project Lead, Digital Transaction Services, Sonoma County*

Sonoma County made its Staff Development/Wellness Reimbursement Request one of the first forms moved to Adobe Sign, creating a pilot that touches every County employee. Each fiscal year, employees can access a fund for personal development and wellness programs. Employees love the opportunities that the fund brings, but the process for submitting a reimbursement request was traditionally long and complex.

The reimbursement request needed to pass through a chain of approvers and it could take three months for the form to make its rounds and for the employee to receive reimbursement. Many employees would put off this paperwork until the last minute, compounding wait times.

Now employees simply fill out the form online, and Adobe Sign automatically routes the document through the approval workflow. Payroll clerks, managers, and other staff involved in the approval process praised the new Adobe Sign workflow. With just a few clicks, they can sign the document. Adobe Sign automatically forwards the request to the next person on the approval list, so there's no need to repackage the document for a courier.

Approvals are circulated much faster, with many employees getting reimbursed within three weeks. Even by conservative estimates, payroll clerks and managers save at least 10 minutes of work per form during the review process, adding up to at least $209,000 in labor savings each fiscal year.

Employees quickly recognized the benefit of submitting Staff Development/Wellness Reimbursement Requests through Adobe Sign. Sonoma County started with a soft release of the new reimbursement workflow, initially training only 74 employees on Adobe Sign. But word of the new Adobe Sign option quickly spread among employees. As a result, Sonoma County received more than 5,000 reimbursement requests through Adobe Sign after its soft release.

"We are so excited to offer our employees a technological solution that improves efficiencies across the board, reduces reliance on paper, and improves reimbursement time," says Deborah Lindley, IT Project Lead, Digital Transaction Services at Sonoma County. "The response to the use of Adobe Sign for the Staff Development reimbursement has been overwhelmingly positive. It feels great that our team can use this tool to help improve business processes and offer seamless transitions in shifting from paper to digital transactions."

Adding accountability while simplifying applications

Sonoma County also started a pilot that touches members of the public through the Community Investment Program Request for Funding. Local vendors, non-profits, and individuals may apply for this grant to participate in any local event that supports the economy and tourism in Sonoma County.

SOLUTION AT A GLANCE

Adobe Document Cloud
  Adobe Sign
  Adobe Acrobat Pro DC

Applicants used to fill out the form electronically, but then had to print and mail it to the County Administrators Office (CAO). The CAO would review the forms and often email back and forth with applicants to adjust information about the economic impact of the event, budget requests, and other necessary information. Each time, applicants would reprint, sign, and mail the form.

With Adobe Sign, applicants simply submit an online form. Adjusted forms can be resubmitted with ease. "The initial response to the Adobe Sign pilot with the Community Investment Program Request for Funding form has been very positive, with many members of the public saying that the submission process was very quick and easy," says Staats. "We're providing a much better experience for the community, which is very important to us as a county government."

For CAO staff, the Adobe Sign workflow is much easier, requiring less printing and management of multiple copies of submissions. Just as importantly, Adobe Sign adds a level of auditability to the submission process. The County must submit to regular audits of its programs to show that funds are being distributed responsibly. All submissions are saved as PDF within the Adobe Sign dashboard along with information about exactly who signed the document. This makes it easier for Sonoma County to look up past submissions and conduct audits.

"The public wants to know that the government is distributing funds fairly and using tax dollars wisely," says Staats. "Adobe Sign helps us manage paperwork and add accountability to our submission processes."

Building excitement for implementation

With multiple successful pilots spreading awareness of Adobe Sign to employees and the public, Sonoma County plans to start expanding its use of Adobe Sign. Possible uses are vast, from travel authorizations and acknowledgement of IT and security policies to the many public-facing forms distributed by the Department of Agriculture.

"People at Sonoma County are getting excited about how Adobe Sign can improve processes and document management," says Staats. "With Adobe Sign, we can deliver fast and accountable approval workflows that will help us serve constituents with much greater efficiency and lower cost."

For more information
https://acrobat.adobe.com/
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