

BOARD MEETING DATE: August 7, 2026

AGENDA NO. 10

PROPOSAL: Authorize Purchase of OnBase Software

SYNOPSIS South Coast AQMD uses OnBase software for its electronic document management system to manage critical documents and to support South Coast AQMD's Record Retention Policy. The software subscription for OnBase expired on July 31, 2026. This action is to obtain approval for renewal of OnBase software subscription for a period of three years at a cost not to exceed \$660,000. Funds for the first year's purchase are included in Information Management's FY 2026-27 Budget.

COMMITTEE: Administrative, June 12, 2026; Recommended for Approval

RECOMMENDED ACTION:

Authorize the Procurement Manager to purchase a renewal of OnBase software subscription and to execute all documents for this purchase for a period of three years, at a cost not to exceed \$660,000, with an annual cost of \$220,000.

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Executive Officer

RMM:HL;mf

Background

South Coast AQMD uses OnBase software as its electronic document management system, which has maintained South Coast AQMD documents and other critical records since 1990. Total storage to date is over ten million multi-page documents. OnBase is used by many of South Coast AQMD's mission critical web applications including Online Application Filing, Asbestos Notifications, and Oil and Gas Well Electronic Notification and Reporting. OnBase is a Windows-based, menu-driven, document management system designed to store and retrieve critical documents in electronic format. The system provides concurrent information to multiple workstations simultaneously. It has a flexible compound document structure where black-and-white

or color images co-exist with text and data within a single document. It stores various types of documents such as Microsoft Word documents, Outlook emails, PDFs, videos and data files.

The system includes document routing and ad-hoc, scheduled point-to-point, and broadcast distribution of documents. It contains a complete set of markup and annotation tools that allow users to add notes, comments and drawings to pages without compromising the original document's integrity. The system has full network support so information can be distributed rapidly within an organization regardless of system architecture. Finally, the system has an extensive number of features to allow the secure display of documents on South Coast AQMD's internal and external websites and on iPhone, iPad and Android mobile applications. The OnBase software subscription expired on July 31, 2026.

Proposal

Hyland Software is the sole manufacturer and provider of OnBase software and is, therefore, the only source for its maintenance support licensing agreements. Staff recommends the purchase of OnBase software subscription for a period of three years from Hyland Software at a cost not to exceed \$660,000, with an annual cost of \$220,000.

Sole Source Justification

Section VIII.B.2 of the Procurement Policy and Procedure identifies circumstances under which a sole source purchase award may be justified. This request for a sole source award is made under provision VIII.B.2.c.(2) and (3). The products and services are available from only Hyland Software; involves the use of proprietary technology; and uses key contractor-owned assets for project performance. The cost of these support services reflects General Services Administration pricing.

Resource Impacts

Sufficient funds are available in Information Management's FY 2026-27 Budget. Funding for subsequent fiscal years will be requested and budgeted appropriately.