



COUNTY OF SONOMA

575 ADMINISTRATION
DRIVE, ROOM 102A
SANTA ROSA, CA 95403

SUMMARY REPORT

Agenda Date: 10/8/2024

To: Board of Directors, Sonoma County Water Agency
Department or Agency Name(s): Sonoma County Water Agency
Staff Name and Phone Number: Stacey Wilkbrooks (707) 292-6282
Vote Requirement: Majority
Supervisorial District(s): Countywide

Title:

Upgrade and Migration to DocuShare 7.7 in the Xerox Private Cloud Hosting

Recommended Action:

Authorize Sonoma County Water Agency's General Manager to execute an agreement with DocuShare LLC, a Xerox company, in substantially the form as the draft presented to this Board, for upgrade and migration to DocuShare 7.7 in the Xerox private cloud through October 7, 2029, in the not-to-exceed amount of \$172,014.26.

Executive Summary:

Sonoma County Water Agency's (Sonoma Water's) current version of DocuShare, a content management system, is out of date, which poses significant risks to Sonoma Water's operations. This item requests an update and migration of data to the latest cloud-based version of DocuShare.

Discussion:

HISTORY OF ITEM/BACKGROUND

In 2000, Sonoma Water implemented DocuShare as part of the Automated Records Management System project to streamline record storage and retrieval processes. The initial cost for 25 users was \$1,345 and a letter of intent to purchase was used to procure the licensing.

Since then, DocuShare has been a critical tool for managing documents across various teams, including Records Management, Right-of-Way, Operations, and Clerical among others.

However, the version of DocuShare has not been upgraded since its initial implementation and is now several years out of date, which poses significant risks to Sonoma Water's operations. It lacks the latest security patches, making it vulnerable to data breaches and unauthorized access. The system's compatibility with modern browsers and technologies is diminishing, leading to reduced functionality and performance. Moreover, the aging software is becoming less stable and more prone to errors and crashes, resulting in increased downtime and lost productivity.

To address these issues, Sonoma Water is requesting to upgrade DocuShare to the latest version, which involves moving from an on-premises solution to a cloud-based one. At a total combined cost of \$172,014.30 for the upgrade (\$14,440), licensing (\$128,290.70) and extended storage (\$29,323.58), this upgrade will bring numerous benefits, including enhanced security, improved performance, expanded functionality, and

compatibility with modern technologies. The cloud-based solution also offers greater accessibility, allowing staff to access files from any location, and remote sites that do not have access to Sonoma Water's network.

The upgrade will take DocuShare from version 6.0 to version 7.7 and will be completed by Xerox, the vendor for DocuShare (Service Provider). This critical investment in the security, efficiency, and sustainability of Sonoma Water's document management system will ensure that Sonoma Water can continue to operate effectively and securely in the long term.

The upgrade will allow Sonoma Water to continue to provide reliable and efficient services, with reduced risk of data breaches or system failures that could compromise sensitive information. By investing in this essential technology, Sonoma Water demonstrates its commitment to maintaining the highest standards of security and productivity, ultimately benefiting the community it serves.

SELECTION PROCESS

A competitive selection process was not completed, and a Single/Sole Source Waiver was obtained from Sonoma Public Infrastructure Department, Purchasing Division.

SERVICES TO BE PERFORMED

Under the agreement, Service Provider will upgrade to DocuShare version 7.7 and migrate data to the new version.

The cost of services will not exceed \$172,014.26; the term end date is October 7, 2029.

The agreement includes authorization for the General Manager to make changes to lengthen time schedules or make minor modifications to the scope of work, which do not increase the amount paid under the agreement, in a form approved by County Counsel.

County of Sonoma Strategic Plan Alignment:

N/A

Sonoma Water Strategic Plan Alignment

Goal: Strengthen the organization and workforce to perform our core functions and responsibilities.

Strategy: Implement organizational development practices to enhance internal communications, decision-making, resource alignment, and project management processes.

Action: Improve internal records management to maximize utility, accessibility, and security

The DocuShare upgrade aligns with Sonoma Water's strategic goal of strengthening the organization by enhancing internal records management. Upgrading to the latest version will improve functionality, accessibility, and security of the document management system. This strategic investment directly supports the Agency's efforts to enhance internal communications, decision-making, resource alignment, and project management processes. By improving the utility, accessibility, and security of its records management system, the Agency demonstrates its commitment to delivering reliable, efficient, and secure services to the community it serves.

Racial Equity:

Was this item identified as an opportunity to apply the Racial Equity Toolkit?

No

Prior Board Actions:

None.

FISCAL SUMMARY

Expenditures	FY24-25 Adopted	FY25-26 Projected	FY26-27 Projected
Budgeted Expenses	\$45,360	\$30,960	\$30,960
Additional Appropriation Requested			
Total Expenditures	\$45,360	\$30,960	\$30,960
Funding Sources			
General Fund/WA GF	\$45,360	\$30,960	\$30,960
State/Federal			
Fees/Other			
Use of Fund Balance			
General Fund Contingencies			
Total Sources	\$45,360	\$30,960	\$30,960

Narrative Explanation of Fiscal Impacts:

Budgeted amount of \$45,360 is available from FY 2024/2025 appropriations for the Sonoma Water General fund. FY2025/2026, 2026/2027, 2027/2028 and 2028/2029 appropriations will be budgeted in those fiscal years.

Staffing Impacts:			
Position Title (Payroll Classification)	Monthly Salary Range (A-I Step)	Additions (Number)	Deletions (Number)

Narrative Explanation of Staffing Impacts (If Required):

N/A

Attachments:

Agreement with DocuShare, LLC

Related Items "On File" with the Clerk of the Board:

Single/Sole Source Waiver