



**Sonoma
Water**

MEMORANDUM

TW: 24/25-040

DATE: January 15, 2025

TO: Grant Davis, General Manager

FROM: Steven Hancock, Project Manager *SH*

SUBJECT: **Selection of Systemates, Inc., for Projectmates Software and Implementation Services**

Sonoma County Water Agency's (Sonoma Water) Project Management Office, in collaboration with key stakeholders from multiple divisions, conducted a comprehensive review of available project management software platforms to replace the current system, which is only used for Construction Management and is set to expire at the end of December 2024. The review team, consisting of representatives from Design Engineering, Construction Management, Survey/Right-of-Way, Finance, and other sections, also reached out to neighboring agencies to gain insight into the platforms they were using. Potential providers were identified and after evaluating responses and conducting demonstrations with six providers (EADOC/Synchro Control, ProCore, Systemates, Oracle/Primavera P6, Aurigo, and Hexagon Ecosys), the team narrowed the options to two finalists (Aurigo and Systemates).

Systemates, Inc., (Service Provider) was selected based on its Projectmates software's ability to meet Sonoma Water's diverse needs, offer a robust and user-friendly mobile platform, integrate with multiple departments, and meet the critical implementation timeline.

Projectmates offers the most extensive tools for cross-departmental and external contractor collaboration, enabling seamless communication and workflow management across diverse teams, whether in capital design or construction management. While other platforms specialized for one sector, Projectmates is designed to accommodate multiple stakeholders with customizable workflows, real-time updates, and role-based access control, allowing for better collaboration between departments that have distinct operational needs.

The platform's mobile app supports real-time collaboration, document access, and updates in the field. This mobile functionality is key for departments like construction management and right-of-way, where users need access to project plans and documents while on-site. Competitors had limited mobile functionality, whereas Projectmates offered a fully integrated mobile experience with the ability to markup drawings, track assets, and update workflows in real-time from the field. Projectmates provides the most effective tool for collaborating with contractors and vendors, allowing them to enter change orders and invoices directly through the system, all

of which is moderated by an electronic approval process to ensure we have strict const controls and construction oversight in place.

Projectmates offers an advanced document management system with robust version control and indexing, allowing users from various departments to access the latest plans, markups, and project documents. One of the strongest unique aspects of Projectmates is its flexibility in creating custom workflows to match the specific processes of each department. This allows teams with vastly different operational needs, such as environmental services, CM, Design, and IT, to build workflows suited to their specific processes while still maintaining cohesion across the platform. The ease of adding additional stakeholders or steps makes it adaptable to changing project scopes.

Integrated Financial Management - Projectmates includes built-in financial tracking features such as budgeting, forecasting, and cost control, critical for large-scale capital projects. While the other project management platforms allowed third-party financial tools, Projectmates included these functionalities into a single interface, making it easier for departments like construction management and operations to monitor financial performance alongside project timelines and resources.

Projectmates provides integration with GIS systems, making it especially useful for right-of-way and environmental services teams. This integration helps manage land parcels, easements, and environmental impact data, which is critical for departments that deal with land development, acquisition, or regulatory compliance. The ability to manage GIS data in a project management tool is less common among comparable platforms.

As a cloud-based platform, Projectmates is scalable and accessible from anywhere, providing flexibility for growing project demands and geographically dispersed teams. This is especially beneficial for us as we manage both small-scale local projects and large capital endeavors, offering scalability as departmental needs evolve over time.

The platform also includes tools to help departments comply with government regulations, such as permitting, environmental assessments, and construction codes. Departments like environmental services and capital design benefit from these built-in compliance features, as they streamline reporting and reduce the risk of non-compliance with regulatory agencies.

A written proposal was received and has been sent to Records.

The hiring of Service Provider for this agreement causes no conflict of interest and is not based on any financial incentive provided to Sonoma Water or its employees and representatives.

c: Rochelle Mueller