



SUMMARY REPORT

Agenda Date: 1/6/2026

To: Board of Supervisors

Department or Agency Name(s): Information Systems Department

Staff Name and Phone Number: Jeff Deffenbaugh, 707-565-5992, Dan Fruchey 707-565-1439

Vote Requirement: Majority

Supervisory District(s): All

Title:

Naviant, LLC. Electronic Document Management System Contract Renewal

Recommended Action:

Authorize the Director of the Information Systems Department to execute an agreement with Naviant, LLC for the continued installation, software, maintenance and support of the electronic document system for an amount not to exceed \$3,409,465 for a five-year term from January 1, 2026 to December 31, 2030.

Executive Summary:

Background

In July 2021, the Board approved a five-year agreement with Neko Industries, Inc. (NEKO) to continue to provide professional services for installation, configuration, training, maintenance and support of Hyland's OnBase software in the amount of \$3,081,100 for a five-year term August 3, 2021, to August 2, 2026.

In October 2021 NEKO was acquired by Naviant LLC, assuming the contract between the County of Sonoma and Neko Industries, Inc. as a part of the acquisition. At that time, the maintenance cost model was changed from a single-year model based on purchase date to be a multi-year model based on the calendar year. The new agreement allows the County to lock in pricing for the next five years.

Discussion:

In February 2021, the Board of Supervisors adopted the five-year strategic plan and digitization was a component of three of the pillars: Resilient Infrastructure, Climate Action and Resiliency, and Operational Excellence. OnBase is one of the platforms that support ISD's effort to implement the improvements in these strategic initiatives.

The OnBase solution provides departments with the ability to image, store and manage electronic records in a trusted system. Digitizing documents enables access to information for both onsite and remote workers as well as systems that provide information and records access to the public. It also leverages automation for increased efficiency and reliability.

Services provided by Naviant support County efforts to provide reliable and quick access to records, create efficiencies in workflow processes, allow departments to meet changing requirements in document retention categories and retention periods, and prepare departments for potential physical moves. By digitizing current records, the county can reduce both the physical space required to provide services and the increase in construction costs associated with the weight of storing paper documentation.

Sonoma County departments have completed 37 projects utilizing this vendor and continue to evaluate and plan additional digitization projects to support their service needs. Community Development Services, Agriculture Preservation and Open Space, Agriculture Weights and Measures, and Probation are some of the departments that have worked with the Information Systems Department to improve access to records and improve their workflows by scanning existing records and converting from other less efficient and accessible systems. Board of Supervisors staff have implemented new automation processes which streamline document distribution, and the Department of Health Service Vital Statistics Unit has eliminated data entry using OnBase Advance Capture. Several departments have potential digitization projects under evaluation or in planning phases, including Sonoma County Employee Retirement Agency (SCERA), Regional Parks, Department of Health Services, and the District Attorney's Office.

This agreement with Naviant and Hyland will lock the maintenance and support costs at \$2,481,294 over five years, providing advantageous pricing and longer-term budget stability for a service that is projected to be a continued need.

In addition to maintenance and support costs, Information Systems Department is requesting to enter into a new Professional Service Agreement with Naviant LLC to fulfill requests for professional services supporting projects such as:

- Onboarding and implementation of new departments including migration
 - Scan, store and retrieve
- Expansion of existing workflow automation processes
- Enhancements of existing department applications

All project work under the Professional Services Agreement will follow the project methodology with defined deliverables as described in Exhibit A - Scope of Work.

Based on projected demand, it is estimated that professional services for new projects will range in cost, based on complexity of the work needed, from \$3,000 to \$75,000, for an estimated total of \$928,171 over five years. These professional services are purchased on an as-needed basis, with no minimum guaranteed to the vendor. Total costs over the next five year-year period are estimated to be \$3,409,465.

Professional Services	\$	928,171
Maintenance & Support	\$	2,481,294
Total	\$	3,409,465

Strategic Plan:

This item directly supports the County's Five-year Strategic Plan and is aligned with the following pillar, goal, and objective.

Pillar: Resilient Infrastructure

Goal: Goal 1: Invest in County buildings and technology to enhance service delivery and improve employee mobility

Objective: Objective 3: Develop and implement technology tools that enhance employees' ability to work remotely and promote virtual service delivery models in order to reduce County facility space needs.

Racial Equity:

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

No

Prior Board Actions:

July 20, 2021 (Item #8) -Board approved the Electronic Document Management System contract renewal with NEKO Industries, Inc.

August 2, 2016 (Item #8) -Board approved continued implementation and support contract with NEKO Industries, Inc.

May 7, 2013 (Item #41) -Board approved Enterprise Financial System (EFS) Project Implementation Update and NEKO Industries, Inc. contract.

August 21, 2012 (Item #17) -Board approved second amendment to Agreement with NEKO Industries, Inc.

July 12, 2011 (Item #75) - Board approved implementation of an Electronic Document Management System (EDMS) and Agreement with NEKO Industries, Inc.

FISCAL SUMMARY

Expenditures	FY25-26 Adopted	FY26-27 Projected	FY27-28 Projected
Budgeted Expenses	\$309,351	\$634,002	\$665,581
Additional Appropriation Requested			

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Total Expenditures	\$309,351	\$634,002	\$665,581
Funding Sources			
General Fund/WA GF			
State/Federal			
Fees/Other	\$309,351	\$634,002	\$665,580
Use of Fund Balance			
General Fund Contingencies			
Total Sources	\$309,351	\$634,002	\$655,580

Narrative Explanation of Fiscal Impacts:

Annual expenditures for this agreement are estimated to be \$309,351 in FY2025-26, \$634,002 in FY2026-27, \$665,580 in FY2027-28, \$699,181 in FY2028-29, \$729,801 in FY2029-30, and \$371,550 in FY2030-2031. The services provided will be reimbursed to ISD by departments through baseline and project rates. This action represents a continuation of services already acquired.

Narrative Explanation of Staffing Impacts (If Required):

None

Attachments:

Professional Services Agreement
Exhibit A - Scope of Work
Exhibit B - Pricing and Payment
Exhibit C - NEKO Service Agreement
Exhibit D - Insurance Requirements
Single Source Waiver (signed waiver forthcoming)

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

None