



# COUNTY OF SONOMA

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

## SUMMARY REPORT

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**Agenda Date:** 3/24/2026

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**To:** Board of Directors, Sonoma County Water Agency

**Department or Agency Name(s):** Sonoma County Water Agency

**Staff Name and Phone Number:** Grant Davis 707-547-1900, Ty Justice 707-524-1182

**Vote Requirement:** Majority

**Supervisorial District(s):** Countywide

**Title:**

Data Migration to M-Files and Software Subscription Services

**Recommended Action:**

- A) Authorize Sonoma County Water Agency's General Manager to execute an agreement with 21Tech LLC, in substantially the form presented to this Board, for software implementation and subscription services beginning April 1, 2026, through March 31, 2029, in the not-to-exceed amount of \$256,941 and authorize Sonoma County Water Agency's General Manager to amend or terminate this agreement with approval of County Counsel.
- B) Authorize Sonoma County Water Agency's General Manager to renew the agreement annually for not more than two years at a rate not to exceed 5% per year of each prior year's cost in a form approved by County Counsel.

**Executive Summary:**

21Tech LLC is an implementation provider for the M-Files document management system. The M-Files software was selected as a modern replacement for the legacy Xerox DocuShare system, which has been in use for over 20 years. The transition to M-Files will significantly enhance the efficiency and accessibility of Sonoma County Water Agency's (Sonoma Water) records by reducing manual effort, facilitating adherence to regulatory requirements, enabling secure and controlled external access to key information; and supporting a unified and secure digital workplace.

**Discussion:**

**HISTORY OF ITEM/BACKGROUND**

In 2000, Sonoma Water implemented DocuShare, a Xerox product, as part of its automated records management system to streamline document storage and retrieval across divisions. DocuShare quickly became a foundational on-premises tool for Sonoma Water's document management needs.

In 2024, Sonoma Water entered into an agreement with Xerox to upgrade DocuShare from version 6.0 to 7.7. This upgrade was initiated to apply critical security patches, ensure compatibility with modern technologies, and resolve system instability that posed operational and cybersecurity risks. The upgrade also facilitated a transition to a cloud-based platform, providing expanded storage capacity, enhanced security, improved performance and functionality, and better access for staff working at off-network locations.

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While the upgrade addressed immediate concerns, it was ultimately a short-term solution. DocuShare no longer aligns with Sonoma Water's evolving approach to modern records management. The platform requires significant staff time to perform tasks that are automated in more advanced systems, and the platform struggles with capacity limitations when transferring large file collections.

To meet these growing needs, Sonoma Water will be transitioning to M-Files-a cloud-native, metadata-driven platform that offers a more advanced and efficient approach to document management. Key features of M-Files include:

- Automated retention and lifecycle management
- Advanced search capabilities and integrated workflows
- A public-facing knowledge base for controlled external access
- Seamless integration with Microsoft tools and identity/access management systems

This proposed transition to M-Files positions Sonoma Water for operational excellence and long-term sustainability. By replacing the legacy DocuShare system, Sonoma Water seeks to modernize its records management. The adoption of M-Files represents an investment in a secure, scalable, and future-ready infrastructure.

#### SELECTION PROCESS

Sonoma Water obtained a sole source waiver from the Purchasing Agent, a copy of which is attached.

#### SERVICES TO BE PERFORMED

Under the proposed agreement, Service Provider will provide implementation services (including data migration, retention schedule setup, forms workflow development, public-facing knowledge base, workflow configuration, M-Files Aino - Metadata automation essentials development, and related services) and software subscription services post-implementation.

The cost of services will not exceed \$256,941; the term end date is March 31, 2029.

This proposed agreement provides an annual renewal for the software subscription with a rate increase of 5 percent per year over the prior subscription cost, which is \$62,261 per year for the first three years.

#### REQUEST FOR SONOMA WATER GENERAL MANAGER AMENDMENT AND TERMINATION AUTHORITY

Consistent with other agreements, staff recommend that the Board authorize Sonoma Water's General Manager to amend or terminate the agreement with approval of County Counsel.

#### **Strategic Plan:**

n/a

#### **Sonoma Water Strategic Plan Alignment**

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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 migration to M-Files aligns with Sonoma Water's strategic goal of strengthening the organization by enhancing internal records management.

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 migration to M-Files 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.

**Racial Equity:**

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

No

**Prior Board Actions:**

10-08-2024 Upgrade and Migration to DocuShare 7.7 in the Xerox Private Cloud Hosting

**FISCAL SUMMARY**

<b>Expenditures</b>	<b>FY25-26 Adopted</b>	<b>FY26-27 Projected</b>	<b>FY27-28 Projected</b>
Budgeted Expenses	\$132,419	\$62,261	\$62,261
Additional Appropriation Requested			
<b>Total Expenditures</b>	<b>\$132,419</b>	<b>\$62,261</b>	<b>\$62,261</b>
<b>Funding Sources</b>			
General Fund/WA GF	\$132,419	\$62,261	\$62,261
State/Federal			
Fees/Other			
Use of Fund Balance			
General Fund Contingencies			
<b>Total Sources</b>	<b>\$132,419</b>	<b>\$62,261</b>	<b>\$62,261</b>

**Narrative Explanation of Fiscal Impacts:**

Budgeted amount of \$132,419 is available from FY 2025/2026 appropriations for the Sonoma Water General Fund. FY 2026/2026 and FY 2027/2028 appropriations will be budgeted in those fiscal years.

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

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**Narrative Explanation of Staffing Impacts (If Required):**

N/A

**Attachments:**

Attachment 1: Agreement with 21Tech LLC

Attachment 2: Sole Source Waiver

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

None.