

SimpliGov Shortens Chancellor's Office Agreement Approval Process by One-Third

Four Automated Workflows Implemented in Less Than Three Months

The Chancellor's Office is the administrative arm of the [California Community Colleges Board of Governors](#) that handles several key policy, financing, programming, and professional development responsibilities for the system's 116 educational institutions. The Chancellor's Office of General Counsel finalizes several hundred agreements of different types every year—including grants valued at more than \$120 million annually.

CHALLENGE

All of the Chancellor's Office's agreements were manually routed for review and signature. As many as five copies of each document might be in circulation with little operational control.

Stakeholders used email and OneDrive folders to share documents. The process was inefficient, requiring manual intervention and with little control. A typical agreement usually involved at least three people within the division that had programmatic responsibility.

Other departments were involved in the process as well. This could include the agreement creator, that person's supervisor, HR, accounting, and the vice chancellor. Final documents were sent via PDF or postal service for wet signatures from private contractors, school district personnel, state agencies, and other external third parties.

As COVID-19 forced Chancellor's Office employees to work in a remote office environment, it became a necessity to update the way agreements were reviewed and managed.

Maintaining a manual tracking system wasn't feasible under the remote model. Locating documents proved even more time-consuming, creating even longer processing delays. It was taking several months to get one agreement approved and signed.

"We needed a platform to accelerate our processes, facilitate communications around the agreements, and provide an audit trail to identify and fix the bottlenecks," said Marc LeForestier, General Counsel, Chancellor's Office.

SOLUTION

The Chancellor's Office selected [SimpliGov's](#) integrated workflow automation and [SimpliSign](#) electronic signature solution for its intuitiveness and no-code architecture. That level of user-friendliness made it easy for nontechnical employees to customize processes and go live with them quickly.

The Chancellor's Office decided to initially launch four new processes:

1. Grant Approvals
2. Vendor Agreements
3. Contracts
4. Memoranda of Understanding (MOUs)

In consultation with SimpliGov implementation specialists, employees were able to fine-tune the initial workflows with a few mouse clicks. SimpliGov makes it easy to change dashboard items, reorder executive document review and signature sequences, and dynamically update documents as revised.

All stakeholders in any document review cycle now review and edit documents in a pre-defined order, and once submitted, the document moves along its sequential approval path. The next person in the path then receives an email that the document is ready for their review.

Should a change or additional information be required at any point in the process, an agreement can be returned to any reviewer at any point with additional questions and comments.

“The new electronic version of the process afforded us newfound flexibility in terms of routing—and rerouting—agreements,” said LeForestier.

RESULTS

- Four fully functional processes—one for each document type—went live in only **two and a half months**.
- Agreements take approximately **one month** to finalize —**a one-third reduction in approval time**.
- In the first month alone, the organization ratified an unprecedented volume of **57 agreements**.
- Dashboards create instant visibility into the status of any open document in the approval cycle, creating marked efficiencies and a higher level of accountability.

“We’re no longer in the dark about where something stands. If we want to know where an agreement has stalled, we can find out *immediately* and rectify the situation.”

Marc LeForestier
General Counsel,
Chancellor’s Office