

# ANNUAL MEMBERSHIP REPORT 2023

DECEMBER 2023



**eSRA**  
Electronic Signature &  
Records Association

# TABLE OF CONTENTS

A MESSAGE FROM THE ESRA CHAIR DANIELLE JOHNSON-KUTCH .....3

PUBLIC POLICY COMMITTEE 2023 OVERVIEW.....4

ESRA 2023 EVENTS.....9

LOOKING AHEAD: 2024 VISION AND PRIORITIES.....11

A CALL TO ACTION FROM EXECUTIVE DIRECTOR JIM THOMPSON.....14

CONTACT INFORMATION.....15



# A WORD FROM ESRA CHAIR DANIELLE JOHNSON-KUTCH

ESRA Members,

As we gather to reflect on another year of growth and progress, I am pleased to present the 2023 Annual Report to Membership for the Electronic Signatures and Records Association (ESRA), summarizing our collective achievements and the milestones we've reached in the past year.

2023 has been an extraordinary journey for ESRA. We've witnessed challenges and remarkable successes at the state and federal levels. Our commitment to our mission, which is to advance and accelerate the adoption of digital transactions and related technologies across all verticals, remained unwavering. This report will provide an overview of our key accomplishments, challenges, and our path forward as we continue to empower and inspire our members.

Together, we have continued to strengthen our bond, and the following pages will serve as a testament to the dedication and hard work of our members, staff, volunteers, and leadership team. Thank you for being an integral part of ESRA, and we look forward to the exciting opportunities that the future holds for our organization.

Thank you!

**DANIELLE JOHNSON-KUTCH**  
CHAIR

# ABOUT ESRA

ESRA is the industry trade association for digital transactions. It advances and accelerates the adoption of digital transactions and related technologies across all verticals, and provides thought leadership, legislative advocacy, education, and events to inspire a trusted digital economy for all.

## CORE VALUES

Our core values include:

**Expertise:** We bring leading experts together to address complex issues on digital transactions.

**Leadership:** We influence the quality and direction of the digital economy.

**Collaboration:** We provide a collaborative environment among peers, partners, and competitors.

**Technology Neutrality:** We embrace technology neutrality to ensure a level playing field that fosters innovation.

**Accessibility:** We promote global access to digital services.



ESRA membership helps you streamline business processes, increase ROI, and save time and money by empowering you to digitally transform your business. With your membership, your business will receive everything you need to succeed.

If your organization powers, is powered by, or utilizes eSignatures and eRecords, becoming a member of ESRA helps you and the organization move the global economy forward.

# PUBLIC POLICY COMMITTEE:

## 2023 OVERVIEW

In a world where the intersection of technology, society, and ethics is more significant than ever, our Public Policy Committee plays a pivotal role in shaping the future.

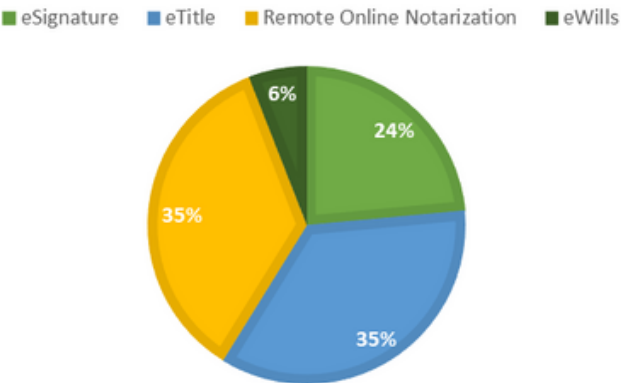
This year's overview provides insight into the Committee's diligent efforts to advocate for policies that align with our mission and values, making a positive impact on our community and beyond.

### 2023 Advocacy Efforts

In 2023, ESRA demonstrated unwavering commitment to its mission of advocating for a trusted digital economy for all by sending a total of 13 comment letters, including joining four coalitions, to four federal agencies including the Department of Health and Human Services, Internal Revenue Service, Congress, and Department of State, and engaging in advocacy with nine states across the nation on our priorities.

Our relentless dedication to influencing policy and regulatory decisions has not only showcased the strength of our collective voice but has also yielded significant impacts in shaping the digital landscape. It is a testament to the collective power of our members and our ongoing mission, and the outcomes of this activity led to the following:

ESRA 2023: ADVOCACY ACTIVITIES  
BY POLICY ISSUE





# 2023: HIGHLIGHTED ACHIEVEMENTS

**ILLINOIS** ACCEPTED ESRA  
CHANGES TO RON  
REGULATION

**CALIFORNIA** PASSED RON  
LEGISLATION



## SUBCOMMITTEE REPORTS

### RON TECH VENDOR CAUCUS

#### Co-Chairs:

**Nancy Pratt, Black Knight & Dale Hardy, Proof**

The RON Tech Vendor Caucus continues to explore the forefront of remote online notarization (RON) and gain a deep understanding of technologies shaping the notarial landscape of tomorrow. In 2023, the Caucus, led by Nancy Pratt and Dale Hardy, met to share key insights and industry trends in addition to activity across the country.

The Caucus took a number of steps to advance RON, including:

- Commented on proposed RON & notarial regulations in Illinois, leading to positive changes on nearly all issues raised by the RON Tech Vendor Caucus.

- Commented on proposed RON & notarial regulations in Maine, leading to an extension in the rulemaking process during which the Secretary of State made changes to address the issues raised.
- Worked through proposed amendments to the SECURE Notarization Act, leading to the beginnings of discussions between the main proponents of the legislation and ESRA.
- Provided comments on proposed regulations in both Pennsylvania and North Carolina, outcomes still pending.

With 44 states passing RON, the Caucus will continue to advocate at the federal and state levels heading into 2024.

## ETITLING SUBCOMMITTEE

Chair: Suzanne Konstance, Wolters Kluwer

The eTitling subcommittee works with ESRA to actively encourage adoption of greater digitization of vehicle titling.

eTitling subcommittee member Tony Hall recently worked with the ESRA members and board to provide letters of support and ongoing reach outs to targeted states – Arizona, Massachusetts, Indiana, Oregon and North Carolina.

In addition, the subcommittee developed eSignature model legislation which was approved by the board in early October. The model legislation is explicitly intended for inclusion in a state's motor vehicle title/registration code and not a broader eSignature package. It aims to balance what is emerging at DMVs with best practices. Additionally, template communications for lawmakers on the model legislation are being drafted for board consideration.

Heading into 2024, the subcommittee plans to continue to monitor and encourage such legislation, as well as DMV digital adoption and new technology developments in eTitling. At the same time, the subcommittee will continue to provide related learning and insights to ESRA membership.



PAUL STEIER, DIRECTOR OF VEHICLE PROGRAMS AT AAMVA SPEAKS AT ESRA MEMBERSHIP MEETING.

# ESRA EVENTS: 2023 RECAP

At ESRA, events are more than just gatherings; they are vibrant forums for knowledge exchange, networking, and the shared pursuit of excellence. Our events, ranging from thought-provoking conferences to collaborative roundtable meetings, have not only brought us together but also ignited the sparks of innovation and growth.

## ESRA MEMBER MEETINGS

In 2023, ESRA held two membership meetings. The meetings unfolded as a dynamic convergence of intellect, innovation, and collaboration. Throughout the sessions, industry leaders shared profound insights, fostering a collective spirit of learning and growth. The vibrant exchange of ideas and enthusiasm showcased the unwavering commitment of the ESRA community to advancing excellence in the field.



ADOBE PRESENTS AT ESRA SPRING MEMBER MEETING

ESRA held its spring member meeting at DLA Piper Offices in Washington, DC, and its summer meeting virtually. The day-long events brought together the ESRA membership to discuss a variety of topics, both administrative- and policy-related, and to network. Both included a Legal and Regulatory Review, updates from the Public Policy Committee, presentations from the eTitling Workgroup and RON Tech Vendor Caucus, and annual conference planning.

Highlighted topics at the meetings included:

- Digital rights and authentication
- Blockchain
- eWills
- European digital identity framework eIDAS 2.0
- NIST Special Publication 800-63 and Update to Digital Guidelines

## #ESIGNRECORDS2023

In November 2023, ESRA held its annual conference, #ESIGNRecords2023. Hosted at Carvana's headquarters, the multi-day event brought together leaders from various industries and the government to discuss digital transformation and eSignatures. Renowned experts illuminated the latest trends, while engaging workshops provided hands-on experiences. The vibrant atmosphere fostered networking and idea exchange, solidifying the sense of community within ESRA.

There were about 50 attendees and panels on the following topics: AI and s, RON, eTitling, eVault and the mortgage process, blockchain, legal and political reviews, international eSignature adoption, and more.

Highlights included:

- An overview of the National Institute of Standards and Technology (NIST) digital identity standards from NIST's David Temoshok.
- Discussions with California DMV's Bernard Soriano on blockchain technology and Arizona DMV's Eric Jorgensen on automotive eRecords.
- Multiple networking opportunities, including a reception at Carvana's Car Vending Machine.
- Updates on RON, eTitling, and acceptance of eWills.
- Roundtable discussions on various topics related to ESRA priorities and membership needs.



ROUNDTABLE DISCUSSION ON AUTHENTICATION STRATEGY AT #ESIGNRECORDS2023



## LOOKING AHEAD: 2024 VISION

As we step into a new year, the 2024 Public Policy Committee Priorities mark a crucial chapter in our ongoing commitment to shaping the intersection of technology and society. Our evolving digital landscape presents both opportunities and challenges that demand our attention and action.

Together, we can drive meaningful change, ensuring that technology serves the greater good and preserves our shared values.

The Public Policy Committee Priorities are built with the Committee's Guiding Principles in mind.

The association's public policy positions are informed by the deep subject matter expertise of its members and guided by the following four guiding principles.

# PUBLIC POLICY GUIDING PRINCIPLES

**First Principle** Protect the integrity, stability, and security of eRecord ecosystems to advance public trust in electronic transactions.

**Second Principle** Promote responsible applications of eSignature and associated eSignature technologies.

**Third Principle** Advance standardization and innovation to ensure synergy and interoperability across eRecords and eSignature applications.

**Fourth Principle** Identify the impact of new technologies on eRecords and eSignature applications.

## 2024 PUBLIC POLICY PRIORITIES\*

- Advance, comprehend, defend, and promote the role of electronic signatures and related technologies within cutting-edge and emerging technological landscapes through sound and responsible public policy.
- Drive progress in eSignatures within digital identity frameworks.
- Enhance government records and documentation by implementing eSignature.
- Advance the widespread recognition of eWills.
- Complete establishment of national acceptance for RON.
- Standardize acceptance of eSignature across automotive documents.



# A CALL TO ACTION FROM EXECUTIVE DIRECTOR JIM THOMPSON

As we celebrate our achievements of the past year, it's vital that we recognize the power we hold as a united force. The success of ESRA is a collective effort, and our journey doesn't end here. In fact, it's just the beginning.

Let's build on our accomplishments and set new horizons for ESRA. Your continued dedication, involvement, and enthusiasm are essential to our growth and impact. Here's how you can take action:

1. Engage: Attend our upcoming events, seminars, and meetings. Your participation is crucial in shaping the future of ESRA.
2. Share Your Expertise: We value your knowledge and insights. Consider contributing to our initiatives, whether through writing, speaking, or mentoring.
3. Recruit New Members: Encourage others to join ESRA and be part of our mission. The more diverse our membership, the stronger our impact.
4. Support Our Initiatives: Financial support, volunteering, or in-kind contributions can make a significant difference. Your involvement ensures that we can continue to innovate and provide valuable resources.
5. Stay Informed: Keep up to date with ESRA's activities, updates, and opportunities. The more informed you are, the more you can actively participate.

Remember, ESRA's strength lies in its members. Together, we can achieve even greater heights. Thank you for being a part of this incredible journey, and let's shape the future of ESRA together.

**JIM THOMPSON**  
EXECUTIVE DIRECTOR



## ESRA BOARD OF DIRECTORS

### Leadership

Danielle Johnson-Kutch, Chair  
Director of Government Affairs, DocuSign

Patrick Hicks, Vice-Chair  
Head of Legal, Trust & Will

Renée Hunter, Secretary  
General Counsel, Proof

Kevin Park, Treasurer  
IAAI, Govt Affairs/Industry Relations Legal Dept.

Jim Thompson, Executive Director

### Directors

Stephen Bisbee, President/Founder, eOriginal  
Radu Braniste, Fellow Software Architect, OneSpan  
John Levy, Executive Vice President, Kinective  
Brian Pannell, PMP, Chief eServices Executive, DocMagic  
John Peart, Senior Vice President, Alphatrust, Canada  
Liz Pereira, Legal Counsel, Adobe  
Nancy Pratt, Strategy Business Manager, Black Knight  
Andrew Silsby, Sr. Mgr Digital Product Mgmt, Wells Fargo

### Counsel

Margo Tank, Partner, DLA Piper  
David Whitaker, Partner, DLA Piper

### Advisor

Nicole Booth, Founder, Synergos Strategy

# MAKE YOUR MARK!

## LEARN MORE ABOUT ESRA AT [ESIGNRECORDS.ORG](https://esignrecords.org)