



March 12, 2019

Board of Supervisors  
County of Ventura  
800 South Victoria Avenue  
Ventura, California 93009

**RODNEY LANTHIER**  
Assistant Chief Information Officer

**TERRY THEOBALD**  
Assistant Chief Information Officer  
Health Care Agency IT Director

**BILL DE LA ESPRIELLA**  
Deputy Chief Information Officer  
Application Services

**BRIAN PALMER**  
Deputy Chief Information Officer  
Network Services

**ED ALTHOF**  
Deputy Chief Information Officer  
Enterprise Services

**SUBJECT: Approval of, and Authorization for the County Purchasing Agent or Designee to Sign, the Contract between the County of Ventura and Gartner, Inc. for Information Technology Consulting Services, Effective March 12, 2019 through March 11, 2024; Authorization for the County Purchasing Agent or Designee to Issue a Purchase Order to Gartner, Inc., for Information Technology Consulting Services in an Amount Up to \$275,700; Authorization for the County Purchasing Agent or Designee to Increase the Purchase Order Amount by Up to 10% for Necessary Unforeseen Increased Service Levels and Additional Services Including Short-Term Consulting Work.**

**RECOMMENDATIONS:**

1. **APPROVE** and **AUTHORIZE** the County Purchasing Agent or designee to sign the Contract between the County of Ventura and Gartner, Inc. for information technology consulting services, effective March 12, 2019 through March 11, 2024; and
2. **AUTHORIZE** the County Purchasing Agent or designee to issue a purchase order to Gartner, Inc. pursuant to the contract for information technology consulting services in an amount up to \$275,700; and
3. **AUTHORIZE** the County Purchasing Agent or designee to increase the purchase order amount by up to ten percent (10%) for necessary unforeseen increased service levels and additional services including short-term consulting work.

**FISCAL/MANDATES IMPACT OF CONTRACT:**

**Mandatory:** No

**Source of Funding:** Information Technology Services Department-ISF and CCISDA Consortium Members

**Funding Match Required:** N/A

**Impact on Other Department(s):** None, unless County departments utilize the services of Gartner, Inc.

**DISCUSSION:**

**Current Situation:**

On November 27, 2018 the County issued RFP 5962 for information technology ("IT") research and advisory services. The County received two proposals which were evaluated by a multi-jurisdictional team comprised of members from both the County and the California County Information Services Directors Association (CCISDA). The evaluators unanimously recommend an award to Gartner, Inc. for consulting and advisory services.

Counties across the state leverage this County of Ventura contract award through CCISDA, the official organization of the county IT directors and chief information officers throughout the state of California. CCISDA represents all 58 California counties in the area of information technology and county government.

CCISDA facilitates sharing of new computer applications and products, staff development and training, consulting services to member counties and support organizations, and systems integration work between counties, the State of California and the federal government. CCISDA members also regularly participate in many statewide and national government and technology organizations.

**Proposed Action:**

The County IT Services Department ("ITSD") requests your Board's approval of the agreement with Gartner, Inc. through March 11, 2024. Additionally, ITSD requests that your Board authorize the County Purchasing Agent or designee to issue a purchase order to Gartner, Inc. pursuant to the proposed contract in an amount up to \$275,700 for information technology consulting services to be provided to ITSD, the Health Care Agency, and the Ventura County Fire Protection District from March 12, 2019 through March 11, 2024. Because the County of Ventura is a member of the CCISDA consortium, ITSD requires that all County agencies/departments utilize the existing contract with Gartner, Inc. when purchasing Gartner, Inc. services. ITSD plans to utilize the technical advisory services provided by Gartner, Inc.

during the forthcoming fiscal year and has included a value of \$275,700 in the FY 2019/20 proposed budget to support this plan. This also includes services for the

Health Care Agency (\$78,867) and the addition of the Ventura County Fire Protection District (\$40,800), which will be recouped through ITSD Internal Service Fund billing.

ITSD also requests that your Board authorize the County Purchasing Agent or designee to increase the purchase order amount by up to ten percent (10%) for necessary unforeseen increased service levels and additional services including short-term consulting work.

**Fiscal/Mandates Impact of Purchase Order:**

Mandatory: No  
Source of Funding: Charges for Services revenue from various departments  
Funding Match Required: No  
Impact on Other Departments: Yes

**Summary of Revenues and Costs:**

	FY 2018-19	FY 2019-20
Revenue:	\$ 275,700	\$ 0
Costs:		
Direct	\$ 275,700	\$ 0
Indirect Agency/Dept.	0	0
Indirect County CAP	0	0
Total Costs	\$ 0	\$ 0
Net Costs:	\$ 0	\$ 0
Recovered Indirect Costs:	\$ 0	\$ 0

FY 2018-19 Budget Projection for IT Services ISF – Division 4800				
	Adopted Budget	Adjusted Budget	Projected Actual	Estimated Savings/(Deficit)
Appropriations	\$ 29,826,774	\$ 34,389,704	\$ 31,401,621	\$ 2,988,083
Revenue	\$ 27,671,155	\$ 30,171,155	\$ 31,986,207	\$ 1,815,052
Net Cost	\$ (2,155,619)	\$ (4,218,549)	\$ 584,586	\$ 4,803,135

This item has been reviewed by the County Executive Office, Auditor-Controller's Office, County Counsel, and General Services Agency-Procurement Services.



Brian Ganley  
Chief Information Officer

Exhibit A – Gartner County of Ventura Contract #7914  
Exhibit B – Gartner Fee Schedule  
Exhibit C – Gartner SOW

COUNTY OF VENTURA CONTRACT NUMBER #7914

This Contract is hereby entered into by and between the County of Ventura ("County") and Gartner, Inc. ("Gartner "or "Contractor") (collectively, "parties").

WHEREAS, it is necessary and desirable that Contractor be engaged by County for the purpose of performing Information Technology Consulting services hereinafter described.

NOW, THEREFORE, IT IS HEREBY AGREED by the parties as follows:

1. **SERVICES TO BE PERFORMED BY CONTRACTOR**

Contractor will perform services for County in accordance with the terms, conditions and specifications set forth herein and in the Scope of Work entitled: Ventura County RFP 5962 Table 2 – Service Descriptions, Attachment A, which is incorporated herein by reference.

2. **PAYMENTS**

For services rendered in accordance with all terms, conditions and specifications set forth herein and in Attachment A, County will make payment to Contractor in the amount and in the manner specified in the Fee Schedule entitled: Ventura County RFP 5962 Table 1 – Research and Advisory Services, Attachment B.

3. **INDEPENDENT CONTRACTOR**

Contractor is an independent contractor, and no relationship of employer and employee is created by this Contract. Neither Contractor nor any of the persons performing services for Contractor pursuant to this Contract, whether said person be a member, partner, employee, subcontractor or otherwise of Contractor, will have any claim under this Contract or otherwise against County for sick leave, vacation pay, retirement benefits, social security, workers' compensation, disability, unemployment insurance benefits, or other employee benefits of any kind.

Except as provided in this Contract, Contractor in the performance of the services hereunder agreed to be performed is subject to the control or direction of County solely as to the results to be accomplished by the services and not as to the means and methods for accomplishing the results.

If, in the performance of this Contract, any third persons are employed by Contractor, such persons will be entirely and exclusively under the direction, supervision and control of Contractor. All terms of employment, including hours, wages, working conditions, discipline, hiring and discharging, and applicable requirements of law will be the responsibility of and determined by Contractor, and County will have no right or authority over such persons or the terms of such employment, except as provided in this Contract.

Contractor will comply with all applicable provisions of the Worker's Compensation Insurance and Safety Act of the State of California (codified as amended



commencing at Labor Code section 3200), including, without limitation, divisions 4 and 5 of the California Labor Code, and all amendments thereto, and all similar state and federal laws, and will indemnify and hold harmless County from and against all claims, demands, payments, suits, actions, proceedings and judgments of every nature and description, including attorney fees and costs, presented, brought or recovered against County, for or on account of any liability under any of said laws which may be incurred by reason of any work to be performed under this Contract.

4. **NON-ASSIGNABILITY**

Contractor will not assign this Contract or any portion thereof to a third party without the prior written consent of County, and any attempted assignment without such prior written consent will be null and void and will be cause, at County's sole and absolute discretion, for immediate termination of this Contract. County may withhold its consent to assignment at its discretion.

5. **TIMING**

Time is of the essence in the performance of this Contract.

6. **TERM**

The term of this Contract will commence on March 12, 2019 and be in effect through March 11, 2024, unless earlier terminated pursuant to the terms and conditions set forth herein.

Continuation of the Contract is subject to the appropriation of funds for such purpose by County's Board of Supervisors. If funds to effect such continued payment are not appropriated, County may terminate this Contract and Contractor will relieve County of any further obligation hereunder.

7. **TERMINATION**

Termination for Breach - Either party may, upon giving ten (10) business days' written notice identifying specifically the basis for such notice, terminate the Master Agreement or a Service Agreement issued subject to the Master Agreement for breach of a material term or condition of the Master Agreement, provided the other party shall not have cured such breach within the ten (10) business day cure period.

Termination for Convenience - County may terminate this Master Agreement for its convenience upon thirty (30) calendar day's written notice to Contractor. In the event of such termination, Contractor shall be entitled to payment of all Service Agreements issued prior to the effective date of such termination. All provisions of this Agreement which are by their nature intended to survive the expiration or termination of this Agreement for breach and/or County's convenience shall survive such expiration or termination.

8. **TRANSFER OF PROPERTY**

On completion or termination of this Contract, County will be entitled to immediate possession of and Contractor will furnish on request, all computations, plans, correspondence and other pertinent data gathered or computed by Contractor for

this particular Contract prior to any termination. Contractor may retain copies of said original documents for Contractor's files.

**9. DEFAULT; TERMINATION AFTER DEFAULT**

If Contractor defaults in the performance of any term or condition of this Contract, Contractor must cure that default by satisfactory performance within 10 days after service upon Contractor of written notice of the default. If Contractor fails to cure the default within that time, then County may terminate this Contract without further notice. The foregoing requirement for written notice and opportunity to cure does not apply to a termination pursuant to section 6.

**10. INDEMNIFICATION AND HOLD HARMLESS**

Person and/or Tangible Property - Contractor agrees to indemnify, defend and hold harmless the County, its employees, officers and agents, from and against any third party claims, demands, loss, damage or expenses (including reasonable attorney's fees and court costs) relating to bodily injury or death of any person or damage to real and/or tangible personal property directly caused by the negligence or willful misconduct of the Contractor, its personnel, or agents during the course of the Services under this Agreement.

Contractor agrees to waive all rights of subrogation against County for losses arising proximately and directly from the activities and work covered by this Agreement.

**11. INSURANCE PROVISIONS**

A) Contractor, at Contractor's sole cost and expense, will obtain and maintain in full force during the term of this Contract the following types of insurance:

- 1) General liability "occurrence" coverage in the minimum amount of \$1,000,000 combined single limit (CSL) bodily injury and property damage each occurrence and \$2,000,000 aggregate, including personal injury, broad form property damage, products/completed operations, broad form blanket contractual and \$50,000 fire legal liability.
- 2) Commercial automobile liability coverage in the minimum amount of \$1,000,000 CSL bodily injury and property damage, including owned, non-owned, and hired automobiles, and also including uninsured/underinsured motorists coverage in the minimum amount of \$100,000 when there are owned vehicles.
- 3) Workers' compensation coverage, in full compliance with California statutory requirements, for all employees of Contractor and employer's liability coverage in the minimum amount of \$1,000,000.
- 4) Professional liability coverage in the minimum amount of \$1,000,000 each occurrence and \$2,000,000 aggregate.

- B) All insurance coverage Contractor is required to obtain and maintain will be primary coverage as respects County, and any insurance or self-insurance maintained by County will be excess of Contractor's insurance coverage and will not contribute to it.
- C) County is to be notified immediately if any aggregate insurance limit is exceeded. Contractor must purchase additional coverage to meet requirements.
- D) For the general liability insurance required above, County and, if applicable, County's dependent special districts are to be named as additional insureds as respects work done by Contractor under the terms of this Contract.
- E) Contractor agrees to waive all rights of subrogation against County and its boards, agencies, departments, officers, employees, agents and volunteers for losses arising directly or indirectly from the services, work and/or activities performed under the terms of this Contract.
- F) Contractor shall employ commercially reasonable efforts to advise County within thirty (30) days of any cancellation or determination to affect a material change in the insurance coverage's listed herein and/or maintained by Contractor in support of this Agreement
- G) Contractor agrees to provide County with the following insurance documents on or before the commencement date of this Contract:
  - 1. Certificates of Insurance for all required coverage.
  - 2. Additional Insured endorsement for general liability insurance.
  - 3. Waiver of Subrogation endorsement (also known as Waiver of Transfer Rights of Recovery Against Others, Waiver of Our Right to Recover from Others) for workers' compensation insurance.

Failure to provide these documents will be, at County's sole discretion, grounds for immediate termination of this Contract or suspension of the commencement date.

## 12. **NON-DISCRIMINATION**

### A) General.

No person will on the grounds of race, color, national origin, religious affiliation or non-affiliation, sex, age, handicap, disability, or political affiliation, be excluded from participation in, be denied the benefits, or be subjected to discrimination under this Contract.

### B) Employment.

Contractor will insure equal employment opportunity based on objective standards of recruitment, selection, promotion, classification, compensation, performance evaluations, and management relations, for all employees under this Contract. Contractor's personnel policies will be made available to County upon request.

13. **SUBSTITUTION OF PERSONNEL**

If Attachment A identifies specific personnel of Contractor to work on this Contract, Contractor will not assign others to work in their place without advance written approval of County. Any substitution will be with a person of commensurate experience and knowledge.

14. **CONTRACTOR INVESTIGATION AND RESEARCH; ENTIRE UNDERSTANDING**

Contractor by investigation and research has acquired reasonable knowledge of all conditions affecting the services to be performed under this Contract, and Contractor acknowledges that Contractor's execution of this Contract is based on such investigation and research, and not upon any representation made by County or any of its officers, agents or employees, except as provided herein. This Contract supersedes all previous agreements, understandings and representations of any nature whatsoever, whether oral or written, between the parties hereto, and constitutes the entire understanding between them, regarding the subject matter hereof. Contractor acknowledges that no representations, inducements or promises have been made by or on behalf of County except those expressly set forth herein and that no representation, inducement or promise not contained in this Contract will be valid or binding against County.

15. **CONTRACT MONITORING**

County will have the right to review the work being performed by Contractor under this Contract at any time during Contractor's usual working hours. Review, checking, approval or other action by County will not relieve Contractor of Contractor's responsibility for the thoroughness of the services to be provided hereunder. This Contract will be administered on behalf of County by Brian Ganley or his authorized representative.

16. **CHANGES TO CONTRACT**

County may from time to time require changes in the scope of the services or other terms or conditions of this Contract. Such changes, including any increase or decrease in the amount of Contractor's compensation, which are mutually agreed upon by the parties will be effective only when set forth in a written amendment to this Contract signed by the parties.

17. **CONFLICT OF INTEREST**

Contractor covenants that Contractor presently has no interest, including, but not limited to, other projects or independent contracts, and will not acquire any such interest, direct or indirect, which would conflict in any manner or degree with the performance of services required under this Contract. Contractor further covenants that in the performance of this Contract no person having such interest will be employed or retained by Contractor under this Contract.

18. **CONFIDENTIALITY**

Any reports, information, data, statistics, forms, procedures, systems, studies, communications or other forms of knowledge given to or prepared or assembled by Contractor under this Contract which County requests in writing to be kept confidential will not be made available to any individual or organization by Contractor without the prior written approval of the County except as authorized by law.

**19. NOTICES**

All notices required under this Contract will be made in writing and addressed or delivered as follows:

TO COUNTY: COUNTY OF VENTURA  
GENERAL SERVICES AGENCY  
PROCUREMENT SERVICES  
800 SOUTH VICTORIA AVENUE  
VENTURA, CALIFORNIA 93009-1080

TO CONTRACTOR: GARTNER, INC.  
LEGAL & CONTRACTS  
1201 WILSON BLVD – 17TH FLOOR  
ARLINGTON, VA 22209

Either party may, by giving written notice in accordance with this paragraph, change the names or addresses of the persons or departments designated for receipt of future notices. When addressed in accordance with this paragraph and deposited in the United States mail, postage prepaid, notices will be deemed given on the third day following such deposit in the United States mail. In all other instances, notices will be deemed given at the time of actual delivery.

**20. ORDER OF PRECEDENCE**

In the event of an inconsistency in this Contract, the inconsistency shall be resolved by resort to the following documents in the following order:

1. This Contract;
2. County of Ventura RFP # 5962
3. Contactor's Proposal dated December 18, 2018

**21. GOVERNING LAW**

The validity of this contract and any of its terms or provisions, as well as the rights and duties of the parties under this contract, will be construed pursuant to and in accordance with the laws of the State of California.

**22. SEVERABILITY OF CONTRACT**



If any term of this contract is held by a court of competent jurisdiction to be void or unenforceable, the remainder of the contract terms will remain in full force and effect and will not be affected.

23. **CUMULATIVE REMEDIES**

The exercise or failure to exercise of legal rights and remedies by the County of Ventura in the event of any default or breach hereunder will not constitute a waiver or forfeiture of any other rights and remedies, and will be without prejudice to the enforcement of any other right or remedy available by law or authorized by this contract.

24. **COMPLIANCE WITH LAWS**

Each party to this contract will comply with all applicable laws.

25. **CONSTRUCTION OF COVENANTS AND CONDITIONS**

Each term and each provision of this contract will be construed to be both a covenant and a condition

26. **LIVING WAGE ORDINANCE**

Unless otherwise exempt in accordance with the provisions of this Ordinance, this contract is subject to the applicable provisions of the Living Wage Ordinance (LWO) Nos. 4233 and 4236, and as amended from time to time.

Payment of a minimum initial wage rate to employees as defined in the LWO and as may be adjusted each July 1 and provision of health benefits as defined in the LWO. Contractor further pledges that it will comply with federal law proscribing retaliation for union organizing and will not retaliate for activities related to the LWO. Contractor shall require each of its Subcontractors within the meaning of the LWO to pledge to comply with the terms of federal law proscribing retaliation for union organizing. Contractor shall deliver the executed pledges from each such Subcontractor to the County within 90 days of the execution of the Subcontract. Contractor's delivery of executed pledges from each such Subcontractor shall fully discharge the obligation of the Contractor to comply with the provision in the LWO contain in Section 4957 concerning compliance with the LWO.

27. **PAYMENT**

Payment terms are typically Net 30 Days, in arrears for deliverables based Consulting services. Payment terms for Subscription based Research Services is net/30 from the date a service agreement is executed and/or access is provided. Reimbursement for travel and expenses are to be in accordance with the County's expense reimbursement policy (Administrative Manual).

28. **ACCESS TO AND USE OF COUNTY TECHNOLOGY**

As part of this contract Contractor shall agree with and abide by the provisions set forth in the Ventura County Non-Employee Information Technology Usage Policy, which by this reference is made a part hereof. Any employee, sub-contractor, or agent of the Contractor who will access (which shall include, but is not limited to, the use, maintenance, repair or installation of) County information technology in the course of his, or her, work for the County is required to sign the Ventura County Non-Employee Information Technology Usage Policy before accessing, using, maintaining, repairing or installing any County information technology system or component. Information technology shall include, but is not limited to, the network, Internet access, electronic mail, voice mail, voice message systems, facsimile devices, or other electronic or telecommunication systems used by the County.

## 29. SPECIAL TERMS — RESEARCH SUBSCRIPTIONS

A. An individual Service Agreement (SA) for subscription-based research and related services (the "**Services**") once issued is non-cancelable, and may be terminated only for material breach by either party, upon 30 days prior written notice, if the breach is not cured within the notice period.

B. **Ownership and Use of the Services.** Contractor owns and retains all rights to the Services not expressly granted to County in a SA. Only the individuals named in a SA (each a "**Licensed User**") may access the Services. Each Licensed User will be issued a unique password, which may not be shared. County agrees to review and comply with the Usage Guidelines for Contractor Services ("**Guidelines**"), which are accessible to all Licensed Users via the "Policies" section of gartner.com. Among other things, these Guidelines describe how County may substitute Licensed Users, excerpt from and/or share Contractor research documents within the County organization, and quote or excerpt from the Services externally.

C. **Disclaimer of Warranties.** The services are provided on an "as is" basis, and contractor expressly disclaims all warranties, express or implied, statutory or otherwise, including, without limitation, any implied warranties of fitness for a particular purpose or as to accuracy, completeness or adequacy of information. Client recognizes the uncertainties inherent in any analysis or information that may be provided as part of the services, and acknowledges that the services are not a substitute for its own independent evaluation and analysis and should not be considered a recommendation to pursue any course of action. Contractor shall not be liable for any actions or decisions that county may take based on the services or any information or data contained therein. County understands that it assumes the entire risk with respect to the use of the services.

D. **County Confidential Information.** Contractor agrees to keep confidential any County-specific information communicated by County to Contractor in connection with this SA that is (i) clearly marked confidential if provided in written form, or (ii) preceded by a statement that such information is confidential, if provided in oral form, and such statement is confirmed in writing within 15 days of its initial disclosure. This obligation of confidence shall not apply to any information that: (1) is in the public domain at the time of its communication; (2) is independently developed by Gartner; (3) entered the public domain through no fault of Contractor subsequent to County's communication to Gartner; (4) is in Gartner's possession free of any obligation of confidence at the time of County's communication to Gartner; or (5) is communicated by the County to a third party free of any obligation of confidence. Additionally, Contractor may disclose such information to the extent required by legal process.

E. **Miscellaneous**

A. **Assignability.** A SA and the rights granted to County in a SA may not be assigned, sublicensed or transferred, in whole or in part, by either party without the prior written consent of the other party, except to a successor to substantially all of the business or assets of a party by merger or acquisition. Where consent is required, it will not be unreasonably withheld.

B. **Use of Name, Trademark, and Logo.** Absent the prior written consent of the other party, neither party shall use the name, trademarks, or logo of the other in promotional materials, publicity releases, advertising, or any other similar publications or communications.

C. **No Third Party Beneficiaries.** SA's are for the benefit of the parties only.

### 30. SPECIAL TERMS — AD HOC CONSULTING PROJECTS

**Ownership of Deliverables:** Deliverables, as defined in the ordering documents, are subject to the payment of applicable fees contained in an individual Statement of Work. Contractor shall assign to County ownership of any project Deliverable(s) originally created for and submitted to the County, provided, however, that Contractor may use, reproduce, display and distribute excerpts and data from the Deliverables, either alone or together with other material, in the ordinary course of Gartner's business, so long as such excerpts and data do not identify County by name or contain any of the County's confidential or proprietary information, and provided further that Contractor retains all right, title and interest in and to its processes, benchmarking data and data collection tools, assessment models and pertinent methodologies such as Strategic Planning, Gartner's copyrighted proprietary research and other pre-existing materials and data, such as Data Collection Templates and Survey Tools for Applications and Infrastructure, and benchmark comparisons ("Preexisting Intellectual Property").

Nothing contained in this Agreement shall preclude Contractor from rendering services to others or developing work products that are competitive with, or functionally comparable to, the Services. Contractor shall not be restricted in its use of ideas, concepts, know-how, data and techniques acquired or learned in the course of performing the Services, provided that Contractor shall not use or disclose any of County's confidential information.

**Indemnification for Intellectual Property:**

Upon notification of a claim against County alleging any Contract Deliverable infringes a copyright, patent or trade secret of any third party, Contractor will defend such claim at its expense and will pay any costs or damages that may be finally awarded against County. Contractor will not indemnify County however, if the claim of infringement is caused by (1) County's misuse or modification of the Deliverable; (2) County's failure to use corrections or enhancements made available by Contractor; (3) County's use of the Deliverable in combination with any product or information not owned or developed by Contractor (4) Information direction, specification or materials provided by County. If any Deliverable is, or in Contractor's opinion is likely to be, held to be infringing, Contractor shall at its expense and option either: (a) procure the right for County to continue using it, (b) replace it with a noninfringing equivalent, (c) modify it to make it noninfringing, or (d) direct the return of the Deliverable and refund to County the fees paid for such Deliverable.

**Preexisting Materials:** County shall retain its rights in any proprietary material that County supplies to Contractor. If the County provides Contractor with materials owned or controlled by County or with use of, or access to, such materials, the County grants to Contractor all rights and licenses that are necessary for Contractor to fulfill its obligations under each Statement of Work. Contractor grants to County for internal purposes only a worldwide, royalty-free, perpetual license to use, reproduce, display, distribute copies of, and prepare derivative works of any Contractor "Preexisting Intellectual Property" embodied in the Deliverables.

**Limitation of Liability:** Neither party shall be liable for any consequential, indirect, special or incidental damages, such as damages for lost profits, business failure or loss arising out of use of the Deliverables or the Services, whether or not advised of the possibility of such damages.

**Warranty:** a) The County warrants that Contractor's use of any materials furnished by the County in connection with a specific consulting order's Statement of Work does not infringe any copyright, trademark, trade secret or other right of any third party. (b) Contractor warrants that the Deliverables, in the form provided to the County, do not infringe any copyright, trademark, trade secret or other right of any third party. (c) ALL SERVICES ARE PROVIDED ON AN "AS IS" BASIS. CONTRACTOR DISCLAIMS ALL WARRANTIES, EXPRESS OR IMPLIED, STATUTORY OR OTHERWISE, INCLUDING, WITHOUT LIMITATION, ANY IMPLIED WARRANTIES OF MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE. THE INFORMATION IN THE DELIVERABLES HAS BEEN OBTAINED FROM SOURCES THAT CONTRACTOR BELIEVES TO BE RELIABLE. ALL DELIVERABLES SPEAK AS OF THE DATE OF DELIVERY TO THE COUNTY.

COUNTY OF VENTURA



Authorized Signature

Cliff Chroust

Printed Name

Purchasing Agent

Title

3.15.19

Date

CONTRACTOR\*



Authorized Signature

Phillip A. Cummings

Printed Name

Contracts Counsel

Title

05 March

Date

04-3099750

Tax Identification Number

**CONTRACTOR\***

\_\_\_\_\_  
Authorized Signature

\_\_\_\_\_  
Printed Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Date

\* If a corporation, this Contract must be signed by two specific corporate officers.

The first signature must be either the (1) Chief Executive Officer, (2) Chairman of the Board, (3) President, or any (4) Vice President.

The second signature must be the (a) Secretary, an (b) Assistant Secretary, the (c) Chief Financial Officer, or any (d) Assistant Treasurer.

In the alternative, a single corporate signature is acceptable when accompanied by a corporate resolution demonstrating the legal authority of the signature to bind the company.





## Ventura County

### RFP 5962

#### Table 1 - IT Research and Advisory Services

Prices for each year apply to orders received on or before December 31st of that year. Delivery start date of service(s) ordered shall be no later than the first of the month following the expiration of each year's pricing.

**Prices herein are maximum not to exceed rates.** The actual price an eligible client will pay for the renewal of any existing Service or the issuance of a new order will be consistent with the then current Gartner Public Sector pricing plus any applicable administrative fee(s) or the rates herein, whichever is less, for the Service(s) ordered. Please check with account representative for actual pricing before ordering.

RESEARCH AND ADVISORY SERVICES					
TEAM PLUS SOLUTIONS	2019 Price	2020 Price	2021 Price	2022 Price	2023 Price
<b>Executive Programs Leadership Team Plus <sup>1</sup></b>					
Leader	91,500	96,990	102,810	108,980	115,520
Partner Member	77,300	81,940	86,860	92,080	97,610
Partner Leader (must purchase Enterprise IT Leadership Team Plus Members)	77,300	81,940	86,860	92,080	97,610
Delegate Member	47,900	50,780	53,830	57,060	60,490
Delegate Leader (must purchase IT Leadership Team Plus Members)	47,900	50,780	53,830	57,060	60,490
Advisor Member	35,800	37,950	40,230	42,650	45,210
Advisor Leader (must purchase IT Leadership Team Plus Members)	35,800	37,950	40,230	42,650	45,210
Cross Function Member	25,800	27,350	29,000	30,740	32,590
<b>Executive Programs Leadership Team Plus with Industry <sup>1</sup> (one industry)</b>					
Leader	99,500	105,470	111,800	118,510	125,630
Partner Member	85,700	90,850	96,310	102,090	108,220
Partner Leader (must purchase Enterprise IT Leadership Team Plus with Industry Members)	85,700	90,850	96,310	102,090	108,220
Delegate Member	54,500	57,770	61,240	64,920	68,820
Delegate Leader (must purchase Industry Advisory Services Leadership Team Plus Members)	54,500	57,770	61,240	64,920	68,820
Advisor Member	43,100	45,690	48,440	51,350	54,440
Advisor Leader (must purchase Industry Advisory Services Leadership Team Plus Members)	43,100	45,690	48,440	51,350	54,440
Cross Function Member	28,800	30,530	32,370	34,320	36,380
<b>Enterprise IT Leaders Initiative Team <sup>1</sup> - Limited Availability <sup>3</sup></b>					
Leader	83,600	88,620	93,940	99,580	105,560
Advisor Member	43,700	46,330	49,110	52,060	55,190
<b>Enterprise IT Leaders Initiative Team with Industry <sup>1</sup> (one industry) - Limited Availability <sup>3</sup></b>					
Leader	93,500	99,110	105,060	111,370	118,060
Advisor Member	52,100	55,230	58,550	62,070	65,800

<b>Enterprise IT Leadership Team Plus<sup>1</sup></b>					
Leader	65,300	69,220	73,380	77,790	82,460
Advisor Member	32,700	34,670	36,760	38,970	41,310
Cross Function Member	19,800	20,990	22,250	23,590	25,010
<b>Enterprise IT Leadership Team Plus with Industry<sup>1</sup> (one industry)</b>					
Leader	73,100	77,490	82,140	87,070	92,300
Advisor Member	39,000	41,340	43,830	46,460	49,250
Cross Function Member	23,900	25,340	26,870	28,490	30,200
<b>IT Leadership Team Plus<sup>1</sup></b>					
Leader	32,700	34,670	36,760	38,970	41,310
Advisor Member	32,700	34,670	36,760	38,970	41,310
Cross Function Member	19,800	20,990	22,250	23,590	25,010
<b>Industry Advisory Services Leadership Team Plus<sup>1</sup> (one industry)</b>					
Leader	39,000	41,340	43,830	46,460	49,250
Advisor Member	39,000	41,340	43,830	46,460	49,250
Cross Function Member	23,900	25,340	26,870	28,490	30,200
<b>TEAM SOLUTIONS</b>	<b>2019 Price</b>	<b>2020 Price</b>	<b>2021 Price</b>	<b>2022 Price</b>	<b>2023 Price</b>
<b>Executive Programs Leadership Team<sup>2</sup></b>					
Leader	84,000	89,040	94,390	100,060	106,070
Partner Member	70,900	75,160	79,670	84,460	89,530
Partner Leader (must purchase Enterprise IT Leadership Team Members)	70,900	75,160	79,670	84,460	89,530
Delegate Member	44,000	46,640	49,440	52,410	55,560
Delegate Leader (must purchase IT Leadership Team Members)	44,000	46,640	49,440	52,410	55,560
Advisor Member	32,800	34,770	36,860	39,080	41,430
Advisor Leader (must purchase IT Leadership Team Members)	32,800	34,770	36,860	39,080	41,430
Cross Function Member	23,800	25,230	26,750	28,360	30,070
Role Member	16,800	17,810	18,880	20,020	21,230
<b>Executive Programs Leadership Team with Industry<sup>2</sup> (one industry)</b>					
Leader	91,300	96,780	102,590	108,750	115,280
Partner Member	78,500	83,210	88,210	93,510	99,130
Partner Leader (must purchase Enterprise IT Leadership Team with Industry Members)	78,500	83,210	88,210	93,510	99,130
Delegate Member	50,000	53,000	56,180	59,560	63,140
Delegate Leader (must purchase Industry Advisory Services Leadership Team Members)	50,000	53,000	56,180	59,560	63,140
Advisor Member	39,600	41,980	44,500	47,170	50,010

Advisor Leader (must purchase Industry Advisory Services Leadership Team Members)	39,600	41,980	44,500	47,170	50,010
Cross Function Member	26,400	27,990	29,670	31,460	33,350
Role Member	18,700	19,830	21,020	22,290	23,630
<b>Enterprise IT Leadership Team <sup>2</sup></b>					
Leader	60,100	63,710	67,540	71,600	75,900
Advisor Member	30,200	32,020	33,950	35,990	38,150
Cross Function Member	18,300	19,400	20,570	21,810	23,120
Role Member	11,200	11,880	12,600	13,360	14,170
Essentials Member	8,800	9,330	9,890	10,490	11,120
<b>Enterprise IT Leadership Team with Industry <sup>2</sup> (one industry)</b>					
Leader	67,000	71,020	75,290	79,810	84,600
Advisor Member	35,800	37,950	40,230	42,650	45,210
Cross Function Member	21,900	23,220	24,620	26,100	27,670
Role Member	12,600	13,360	14,170	15,030	15,940
Essentials Member	8,800	9,330	9,890	10,490	11,120
<b>IT Leadership Team <sup>2</sup></b>					
Leader	30,200	32,020	33,950	35,990	38,150
Advisor Member	30,200	32,020	33,950	35,990	38,150
Cross Function Member	18,300	19,400	20,570	21,810	23,120
Role Member	11,200	11,880	12,600	13,360	14,170
Essentials Member	8,800	9,330	9,890	10,490	11,120
<b>Industry Advisory Services Leadership Team <sup>2</sup> (one industry)</b>					
Leader	35,800	37,950	40,230	42,650	45,210
Advisor Member	35,800	37,950	40,230	42,650	45,210
Cross Function Member	21,900	23,220	24,620	26,100	27,670
Role Member	12,600	13,360	14,170	15,030	15,940
Essentials Member	8,800	9,330	9,890	10,490	11,120
<b>INDIVIDUAL SOLUTIONS</b>	<b>2019 Price</b>	<b>2020 Price</b>	<b>2021 Price</b>	<b>2022 Price</b>	<b>2023 Price</b>
<b>Executive Programs</b>					
Member (Single User)	92,700	98,270	104,170	110,430	117,060
Member (Multi User)	82,300	87,240	92,480	98,030	103,920
Member Basic (Single User)	63,200	67,000	71,020	75,290	79,810
Member Basic (Multi User)	56,500	59,890	63,490	67,300	71,340
Two Additional Meetings Add-on - Limited Availability <sup>3</sup>	16,500	17,490	18,540	19,660	20,840
<b>Executive Programs with Industry (one industry)</b>					
Member (Single User)	99,600	105,580	111,920	118,640	125,760
Member (Multi User)	89,500	94,870	100,570	106,610	113,010
Member Basic (Single User)	70,300	74,520	79,000	83,740	88,770
Member Basic (Multi User)	63,800	67,630	71,690	76,000	80,560



<b>Enterprise IT Leaders</b>					
Member (Single User)	71,600	75,900	80,460	85,290	90,410
Member (Multi User)	60,100	63,710	67,540	71,600	75,900
Industry Add-on (one industry) <sup>4</sup>	10,500	11,130	11,800	12,510	13,270
Two Onsite Meetings Add-on - Limited Availability <sup>3</sup>	16,600	17,600	18,660	19,780	20,970
<b>IT Leaders</b>					
Advisor (Single User)	40,800	43,250	45,850	48,610	51,530
Advisor (Multi User)	30,200	32,020	33,950	35,990	38,150
Reference (Single User)	28,500	30,210	32,030	33,960	36,000
Reference (Multi User)	17,700	18,770	19,900	21,100	22,370
<b>Industry Advisory Services (one industry)</b>					
Advisor (Single User)	46,300	49,080	52,030	55,160	58,470
Advisor (Multi User)	35,800	37,950	40,230	42,650	45,210
Reference (Single User)	31,200	33,080	35,070	37,180	39,420
Reference (Multi User)	21,300	22,580	23,940	25,380	26,910
<b>Core Connect</b>					
Advisor (Single User)	36,800	39,010	41,360	43,850	46,490
Advisor (Multi User)	26,300	27,880	29,560	31,340	33,230
Reference (Single User)	24,500	25,970	27,530	29,190	30,950
Reference (Multi User)	13,800	14,630	15,510	16,450	17,440
<b>IT News and Insight</b>	640	680	730	780	830
<b>MULTI-USER SOLUTIONS</b>	<b>2019 Price</b>	<b>2020 Price</b>	<b>2021 Price</b>	<b>2022 Price</b>	<b>2023 Price</b>
<b>Technical Professionals <sup>5</sup></b>					
Advisor Department	115,900	122,860	130,240	138,060	146,350
Reference Department	78,000	82,680	87,650	92,910	98,490
<b>Technical Professionals Advisor Team <sup>5</sup></b>	55,100	58,410	61,920	65,640	69,580
<b>Technical Professionals Small &amp; Midsize Business (SMB) <sup>5</sup> (per agency)</b>					
Advisor SMB	58,600	62,120	65,850	69,810	74,000
Reference SMB	38,900	41,240	43,720	46,350	49,140
<b>GARTNER BUSINESS SERVICES</b>	<b>2019 Price</b>	<b>2020 Price</b>	<b>2021 Price</b>	<b>2022 Price</b>	<b>2023 Price</b>
<b>Customer Service &amp; Support Leaders Team <sup>8</sup></b>					
Leader	30,200	32,020	33,950	35,990	38,150
Advisor Member	30,200	32,020	33,950	35,990	38,150
Reference Member	13,500	14,310	15,170	16,090	17,060
<b>Customer Service &amp; Support Leaders Individual Access</b>	40,500	42,930	45,510	48,250	51,150
<b>Finance Leaders Team <sup>8</sup></b>					
Leader	30,200	32,020	33,950	35,990	38,150
Advisor Member	30,200	32,020	33,950	35,990	38,150
Reference Member	14,000	14,840	15,740	16,690	17,700
<b>Finance Leaders Individual Access</b>	40,500	42,930	45,510	48,250	51,150



<b>Chief Human Resources Officers Team <sup>8</sup></b>					
Leader	74,800	79,290	84,050	89,100	94,450
Advisor Member	30,200	32,020	33,950	35,990	38,150
Reference Member	16,700	17,710	18,780	19,910	21,110
<b>Chief Human Resources Officers Individual Access</b>	82,400	87,350	92,600	98,160	104,050
<b>Human Resources Leaders Team <sup>8</sup></b>					
Leader	30,200	32,020	33,950	35,990	38,150
Advisor Member	30,200	32,020	33,950	35,990	38,150
Reference Member	16,700	17,710	18,780	19,910	21,110
<b>Human Resources Leaders Individual Access</b>	40,500	42,930	45,510	48,250	51,150
<b>Human Resources Professionals <sup>8</sup></b>					
Up to 20 HR Professionals	37,000	39,220	41,580	44,080	46,730
Up to 5 HR Professionals	23,000	24,380	25,850	27,410	29,060
<b>Legal &amp; Compliance Leaders Team <sup>8</sup></b>					
Leader	26,100	27,670	29,340	31,110	32,980
Advisor Member	26,100	27,670	29,340	31,110	32,980
Reference Member	10,400	11,030	11,700	12,410	13,160
<b>Legal &amp; Compliance Leaders Individual Access</b>	34,600	36,680	38,890	41,230	43,710
<b>Marketing Leaders Team <sup>8</sup></b>					
Leader	38,200	40,500	42,930	45,510	48,250
Advisor Member	38,200	40,500	42,930	45,510	48,250
Reference Member	15,000	15,900	16,860	17,880	18,960
<b>Marketing Leaders</b>					
Advisor (Single User)	45,900	48,660	51,580	54,680	57,970
Advisor (Multi User)	38,200	40,500	42,930	45,510	48,250
<b>OTHER SERVICES</b>	<b>2019 Price</b>	<b>2020 Price</b>	<b>2021 Price</b>	<b>2022 Price</b>	<b>2023 Price</b>
<b>Strategic Advisory Services</b>					
Remote Advisory Services <sup>4</sup>	7,700	8,170	8,670	9,200	9,760
Internal Advisory Session <sup>4</sup>	15,700	16,650	17,650	18,710	19,840
<b>Events</b>					
Symposium Ticket	4,600	TBD	TBD	TBD	TBD
Summit Ticket	3,150	TBD	TBD	TBD	TBD
Summit Ticket (excludes BI, Data Center, Security, and Apps)	2,650	TBD	TBD	TBD	TBD
Catalyst Conference Ticket	3,150	TBD	TBD	TBD	TBD

<b>RENEWAL ONLY SERVICES <sup>6</sup></b>	<b>2019 Price</b>	<b>2020 Price</b>	<b>2021 Price</b>	<b>2022 Price</b>	<b>2023 Price</b>
<b>IT Executives - Renewal Only <sup>6</sup></b>					
CIO Signature	103,100	109,290	115,850	122,810	130,180
CIO Member (Single User)	94,400	100,070	106,080	112,450	119,200
CIO Member (Multi User)	84,000	89,040	94,390	100,060	106,070
CIO Essentials Member (Single User)	63,200	67,000	71,020	75,290	79,810
CIO Essentials Member (Multi User)	56,500	59,890	63,490	67,300	71,340
Delegate Add-on to CIO Signature - Limited Availability <sup>3</sup>	44,000	46,640	49,440	52,410	55,560
Industry Add-on (one industry) <sup>4</sup>	10,500	11,130	11,800	12,510	13,270
<b>Legacy Core Research - Renewal Only <sup>6</sup></b>					
Advisor (50+ users)	11,900	12,620	13,380	TBD	TBD
Advisor (100+ users)	10,643	11,290	11,970	TBD	TBD
Reference (50+ users)	7,300	7,740	8,210	TBD	TBD
Reference (100+ users)	5,491	5,830	6,180	TBD	TBD
<b>PUBLIC AND NON-PROFIT HIGHER EDUCATION INSTITUTIONS ONLY</b>	<b>2019 Price</b>	<b>2020 Price</b>	<b>2021 Price</b>	<b>2022 Price</b>	<b>2023 Price</b>
<b>Technical Professionals for Higher Education <sup>7</sup> (per student campus)</b>					
Advisor Higher Education for a designated campus IT Staff Only	58,600	62,120	65,850	69,810	74,000
Reference Higher Education for a designated campus IT Staff Only	38,900	41,240	43,720	46,350	49,140
<b>APPLIED STRUCTURED RESEARCH ADVISORY SERVICES</b>	<b>2019 Price</b>	<b>2020 Price</b>	<b>2021 Price</b>	<b>2022 Price</b>	<b>2023 Price</b>
<b>Digital Strategy and IT Strategic Planning</b>					
Digital Strategy / IT Strategy – Low Complexity	150,000	154,500	159,140	163,920	168,840
Digital Strategy / IT Strategy – Medium Complexity	200,000	206,000	212,180	218,550	225,110
Digital Strategy / IT Strategy – High Complexity	250,000	257,500	265,230	273,190	281,390
<b>Smart Government Readiness Assessment</b>					
Smart Government Readiness Assessment – Low Complexity	150,000	154,500	159,140	163,920	168,840
Smart Government Readiness Assessment – Medium Complexity	200,000	206,000	212,180	218,550	225,110
Smart Government Readiness Assessment – High Complexity	250,000	257,500	265,230	273,190	281,390
<b>IT Maturity Assessment</b>					
IT Maturity Assessment – Low Complexity	50,000	51,500	53,050	54,650	56,290
IT Maturity Assessment – Medium Complexity	100,000	103,000	106,090	109,280	112,560
IT Maturity Assessment – High Complexity	150,000	154,500	159,140	163,920	168,840

“Single User” applies to a buying center that has one individual license; “Multi User” applies to a buying center that has at least two qualifying licenses within the same agency or municipality. To qualify for multi-user price levels, services must be ordered on the same Service Agreement or Purchase Order and reflect a common “Bill To” address. Strategic Advisory Services, Events, and Add-on services do not contribute towards multi-user pricing qualification.

<sup>1</sup> Team Plus licenses require the purchase of a team configuration and are not available for purchase as standalone licenses. A maximum of one Leader per Team. Each Leader type license must have three (3) to ten (10) Team Plus Members coterminous with the Leader license. An Executive Programs Leadership Team Plus with one Team Plus Leader and less than three (3) Team Plus Members is permissible so long as one of the Team Plus Members is a Delegate or Partner. Team Plus with Industry Advisory Services pricing is for one industry and all licenses in a Team Plus with Industry Advisory Services must purchase access to the same industry. All licenses in a Team Plus solution, including subteam members, must be “Team Plus” type licenses.

<sup>2</sup> Team licenses require the purchase of a team configuration and are not available for purchase as standalone licenses. A maximum of one Leader per Team. Each Leader type license must have three (3) to ten (10) Team Members coterminous with the Leader license. An Executive Programs Leadership Team with one Team Leader and less than three (3) Team Members is permissible so long as one of the Team Members is a Delegate or Partner. Team with Industry Advisory Services pricing is for one industry and all licenses in a Team with Industry Advisory Services must purchase access to the same industry. All licenses in a Team solution, including subteam members, must be “Team” type licenses and cannot include “Team Plus” licenses.

<sup>3</sup> Limited availability. Check with Sales Representative before purchasing.

<sup>4</sup> Purchasing prerequisite and/or eligibility requirements applies. Check with Sales representatives before purchasing.

<sup>5</sup> Technical Professionals services require a minimum spend on Gartner licenses. For government agencies of 4,000 employees or fewer, the minimum spend in Gartner licenses is \$30,400, for agencies over 4,000 employees it's \$118,700. For a distinct university or college the minimum spend in Gartner licenses is \$30,400. Technical Professionals SMB is available only to eligible small and medium size agencies with 4,000 or fewer employees.

<sup>6</sup> **Renewal only** services are available to eligible license holders who purchased the service listed on or before the date specified below and continuously purchase the service thereafter.

Core Research license holders as of February 29, 2012. \*

IT Executives license holders as of April 30, 2015. \*\*

\* Renewals of existing Core Research seats are permitted at the 100 seat quantity price level in effect as of May 1, 2018 unless the renewal seat aggregate drops to a lower seat quantity price level. Core Research to IT Leaders or Industry Advisory Services promotional migration options may be available. Please check with your Gartner Account Executive for details.

\*\* Industry Add-on must be coterminous with the base IT Executives license. The same Industry Add-on license must be purchased for each user within the IT Executives CIO Signature for the Member and each Delegate.

<sup>7</sup> Higher Education products are only available to eligible, not-for-profit Higher Education colleges or universities. A Core IT Research Reference for Higher Education license is for one designated, student campus based on the total full-time equivalent (FTE) student enrollment of the college or university, as assessed at the time of purchase. Purchasing prerequisites apply. Check with Sales representatives before purchasing.

<sup>8</sup> Gartner Business Services Team licenses require the purchase of a team configuration and are not available for purchase as standalone licenses. A maximum of one Team Leader per Team. Each Team Leader type license must have three (3) to ten (10) Team Members coterminous with the Leader license. A Customer Service & Support Team or Legal & Compliance Leaders Team with one Team Leader and two Team Members is permissible. All licenses in a Team must be of the same business domain; for example, a Finance Leaders Team may only consist of Finance Leaders Team licenses. Human Resources Professionals requires the purchase and maintenance of a coterminous Chief Human Resources Officers Team or Human Resources Team.

<sup>9</sup> Gartner Account Executive can provide multi-year pricing options upon Client's request. Any multi-year price quote is expressly conditioned upon the individual Client agreeing to waive its right to terminate for convenience. The pricing for each year will be listed on the completed Service Agreement. The order will contain the following terms:

"This is a promotional offer for a [insert desired number of years] year, non-cancellable term. Upon Year [insert 2 or 3] Contract Term End Date any additional or renewal purchases shall be at Gartner's then-current Ventura County pricing."

**Gartner reserves the right to refresh its pricing and product offerings on an annual basis. The refreshed pricing and product offering(s) will be provided to the Client in writing and will become effective within 10 days of submission by Gartner and/or upon the Agreement's annual renewal date.**

# Ventura County

RFP 5962

**Table 2 - Service Descriptions**

Service	Service Description URL
<b>TEAM PLUS SOLUTIONS</b>	
<b>Executive Programs Leadership Team Plus</b>	
Leader	<a href="http://www.gartner.com/it/sd/sd_ep_team_plus_leader.pdf">http://www.gartner.com/it/sd/sd_ep_team_plus_leader.pdf</a>
Partner Member	<a href="http://www.gartner.com/it/sd/sd_ep_team_plus_partner.pdf">http://www.gartner.com/it/sd/sd_ep_team_plus_partner.pdf</a>
Partner Leader	<a href="http://www.gartner.com/it/sd/sd_ep_team_plus_partner_leader.pdf">http://www.gartner.com/it/sd/sd_ep_team_plus_partner_leader.pdf</a>
Delegate Member	<a href="http://www.gartner.com/it/sd/sd_ep_team_plus_delegate.pdf">http://www.gartner.com/it/sd/sd_ep_team_plus_delegate.pdf</a>
Delegate Leader	<a href="http://www.gartner.com/it/sd/sd_ep_team_plus_delegate_leader.pdf">http://www.gartner.com/it/sd/sd_ep_team_plus_delegate_leader.pdf</a>
Advisor Member	<a href="http://www.gartner.com/it/sd/sd_ep_team_plus_advisor.pdf">http://www.gartner.com/it/sd/sd_ep_team_plus_advisor.pdf</a>
Advisor Leader	<a href="http://www.gartner.com/it/sd/sd_ep_team_plus_advisor_leader.pdf">http://www.gartner.com/it/sd/sd_ep_team_plus_advisor_leader.pdf</a>
Cross Function	<a href="http://www.gartner.com/it/sd/sd_ep_team_plus_cf.pdf">http://www.gartner.com/it/sd/sd_ep_team_plus_cf.pdf</a>
<b>Executive Programs Leadership Team Plus with Industry (one industry)</b>	
Leader	<a href="http://www.gartner.com/it/sd/sd_ep_team_plus_industry_leader.pdf">http://www.gartner.com/it/sd/sd_ep_team_plus_industry_leader.pdf</a>
Partner Member	<a href="http://www.gartner.com/it/sd/sd_ep_team_plus_industry_partner.pdf">http://www.gartner.com/it/sd/sd_ep_team_plus_industry_partner.pdf</a>
Partner Leader	<a href="http://www.gartner.com/it/sd/sd_ep_team_plus_industry_partner_leader.pdf">http://www.gartner.com/it/sd/sd_ep_team_plus_industry_partner_leader.pdf</a>
Delegate Member	<a href="http://www.gartner.com/it/sd/sd_ep_team_plus_industry_delegate.pdf">http://www.gartner.com/it/sd/sd_ep_team_plus_industry_delegate.pdf</a>
Delegate Leader	<a href="http://www.gartner.com/it/sd/sd_ep_team_plus_industry_delegate_leader.pdf">http://www.gartner.com/it/sd/sd_ep_team_plus_industry_delegate_leader.pdf</a>
Advisor Member	<a href="http://www.gartner.com/it/sd/sd_ep_team_plus_industry_advisor.pdf">http://www.gartner.com/it/sd/sd_ep_team_plus_industry_advisor.pdf</a>
Advisor Leader	<a href="http://www.gartner.com/it/sd/sd_ep_team_plus_industry_advisor_leader.pdf">http://www.gartner.com/it/sd/sd_ep_team_plus_industry_advisor_leader.pdf</a>
Cross Function	<a href="http://www.gartner.com/it/sd/sd_ep_team_plus_industry_cf.pdf">http://www.gartner.com/it/sd/sd_ep_team_plus_industry_cf.pdf</a>
<b>Enterprise IT Leadership Initiative Team</b>	
Leader	<a href="http://sd.gartner.com/sd_eitl_it_leader.pdf">http://sd.gartner.com/sd_eitl_it_leader.pdf</a>
Advisor Member	<a href="http://sd.gartner.com/sd_eitl_it_advisor_member.pdf">http://sd.gartner.com/sd_eitl_it_advisor_member.pdf</a>
<b>Enterprise IT Leadership Initiative Team with Industry (one industry)</b>	
Leader	<a href="http://sd.gartner.com/sd_eitl_it_industry_leader.pdf">http://sd.gartner.com/sd_eitl_it_industry_leader.pdf</a>
Advisor Member	<a href="http://sd.gartner.com/sd_eitl_it_team_industry_advisor_member.pdf">http://sd.gartner.com/sd_eitl_it_team_industry_advisor_member.pdf</a>
<b>Enterprise IT Leadership Team Plus</b>	
Leader	<a href="http://www.gartner.com/it/sd/sd_eitl_team_plus_leader.pdf">http://www.gartner.com/it/sd/sd_eitl_team_plus_leader.pdf</a>
Advisor Member	<a href="http://www.gartner.com/it/sd/sd_eitl_team_plus_advisor_member.pdf">http://www.gartner.com/it/sd/sd_eitl_team_plus_advisor_member.pdf</a>
Cross Function Member	<a href="http://www.gartner.com/it/sd/sd_eitl_team_plus_cf_member.pdf">http://www.gartner.com/it/sd/sd_eitl_team_plus_cf_member.pdf</a>
<b>Enterprise IT Leadership Team Plus with Industry (one industry)</b>	
Leader	<a href="http://www.gartner.com/it/sd/sd_eitl_team_plus_industry_leader.pdf">http://www.gartner.com/it/sd/sd_eitl_team_plus_industry_leader.pdf</a>
Advisor Member	<a href="http://www.gartner.com/it/sd/sd_eitl_team_plus_industry_advisor_member.pdf">http://www.gartner.com/it/sd/sd_eitl_team_plus_industry_advisor_member.pdf</a>
Cross Function Member	<a href="http://www.gartner.com/it/sd/sd_eitl_team_plus_industry_cf_member.pdf">http://www.gartner.com/it/sd/sd_eitl_team_plus_industry_cf_member.pdf</a>
<b>IT Leadership Team Plus</b>	
Leader	<a href="http://www.gartner.com/it/sd/sd_itl_team_plus_leader.pdf">http://www.gartner.com/it/sd/sd_itl_team_plus_leader.pdf</a>
Advisor Member	<a href="http://www.gartner.com/it/sd/sd_itl_team_plus_advisor_member.pdf">http://www.gartner.com/it/sd/sd_itl_team_plus_advisor_member.pdf</a>
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# **A Proposal for the California County Information Services Directors Association**

## **IT Research and Advisory Services**

18 December 2018

Solicitation Number: RFP #5962





## Cover Letter

18 December 2018

Cliff Chroust  
Purchasing Agent  
California County Information Services Directors Association  
County of Ventura  
General Services Agency  
Procurement Services  
800 S. Victoria Ave., L#1080  
Ventura, CA 93009

Email: cliff.chroust@ventura.org

Re: Proposal for IT Research and Advisory Services  
Solicitation Number: RFP #5962

Dear Mr. Chroust:

Gartner, Inc. (Gartner) is pleased to provide the County of Ventura, in cooperation with the California County Information Services Directors Association (CCISDA) with this Proposal in response to RFP #5962: IT Research and Advisory Services. Gartner understands the importance of this effort in order for CCISDA to utilize subscription-based Information Technology (IT) insights in support of the planning, analysis, development, operations and maintenance of computer-assisted systems as well as supporting the information processing requirements for the counties of California. Over the course of our response, we will demonstrate our capability as the **only** IT research and advisory services provider capable of meeting and exceeding all of the requirements set forth by CCISDA, supported by our unmatched depth and breadth, technically superior analysts and a unique Government focus.

Our offer is valid for 90 days from the submission date of this Proposal.

Please contact me at +1 239 851 0029 or via email at david.kennison@gartner.com if you have any questions regarding this Proposal. Thank you for this opportunity. We look forward to assisting CCISDA with this key initiative.

Sincerely,

A handwritten signature in blue ink that reads "David Kennison".

David Kennison  
Sales Manager  
7676 Hazard Center Drive  
Suite 810  
San Diego, CA 92108

cc: Mike Ryan, Regional VP, Gartner

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# **Technical Proposal**

## 1.0 Executive Summary

The California County Information Services Directors Association (CCISDA) is responsible for facilitating the sharing of new computer applications and products, staff development and training, consulting services to member counties and support organizations, and systems integration work between counties, the State of California and the federal government. It is therefore paramount to utilize trusted, independent research and insights when providing reliable, responsive, cost-effective and relevant technology services and counsel. Gartner, the world's leading provider of IT research and advisory services, has fostered trusted partnerships with over 15,000 distinct organizations and 300,000+ professionals in more than 100 countries, including multiple state-wide organizations. Our renowned depth and breadth, foundationally built on expert-driven insights and real-world best practices, provide an unmatched set of resources to support CCISDA's vision of securely leveraging technology and effectively serving the residents of California. Through the course of this Technical response, we will demonstrate our capability as the **only** IT research and advisory firm in meeting and exceeding all of the County's requirements set forth. Our proposed services with this response will provide the insight and support needed by CCISDA in improving accountability, reducing costs, and aligning IT with the business needs, through the following factors:

- **Depth and Breadth** — Gartner will provide unmatched depth and breadth of coverage for CCISDA. Our research database consists of 135,000+ research documents including 7,000+ new documents published annually — **more than 5x** than that of our closest competitors — and covers an unparalleled 1,372 IT and business topics. Our research is derived from fact-based, role-driven datasets and metrics to provide CCISDA with the most qualitative and validated IT research and insight available. CCISDA can be confident that Gartner research can support it going forward, not only with the number of topics it covers but also in the depth of each topic and the relevance and timeliness of the information.
- **Government Expertise** — Gartner is the only unique IT research and advisory firm with a true Government focus. From our analysts to our research to our delivery, we bring a depth in the government landscape that cannot be matched. We contextualize Gartner research and specifically help our Government clients reduce cost, operate more effectively, mitigate risks and improve business outcomes. Our dedicated Government Service Delivery Team and Government Research practice enables an unrivaled level of insight into government research and resources on the most critical public sector topics.
- **Technically Superior Analysts** — Gartner delivers more than just information: Our analysts, advisors, researchers and quantitative analysts have the practical experience and knowledge to provide CCISDA with truly insightful, strategic guidance on its most critical priorities. Our 2000+ analysts and researchers are dedicated to creating original, unbiased documents as well as contextualizing research for our clients. Only Gartner has a dedicated team of government analysts who create government-focused research on the most critical government topics. Gartner has **15 government-focused analysts** in total, who bring specific experience working with all department-level agencies. In addition, our government analysts have an average of 26 years of experience as public-sector IT executives, having led critical and wide-reaching initiatives and programs.

## 2.0 Gartner Compliance with Section 2.0 Instructions

Gartner is the world's leading information technology research and advisory company. We deliver the technology-related insight necessary for clients in public and private sector to make the right decisions, every day. While other firms may claim that they offer similar, technically acceptable research and advisory services, **only** Gartner will provide CCISDA with the trusted, independent and actionable insight, without any sponsored research, and an unparalleled access to the world's largest database of IT and business research. Our sheer depth and breadth is illustrated through our database, consisting of 135,000+ research documents covering 1,372 IT and business topics. In addition to the world's largest database of IT research, Gartner will also equip CCISDA's leaders with decision support insights, advice and tools to achieve their mission critical priorities and build the successful organizations of tomorrow. We will demonstrate in the sections below the depth and breadth of our unmatched offerings.

### 2.1 Company Profile

Requirement 1.1.1 Offeror must provide a company profile.

1. Name, address, and telephone number. Company headquarters location. Include office location closest to Ventura.

**Complies.** Please reference the table below for the required Gartner contact information

Table 1. Company Information

Required Information	Gartner Response
Name	Gartner, Inc.
Headquarters Address	56 Top Gallant Road Stamford, CT 06902
Telephone Number	Corporate #: +1 203 964 0096 Contract Manager #: +1 239 851 0029
Local Address	7676 Hazard Center Drive Suite 810 San Diego, CA 92108

2. Company background/history and why proposer is qualified to provide the services described in this RFP. What differentiates the company from its competitors and company's market focus.

**Complies.** IT is critical to every organization, but harder to manage successfully due to its increasing complexity. Providing global, industry-leading insights and support since 1979, Gartner is the world's most trusted provider of IT research and advisory services. With a long standing relationship with the County of Ventura and CCISDA extending over 15 years, Gartner is uniquely qualified to continue providing trusted insights, strategic advice and practical tools to achieve the most critical priorities and initiatives facing CCISDA's organizations. We help clients:

- **Ensure the success of key initiatives.** CCISDA will benefit from an unbiased, outside perspective on best practices — contextualized to its situation(s) — and save time through our proactive delivery. We deliver in-depth research, resources, tools and methodologies for 100+ specific initiatives.



- **Select the right products and get the best terms and pricing.** Our fact-based guidance will help CCISDA reduce the risk of critical product decisions, negotiate money-saving terms and conditions, and maximize returns on its IT investments. We find hard-dollar savings in 75% of the contracts we review.
- **Run a world-class IT organization.** We act as an extension of a CCISDA's teams, proactively delivering actionable, independent insight to professionals at all levels of the organization. We also enable our clients to measure, monitor and improve organizational performance in a wide range of mission-critical IT disciplines through the utilization of more than 14,000 peer benchmarks, maturity diagnostics covering more than 35 functional areas and observations from more than 7,000 data points collected annually.
- **Stay current with important innovations.** We will help CCISDA understand what emerging technologies and trends mean for its organizations and over what time frame. End users, technology providers and investors use Gartner Hype Cycles to track and monitor the commercial viability of 1,700 technologies, applications and trends in 109 IT, business and consumer markets. In addition, CCISDA will be able to continually monitor its provider portfolios with Gartner Magic Quadrants and Gartner Market Guides, which deliver market analysis in 140 technology segments.
- **Connect with valuable peers.** Clients leverage our global community of 75,000+ Gartner clients to reduce risks and avoid costly mistakes through unbiased vendor and product references and practical insight from a trusted network of peers. Additionally, as the world's leading IT conference provider, Gartner delivers a global event experience that delivers new thinking not found anywhere else. Gartner events attract more than 55,000 IT and business executives, including 8,000 CIOs and 1,500 industry-leading technology providers, to more than 75+ events each year in 22 locations

The table below illustrates the value provided by utilizing Gartner's services, and clearly demonstrates our quantifiable differentiating factors distinguishing us from other IT research and advisory providers.

**Table 2. Gartner Areas of Distinction**

Area of Distinction	How Gartner is Unequaled*	Benefit to CCISDA
<b>Executive Service Delivery Team</b>	The Gartner Executive Programs team is dedicated solely to providing support to our executive members. The member is supported by a dedicated executive peer advisor with government and commercial executive experience.	We will provide CCISDA leadership tailored support on technology and management issues by a seasoned executive with substantial breadth and depth of experience in government and commercial environments, plus access to the knowledge and experience of 200+ Executive Partners and Advisors who support our executive members globally.
<b>IT-Focused Research Analysts</b>	<ul style="list-style-type: none"> <li>■ Gartner has <b>4 times more analysts</b> than any of our competitors — more than 2,000 total, including 15 analysts dedicated to government research</li> <li>■ Gartner analysts are subject matter experts in specific areas (e.g., mobile architecture, business process management), rather than generalists.</li> </ul>	Our numbers allow us to have analysts with specialized focus areas while still providing superior coverage for the full spectrum of IT topics and trends. In addition, Gartner's 9:1 client-to-analyst ratio is the lowest in the industry, enabling CCISDA to get answers to questions quickly.

Area of Distinction	How Gartner is Unequaled*	Benefit to CCISDA
<b>Online Research Database</b>	<ul style="list-style-type: none"> <li>■ With over 135,793 research notes, Gartner has <b>10 times more documents</b> in our online research database than our competitors, and we publish <b>5 times more documents per year</b></li> <li>■ Each document has been reviewed within the last 18 months to ensure it is current and relevant to today's trends</li> </ul>	CCISDA can be confident that Gartner research can support it going forward, not only with the number of topics it covers but also in the depth of each topic and the currency of the information.
<b>Product and Vendor Evaluations</b>	<p>Gartner has at least <b>7 times more product and vendor evaluations</b> than our competitors, including:</p> <ul style="list-style-type: none"> <li>■ Magic Quadrants and Market Scopes that provide market analysis in 140 technology segments</li> <li>■ Hype Cycles that track and monitor the commercial viability of 1,700 technologies in 109 markets</li> <li>■ 47 Vendor Ratings that assess all the different aspects of a technology provider</li> </ul>	Comprehensive market coverage will enable CCISDA to reduce risk whenever critical procurement and investment decisions are at stake. Without access to data on vendor positions, the viability of evolving technologies, and the strength of technology providers, CCISDA may overlook a critical factor that may impact the technology and vendor selection process.
<b>IT Key Metrics Data</b>	Our clients have access to 2,000 IT Metrics across 90 reports through <b>the world's largest IT benchmarking database</b> — with authoritative data to support staffing and investment levels as well as key technology cost and performance metrics.	This data can help CCISDA plan its IT budget with relevant facts and metrics to justify IT spending and staffing costs, as well as identify opportunities for cost optimization and investment prioritization. This will also lead to improved dialogue and alignment with business units and senior leadership.
<b>Team Plus Offerings</b>	Clients can leverage <b>end-to-end support</b> for initiatives with an added focus on implementation, thanks to the addition of CEB resources in Team Plus products. No other IT research and advisory provider offers the same latitude of coverage, from defining IT strategy all the way to <b>executing an actionable plan</b> .	CCISDA can benefit from guidance that spans the life of an IT initiative. This will help the organization drive smarter and faster implementation of critical initiatives with the help of additional best practice and decision support content.
<b>Cost Optimization</b>	Gartner provides <b>10,100+ research documents</b> and tools focused on IT and business cost optimization. <b>Our 100+ analysts</b> covering this topic help clients understand their top five cost optimization opportunities and create a roadmap for value realization.	Gartner's cost optimization research doesn't just focus on cutting costs — CCISDA can use our resources to prepare for digital disruption, proactively reduce business costs using IT and reimagine business service delivery with technology.

Area of Distinction	How Gartner is Unequaled*	Benefit to CCISDA
<b>Events</b>	Gartner hosts at least <b>4 times more conferences</b> annually with over <b>20 times more attendees</b> at our flagship event than any competitor. Executives and IT managers experience information-packed sessions led by Gartner analysts. We host <b>700+ live events</b> worldwide, as well as <b>220+ exclusive CxO gatherings</b> . Also, Gartner Summit events are role-focused and provide depth of educational content. Gartner Symposium is the premier IT event in the world with over 24,000 senior executives attending.	In addition to presenting the latest research, these events are important opportunities for professional CCISDA staff and leadership development. Critical insight on emerging technologies, vendor negotiations and collaboration provide a ROI, not to mention the opportunity to connect with peers and share best practices.
<b>Educational and Networking Activities</b>	Unlike our competitors, who provide limited teleconferences to licensed clients only, Gartner offers an average of <b>20 Webinars per month</b> across a wide variety of topics to the entire organization. Gartner also provides local analyst briefings and networking events in locations across the U.S.	Complimentary Webinars and local briefings provide professional development and training opportunities that do not incur travel costs. Some Webinars are eligible for continuing education credits (CEU) for ISC2. This feature is exclusive to Gartner.
<b>Private Online Peer Community</b>	Only Gartner offers a private peer community for CCISDA to interact with other IT peers, share best practices, learn about what similar organizations are doing and avoid possible pitfalls.	Only Gartner offers a private online peer community, free from any IT vendor or marketer participation. This means that the advice you receive through this community can be trusted and is not based on salespeople trying to sell you their solution. Eighty percent of questions are answered in 48 hours or less.
<b>Unique Perspective</b>	Gartner provides clients with unmetered access to our analysts. As a result, Gartner analysts engage in 380,000 one-to-one interactions with clients every year, or <b>15 times more one-to-one client interactions</b> per year than our competitors.	With a far-reaching view of the IT landscape, Gartner uncovers patterns and trends that others do not see. For CCISDA, this means more sound advice and more innovative solutions to IT and business challenges.

Area of Distinction	How Gartner is Unequaled*	Benefit to CCISDA
<b>Structured Applied Research Services</b>	<b>Gartner's applied research service</b> is the leading consultancy at the nexus of technology and business, helping clients define key strategies, manage major technology initiatives, optimize operations and achieve high returns on their IT investments. Our experienced practitioners apply rigorous methodologies, critical thinking, deep analytics, and knowledge management to solve CCISDA's most pressing issues and deliver maximum business value.	Our solutions address the breadth of CCISDA's business needs from defining key strategies to achieve business objectives, developing enterprise plans to manage IT risk, and managing its departments most critical initiatives. We work with our clients through all stages of the project life cycle to provide insight and support in conquering their greatest challenges. We help organizations make critical decisions on their IT direction, define the initiatives and roadmap to achieve that direction, and work with our clients directly to ensure these key initiatives are delivered successfully.
<b>Document and Contract Reviews</b>	Gartner analysts perform 20,000 reviews of strategies, proposals, policies and briefings, and 5,600 contract reviews each year. These services are <b>unmetered and free of charge</b> with the licenses being proposed for CCISDA.	Gartner provides vendor negotiation strategies and input on how to achieve cost avoidance. <b>This is only available through Gartner</b> with the depth of analyst experience and areas of coverage. Gartner identifies hard dollar savings in 75% of the contracts that we review.
<b>Number of Client Organizations</b>	Gartner has <b>5 times more clients</b> than any other competitor, totaling 15,000+ distinct enterprises in more than 100 countries.	Gartner analysts bring a unique perspective not available anywhere else based on the sheer number of relevant situations they have advised on while interacting with Gartner clients.

\* All competitive statistics are public information and were derived from sources such as corporate websites, corporate earnings calls, corporate investor presentations and SEC filings.

### 3. Location(s) from which employees will be assigned.

**Complies.** While the Contract Manager will be based out of the San Diego office, the applicable Subject Matter Experts (SMEs) relevant for each purpose/agency may be assigned from any one of the various 100+ Gartner offices located worldwide.

### 4. Number of employees both locally and nationally.

**Complies.** Listed below are the number of Gartner employees located in the California, nationally and internationally

**Table 3. Gartner Employees**

Location	Gartner Employees
California	196
National	8249
International	14,099

**5. States in which firm is licensed to practice.**

**Complies.** Gartner is not currently debarred, suspended, disqualified, precluded or prohibited by any governmental entity (federal, state or local government) from participating in any public procurement activity nor to the best of Gartner's knowledge, information and/or belief is there any activity of this type pending.

**6. Must be or will be registered with the State of California (in a timely manner), if awarded.**

**Complies.** Gartner is currently registered with the State of California, and should the registration expire or prove invalid for the purposes of this contract, we will take the appropriate measures to comply with registration requirements as needed upon award.

**Requirement 1.1.2. Indicate the number and type (National/State/Local) of government customers currently under contract.**

**Complies.** Gartner serves 15,000 distinct organizations across public and private industries in 100 countries worldwide — including 71% of the Fortune 1000 and 73% of the Global 500. Our partnerships include over **1,100+** Federal clients and **500+** State and Local Government clients. Our unrivaled Public Sector experience provides proven foundational support for our unique Government insight, from 7,000+ Government-specific research documents to the advisory services provided by our 100+ Government subject matter experts.

## 2.2 Staff Qualifications and Availability and Governmental References

**Requirement 1.2.1. Reference 1 — Offerors should provide a reference from similar projects performed within the last five (5) years. Provide 1) entity name, 2) contact name, 3) phone, 4) email, and a 5) scope of service.**

**Complies.** Please reference the table below for a representation of how the County of Santa Clara utilized Gartner services for a similar set of projects as those of CCISDA.

**Table 4. Reference 1 — County of Santa Clara**

Required Details	Client Information
Client Name	County of Santa Clara
Contact Information	Ann Dunkin Chief Information Officer +1 408 918 7043 <a href="mailto:Ann.dunkin@isd.sccgov.org">Ann.dunkin@isd.sccgov.org</a>
Scope of services	Over the past 12 months, the County utilized Gartner research and advisory subscription services by accessing research documents, conducting analyst inquiries, executive interactions, consulting engagements, contract reviews and document reviews. Gartner has provided advice and insight on initiatives including Cloud Computing, Negotiating Software and Cloud Contracts, Digital Workplace Program, Delivering Effective Identity and Access Management Capabilities, Application Development Strategies for Digital Business.

**Requirement 1.2.2. Reference 2 — Offerors should provide a reference from similar projects performed within the last five (5) years. Provide 1) entity name, 2) contact name, 3) phone, 4) email, and a 5) scope of service.**



**Complies.** Please reference the table below for a representation of how the San Diego District Attorney utilized Gartner services for a similar set of projects as those of CCISDA.

**Table 5. Reference 2 — San Diego District Attorney**

Required Details	Client Information
Client Name	San Diego District Attorney
Contact Information	Usama (Sam) Georges Chief Information Officer +1 619 531 4229 <a href="mailto:Usama.georges@sdcdca.org">Usama.georges@sdcdca.org</a>
Scope of services	Over the past 12 months, the County utilized Gartner research and advisory subscription services by accessing research documents, conducting analyst inquiries and executive interactions. Gartner has provided advice and insight on initiatives including Endpoint and Mobile Security, Mobile, Endpoint and Wearable Computing Strategies, Cloud Security, Network Security, Delivering Effective Identity and Access Management Capabilities.

Requirement 1.2.3. Reference 3 — Offerors should provide a reference from similar projects performed within the last five (5) years. Provide 1) entity name, 2) contact name, 3) phone, 4) eMail, and a 5) scope of service.

**Complies.** Please reference the table below for a representation of how the San Diego County Sheriff's Department utilized Gartner services for a similar set of projects as those of CCISDA.

**Table 6. Reference 1 — San Diego County Sheriff's Department**

Required Details	Client Information
Client Name	San Diego County Sheriff's Department
Contact Information	Ashish (Yosh) Kakkad Chief Information Officer +1 858 692 9089 <a href="mailto:Ashish.kakkad@sdsheriff.org">Ashish.kakkad@sdsheriff.org</a>
Scope of services	Over the past 12 months, the County utilized Gartner research and advisory subscription services by accessing research documents, conducting analyst inquiries, executive interactions and document reviews. Gartner has provided advice and insight on initiatives including Transitioning to Digital Government, Information Security Management Program, Endpoint and Mobile Security, Building and Expanding a Digital Business, Digital Workplace Applications.

Requirement 1.2.4. Personnel Qualification 1 — Provide a resume detailing the experience, level of expertise and qualifications of the contract representative/manager and these individuals who will directly be involved in performing the work of the Consulting.

**Complies.** Listed below is Mr. David Kennison's resume, experience and qualifications, who will serve as the dedicated point of contact for Contract Management upon receiving award of a Contract from CCISDA.

**David Kennison***Sales Manager — Gartner*

With over 18 years of experience fulfilling his client's needs, David Kennison is dedicated to understanding the business agenda of IT Leaders in California. By delivering Gartner's trusted research, analysis and advice, Mr. Kennison helps CIOs and their teams to ensure the success of their key initiatives and get the most value from their IT purchases.

Mr. Kennison routinely excels in understanding the technology priorities and business issues his IT Leaders are looking to solve, while aligning Gartner resources to save time and money, mitigate risk, extend resources and validate thinking throughout the lifecycle.

**Education**

- BS, Marketing — St. John's University, 2000

**Experience**

- 16 Years at Gartner
- 2 Years at Brand Institute as a Business Development Manager

**Requirement 1.2.5. Personnel Qualification 2 — Provide a resume detailing the experience, level of expertise and qualifications of a typical representative/manager who will directly be involved in performing the work of the consultation.**

**Complies.** Listed below is Mr. Bill Finnerty's resume, experience and qualifications, for a representative example of the level of expertise CCISDA can expect for consultations and advisory services.



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**Bill Finnerty*****Sr. Research Analyst***

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Bill Finnerty is a Research Director in Gartner Research, where he is a member of the public-sector team covering citizen engagement, government portals, mobile, geospatial technologies and smart cities/communities for state and local governments.

Mr. Finnerty previously served as the Chief Information Officer for the Pennsylvania Department of State, where he was responsible for the Department's IT strategic direction, budget, policy and staffing strategies. While at the Department of State, he established an agile project management methodology, implemented an ITIL practice, oversaw system modernization projects, and worked on projects to deliver online services to the public.

Mr. Finnerty was also the Director of Information Technology for Cumberland County, Pennsylvania, where he led the Information Technology, ERP, GIS, Elections and Archive departments. During his tenure with the county, he implemented a social media program, oversaw the implementation of a county-owned microwave network, and the creation of a county information security division.

Mr. Finnerty has also been an Adjunct Professor for Central Pennsylvania College, where he taught classes in system analysis and design, ethics, and application development.

**Years of Experience**

- 3 years in total with Gartner
- 19 years in IT industry
- 18 years in Government industry

**Professional Background**

- Pennsylvania Department of State, Chief Information Officer, 3 years
- Cumberland County, Director of Information Technology, 13 years
- Central Pennsylvania College, Adjunct Professor, 10 years

**Education**

- Masters of Information Systems, Shippensburg University
- Bachelor of Science, in Elementary Education, Mansfield University

Requirement 1.2.6. Personnel Qualification 3 — Provide a resume detailing the experience, level of expertise and qualifications of a typical representative/manager who will directly be involved in performing the work of the consultation.

**Complies.** Listed below is Mr. Rick Howard's resume, experience and qualifications, for a representative example of the level of expertise CCISDA can expect for consultations and advisory services.



### **Rick Howard**

Research Vice-President, Gartner

Rick Howard is a Research Vice President and government research Agenda Manager at Gartner, where he focuses on public-sector IT solutions, management practices and technology trends. Mr. Howard's key areas of coverage in government include big data analytics, business intelligence, open government data and services, cross-agency case management, CRM, interoperability, and emerging business and technology trends in government.

Prior to joining Gartner, Mr. Howard served as a state health and human services CIO and co-chaired a governor-appointed leadership council charged with coordinating the statewide adoption of electronic health records and promoting a regional health information exchange. His experience includes large information systems planning and implementation, infrastructure modernization, service delivery and organizational development, IT strategic planning and execution, governance, business case development, and financing. He has more than 22 years of experience in IT in the public health and human services, medical manufacturing, transportation, and technology sectors.

### **Years of Experience**

- Eight years in total with Gartner
- 23 years in IT industry
- 20 years in Government industry

### **Professional Background**

- Oregon Department of Human Services, Chief Information Officer and Deputy CIO, five years
- Oregon Department of Human Services, Manager, Medicaid Health Financing Operations, eight years

### **Education**

- B.S., Business Information Systems, Linfield College

Requirement 1.2.7. Personnel Qualification 4 — Provide a resume detailing the experience, level of expertise and qualifications of a typical representative/manager who will directly be involved in performing the work of the consultation.

**Complies.** Listed below is Ms. Cathleen Blanton's resume, experience and qualifications, for a representative example of the level of expertise CCISDA can expect for consultations and advisory services.



### **Cathleen E. Blanton**

*Research Vice-President, Gartner*

Cathleen Blanton is a Vice President in Gartner Research, where she is a member of the Public Sector team. Ms. Blanton focuses on U.S. Federal agencies, covering strategic planning, governance, and ensuring IT enables business and mission value. Ms. Blanton specializes in helping CIOs position themselves to partner with executive counterparts on the issues that impact business efficiency and mission effectiveness. Ms. Blanton takes an approach that is both pragmatic and tailored to the government culture.

As an EA analyst, Ms. Blanton focused on research that would make enterprise architecture a practical, useful governance mechanism. As a Gartner consultant, she led the EA practice, participating in more-complex projects, providing direction to other practitioners, leading the development of engagement IP and coordinating with research.

At Ernst & Young Consulting (later acquired by Capgemini), Ms. Blanton worked with Fortune 500 clients around the world on their IT strategy and EA programs. At IBM, she began as a system engineer, supporting all of IBM's products for federal financial regulatory clients. She then moved to a position in which she provided technical support for IBM storage systems at the Area Systems Center and later client/server technologies at the Washington Systems Center.

### **Years of Experience**

- 15 years in total with Gartner
- 33 years in IT industry
- 15 years in Government industry
- 11 years in Healthcare industry

### **Professional Background**

- Ernst & Young Consulting (now Capgemini), Senior Manager, eight years
- IBM, Systems Engineer & Market Support Specialist (Storage Systems and Client/Server), 10 years

### **Education**

- B.S., cum laude (distinction in the major), Applied Mathematics, Yale College

Requirement 1.3.1. If you plan to subcontract work, you must indicate the name and address of each firm and the type of work or tasks they will perform. Identify the personnel to be assigned, their position, qualifications and representative experience.

**N/A.** Gartner will not employ or utilize the services of subcontractors for the scope of this contract.



## 2.3 Compliance with County Standard County Terms and Conditions

Please see below for all clarifications requested by Gartner to the County's standard Terms and Conditions.

### Gartner Clarifications

Gartner requests the following clarifications and/or additions to terms and conditions contained in sample contract appended to the County of Ventura Request for Proposal No. 5962.

- I. Gartner requests clause six (6) entitled Termination be amended to read as follows:

Termination for Breach - Either party may, upon giving ten (10) business days' written notice identifying specifically the basis for such notice, terminate the Master Agreement or a Service Agreement issued subject to the Master Agreement for breach of a material term or condition of the Master Agreement, provided the other party shall not have cured such breach within the ten (10) business day cure period.

Termination for Convenience - County may terminate this Master Agreement for its convenience upon thirty (30) calendar day's written notice to Contractor. In the event of such termination, Contractor shall be entitled to payment of all Service Agreements issued prior to the effective date of such termination. All provisions of this Agreement which are by their nature intended to survive the expiration or termination of this Agreement for breach and/or County's convenience shall survive such expiration or termination.

Gartner has inserted a clarification based on the fact that the County is acquiring access to Gartner owned materials for a defined subscription/license period rather than ownership of a tangible deliverable. The revised language allows the County to terminate the Master Agreement for its convenience upon ten business day notice. Gartner has also inserted language that allows the Parties to terminate the master agreement or an individual Service Agreement/Order issued subject to the agreement upon breach of a material term or condition and eliminates language concerning the submission of tangible items.

- II. Gartner requests clause eight (8) entitled Indemnification, Hold Harmless and Waiver of Subrogation be amended to read as follows:

Person and/or Tangible Property - Contractor agrees to indemnify, defend and hold harmless the County, its employees, officers and agents, from and against any third party claims, demands, loss, damage or expenses (including reasonable attorney's fees and court costs) relating to bodily injury or death of any person or damage to real and/or tangible personal property directly caused by the negligence or willful misconduct of the Contractor, its personnel, or agents during the course of the Services under this Agreement.

Indemnity for Intellectual Property – Upon notification of a claim against County alleging any Deliverable infringes a copyright, patent, trade secret or any other intellectual property right of any third party, Contractor will defend such claim at its expense and will pay any costs or damages that

may be finally awarded against County. Contractor will not indemnify County however, if the claim of infringement is caused by (1) County's misuse or modification of the Deliverable; (2) County's failure to use corrections or enhancements made available by Contractor. If any Deliverable is, or in Contractor's opinion is likely to be, held to be infringing, Contractor shall at its expense and option either: (a) procure the right for County to continue using it, (b) replace it with a noninfringing equivalent, (c) modify it to make it noninfringing, or (d) direct the return of the Deliverable and refund to County the fees paid for such Deliverable.

Contractor agrees to waive all rights of subrogation against County for losses arising proximately and directly from the activities and work covered by this Agreement.

Gartner has submitted a clarification of indemnity provided and bifurcated the paragraph into separate sections addressing both tangible and intangible items.

- III. Gartner requests clause nine (9) entitled "Insurance" subsection (A)(F) addressing notice of cancelation be revised to read as follows:

Contractor shall employ commercially reasonable efforts to advise County within thirty (30) days of any cancellation or determination to effect a material change in the insurance coverage's listed herein and/or maintained by Contractor in support of this Agreement

Gartner has added this language to clarify the process and time interval for notifying the County of any change in Insurance coverages provided in support of this Agreement.

Gartner would request the addition of the following "Special Terms" into the proposed contract;

1. An individual Service Agreement (SA) for subscription-based research and related services (the "Services") once issued is non-cancelable, and may be terminated only for material breach by either party, upon 30 days prior written notice, if the breach is not cured within the notice period.

2. **Ownership and Use of the Services.** Gartner owns and retains all rights to the Services not expressly granted to Client in a SA. Only the individuals named in an SA (each a "Licensed User") may access the Services. Each Licensed User will be issued a unique password, which may not be shared. Client agrees to review and comply with the Usage Guidelines for Gartner Services ("Guidelines"), which are accessible to all Licensed Users via the "Policies" section of gartner.com. Among other things, these Guidelines describe how Client may substitute Licensed Users, excerpt from and/or share Gartner research documents within the Client organization, and quote or excerpt from the Services externally.

3. **DISCLAIMER OF WARRANTIES.** THE SERVICES ARE PROVIDED ON AN “AS IS” BASIS, AND GARTNER EXPRESSLY DISCLAIMS ALL WARRANTIES, EXPRESS OR IMPLIED, STATUTORY OR OTHERWISE, INCLUDING, WITHOUT LIMITATION, ANY IMPLIED WARRANTIES OF FITNESS FOR A PARTICULAR PURPOSE OR AS TO ACCURACY, COMPLETENESS OR ADEQUACY OF INFORMATION. CLIENT RECOGNIZES THE UNCERTAINTIES INHERENT IN ANY ANALYSIS OR INFORMATION THAT MAY BE PROVIDED AS PART OF THE SERVICES, AND ACKNOWLEDGES THAT THE SERVICES ARE NOT A SUBSTITUTE FOR ITS OWN INDEPENDENT EVALUATION AND ANALYSIS AND SHOULD NOT BE CONSIDERED A RECOMMENDATION TO PURSUE ANY COURSE OF ACTION. GARTNER SHALL NOT BE LIABLE FOR ANY ACTIONS OR DECISIONS THAT CLIENT MAY TAKE BASED ON THE SERVICES OR ANY INFORMATION OR DATA CONTAINED THEREIN. CLIENT UNDERSTANDS THAT IT ASSUMES THE ENTIRE RISK WITH RESPECT TO THE USE OF THE SERVICES.

4. **Client Confidential Information.** Gartner agrees to keep confidential any Client-specific information communicated by Client to Gartner in connection with this SA that is (i) clearly marked confidential if provided in written form, or (ii) preceded by a statement that such information is confidential, if provided in oral form, and such statement is confirmed in writing within 15 days of its initial disclosure. This obligation of confidence shall not apply to any information that: (1) is in the public domain at the time of its communication; (2) is independently developed by Gartner; (3) entered the public domain through no fault of Gartner subsequent to Client's communication to Gartner; (4) is in Gartner's possession free of any obligation of confidence at the time of Client's communication to Gartner; or (5) is communicated by the Client to a third party free of any obligation of confidence. Additionally, Gartner may disclose such information to the extent required by legal process.

5. **Miscellaneous**

(a) **Assignability.** This SA and the rights granted to Client hereunder may not be assigned, sublicensed or transferred, in whole or in part, by either party without the prior written consent of the other party, except to a successor to substantially all of the business or assets of a party by merger or acquisition. Where consent is required, it will not be unreasonably withheld.

(b) **Use of Name, Trademark, and Logo.** Absent the prior written consent of the other party, neither party shall use the name, trademarks, or logo of the other in promotional materials, publicity releases, advertising, or any other similar publications or communications.

(c) **No Third Party Beneficiaries.** This SA is for the benefit of the parties only.

Notwithstanding language that may appear elsewhere the terms contained in this addendum will control the provision of “Ad Hoc” Consulting Services by Gartner Inc. to Clients in the areas listed below:

**Ownership of Deliverables:** Subject to the payment of applicable fees contained in an individual Statement of Work, Contractor shall assign to Client ownership of any project Deliverable(s) originally created for and submitted to the Client, provided, however, that Contractor may use, reproduce, display and distribute excerpts and data from the deliverables, either alone or together

with other material, in the ordinary course of Contractor's business, so long as such excerpts and data do not identify Client by name or contain any of the Client's confidential or proprietary information, and provided further that Contractor retains all right, title and interest in and to its processes, benchmarking data and data collection tools, assessment models and pertinent methodologies such as Strategic Planning, Contractor's copyrighted proprietary research and other pre-existing materials and data, such as Data Collection Templates and Survey Tools for Applications and Infrastructure, and benchmark comparisons ("Preexisting Intellectual Property").

Nothing contained in this Agreement shall preclude Contractor from rendering services to others or developing work products that are competitive with, or functionally comparable to, the Services. Contractor shall not be restricted in its use of ideas, concepts, know-how, data and techniques acquired or learned in the course of performing the Services, provided that Contractor shall not use or disclose any of Client's confidential information.

**Indemnification:** Contractor agrees to indemnify, defend and hold harmless the Client, its employees, officers and agents, from and against any third party claims, demands, loss, damage or expenses (including reasonable attorney's fees and court costs) relating to the bodily injury or death of any person or damage to real and/or tangible personal property directly caused by the negligence or willful misconduct of the Contractor, its personnel, or agents during the course of the provision of Services under this Agreement.

Upon notification of a claim against Client alleging any Contract Deliverable infringes a copyright, patent or trade secret of any third party, Contractor will defend such claim at its expense and will pay any costs or damages that may be finally awarded against Client. Contractor will not indemnify Client however, if the claim of infringement is caused by (1) Client's misuse or modification of the Deliverable; (2) Client's failure to use corrections or enhancements made available by Contractor; (3) Client's use of the Deliverable in combination with any product or information not owned or developed by Contractor (4) Information direction, specification or materials provided by Client. If any Deliverable is, or in Contractor's opinion is likely to be, held to be infringing, Contractor shall at its expense and option either: (a) procure the right for Client to continue using it, (b) replace it with a noninfringing equivalent, (c) modify it to make it noninfringing, or (d) direct the return of the Deliverable and refund to Client the fees paid for such Deliverable.

**Preexisting Materials:** Client shall retain its rights in any proprietary material that Client supplies to Contractor. If the Client provides Contractor with materials owned or controlled by Client or with use of, or access to, such materials, the Client grants to Contractor all rights and licenses that are necessary for Contractor to fulfill its obligations under each Statement of Work. Contractor grants to Client for internal purposes only a worldwide, royalty-free, perpetual license to use, reproduce, display, distribute copies of, and prepare derivative works of any Contractor "Preexisting Intellectual Property" embodied in the Deliverables.

**Limitation of Liability:** Neither party shall be liable for any consequential, indirect, special or incidental damages, such as damages for lost profits, business failure or loss arising out of use of the Deliverables or the Services, whether or not advised of the possibility of such damages. Except for liability for personal injury or death or for damage to property caused by the negligence or willful misconduct of Contractor or its employees, Contractor's total liability arising out of this Agreement and the provision of the Services shall be limited to the fee paid by the Client under the specific Statement of Work under which such liability arises.

**Warranty:** a) The Client warrants that Contractor's use of any materials furnished by the Client in connection with a Statement of Work does not infringe any copyright, trademark, trade secret or other right of any third party. (b) Contractor warrants that the Deliverables, in the form provided

to the Client, do not infringe any copyright, trademark, trade secret or other right of any third party. (c) ALL SERVICES ARE PROVIDED ON AN “AS IS” BASIS. CONTRACTOR DISCLAIMS ALL WARRANTIES, EXPRESS OR IMPLIED, STATUTORY OR OTHERWISE, INCLUDING, WITHOUT LIMITATION, ANY IMPLIED WARRANTIES OF MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE. THE INFORMATION IN THE DELIVERABLES HAS BEEN OBTAINED FROM SOURCES THAT CONTRACTOR BELIEVES TO BE RELIABLE. ALL DELIVERABLES SPEAK AS OF THE DATE OF DELIVERY TO THE CLIENT.

## 2.4 Payment Terms

Customary terms are Net 30 for work performed. Offerors will indicate their proposed payment terms. Discount for payment in less than 30 days may be considered in the evaluation.

**Complies.** Gartner acknowledges the customary terms for the work performed are set at Net 30. For detailed payment terms proposed by Gartner, please reference an exemplary Service Agreement provided in Appendix A.

## 3.0 Gartner's Plan and Approach

### Minimum Requirements

**Section 3 — Requirement 1.1.1. Proposer currently provides IT Research and Advisory services on a subscription basis.**

**Complies.** Gartner's subscription-based research and advisory services include 2,000+ analysts and access to the world's largest database of IT research and toolkits. We will provide CCISDA with a dedicated account team, led by Mr. David Kennison, who will work with the organization and agencies to recommend a subscription service based on the roles and specific needs of the End User. Our subscription services are customized to meet the demands of the dynamic digital workplace and complex IT organizational structures. From servicing the needs of CxOs and senior IT executives to providing reference architectures to the IT practitioners, CCISDA will have flexible offerings including both individual subscription licenses as well as team-based solutions.

**Section 3 — Requirement 1.1.2. Proposer services 5 or more State, Local, or Federal governments.**

**Complies.** Gartner is the trusted provider of IT research and advisory services to 15,000 distinct organizations across 100 countries, including 1,100+ U.S. Federal clients as well as 500+ U.S. State and Local organizations. Similar to the needs of CCISDA and the County of Ventura, Gartner has built long standing relationships with multiple public-sector organizations including, but certainly not limited to, the states of Georgia, North Carolina, Nevada, Wisconsin, Kansas, Texas, Ohio, and the Commonwealth of Virginia.

**Section 3 — Requirement 1.1.3. Proposer provides summaries of IT industry issues.**

**Complies.** With nearly 4 times the amount of independent research published annually, our 5,000+ new documents each year will provide CCISDA with access to timely and relevant resources encompassing current and future IT industry trends and issues. Through Gartner's dedicated Service Delivery teams, various offerings will also have access to exclusive weekly or monthly bulletins and summaries. Examples include High Level executive summaries, High Level event highlights, Government Insight Reports, etc. Gathered from extensive surveys of CIOs or industry-relevant peers, these reports provide a unique overview of the agenda and topics covered, as well as insight into current trends, concerns, and issues. The [Gartner 2019 CIO Agenda](#) illustrates a representative example of the types of bulletins and summaries CCISDA can expect from Gartner.

**Section 3 — Requirement 1.1.4. Proposer will make available a database of Proposer created and published technology research reports in specific market categories.**

**Complies.** Gartner's database holds more than **135,793** unique research documents across **1,372** technology and business topics. Only Gartner can provide objective, independent research, quoted by more than 30 leading business publications worldwide, such as The Wall Street Journal, The Economist and the Financial Times an average of 70 times every week. CCISDA will have unlimited access to Magic Quadrants, Vendor Ratings, Hype Cycles and other foundational research focusing on the technology markets, as well as an unmatched depth and breadth of research tailored for the Government industry. Drawing from our vast library of IT research based on empirical observations, hard data and rigorous analytical methodologies, CCISDA will have access to a broad set of cross-industry technology topics that help expand



knowledge, build competencies, obtain objective viewpoints and validate decisions to drive business value through technology.

**Section 3 — Requirement 1.1.5. Proposer shall provide technology consulting in the form of question and answer sessions.**

**Complies.** Gartner works with our clients to ensure they directly leverage our more than 2,000 dedicated Research analysts, who are available for unlimited discussions, meetings and document reviews. The value our clients gain from one-to-one interactions with our analysts cannot be matched by our competitors:

- Gartner analysts bring decades of experience, including hands-on roles in the government.
- Access to Gartner analysts is unmetered and is available through phone, Web, email.
- The document and contract review services conducted by our analysts lead to millions of dollars of savings for our clients

Additionally, included with the analyst inquiries, another unique opportunity for analyst access is through Gartner Webinars. Webinars are an effective source of just-in-time learning, available without travel or training expenses. Gartner has hosted 650 Webinars over the past two years. All CCISDA personnel will have the ability to select from and participate in over 300 Gartner Webinars a year. Our Webinar topics are relevant to CCISDA and surround IT management, emerging technologies and trends and vendors. After a presentation by a Gartner analyst, CCISDA participants will be able to ask questions of our subject matter experts. In addition to providing CCISDA with an exceptional professional developmental opportunity, the International Information Systems Security Certification Consortium has agreed to provide a continuing education credit (CEU) for attending select Gartner security-focused Webinars. Clients receive credits within 3–4 weeks.

**Section 3 — Requirement 1.1.6. Proposer agrees that other public agencies may participate in any agreement that created as a result of this solicitation with the same terms and conditions as to the price of the product. The County of Ventura shall incur no financial responsibility in connection with a purchase order from another public/consortium agency.**

**Complies.** Gartner acknowledges and complies with the County's requirement that other public agencies may participate in any agreement that is created as a result of this solicitation with the same terms and conditions. We are able to provide CCISDA and any Recipient Agency with the proven expert opinions and market research, including insight into leading products crucial in assisting any agencies to achieving improved efficiency and limiting technology lock-in. Mr. Kennison will be the primary point of contact for this contract, dedicated to serving the needs of CCISDA and its Recipient Agencies.

**Section 3 — Requirement 1.1.7. Proposer sponsors customer events and conferences pertaining to technology analysis.**

**Complies.** As the world's leading IT conference provider, Gartner delivers a global event experience that delivers new thinking not found anywhere else. Gartner events attract more than 55,000 IT and business executives, including 8,000 CIOs and 1,500 industry-leading technology providers, to more than 75+ events each year in 22 locations.

Gartner Events align to specific IT and business roles that mirror those of the Gartner research offerings, including:

- Applications
- Marketers

- CIOs & Senior IT Executives
- Data & Analytics
- Enterprise Architecture
- Infrastructure & Operations
- Program & Portfolio Management
- Security & Risk Management
- Sourcing & Vendor Relationships
- Supply Chain

Each event features an engaging agenda fueled by comprehensive feedback from Gartner clients and cutting edge research aligned to your organizational role, project or initiative. These multi-day seminars present in-depth analysis and unbiased insight on a variety of key initiatives and hot topics critical to the success of the business.

Gartner events provide the opportunity to:

- **Get objective, independent research** — Our conferences are a direct extension of the Gartner industry-leading research services, and have the breadth and depth of content that no other conference producer in the world can match.
- **Gain a different perspective** — In private one-on-one meetings with Gartner analysts, along with peer group roundtables and interactive workshops, attendees are exposed to new ways of thinking and the latest industry best practices — critical ingredients in formulating effective IT and business strategies.
- **Make efficient use of your time** — In a few days, accomplish what would take months to do on your own. You can earn certification credits at select events, making your trip more cost-effective, or bring your team and advance projects and key initiatives.
- **Review relevant solutions** — Unlike tradeshow, solution providers at Gartner conferences are carefully selected to ensure that they are truly relevant to the roles our events serve. Typically represented by senior-level executives, the exhibitor component allows attendees to engage in time-efficient, meaningful conversations designed to build robust shortlists.
- **Engage in powerful networking** — Gartner conference attendees represent the most forward-looking and influential IT community in the world and, as a result, the value of the contacts they make and the networking they experience is almost impossible to replicate.

Gartner will host 20 multi-day events in North America this year:

**Table 7. Gartner's North America Events span multiple job roles and geographic regions**

Event Name	Date	Location
CIO Leadership Forum	March 10 — 12	Phoenix, AZ
Data & Analytics Summit	March 18 — 21	Orlando, FL
CIO Leadership Forum	March 31 — April 2	Hollywood, FL
<b>Marketing Symposium/Xpo</b>	<b>April 29 — May 1</b>	<b>San Diego, CA</b>
Supply Chain Executive Conference	May 13 — 16	Phoenix, AZ
Enterprise Architecture & Technology Innovation Summit	May 14 — 15	Orlando, FL
Digital Workplace Summit	May 29 — 30	Orlando, FL
Symposium/ITxpo	June 3 — 6	Toronto, Canada
<b>Tech Growth &amp; Innovation Conference</b>	<b>June 3 — 5</b>	<b>San Diego, CA</b>

Event Name	Date	Location
Program & Portfolio Management Summit	June 17 —19	Washington, D.C.
Security & Risk Management Summit	June 17 —20	National Harbor, MD
<b>Catalyst Conference</b>	<b>August 12 —15</b>	<b>San Diego, CA</b>
IT Sourcing, Procurement, Vendor & Asset Management Summit	September 4 —6	Orlando, FL
CSO & Sales Leader Conference	September 17 — 19	Las Vegas, NV
Symposium/ITxpo	October 20 — 24	Orlando, FL
ReimagineHR	October 28 — 30	Orlando, FL
Supply Chain Planning Summit	November 4 — 5	Denver, CO
Application Strategies & Solutions Summit	December 3 — 5	Las Vegas, NV
IT Infrastructure, Operations & Cloud Strategies Conference	December 9 — 12	Las Vegas, NV
Identity & Access Management Summit	December 10 — 12	Las Vegas, NV

The Security & Risk Management Summit, Identity & Access Management Summit and PPM & IT Governance Summit events offer accreditation to enhance and further your professional development.

## Service Delivery

[Section 3 — Requirement 1.2.1. Scope of Service - Describe proposed delivery and content of services required under "Section 3.1 Plan and Approach" of this RFP.](#)

**Complies.** The sections below provide CCISDA with Gartner's proposed plan and approach to delivering expert, independent subscription-based research and advisory services, demonstrating key elements and unique features only Gartner will provide. Among the in scope services included with our offerings, but not limited to, are:

### **Subscription-based advisory services regarding IT strategy and planning, Major IT trends in various industries, or various IT topics**

For tens of thousands of technology professionals, Gartner research and advisory services are an indispensable daily resource. Our clients benefit from quick access to 135,793 unique research documents across 1,372 technology and business topics on our website, as well as the 380,000+ one-to-one client interactions our more than 2,000+ experts conduct each year. Gartner brings a unique perspective — our interactions with 15,000+ distinct enterprises worldwide enable us to make connections, identify patterns and discover trends that no other research firm can see. Our research is objective because of our independence from vendor relationships, our rigorous research methodologies and our unique Office of the Ombudsman. Gartner is quoted an average of 70 times a week by leading business publications worldwide. Gartner has research teams that are focused on nine key industries:

- Banking and Investment Services
- Education
- Energy and Utilities

## ■ Government and Public Sector

- Healthcare Providers
- Insurance
- Manufacturing
- Media
- Retail

Gartner is the only IT research and advisory firm with a true Government focus. From our analysts to our research to our delivery, we bring a depth in the public sector that cannot be matched. We contextualize Gartner research and specifically help our Government clients **reduce cost, operate more effectively, mitigate risks and improve business outcomes:**

### ■ Dedicated Government Research Practice — Only

Gartner has a dedicated team of government analysts who create public sector research on the most critical government topics. Gartner has 15 government-focused analysts in total, who bring specific experience working with many department-level government agencies. Our analysts have an average of **26 years of experience** as public-sector IT executives, having led critical and wide-reaching initiatives and programs.

### ■ Government-Focused Service Delivery Team —

Gartner has a dedicated government delivery team for each level of our client's organization. For instance, at the CIO and IT Executives level, we have government Executive Partners with an average of 32 years of experience — 12 of which are former Government CIOs, including a former Cabinet Agency CIO and former Cabinet Agency deputy CIO — and have successfully built and implemented crucial government strategies. These are the experts — available only through Gartner — that help our Government clients with their most critical decisions.

### ■ Public Sector Peer Networking — Only Gartner can put more than 4,300 U.S. government peers at our clients' fingertips, with more than 8,000 government license holders worldwide. Our clients have the unique ability to gain real-world insight — free of vendors or other agendas — from others facing the same challenges. In addition, Gartner can provide connection to 55,000 peers in other industries to help infuse commercial best practices into government initiatives.

### ■ Local Events and Capabilities — In the era of declining travel budgets, CCISDA's agencies need access to relevant local events. Gartner has a local presence in California that is unrivaled by our competitors. We offer local briefings on topics such as contract negotiation, vendor management, big data, private cloud and hybrid cloud, as well as local Summit events and executive briefings.

#### Deep Government Insight

- More than 1,500 public sector organizations worldwide choose Gartner as a trusted advisor.
- 15 Government-focused analysts, far more than our competitors.
- Gartner has more than 8,000 Federal clients in our unique Peer Connect networking community, worldwide.

For a detailed description of the subscription-based research and advisory services, please reference Gartner Offerings.

## Gartner created technology research reports database in specific IT market categories

Gartner provides all license holders with a commercially available online research database that illuminates intelligent solutions for adopting and implementing technology in order to unlock value across the organization. The Gartner industry-leading and technically superior Research Database serves as the basis for all Gartner services, and is unparalleled by any competitor:

- Sheer volume, breadth and depth of our available research that is continually refreshed to constantly reflect current technology and business trends.
- Globally recognized proprietary methodologies and 100% original research that bring value and actualized benefits unavailable from any competitor.
- Team of analysts, advisors, researchers and quantitative analysts with the experience and knowledge to provide you with truly insightful, strategic guidance on your most critical priorities.
- Rigorous intelligence combined with a deeply collaborative approach to understand your business and your role within it.

The table below is an example of recent Gartner research relevant to specific market categories.

**Table 8. Recent Gartner Research Relevant to Specific Market Categories**

Research	Date Published
Market Guide for AIOps Platforms	12 November 2018
Market Guide for Data Masking	20 July 2018
Top 10 Strategic Technology Trends for 2018: Intelligent Things	8 March 2018
Applying Artificial Intelligence to Enhance Market Insights	3 December 2018
Market Share Alert: Preliminary, PCs, Worldwide, 3Q18	10 October 2018

## Unparalleled Documents

Gartner Research documents far exceed the requirements of this procurement:

- The collective Gartner Research Database holds **135,793 documents**, including 5,000+ new documents annually — far more than any competitor. This volume demonstrates Gartner's full view of the entire IT industry — from the needs of the end user through the goals of technology providers.
- We cover an unparalleled **1,372 topics and trends** such as cloud computing, artificial intelligence, mobility, data analytics, security, enterprise architecture, portfolio management and application trends. We provide Hype Cycles, Magic Quadrants, Case Studies and much more.
- Reaching beyond IT, Gartner is distinguished by our visibility into challenges and opportunities across the C-suite. Our comprehensive perspective means that we can map the full range of stakeholder needs, impacting the future of your business.

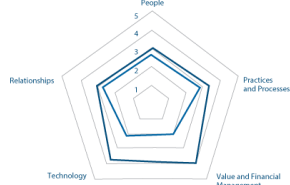
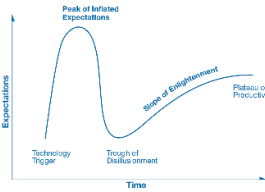
- Our Research agenda is maintained through a rigorous update process to ensure it stays current and aligned with our clients' most key initiatives. All research is archived after **18 months** unless it is determined to still be relevant and current.

## Original Methodologies and Research

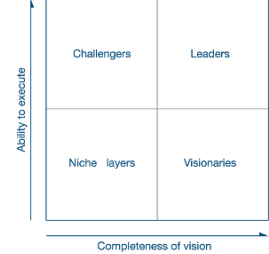
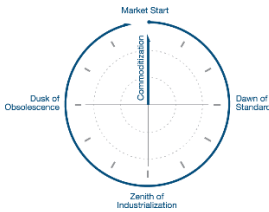
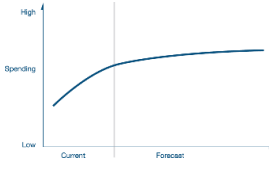


Gartner's compilation of research is technically superior because of its unmatched originality:

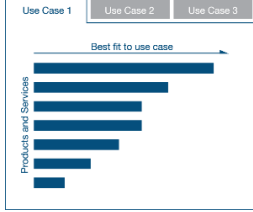
- Unlike our competitors, Gartner Research is **100% original** — it is created by our own dedicated team of Research analysts, does not include any syndicated or third-party research, and provides a compilation of research and value not available elsewhere.
- Gartner brings a unique perspective — Gartner insights are drawn from a fact base including our **380,000 annual one-to-one client interactions**, 21,000+ annual vendor briefings, and support of **clients across 15,000+ distinct organizations in 100+ countries**.
- Gartner's eight proprietary methodologies (described on the following pages) cut through the information overload to help clients arrive at the insights they need to chart the right course forward.
- Gartner also brings the world's largest database of IT key metrics data, with more than 2,000 IT metrics published annually by way of 90 Gartner IT Key Metrics research documents. Use of these metrics helps our clients enable improved budget and investment decisions with regard to the changing environments of business and IT.

**Table 9. Gartner Proprietary Methodologies**

Gartner Methodology	How These Methodologies Add Value
<b>Gartner IT Scores</b> 	<p>Gartner ITScores are holistic sets of interactive maturity assessments designed to help CIOs and IT leaders evaluate the maturity of both the IT organization as a provider of IT services, and the enterprise as a consumer of information technology. Unlike other IT maturity assessments, Gartner ITScore measures an organization's capabilities within the context of enterprise culture, behaviors and capacity for leadership — factors that dramatically impact IT's effectiveness and its ability to contribute real business value.</p>
<b>Hype Cycles</b> 	<p>Gartner Hype Cycles, such as the Hype Cycle for Cloud Security, provide a customizable, graphic representation of the maturity and adoption of technologies and applications, and how they are potentially relevant to solving real business problems and exploiting new opportunities. Hype Cycles will help CCISDA to:</p> <ul style="list-style-type: none"> <li>■ Separate hype from the real drivers of a technology's commercial promise</li> <li>■ Reduce the risk of their technology investment decisions</li> <li>■ Compare their understanding of a technology's business value with the objectivity of experienced IT analysts</li> </ul>
<b>Magic Quadrants</b>	<p>Gartner Magic Quadrants are a culmination of research in a specific market, fully customizable for CCISDA that give a wide-angle view of the relative positions of the market's competitors. By applying a graphical treatment and a uniform set of evaluation criteria, Gartner Magic Quadrants quickly help clients digest how well technology providers are executing against their stated vision. Magic Quadrants will help CCISDA to:</p>



Gartner Methodology	How These Methodologies Add Value
	<ul style="list-style-type: none"> <li>■ Get quickly educated about a market's competing technology providers and their ability to deliver on what end users require today and in the future</li> <li>■ Understand how a market's technology providers are competitively positioned and the strategies they are using to compete for end-user business</li> <li>■ Compare a technology provider's strengths and challenges with their specific needs</li> </ul>
<b>IT Market Clocks</b> 	<p>Gartner IT Market Clocks are decision frameworks that provide a full life cycle view of technology assets — whether capabilities, products or services. They help clients better evaluate technology assets, so they can prioritize IT investments and build technology roadmaps that support business plans. Gartner IT Market Clocks will enable CCISDA to:</p> <ul style="list-style-type: none"> <li>■ Gain a full life cycle view of your technology assets.</li> <li>■ Evaluate and prioritize your IT investments. Build technology roadmaps that support business plans.</li> </ul>
<b>Market Forecasts</b> 	<p>Gartner Market Forecasts give an analysis of both supply and demand, comparing technology investment trends in the provider community with the spending trends of end users. It's a unique picture clients get from Gartner, based on our relationships with thousands of end users and providers. Gartner forecasts provide two years of history while peering five years into the future. Clients get a comprehensive understanding of supply and demand by market, country and global region. Market Forecasts are established and proven proprietary methodologies that will help CCISDA to:</p> <ul style="list-style-type: none"> <li>■ Understand the market opportunity for IT products and services</li> <li>■ Differentiate which market opportunities are emerging, maturing or declining</li> <li>■ Base their business plans and strategies on fact, not conjecture</li> </ul>
<b>Market Share Analysis</b> 	<p>Through our Market Share Analysis methodology, clients see how share is allocated among 400 technology providers in 37 key markets. Our detailed analysis of how provider revenue is allocated reveals which types of solutions are succeeding, which are trailing, and where opportunities exist for providers to take additional share.</p>
<b>Vendor Ratings</b> 	<p>Clients use this well-defined methodology to rate IT technology providers — large, small, public or private. Gartner Vendor Ratings assess all the different aspects of a technology provider, such as its strategy, organization, products, technology, marketing, financials and support, to enable CCISDA to:</p> <ul style="list-style-type: none"> <li>■ Manage provider portfolio risks while keeping an eye on up-and-coming players and alternate providers</li> <li>■ Understand how providers' products and services stack up and how they are positioned for long-term survival</li> <li>■ Support key purchase, investment and renewal decisions</li> </ul>
<b>Critical Capabilities</b>	<p>Gartner Critical Capabilities completes CCISDA's view of the market with deeper insight into vendors' product or service offerings and how these rate against common client-usage scenarios. This essential companion to the Gartner Magic Quadrant enables CCISDA to:</p>

Gartner Methodology	How These Methodologies Add Value
	<ul style="list-style-type: none"> <li>■ Map provider strengths and challenges against specific business requirements</li> <li>■ Narrow down and focus on the product and service criteria most important to you</li> <li>■ Create your own experience with customized use cases based on your unique needs and requirements</li> <li>■ Easily integrate information into your workflow and decision-making process, saving you time</li> </ul>

## Customized Client Experience

The Gartner online database is an incredibly sophisticated tool that lets clients intuitively access research in a modern interface, maximizing value and making the Gartner user experience technically superior:

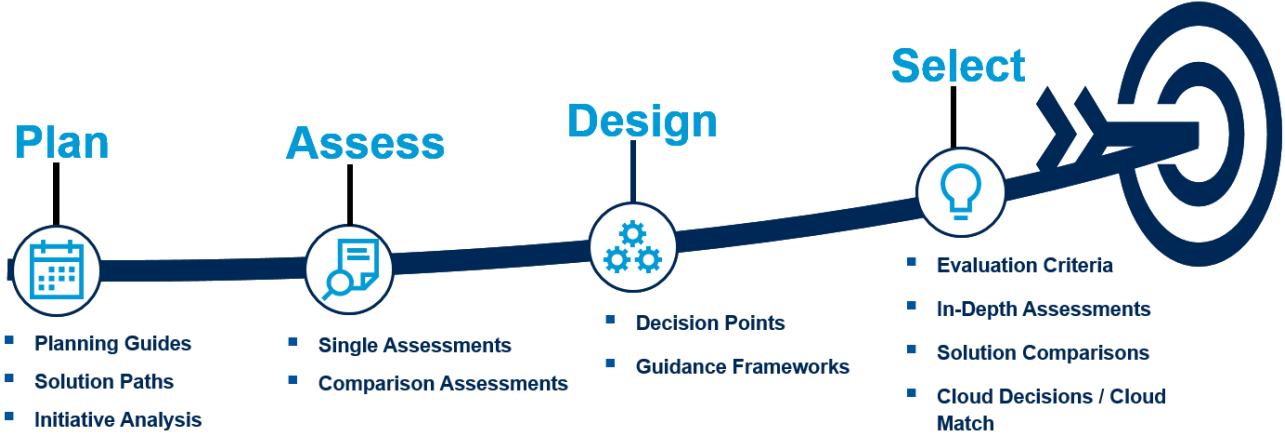
- **Gartner Business Wizard** creates a unique, fully customized experience for each client, highlighting the research, tools, analysts, peers, videos and webinars that align with their current initiatives and trends. Our clients receive recommendations and even mobile alerts based on preferences and actual usage — so the more you use it, the more you get out of it.
- Clients can simplify their access to Gartner research by using the **Gartner Everywhere** Google Chrome extension. The extension recommends Gartner research documents unobtrusively during professional web-browsing activity, in the right context.
- The **My Gartner Mobile** app enables maximum flexibility with on-the-go access to Gartner research. A seamless experience syncs with gartner.com activities, provides a “Recommended for You” feed, has a handy search function and provides a quick overview of documents with a summary view and a “Time to Read” estimate.
- Gartner ensures that our database is continually reliable. Our monthly service level is **99.5% availability**, and our account executives and technical support representatives are available to ensure each client receives the most value from their online experience.

For a representation of an example of a typical client engagement outline, please reference Section 0 — Appendix B.

## Technical Research Overview

Across all functions, in every industry and enterprise size, Gartner’s technical research supports organizations by illuminating intelligent solutions for adopting and implementing technology. While trusted insights and strategic advice are critical, most organizations measure progress by outcomes. Beyond helping you identify strategies that will work, Gartner for Technical Professionals equips you to execute against them.

Gartner for Technical Professionals provides detailed research documents for every phase of the projects and initiatives to execute and support CCISDA strategies. Each research document type aligns to a phase, as shown in Figure 1, below.

**Figure 1. Each Technical Professionals document type aligns to a project life cycle phase.**



Gartner for Technical Professionals research includes the following areas of coverage:








- Applications
- Cloud and IT Infrastructure
- Data Management and Analytics
- Identity and Access Management
- Security and Risk Management
- Collaboration, Content and Mobility
- Enterprise Applications
- Internet of Things

### ***Unique Resources***

Our proven IT architectural frameworks are unique, decision-making tools that provide tailored recommendations to guide IT architecture design. Built on industry best practices, our proprietary research knowledge base, and hands-on experience from hundreds of consulting engagements, Gartner for Technical Professionals research is consistently produced at 30-50 or more pages in length, and goes beyond IT market research and IT strategy, to the level of step-by-step “how to” guidance for the IT practitioners, engineers, architects and developers.

**Table 10. Gartner for Technical Professionals Frameworks and Roadmaps**

Research Type	Description
<b>Planning Guides</b> 	Annual Planning Guides provide recommendations and near-term planning considerations that guide technologists in understanding their budgets and priorities for the coming year. Planning Guides will help CCISDA acquire, organize, analyze and deliver key technologies, and also offer insight into: <ul style="list-style-type: none"> <li>■ Undertaking actions based on current and future trends</li> <li>■ Identifying relevant technologies to invest in</li> <li>■ Select and manage new projects/initiatives</li> <li>■ Determine the critical priorities that must be set</li> </ul>
<b>Solution Paths</b> 	Solution Paths are roadmaps that provide a holistic view and identify the sequential steps, most relevant Gartner for Technical Professionals research, and architectural components needed to accomplish every phase of a complex, multi-faceted project. Solution Paths will help CCISDA deconstruct complex projects into specific actions and decisions.
<b>Initiative Analysis</b>	Initiative Analysis research provides an analysis of IT initiatives in a business or cross-cutting context. The analysis may identify management

Research Type	Description
	and/or cross-domain implications of CCISDA's technical initiatives, in relation to the organization.
<b>Decision Points</b> 	Decision Points are sets of tools to evaluate your specific requirements and constraints. By using Decision Points, readers will be able to assess and choose from viable architectural alternatives, and justify the decisions based on the varying priorities. Decision Points typically begin with a problem statement and drive toward decision tool using "if/then/else" logic.
<b>Guidance Frameworks</b> 	Guidance Frameworks offer step-by-step guidance and recommendations on how to tackle a specific challenge or aspect of an implementation. Guidance Frameworks articulates Gartner's recommended approach to addressing a strategic topic by proposing new approaches, frameworks or solutions to the specific problems.
<b>Evaluation Criteria</b> 	Evaluation Criteria is a comprehensive, customizable toolkit designed to provide a baseline set of criteria by which CCISDA can make product purchasing decisions. It encompasses all the relevant technical features and displays in a graphical representation based on <b>Required</b> "must have" features, <b>Preferred</b> "nice-to-have" features and <b>Optional</b> "use-case driven" features.
<b>In-Depth Assessments</b> 	In-Depth Assessments complement our Evaluation Criteria by providing scores and technical assessments of vendors on a given technology implementation. These assessments offer in-depth comparisons of products scored against the Evaluation Criteria for a more scientific and justifiable solution selection.
<b>Solution Comparisons</b> 	Solution Comparisons are designed to provide a baseline set of criteria by which CCISDA can make a purchasing decision among related products. Solution Comparisons provide side-by-side solution comparisons of up to 12 different solutions.
<b>Cloud Decisions</b> 	Gartner Cloud Decisions will allow CCISDA to make smarter cloud solution decisions. The easy-to-use dashboard makes it simple to compare features, pricing, performance and availability, in order to save time, control costs and verify performance and availability of services. Gartner Cloud Match, a proprietary component of Cloud Decisions, is a powerful automation tool which helps take the guesswork out of cloud selection by: <ul style="list-style-type: none"> <li>■ Building cloud application architectures visually</li> <li>■ Customizing against hundreds of in-depth criteria</li> <li>■ Generating recommendations in minutes</li> <li>■ Optimizing for performance, cost or availability within or across providers</li> <li>■ Finding the best possible instance size for your workload.</li> </ul>

### ***Team Plus Advantage***

New content available through Team Plus includes an additional 1,700+ pieces of member-driven research including Ignition Guides, practical tools and templates and best practice case studies; and additional analysts to contextualize research.

**Figure 2. New Team Plus Solutions provide an enhanced end-to-end experience, with new support for translating vision into an actionable plan**



Team Plus research is foundationally built on the success and best practices of peer organizations. By studying the processes and cultures of industry leaders, our Team Plus analysts deliver proven, real-world best practices, tools and templates and case studies to support critical decisions. We combine expert-driven, strategic insights with peer-driven implementation resources, CCISDA will have unmatched support to drive smarter and faster implementations. Our Team Plus solutions will drive collaboration and consistency among your team to ensure effective execution on critical goals. Gartner will enable CCISDA team members to:

- Make more-informed decisions:
  - ❑ Access to key initiative research and analysts
  - ❑ Real-world peer experiences
- Work more efficiently as an individual and team member:
  - ❑ Time-saving, dedicated service delivery team
  - ❑ Shared access to research, insights and events
- Drive better, faster business results and lead more effectively:
  - ❑ CIO-specific research, events, advice and perspectives
  - ❑ A strategic partner to contextualize it all

With access to additional member-driven, real-world insights and more resources to drive smarter and faster implementation, CCISDA's leaders will be equipped to formulate their approach to strategy and execution and move faster on critical initiatives to develop and increase team effectiveness.

- **Best Practice Case Studies** — Case studies are at the heart of our peer and practitioner research models. An actionable blueprint from an organization provides a proven approach to tackle challenges focused on people, processes and strategy. These



resources offer easy-to-implement, cost effective solutions with a clear ROI, proven member-driven examples from leading companies and are industry agnostic, scalable and transferrable. Our case studies provide 90<sup>th</sup> percentile tactics to help users compare peer approaches to solve common challenges.

- **Ignition Guides** — Intuitive, step-by-step guides to plan, build and monitor your most important projects. They provide immediate and tactical actions that must be taken to move forward, and are written in business terms to speed adoption and execution with cross functional teams. Ignition Guides provide readily usable recipes, including implementation tools and templates, structured to:
  - ☐ Plan the project
  - ☐ Build the solution
  - ☐ Monitor the project's outcomes
- **Tools for Managing Talent** — A suite of practical tools and templates to identify emerging skill needs, build a strategic workforce plan, and attract, retain and develop IT talent. These comprehensive resources offer real-world applicability in preparing organizations for dynamic shifts in the employment value proposition of the IT environment.
- **Client Tools and Templates** — An expanded set of peer-tested, business-friendly tools and templates designed specifically to be adapted across a wide variety of organizations and industries. These tools and templates will save CCISDA valuable time from not having to build from scratch, and substantially mitigate risks when using templates that are peer tested.

## **Consultations providing advisory on subject matter covered in the database**

### ***Analyst Inquiry***

Gartner works with our clients to ensure they directly leverage our more than 2,000 dedicated Research analysts, who are available for unlimited discussions, meetings and document reviews.

#### **Technically Superior Analyst Inquiry**

The value our clients gain from one-to-one interactions with our analysts cannot be matched by our competitors:

- Gartner analysts bring to bear decades of experience, including hands-on roles in the federal government.
- Access to Gartner analysts is unmetered and is available through phone, Web, email or even in person.
- The document and contract review services conducted by our analysts lead to millions of dollars of savings for our clients.

#### **Industry-Leading Qualifications**

The qualifications and experience of our Research analysts are technically superior and provide unique perspective not available elsewhere:

- Gartner has more than 2,000 research analysts who collectively engage in **380,000 one-to-one client interactions each year** and more than 5,600 annual contract reviews for 15,000+ distinct client organizations worldwide.
- Our industry-leading analysts bring deep subject matter expertise, and many are **former IT leaders or CIOs**. Sixty percent of our analysts have more than 20 years of industry experience, and 50% have postgraduate degrees.
- Gartner has 15 government-focused analysts who bring specific experience working with all department-level federal agencies. They have an average of **26 years of experience** with backgrounds as ex-public-sector CIOs or directors, having led critical and wide-reaching initiatives.

### Unmetered Access

Gartner provides truly unlimited access to our Research analysts. Not only do we not meter usage, but we actually encourage the use of our analyst time as often as possible for each client:

- Gartner clients can request an inquiry **at any time**. They can ask questions or obtain research about your most pressing issues or areas of interest. Gartner can help through every stage of planning, implementing and managing your technology initiatives.
- Clients can request a particular analyst or can let our account team connect them with the right analyst for their needs. Leveraging our global team of more than **2,000 analysts** ensures we are quickly delivering the right expertise at the right time.
- Gartner understands that **flexibility is key**. We offer analyst inquiry through phone, Web or email. Inquiries can be discussions or written responses, and clients can request multiple inquiries at once.

### Document and Contract Review

In addition to general inquiries, Gartner analysts are available to provide review of documents of 20 pages or fewer. Our analysts provide more than 20,000 strategy reviews and 5,600 contract reviews per year. Gartner clients gain analyst insight on these documents through a 30-minute review session that results in real value — we find hard-dollar savings in 75% of the contracts we review, and many reviews lead to multimillion-dollar savings.

Gartner also provides contract negotiation advice through three indispensable services:

- **Pricing Proposal and Comparative Analysis** — Identify obscure fees and pay only what you need.
- **Business Terms and Conditions Review** — Find clauses that can lead to unexpected charges, limit your usage rights or add risk.
- **Negotiation Strategy** — Gain effective negotiating strategies to achieve important concessions and real cost savings.

### Structured Applied Research Advisory Services

Gartner also offers Structured Applied Research Advisory Services based on our extensive library of over 2,500 Gartner Research Toolkits covering critical IT capabilities such as Digital Strategy, IT Strategic Plans, IT Service Catalogs, IT Organizational Assessments, Maturity Readiness Assessments, etc.

While some clients have the resources to apply these toolkits themselves, other workforces are unequipped with the skills, expertise or manpower to execute on or apply the best practices

prescribed in our Research. The offerings outlined in Gartner Offerings are standardized, template driven and structured to assist our clients with the application of Gartner Research to their specific environment. These structured services delivered by our Applied Research analysts are a direct extension of Gartner Research, helping clients translate insights into actions to achieve superior performance and build organizational capabilities.

The Structured Applied Research Advisory Services include the following:

- Digital Strategy and IT Strategic Planning
- Smart Government Readiness Assessment
- Maturity Assessments

## **Regular bulletins and summaries of IT industry issues**

With nearly 4 times the amount of independent research published annually, our 5,000+ new documents each year will provide CCISDA with access to timely and relevant resources encompassing current and future IT industry trends and issues. Through Gartner's dedicated Service Delivery teams, various Offerings will have also have access to exclusive weekly or monthly bulletins and summaries. Examples include High Level executive summaries, High Level event highlights, Government Insight Reports, etc. Gathered from extensive surveys of CIOs or industry-relevant peers, these reports provide a unique overview of the agenda and topics covered, as well as insight into current trends, concerns, and issues. The [Gartner 2019 CIO Agenda](#) and the [2019 CIO Agenda: Government Insights](#) illustrates a representative example of the types of bulletins and summaries CCISDA can expect from Gartner.

## **Regularly scheduled live executive briefings of IT industry issues**

Gartner's Executive Programs offerings provide an unparalleled schedule of regular local and national events, exclusive for CxOs and Senior IT Executives, tailored to focus on relevant mission critical priorities and key initiatives. Executive Programs license holders will have exclusive access to **local briefings** held in the areas encompassing CCISDA. Local briefings are half-day events led by analysts presenting key research, highlighting client testimonials and providing an exclusive avenue for growth opportunities to network with other local IT executives.

## **Question-and-answer-based technology market research consultations**

Gartner works with our clients to ensure they directly leverage our more than 2,000 dedicated Research analysts, who are available for unlimited discussions, meetings and document reviews. The value our clients gain from one-to-one interactions with our analysts cannot be matched by our competitors:

- Gartner analysts bring decades of experience, including hands-on roles in the government.
- Access to Gartner analysts is unmetered and is available through phone, Web, email.
- The document and contract review services conducted by our analysts lead to millions of dollars of savings for our clients

Additionally, included with the analyst inquiries, another unique opportunity for analyst access is through Gartner Webinars. Webinars are an effective source of just-in-time learning, available without travel or training expenses. Gartner has hosted 650 Webinars over the past two years. All CCISDA personnel will have the ability to select from and participate in over 300 Gartner

Webinars a year. Our Webinar topics are relevant to CCISDA and surround IT management, emerging technologies and trends and vendors. After a presentation by a Gartner analyst, CCISDA participants will be able to ask questions of our subject matter experts. In addition to providing the CCISDA with an exceptional professional developmental opportunity, the International Information Systems Security Certification Consortium has agreed to provide a continuing education credit (CEU) for attending select Gartner security-focused Webinars. Clients receive credits within 3–4 weeks. The table below is a schedule of upcoming webinars available for CCISDA.

**Table 11. Upcoming Webinar Schedule**

Webinar Title	Date
Articulate the Business Value of Cybersecurity	18 December 2018
Data and Analytics Trends for 2019 and Beyond: A Panel Discussion	18 December 2018
Leadership Vision for 2019: Program and Portfolio Management	19 December 2018
Manage Disruptive Changes In Java Release and Support Options	7 January 2019
How Brexit Will Impact Supply Chains Across Europe	7 January 2019
IT Spending Forecast, 4Q18 Update: What Will Make Headlines in 2019?	8 January 2019
The Top Myths About Digital Disruption	8 January 2019
AI and Robotic Process Automation: From Hype to Reality	9 January 2019
Gartner Top Strategic Predictions for 2019 and Beyond	9 January 2019
The 10 Habits of Customer-Centric Organizations	14 January 2019
The Top 10 Emerging Trends and Technologies Driving the Future of IoT	15 January 2019
Break Through 3 Culture Barriers to Create Change	15 January 2019
Hype vs. Reality of AI, Data Science and Machine Learning	16 January 2019
Gartner Predicts 2019: Midsize Enterprise Perspectives for Digital Transformation	21 January 2019
Panel Discussion: 2019 Marketing Predictions	21 January 2019
Digital Platforms: The Role Data and Analytics Plays in their Success	22 January 2019
2019 HR Executive Priorities	23 January 2019
Build Support for Moving From Projects to Products and Agile	23 January 2019
Data & Analytics Leadership and Vision for 2019	24 January 2019
What the Digital Workplace Will Look Like in 2028	29 January 2019
Modern Network Threat Detection and Response	29 January 2019
Create a Successful Product Strategy	30 January 2019

## Events sponsored by Gartner pertaining to technology analysis

As the world's leading IT conference provider, Gartner delivers a global event experience that delivers new thinking not found anywhere else. Gartner events attract more than 55,000 IT and business executives, including 8,000 CIOs and 1,500 industry-leading technology providers, to more than 75+ events each year in 22 locations.

Gartner Events align to specific IT and business roles that mirror those of the Gartner research offerings, including:

- Applications
- CIOs & Senior IT Executives
- Data & Analytics
- Enterprise Architecture
- Infrastructure & Operations
- Marketers
- Program & Portfolio Management
- Security & Risk Management
- Sourcing & Vendor Relationships
- Supply Chain

Each event features an engaging agenda fueled by comprehensive feedback from Gartner clients and cutting edge research aligned to your organizational role, project or initiative. These multi-day seminars present in-depth analysis and unbiased insight on a variety of key initiatives and hot topics critical to the success of the business.

Gartner events provide the opportunity to:

- **Get objective, independent research** — Our conferences are a direct extension of the Gartner industry-leading research services, and have the breadth and depth of content that no other conference producer in the world can match.
- **Gain a different perspective** — In private one-on-one meetings with Gartner analysts, along with peer group roundtables and interactive workshops, attendees are exposed to new ways of thinking and the latest industry best practices — critical ingredients in formulating effective IT and business strategies.
- **Make efficient use of your time** — In a few days, accomplish what would take months to do on your own. You can earn certification credits at select events, making your trip more cost-effective, or bring your team and advance projects and key initiatives.
- **Review relevant solutions** — Unlike tradeshows, solution providers at Gartner conferences are carefully selected to ensure that they are truly relevant to the roles our events serve. Typically represented by senior-level executives, the exhibitor component allows attendees to engage in time-efficient, meaningful conversations designed to build robust shortlists.
- **Engage in powerful networking** — Gartner conference attendees represent the most forward-looking and influential IT community in the world and, as a result, the value of the contacts they make and the networking they experience is almost impossible to replicate.

Gartner will host 20 multi-day events in North America in 2019:

**Table 12. Gartner's North America Events span multiple job roles and geographic regions**

Event Name	Date	Location
CIO Leadership Forum	March 10 — 12	Phoenix, AZ
Data & Analytics Summit	March 18 — 21	Orlando, FL
CIO Leadership Forum	March 31 — April 2	Hollywood, FL
<b>Marketing Symposium/Xpo</b>	<b>April 29 — May 1</b>	<b>San Diego, CA</b>
Supply Chain Executive Conference	May 13 — 16	Phoenix, AZ
Enterprise Architecture & Technology Innovation Summit	May 14 — 15	Orlando, FL



Event Name	Date	Location
Digital Workplace Summit	May 29 — 30	Orlando, FL
Symposium/ITxpo	June 3 — 6	Toronto, Canada
<b>Tech Growth &amp; Innovation Conference</b>	<b>June 3 — 5</b>	<b>San Diego, CA</b>
Program & Portfolio Management Summit	June 17 —19	Washington, D.C.
Security & Risk Management Summit	June 17 —20	National Harbor, MD
<b>Catalyst Conference</b>	<b>August 12 —15</b>	<b>San Diego, CA</b>
IT Sourcing, Procurement, Vendor & Asset Management Summit	September 4 —6	Orlando, FL
CSO & Sales Leader Conference	September 17 — 19	Las Vegas, NV
Symposium/ITxpo	October 20 — 24	Orlando, FL
ReimagineHR	October 28 — 30	Orlando, FL
Supply Chain Planning Summit	November 4 — 5	Denver, CO
Application Strategies & Solutions Summit	December 3 — 5	Las Vegas, NV
IT Infrastructure, Operations & Cloud Strategies Conference	December 9 — 12	Las Vegas, NV
Identity & Access Management Summit	December 10 — 12	Las Vegas, NV

The Security & Risk Management Summit, Identity & Access Management Summit and PPM & IT Governance Summit events offer accreditation to enhance and further your professional development.

Executive Programs members will have complimentary access to the annual Symposium/ITxpo, the most influential and strategic IT conferences for CIOs. This event is an unparalleled, 4.5 day event that explores the strategic trends and technologies that are driving digital transformation and shaping the future of IT and Business. At this event, attendees will interact with Gartner analysts, industry experts, cutting-edge solution providers and peers, all helping uncover innovative ways to approach challenges, make decisions with confidence and become an even more effective team. Now in its 29th year, Gartner Symposium hosts 8,000+ CIOs and senior IT executives and allows the CIO and their team to join a global community of more than 20,000 IT executives. This year's agenda tracks tackled the biggest challenges from three angles:

- **Business Strategy** — CxOs are investing to exploit opportunities in digital business. Top performers are designing new business information and technology operating models that enable and accelerate digital business transformation. This track is for CIOs and senior IT executives planning the role of information and technology in the digital strategy.
- **Leadership** — Leadership is undergoing a revolution in response to digital business demands. The beliefs and models of how we work are being shattered and reshaped. This track challenges your thinking about leadership, skills, and the organization required to successfully navigate uncertainty and create a culture of success.
- **Technology and Information** — Understanding how technology and information is evolving is critical in creating effective digital transformation. This track will examine those technologies and innovative uses of information that will have the greatest impact in shaping your digital transformation journey.

The Symposium agenda is designed to address the issues and challenges most critical to CIOs and their teams in the areas of technology, leadership and business strategy. The 2018 Symposium agenda focused on 13 key themes:

- Application Modernization
- Business Intelligence & Data Analytics
- Cloud Computing
- Cost Optimization
- Customer Experience
- Digital Transformation, Platforms & Strategy
- Emerging & Advanced Technologies
- Enterprise Architecture
- I&O Modernization
- Innovation
- Leadership
- Security & Risk
- Work, People & Culture

In addition to these initiative-driven tracks, Gartner also delivers industry-specific networking, sessions, speakers and insights. The U.S. Symposium included 10 sectors in 2018, including a **State and Local-Government-specific track**. The first day of Symposium is dedicated to the Industry Program. Gartner dedicates a full day of sessions for each of the following industries:

- **Federal Government** — Senior IT leaders from the federal government need to adopt proven practices and lessons from digital top performers; replace legacy systems with cloud-based alternatives; accelerate modernization to reduce technical debt; and work with ecosystem partners to increase interoperability.
- **State & Local Government** — To realize the benefits of an effective digital government strategy, senior IT leaders from the regional, state & local government need to expand digital ecosystems and use analytics to improve citizen experience and security; build a smart city execution road map; and implement a case management modernization program.
- **Healthcare** — To respond to digital disruptions, healthcare providers and payers need to drive change with advanced analytics, IoT, AI and algorithms; work with providers, payers and public health agencies to create customer-centric models that improve service delivery and care; and review digitalization strategies to identify talent gaps
- **Education** — To enable student success and improve institutional outcomes, senior IT leaders in education need to serve a generation of digital learners with a high-quality, personalized experience, create a student-centric learning environment and build a technology-agile organization and faculty.
- **Banking & Investment Services** — As digitalization continues to dominate growth, senior IT leaders from the banking and investment services industry need to look at non-financial services ecosystems to broaden market opportunity and enhance customer experience.
- **Electric & Gas Utilities** — By understanding digital business, senior IT leaders in electric and gas utilities will be positioned to can capitalize on transformational industry changes; use analytics to improve service delivery; optimize IT costs to free up discretionary funds; and strengthen the focus on innovation with bimodal IT.
- **Insurance** — As digital insurance becomes the focal point, it is more critical than ever that senior IT leaders in insurance embrace digital business platforms and new insurance business models, build effective modernization strategies and simplify the IT landscape.

- **Manufacturing** — To differentiate products, manage portfolios and make stronger customer connections, CIOs and senior IT leaders in manufacturing need to expand their information and analytics ecosystems; identify metrics to enhance product maturity life cycle planning; and engage customers to ensure higher success of new product information.
- **Oil & Gas** — Through understanding digital business, senior IT oil and gas leaders can capitalize on transformational industry changes; create a digital business game plan consistent with oil and gas culture; innovate creatively, rapidly, and effectively to increase competitive differentiation; and continuously evolve their digital business practice.
- **Retail** — Meet the demands of digital-empowered customers and improve customer experience and engagement by learning to deploy advanced analytics technology to improve customer experience and engagement; use digital technologies to ensure pricing, promotions and offers are consistent across channels; use IoT to automatically replenish consumables; and enhance the customer experience with self-funding technology.

ITxpo provides the opportunity to explore cutting-edge IT solutions from hundreds of top providers in 11 relevant marketplaces: Applications; Data & Analytics; Digital Business Platform & Process Management; Digital Workplace; Enterprise Architecture; Enterprise Networking & Communications; IT Infrastructure, Operations Management & Data Center; Mobility & Wireless; Program & Portfolio Management; Security & Risk Management; and Sourcing & IT Services — as well as the Emerging Technologies Pavilion and Industry Day Exhibitor booths.

Sponsors demonstrate their solutions and share their insights on the latest products and services through client case studies. Senior executives from technology providers present their strategy and vision in sessions geared toward CIOs. Gartner analysts lead brief sessions focused on a Hype Cycle or Magic Quadrant, and Learning Labs offer the additional opportunities to interact with Gartner analysts.

Executive Programs license holders will also have exclusive access to the annual CIO Leadership Forum. In 2019, CIOs will see the use of digitalized products and services drive new forms of growth. Gartner CIO Leadership Forum 2019 prepares IT executives for their new job as a growth leader.

[Section 3 — Requirement 1.2.2. Independent Vendor Analysis - Describe the vendor relationship. Describe any financial arrangements with vendors and steps taken to ensure independent evaluation.](#)

**Complies.** Clients trust Gartner because our 100% original research is always independent and objective. In order to protect our objectivity, we are not obligated to any outside agenda or influenced by any third party. Gartner is the only research organization of its kind equipped with an ombudsman's office to ensure that our research is objective, independent and meets our exacting quality standards. We never publish research on a sponsored basis, unlike many of our competitors. Our closest competitors have published research on a sponsored basis, some within the last 12 months, as evidenced in the figures below.

**Figure 3. Our closest competitor publishes sponsored research**

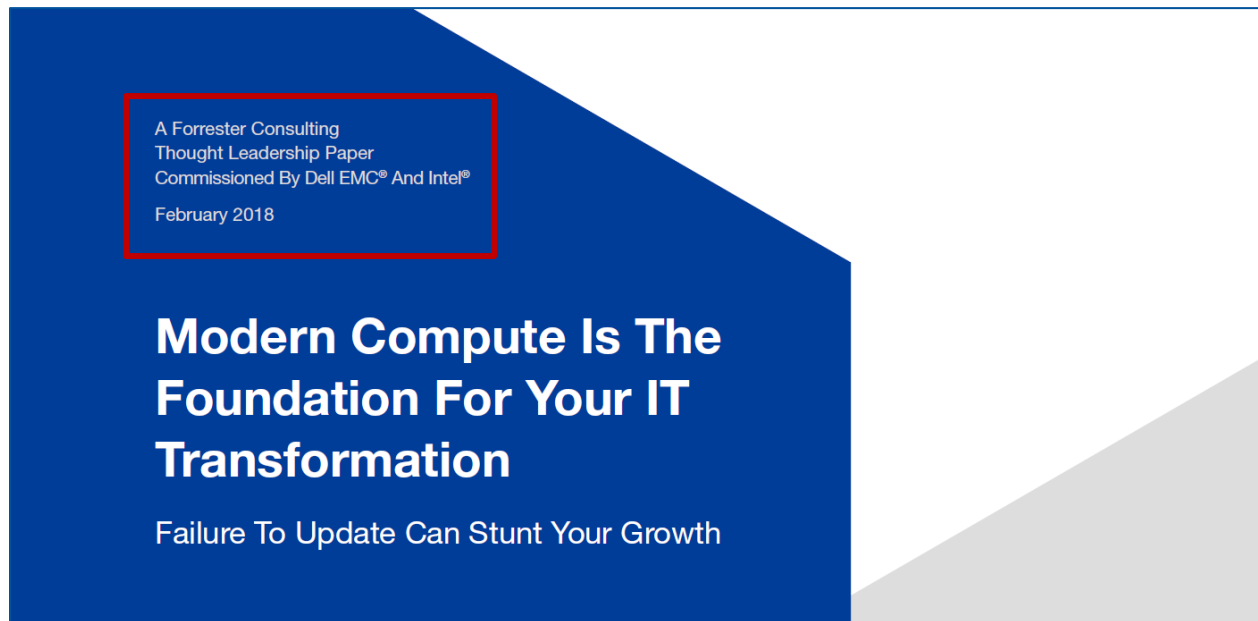


Figure 4. Other competitors publishing sponsored research



## MOBILITY IN THE CLOUD

Section 3 — Requirement 1.2.3. Account Manager - Detail the duties assigned to the account manager role. Describe the minimum qualifications for the proposed position.

**Complies.** Gartner does more than just make our research available — we provide direct customer service to help you understand what the research means for your organization and to ensure maximum benefit for each individual license holder:

- Mr. David Kennison and his team will work proactively to understand CCISDA and its recipient agencies and create a **business plan** for them to best leverage Gartner services for their current challenges and most critical initiatives. Mr. Kennison and his team will ensure that each user is up to date on how to use the database and leverage the full suite of services Gartner provides.
- Mr. Kennison and the dedicated Service Delivery team aligned to each contract will show **clear return on investment** through regular reports. They monitor usage by each individual and proactively help identify and align the appropriate Gartner resources to



assist them. They even proactively identify research and analysts for clients who are too busy to do it themselves.

Gartner's Human Resources Department works to ensure that we attract and retain the industry's top talent to deliver results for our clients, while also following fair, equitable and uniform procedures in our global recruiting activities. We actively embrace and encourage qualified applicants of all backgrounds to join us, without regard to race, national origin, gender, age, religion, disability, sexual orientation, veteran status or marital status.

The hiring process of account management team and account manager positions are carefully vetted to maintain the expert level of service clients have come to expect. Listed below are the representative qualifications we seek in prospective hires.

**Account Manager/Account Executive:**

- Highly motivated, achievement-driven associate with experience delivering the technology-related insight necessary for clients to make the right business decisions, every day
- Experience with proven consultive services/sales, preferably experience in Information Technology
- Ability to prospect and manage C-level and senior level relationships within the respective organizations
- Proven experience building excellent client relationships, offering value added, insightful and strategic insight into their business
- Strong computer proficiency
- Excellent written and oral/presentation skills
- Ability to develop and conduct effective presentations with contract decision makers (C-level)
- Bachelor's degree, with strong evidence of success in school
- Masters or advanced degree preferred

**Section 3 — Requirement 1.2.4. Account Manager - Detail the methods used to ensure qualified resources are assigned to the consulting engagement.**

**Complies.** We deliver more than just information: Our analysts, advisors, researchers and quantitative analysts have the experience and knowledge to provide you with truly insightful, strategic guidance on your most critical priorities. Our dedicated Service Delivery team works diligently to align the appropriate resources to enable maximum ROI. After gaining a deep understanding of each individual client's mission critical priority and key initiatives, we provide recommendations on new, relevant research, suggested analysts for personalized insights, upcoming webinars and relevant events, and also connect the clients with peers facing similar challenges.

**Section 3 — Requirement 1.2.5. Research Analysts - Indicate the number of research analysts that are 1) available for live engagements such as advisory calls and 2) contribute to the pool of available research materials available in the database.**

**Complies.** In addition to writing over 5,000 research documents annually, Gartner's 2,000+ analysts provide in-depth, customized support for our clients, including approximately 20,000 strategy reviews and 5,600 contract reviews a year. Also, Gartner analysts collectively engage

in about 380,000 one-to-one client interactions each year, of which approximately 130,000 are senior executive interactions.

Our capabilities extend beyond intelligence. By pairing you with an expert partner — a former practitioner who's overseen your function and faced your challenges — various offerings provide an additional channel of high-level support by aligning license holders with Executive Partners or Leadership Partners.

[Section 3 — Requirement 1.2.6. Research Analysts - Indicate the minimum qualifications for 1\) available for live engagements such as advisory calls and 2\) contribute to the pool of available research materials available in the database.](#)

**Complies.** Our 2,000+ analysts are the most senior, qualified evaluators in the industry:

- Our analysts have an average of 15 years of experience at the time of hire.
- 60% of our analysts have more than 20 years of industry experience.
- 50% of our analysts have a postgraduate degree

A typical set of qualifications and experience Gartner requires from an Executive Partner include:

- A university graduate (Masters preferred) with 10+ years of experience working as a CIO or in a Senior management role in an IT capacity
- An in-depth understanding of the IT industry and the role of the CIO (including leadership, operations management, strategy and trends, use of metrics, etc.)
- In-depth understanding of the business value of It and the alignment of business and IT strategies
- The Executive Partner will be an accomplished CIO, with a broad base of expertise who has operated at a senior leadership level and driven change at all levels
- Ability to build strategic internal partnerships with key roles across the organization and positively impact change
- Critical thinking and problem solving capabilities, with the ability to demonstrate assessing Client's situations and providing actionable, outcome-based business/technical advice, as well as the ability to leverage appropriate resources to help Clients achieve results
- Previous experience in Federal government or the Public Sector - Preferred

[Section 3 — Requirement 1.2.7. Customer Satisfaction - Describe your process for measuring both engagement performance and overall customer satisfaction. Describe any steps taken following a specific advising to ensure customer satisfaction.](#)

**Complies.** Gartner does more than just make our research available — we provide direct support to help you understand what the research means for your organization and to ensure maximum benefit for each individual license holder:

- Gartner dedicated account executives work proactively to understand each individual client and create a **business plan** for them to best leverage Gartner services for their current challenges and most critical initiatives. They ensure that each user is up to date on how to use the database and leverage the full suite of services Gartner provides.
- Account executives show **clear return on investment** through regular reports. They monitor usage by each individual and proactively help identify and align the appropriate

Gartner resources to assist them. They even proactively identify research and analysts for clients who are too busy to do it themselves.

- Gartner capabilities extend beyond intelligence. We roll up our sleeves and step into the shoes of senior leaders. By pairing you with an Executive Partner or Leadership Partner — a former practitioner who's overseen your function and faced your challenges — we provide an additional channel of high-level support.
- Gartner connects our clients to **true peers** through Gartner Events, membership programs and Gartner Peer Connect, an exclusive online client community of 65,000 experienced IT and business decision makers. Clients leverage this collective wisdom to broaden perspectives, avoid risky or expensive pitfalls, and expedite the solving of shared challenges.

**Section 3 — Requirement 1.2.8. Issue Resolution - Describe the steps to be used in any issues escalation process. List the positions and timeline to resolve service complaints.**

**Complies.** The Gartner Account Management team monitors the needs at all levels of CCISDA's organization and quickly adapts to these requirements at all levels meeting together weekly to identify new requirements and to proactively engage resources for CCISDA, wherever needed. To ensure optimal alignment, the Gartner Account Management team members meet periodically with individual executives, senior management and sponsors that are both users and non-users to conduct status meetings and value reviews to reach consensus on future activities and make any course corrections. Table 13 summarizes a representative Gartner Account Management team and the role the representative individual fulfills within the structure:

**Table 13. Representative Gartner Account Management Team**

<b>Gartner Associate, Role</b>	<b>Key Objectives and Duties of the Role</b>
David Kennison Sales Manager	<ul style="list-style-type: none"> <li>■ Overall relationship manager</li> <li>■ Ensures effective utilization of all Gartner resources</li> <li>■ Handles all contract-related questions and issues</li> </ul>
Hannes Scheidegger Sr. Managing Partner Gartner Consulting	<ul style="list-style-type: none"> <li>■ Assess consulting needs and requirements of County</li> <li>■ Assign an appropriate consulting team with the required expertise to conduct the work required to the required budget, quality standards and definition of success</li> </ul>
Mike Ryan Regional Vice President	<ul style="list-style-type: none"> <li>■ Manages Gartner's Western Region Government Team</li> <li>■ Responsible for any escalations</li> </ul>

The role of the dedicated Account Management team is to ensure continuous feedback and discussion of your experience to ensure you are deriving maximum value. This means that any point in our relationship, and in relation to any engagement or use of Gartner resources, the County will be able to raise issues and challenges and receive rapid responses. The first point of contact is the Account Manager who will work with you to resolve immediate difficulties and have the authority to gather additional Gartner resources to ensure this takes place. If this proves insufficient then escalation to the Regional Vice President level is the next recourse. For quality assurance purposes the Regional Vice President will be regularly in contact with the account management team to ensure awareness of your circumstances and any situations potentially requiring support, well in advance of any requirement to become involved.

Gartner will conduct user training on how to best utilize the Gartner recourses provided to users of our Research services. Gartner has an effective process for accomplishing user training and

familiarizing users with our Website and the process for efficient analyst inquiry. Gartner has a team within our Client Services Organization (CSO) to facilitate this process called the New Client Engagement Team. A representative of our Client Engagement Team will prepare users to make full use of the Gartner portals and services through which our services are delivered on a day-to-day basis by contacting all license holders within five days of contract award to provide their personal username/password and to offer personalized training. Our goal is to conduct training with each license holder within 14 business days covering the following topics:

- Searching Gartner.com
- Planning for upcoming Events
- Understanding Hype Cycles & Magic Quadrants
- Scheduling and Participating in Teleconference
- Creating and Managing Alerts
- Peer Connect
- Creating Analyst Inquiries

At any time during the contract period, a user may request additional training and/or utilize a number of online tools to assist them in navigating gartner.com:

- **Interactive Tour** — For the fastest overview of Gartner Internet resources we provide a high-level guided tour of gartner.com
- **Online Training** — Online training sessions are available to help each user get the most from gartner.com. Each training session focuses on a specific topic
- **Search Help** — Hints for creating the best searches on gartner.com

A large part of a Gartner relationship is the careful considerate management of client requests. Gartner values and promotes a collaborative, interactive environment and works hand-in-hand to understand the IT and business needs of CCISDA.

CCISDA benefits from the Gartner Account Team's ability to facilitate relationships with analysts, consultants and executive leadership. Gartner is proud to offer an account support team that continually monitors the needs at all levels of the organization. Additionally, Gartner periodically conduct status meetings and reviews to ensure the Government's needs are being met.

- **Monthly Status Calls** — One-hour pre-scheduled update calls to discuss utilization of inquiry, research requests and fulfillment, per the terms of our agreement. The Local Gartner Account Manager, Service Deliver team expert, CCISDA's dedicated contract holder will participate in this meeting. The local Account Manager is available for on-site visitation to CCISDA locations to assist in facilitating inquiry or research requests on a proactive basis
- **Quarterly Relationship and Value Reviews** — Today, relationship and value reviews with CCISDA clients are conducted on a quarterly basis (i.e., every 90 days). Gartner proposes to continue with this formal value review — one hour, each quarter, conducted on-site with each user and reviewed with IT Executives. The intent of these reviews is to allow Gartner to provide industry observations, as well as, to allow CCISDA/Gartner to provide observations of our relationship status while identifying additional opportunities to extract the most value based on CCISDA requirements

- **Impact Assessment Report** — To guide the value reviews, Gartner and CCISDA will jointly use the Impact Assessment Report (noted previously in this proposal) to document and score the value of the services delivered and ensure alignment with the objectives of CCISDA are consistently measured throughout the engagement of services. This quality assurance approach and scorecard will be used to measure performance and proactively identify areas that need to be improved or adjusted
- **Communication Mechanisms** — Gartner is a global IT company that transacts business with a large number of clients across a wide array of media (both physical and electronic). Gartner is sensitive to our clients' needs for confidentiality and security
- **Service Responsiveness and Hours of Staff Availability** — The Gartner Account Team is available daily for communication via face-to-face, email, telephone and mobile phone communications. Office hours for the account team are aligned with CCISDA's normal business hours at a minimum

The Gartner Inquiry Team is also available daily by phone, email and inquiry submission through gartner.com in the following ways:

- Contact Gartner (automated Inquiry submission form on gartner.com) submissions enact real-time email acknowledgment
- Phone submissions will allow for live acknowledgment of the request
- Email submissions are typically acknowledged within three business hours from submission, via an email notification that includes the unique Reference number for the request

Section 3 — Requirement 1.2.9. Kickoff - Describe the process of initiating a topic-specific consultation. Indicate 1) how a request is made, 2) the expected response time, 3) number planned of interactions (calls/meetings) and 4) materials provided.

**Complies.** In addition to scheduling analyst inquiries through the aligned Service Delivery team, advisory level license holders will also be able to manually place individual inquiry requests through each license holder's customized My Gartner portal. The service-level time scales detailed below are subject to the availability of individual Analysts. Gartner will endeavor to meet client requests within these guidelines.

1. *General Inquiry:*

- Inquiry requests acknowledged by email back to the requestor (Licensed User): target service level = three (3) business hours or less

(Note: This is the time by which the client can expect a "confirmation of receipt of request," not the time by which the client can expect scheduling of the Inquiry.)

2. *Request for specific existing published documents (to be emailed as PDF documents to the client):*

- Urgent request: target service level = one (1) business day
- Normal request: target service level = two (2) business days

3. *Time taken to schedule an Analyst call, from receipt of a correctly completed request:*

- Urgent call scheduled: target service level = one (1) business day
- Normal call scheduled: target service level = two (2) business days



(Note: This is the time by which the client can expect a response containing the scheduling of the Inquiry.)

4. *Time from receipt of a correctly completed request to completion of the Analyst call:*

- Urgent call scheduled: target service level = two (2) business days
- Normal call scheduled: target service level = five (5) business days

(Note: If a specific Analyst is requested for the call and is unavailable, Gartner cannot be held to these time scales. Every effort will be made to schedule an alternative Analyst.)

## Tools and Resources

Section 3 — Requirement 1.3.1. Data Warehouse - Describe the organization and contents of the analytical database available through the subscription agreement. Provide a category summary of the number of reports by market segments. Indicate the median age of the reports.

**Complies.** Gartner provides all license holders with a commercially available online research database that illuminates intelligent solutions for adopting and implementing technology in order to unlock value across the organization. Gartner Research documents far exceed the requirements of this procurement:

- The collective Gartner Research Database holds **135,793 documents**, including 5,000+ new documents annually — far more than any competitor. This volume demonstrates Gartner's full view of the entire IT industry — from the needs of the end user through the goals of technology providers.
- We cover an unparalleled **1,372 topics and trends** such as cloud computing, artificial intelligence, mobility, data analytics, security, enterprise architecture, portfolio management and application trends. We provide Hype Cycles, Magic Quadrants, Case Studies and much more.
- Reaching beyond IT, Gartner is distinguished by our visibility into challenges and opportunities across the C-suite. Our comprehensive perspective means that we can map the full range of stakeholder needs, impacting the future of your business.
- Our Research agenda is maintained through a rigorous update process to ensure it stays current and aligned with our clients' most key initiatives. All research is archived after **18 months** unless it is determined to still be relevant and current.

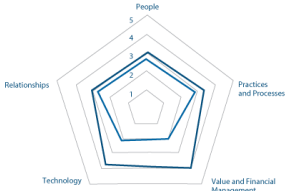
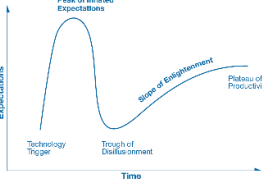
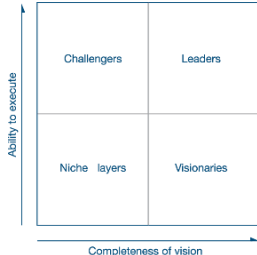
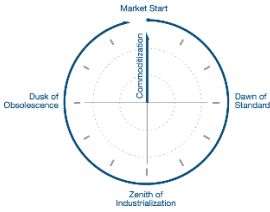
## Original Methodologies and Research

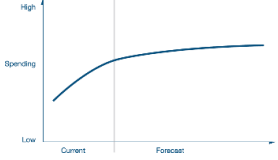


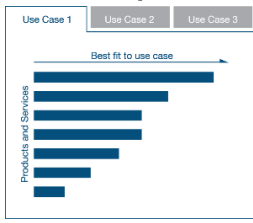
Gartner's compilation of research is technically superior because of its unmatched originality:

- Unlike our competitors, Gartner Research is **100% original** — it is created by our own dedicated team of Research analysts, does not include any syndicated or third-party research, and provides a compilation of research and value not available elsewhere.
- Gartner brings a unique perspective — Gartner insights are drawn from a fact base including our **380,000 annual one-to-one client interactions**, 21,000+ annual vendor briefings, and support of **clients across 15,000+ distinct organizations in 100+ countries**.
- Gartner's eight proprietary methodologies (described on the following pages) cut through the information overload to help clients arrive at the insights they need to chart the right course forward.

- Gartner also brings the world's largest database of IT key metrics data, with more than 2,000 IT metrics published annually by way of 90 Gartner IT Key Metrics research documents. Use of these metrics helps our clients enable improved budget and investment decisions with regard to the changing environments of business and IT.

**Table 14. Gartner Proprietary Methodologies**

Gartner Methodology	How These Methodologies Add Value
<b>Gartner IT Scores</b> 	<p>Gartner IT Scores are holistic sets of interactive maturity assessments designed to help CIOs and IT leaders evaluate the maturity of both the IT organization as a provider of IT services, and the enterprise as a consumer of information technology. Unlike other IT maturity assessments, Gartner IT Score measures an organization's capabilities within the context of enterprise culture, behaviors and capacity for leadership — factors that dramatically impact IT's effectiveness and its ability to contribute real business value.</p>
<b>Hype Cycles</b> 	<p>Gartner Hype Cycles, such as the Hype Cycle for Cloud Security, provide a customizable, graphic representation of the maturity and adoption of technologies and applications, and how they are potentially relevant to solving real business problems and exploiting new opportunities. Hype Cycles will help CCISDA to:</p> <ul style="list-style-type: none"> <li>■ Separate hype from the real drivers of a technology's commercial promise</li> <li>■ Reduce the risk of their technology investment decisions</li> <li>■ Compare their understanding of a technology's business value with the objectivity of experienced IT analysts</li> </ul>
<b>Magic Quadrants</b> 	<p>Gartner Magic Quadrants are a culmination of research in a specific market, fully customizable for CCISDA that give a wide-angle view of the relative positions of the market's competitors. By applying a graphical treatment and a uniform set of evaluation criteria, Gartner Magic Quadrants quickly help clients digest how well technology providers are executing against their stated vision. Magic Quadrants will help CCISDA to:</p> <ul style="list-style-type: none"> <li>■ Get quickly educated about a market's competing technology providers and their ability to deliver on what end users require today and in the future</li> <li>■ Understand how a market's technology providers are competitively positioned and the strategies they are using to compete for end-user business</li> <li>■ Compare a technology provider's strengths and challenges with their specific needs</li> </ul>
<b>IT Market Clocks</b> 	<p>Gartner IT Market Clocks are decision frameworks that provide a full life cycle view of technology assets — whether capabilities, products or services. They help clients better evaluate technology assets, so they can prioritize IT investments and build technology roadmaps that support business plans. Gartner IT Market Clocks will enable CCISDA to:</p> <ul style="list-style-type: none"> <li>■ Gain a full life cycle view of your technology assets.</li> <li>■ Evaluate and prioritize your IT investments. Build technology roadmaps that support business plans.</li> </ul>
<b>Market Forecasts</b>	<p>Gartner Market Forecasts give an analysis of both supply and demand, comparing technology investment trends in the provider community with the spending trends of end users. It's a unique picture clients get from</p>

Gartner Methodology	How These Methodologies Add Value
	<p>Gartner, based on our relationships with thousands of end users and providers. Gartner forecasts provide two years of history while peering five years into the future. Clients get a comprehensive understanding of supply and demand by market, country and global region. Market Forecasts are established and proven proprietary methodologies that will help CCISDA to:</p> <ul style="list-style-type: none"> <li>■ Understand the market opportunity for IT products and services</li> <li>■ Differentiate which market opportunities are emerging, maturing or declining</li> <li>■ Base their business plans and strategies on fact, not conjecture</li> </ul>
<b>Market Share Analysis</b> 	<p>Through our Market Share Analysis methodology, clients see how share is allocated among 400 technology providers in 37 key markets. Our detailed analysis of how provider revenue is allocated reveals which types of solutions are succeeding, which are trailing, and where opportunities exist for providers to take additional share.</p>
<b>Vendor Ratings</b> 	<p>Clients use this well-defined methodology to rate IT technology providers — large, small, public or private. Gartner Vendor Ratings assess all the different aspects of a technology provider, such as its strategy, organization, products, technology, marketing, financials and support, to enable CCISDA to:</p> <ul style="list-style-type: none"> <li>■ Manage provider portfolio risks while keeping an eye on up-and-coming players and alternate providers</li> <li>■ Understand how providers' products and services stack up and how they are positioned for long-term survival</li> <li>■ Support key purchase, investment and renewal decisions</li> </ul>
<b>Critical Capabilities</b> 	<p>Gartner Critical Capabilities completes CCISDA's view of the market with deeper insight into vendors' product or service offerings and how these rate against common client-usage scenarios. This essential companion to the Gartner Magic Quadrant enables CCISDA to:</p> <ul style="list-style-type: none"> <li>■ Map provider strengths and challenges against specific business requirements</li> <li>■ Narrow down and focus on the product and service criteria most important to you</li> <li>■ Create your own experience with customized use cases based on your unique needs and requirements</li> <li>■ Easily integrate information into your workflow and decision-making process, saving you time</li> </ul>

### Section 3 — Requirement 1.3.2. Data Warehouse - Describe the steps that are taken to ensure analytical reports are updated in a timely manner and represent the current state of the market.

**Complies.** Our Research agenda is maintained through a rigorous update process to ensure it stays current and aligned with our clients' most key initiatives. All research is archived after **18 months** unless it is determined to still be relevant and current. Gartner research is the highest-quality research in the industry. We ensure this in part through our Fact-Based Research principles and our Document Quality Framework.

## ***Fact-Based Research***

Fact-Based Research has three components:

1. **Research transparency** ensures that our positions are defensible and clear. This means showing sufficient evidence to support the claims and advice we give, and giving enough detail in the data for readers to understand how this research applies to them.
2. **Finding data** involves exploiting the many databases available to support the research we deliver.
3. **Using data** involves utilizing available sources of information to support research positions and in a clear and transparent way.

## ***Document Quality***

The Document Quality Framework is intended to provide a common understanding of the key factors that contribute to high research quality so that:

- Authors can build in the important contributing components of high-quality research prior to management review and publishing
- Peer reviewers can provide thoughtful, relevant feedback using a common research quality framework
- Team managers can uphold research quality and consistency across their teams

The Written Research Quality Framework is built on seven research quality components:

- Peer and external review
- Clarity
- Actionable
- Relevancy
- Transparency
- Methodology
- Accuracy and reliability

The framework provides a robust structure for analysts, peer reviewers and team managers to assess and give feedback on the quality, content and compliance of the document in a structured manner, and includes guidelines on how documents should be rated.

[Section 3 — Requirement 1.3.3. Data Warehouse - Provide a user guide for accessing available reporting.](#)

**Complies.** We will provide CCISDA with access to “on-demand” subscribed research content and more, through an intuitive, tailored online portal available at <https://www.gartner.com/en>.

Users will have access to a personalized, intelligent web-based home page called **MyGartner** that recommends the most relevant research and resources based on the users key initiatives, activities, job role and profile information. MyGartner is accessible anytime from anywhere and provides access to independent, expert advice whether a user is at their desk, in a meeting or on the move. MyGartner delivers timely research and resources to inform mission-critical decisions based on the user’s key initiatives. Powered by the patented Gartner Recommendation Engine that delivers targeted content on the basis of role, profile, workflow timelines, preferences and key initiatives, MyGartner delivers unmatched functionality to enable a smooth customer experience:

- The **MyGartner Alerts** feature allows clients to automate the delivery of the latest research directly to their email address and to the Alerts area of gartner.com. Users can

define topics and how they want to receive them, and then gartner.com will send matches as soon as they are published. Alerts will save users time by delivering timely, accurate and relevant research to support their current initiatives and priorities.

- **MyGartner TRACK** is a patented engine that proactively delivers timely, targeted resources. Users will be able to input their top initiatives, vendors or IT markets to track and receive the most relevant and customized content and notifications. Recommendations are based on users' preferences and actual usage, so CCISDA can be confident that displayed content will be directly relevant to its challenges.
- Users can save and organize research in their personal library; it automatically synchronizes with the MyGartner home page.
- Browse personalized recommendations based on users preferences and recent activity, get access to special reports as soon as they are available, and learn about important upcoming events.

The Gartner online database is an incredibly sophisticated tool that lets clients intuitively access research in a modern interface, maximizing value and making the Gartner user experience technically superior:

- The **MyGartner Mobile** app enables maximum flexibility with on-the-go access to Gartner research. A seamless experience syncs with gartner.com activities, provides a "Recommended for You" feed, has a handy search function and provides a quick overview of documents with a summary view and a "Time to Read" estimate.
- Gartner ensures that our database is continually reliable. Our monthly service level is **99.5% availability**, and our account executives and technical support representatives are available to ensure each client receives the most value from their online experience.

MyGartner is transparent and easy to use; the portal seeks out and delivers relevant research that each user needs, just when they need it, to inform all critical business decisions. The Gartner Recommendation Engine uses penetrating logic for fast insights relevant to recent activity and concerns, and gets smarter with repeated usage.

Through My Gartner, users will be able to easily navigate and discover relevant research documents, analysts, events, webinars and professional development resources. CCISDA will be able to search within many unique parameters to more refined searches. The advanced search tool enables users to search by date range, content type, initiatives, industries, region and more. For additional information regarding the value of our My Gartner portal, please reference the [My Gartner Quick Reference](#) guide.

Upon the start of services, each user will be able to log-in using their unique credentials. Gartner will provide all CCISDA license holders with a customized, user-friendly My Gartner portal, catered to serve the needs of each CCISDA users. Users will have a customized landing page with recommended research, private online community forums and professional development opportunities. Users can also actively monitor their usage and track new research based on initiatives, vendors, keywords or IT markets.

## Gartner's Cost Effective Services

Our cost-effective services provide hard-dollar return on your investment. By providing an industry-leading 7,300+ annual contract reviews (resulting in 15% savings on over 75% of the contracts reviewed), we deliver an unmatched set of resources to combat the persistent challenges of complex costs and vendor offerings. In addition to our contract review services,



Gartner will also provide CCISDA with unique sets of data, toolkits and templates geared to improve efficiency of State services through both cost avoidance as well as services that can result in direct savings.

## IT Key Metrics Data

Gartner is the world's leader in technology benchmarking solutions with the industry's largest database of benchmarks. To help you understand how CCISDA stacks up against peer organizations — and prioritize areas to improve — we've created more than 14,000 peer benchmarks, and we offer maturity diagnostics covering more than 35 functional areas. Our IT-specific database alone includes observations from more than 7,000 data points collected annually, including:

- Current technology cost and staffing level
- Current outsourcing deals
- Industry competitive measures
- Maturity levels

The benchmarking database will enable CCISDA to plan its IT budget with key relevant facts and metrics to highlight and justify IT spending and staffing costs. Database metrics are also used to identify opportunities for cost optimization and investment prioritization by using IT cost metrics to baseline IT price performance and identify opportunities for savings. CCISDA will be able to use data to improve decision-making and alignment with business units and its various governance boards. The size of the Gartner database in relation to others is a critical differentiator. Benchmarking against narrow or small datasets will not provide CCISDA the accuracy required to inform decision-making and could introduce unnecessary risk.

The Gartner IT Key Metrics Data research series contains over 2,000 IT investment, cost and performance metrics spread across five topic areas and 90 documents. This year's edition is composed of 7,158 data points, gleaned from more than 80 countries, across 21 vertical industries. These key metrics reports are broadly defined by five key areas of the IT portfolio:

- **Key Industry Measures** — Enterprise-level total IT spending and staffing metrics across 21 vertical industries (including government), including current year and multiyear averages. Metrics based on enterprise size are provided, when available.
- **Key Infrastructure Measures** — Technology-domain-specific unit cost, productivity and performance measures for the IT infrastructure environments, including current year and multiyear averages for the mainframe, Windows server, Linux server, Unix server, storage, end-user computing, IT service desk, data and voice network environments. Metrics by workload size are often provided.
- **Key Applications Measures** — Application development and application support spending and staffing metrics, project measures, life cycle phases, productivity and quality measures (current year and multiyear).
- **Key Information Security Measures** — Enterprise-level total spending and staffing measures by industry and region.
- **Key Outsourcing Measures** — Enterprise-level total spending and staffing measures by industry and region.

## ITScore

Trusted insights and strategic advice are critical, but progress is measured by outcomes. Beyond helping CCISDA identify strategies that will work, we equip your organization in executing against them, including through tools like ITScore. Integrated with IT Key Metrics Data, Gartner ITScores are holistic sets of interactive maturity assessments designed to help CIOs and IT leaders evaluate the maturity of both the IT organization as a provider of IT services, and the enterprise as a consumer of information technology. Unlike other IT maturity assessments, Gartner ITScore measures an organization's capabilities within the context of enterprise culture, behaviors and capacity for leadership — factors that dramatically impact IT's effectiveness and its ability to contribute real business value. Gartner ITScores enable clients to:

- Gain insights into what needs to be accomplished, where the IT organizations today in developing the necessary capabilities, and the actions needed to close gaps and advance
- Assess and compare maturity across IT disciplines, and leverage best practices throughout the organization
- Provide an objective basis for cross-functional communication, collaboration and planning
- Optimize business costs through increasing the effectiveness and impact of the IT organization

Gartner ITScore will allow CCISDA to assess its IT maturity in key areas such as application portfolio management, project portfolio management, business intelligence and performance management, enterprise architecture, infrastructure and operations, sourcing and procurement, vendor management, privacy, information security, risk management, compliance and more. Gartner ITScore is a comprehensive set of assessment modules based on extensive proprietary research that will enable clients to:

- Receive a customized report for each assessment, with targeted insight for getting to the next level
- Obtain an enterprise maturity score and ratings for multiple roles and functions
- Delegate surveys to anyone in your organization (whether or not they are a Gartner seatholder), and retake them as often as you wish
- Manage and maintain a library of completed assessments through your My Assessments page

## ITBudget

Basing decisions and solving problems with the right, most robust data is no longer a luxury. Our research and analytics create a strong foundation for making informed decisions — and ultimately driving successful outcomes. Like many other government organizations, CCISDA would benefit from using **Gartner ITBudget** — an interactive online tool that will allow CCISDA to input IT spending data and within minutes and get a customized report that details how CCISDA's spending compares to industry averages. This unique tool is a proven, structured methodology and draws from our proprietary IT Key Metrics Data database.

With more than 7,000 data points from 80 countries and 21 industries, our database is the most comprehensive — and authoritative — source of IT spending, staffing and performance data in

the industry and will deliver the best value for CCISDA. Trusted insights and strategic advice are critical, but progress is measured by outcomes. This tool will enable CCISDA to plan, align and justify its IT spend with enterprise objectives, enable cost optimization within the organization and compare its productivity to that of similar companies. With Gartner ITBudget, CCISDA can:

- Compare the size and distribution of CCISDA's IT spend to industry averages
- Evaluate the alignment between the IT budget and CCISDA's enterprise objectives for running, growing and transforming the business
- Optimize costs by establishing a baseline of performance and identifying opportunities for savings
- Provide a foundation for cross-functional communication, collaboration and planning, based on objective facts and hard data
- Identify and prioritize areas to improve operational efficiency
- Establish a baseline, evaluate alternative scenarios, and track progress over time

Gartner ITBudget enables CCISDA to get fast insight into how its spending compares on a variety of important measures, including:

- IT spending per employee and as a percentage of enterprise revenue and operating expenses
- Levels of operational expenditures (opex) versus capital (capex) expenditures
- Percentage of the IT budget devoted to running, growing and transforming the business
- IT spending by technology domain — e.g., data centers, IT help desk, finance and administration
- Hardware, software and human capital expense ratios
- Allocation of human capital expenses — e.g., internal versus external, and by technology domain

## Gartner Offerings

Gartner understands CCISDA's unique roles requiring access to technology research services combined with industry analysis experts. The Service Delivery team, led by Mr. David Kennison, will work diligently to provide targeted tiered membership options for every level of CCISDA's organization, to deliver the specific services and information required for each role through various types of subscription services. These subscriptions may range from self-service research and analyst access, to proactive, customized support provided through an experienced "Partner" who works with the user on achievement of assigned goals. Our experienced Analysts and "Partners", through their own experience and knowledge, are able to relate to challenges and synthesize not only Gartner data, but also the particular environment around CCISDA's IT leaders. The level of renowned experience and expertise our "Partners" and Analysts offer, is a fundamental characteristic of Gartner's advisory support. Gartner products are complementary and offer maximum flexibility for CCISDA's agencies and bureaus by providing a wide range coverage while offering individual subscriptions or team solutions.

The services described below are subscriptions provided to other similar public sector organizations, based on the similar requirements listed in the RFP's Scope of Work. The services described are only suggestions, and Gartner will work together with the County to align

our services to match to the specified needs and requirements of each member's usage and expectation.

For Service Descriptions of all of the services listed below, please reference section 0.

**Team Plus Solutions** are new Gartner products designed to provide license holders with access to the former CEB research that complements the traditional Gartner IT offerings. Team Plus has all the value of Gartner Leadership Teams, with an added focus on actionable research for CIOs and their teams to make sure they have end-to-end support to build smarter strategies and stronger business outcomes. Available research includes best practice case studies, ignition guides, new tools and templates, and an annual executive retreat (Executive Programs only). Team Plus is available through Gartner Executive Programs Leadership Team Plus, Gartner Enterprise IT Leadership Team Plus and Gartner IT Leadership Team Plus.

**Gartner Executive Programs** is targeted toward CIOs and senior executives to provide strategic insight for the organization to execute against its mission effectively and efficiently. Gartner also offers Executive Programs Leadership Team to extend the benefits of Gartner insight to the Senior Executive's team while driving collaboration and consistency. Leadership Teams can be made up of one leader and up to 10 members with any combination of five member types. The flexibility allows the most effective team for CCISDA's needs. Users also have unlimited analyst inquiry, which can be used for contract or document reviews. The Gartner Executive Programs family of products includes:

- Executive Programs Leadership Team Plus: Leader, Partner, Delegate, Advisor and Cross Function
- Executive Programs Leadership Team: Leader, Partner, Delegate, Advisor, Cross Function, Role and Essentials
- Gartner for Executive Programs: Member and Member Basic
- Some Add-ons are also available for purchase

**Gartner for Enterprise IT Leaders** is targeted toward senior IT leaders and provides subject matter expertise through research, analyst inquiry and the alignment of a leadership partner — a peer with subject matter expertise in the role of the license holder (i.e., Security and Risk Management, Sourcing and Vendor Management, Enterprise Architecture, Infrastructure and Operations, or Applications). Inquiries may be used for contract or document reviews. The product family includes:

- Gartner for Enterprise IT Leadership Initiative Team: Leader, Advisor
- Gartner for Enterprise IT Leadership Team Plus: Leader, Advisor and Cross Function
- Gartner for Enterprise IT Leadership Team: Leader, Advisor, Cross Function, Role and Essentials
- Gartner for Enterprise IT Leaders Individual Access

**Gartner for IT Leaders** is targeted toward IT managers and provides unlimited access role-based research and the opportunity to connect with 42,000 peers through Gartner Peer Connect. A Client Partner is aligned as a service delivery partner to ensure that each user receives maximum value through research selections. Inquiries may also be used for contract or document reviews that lead to hard-dollar and time savings. Gartner for IT Leadership Team can be customized with one leader and up to 10 members in any combination of five member types to maximize value. The product family includes:

- Gartner for IT Leadership Team Plus: Leader, Advisor and Cross Function
- Gartner for IT Leadership Team: Leader, Advisor, Cross Function, Role and Essentials
- Gartner for IT Leaders: Individual Access Advisor and Reference

**Gartner for Technical Professionals** delivers detailed research for technical practitioners such as software engineers, computer programmers and network architects. Gartner for Technical Professionals is licensed a department structure with access for up to 40 named users. This subscription provides access to different research from the other services. Gartner also provides time-saving Reference Architecture to customize and build the right architecture for the IT organization, and Gartner Cloud Decisions, which uses an interactive dashboard to help our clients make smarter cloud decisions. Inquiries may be used for review of technical documents such as architecture designs. It is available in Advisor and Reference.

**Gartner Technology Planner** is an interactive web service for improving infrastructure analysis and planning, offered through a department structure with access for up to 40 users. Only Gartner Technology Planner helps infrastructure architects, engineers and capacity planners make smarter, faster infrastructure decisions through access to a comprehensive database including 38,000 server, storage, network and integrated systems sample configurations. The product family includes:

- Gartner Technology Planner
- Gartner Technology Planner Essentials

**Gartner for Finance Leaders** provides a unique integration research and tools to understand and solve finance challenges. Peer benchmarks, diagnostics, best practice insights and case studies provide insight into effective resource allocation and issues diagnosis. Tailored for finance decision makers, Gartner for Finance Leaders provides expert advice and insight in Finance technology to help you select and secure value from your tech investments. The product family includes:

- Gartner for Finance Leaders Team: Leader, Advisor and Reference
- Gartner for Finance Leaders Individual Access

**Gartner for Customer Service & Support Leaders** provides insight into key success metrics for Customer Service and Support leaders. Under constant pressure to improve service quality while also managing down the cost of service operations, our resources provide insight into CRM technologies, Operations and Management Systems, Customer Service Experience Management and more. The product family includes:

- Gartner for Customer Service & Support Leaders Team: Leader, Advisor and Reference
- Gartner for Customer Service & Support Leaders Individual Access

**Gartner for Chief Human Resources Officers** provides the best of Gartner insights, research, and tools in a product bundle that is delivered through seat-based access by an assigned service delivery team. The offering is designed for chief human resources officers (CHROs) and heads of HR and their leadership teams. Clients benefit from personalized service from an assigned service delivery team, including a senior partner with experience as a CHRO or similar, peer forums and networking opportunities. Gartner for Chief Human Resource Officers provide privileged access to the world's largest network of senior HR leaders and their business partners, provides access to proprietary data assets covering HR budget and staffing, employee turnover, span of control, total rewards and more to help you benchmark key HR metrics. Our proprietary research methodologies combine peer-sourced best practices with quantitative research and expert advice. The product family includes:

- Gartner for Chief Human Resource Officers Team: Leader, Advisor and Reference
- Gartner for Chief Human Resource Officers Individual Access

**Gartner for HR Leaders** provides HR leaders with the tools and resources needed to succeed while operating in an environment of constant changes. CEOs, Boards, and investors are



increasingly aware that Talent is key to moving the business forward; in fact, the percentage of companies that talk about talent during earnings calls has increased by 25% since 2010. HR's top priority is developing and executing a Talent strategy that propels rather than hinders corporate growth. Through Gartner for HR Leaders, top HR leaders will be empowered to continuously improve HR capabilities and key processes while building a corporate culture that supports the evolving needs of their organizations. The product family includes:

- Gartner for Human Resources Leaders Team: Leader, Advisor and Reference
- Gartner for Human Resources Leaders Individual Access

**Gartner for Legal & Compliance Leaders** provides general counsel, compliance and ethics, and privacy leaders with privileged access to key diagnostics including State of the Function, Risk Assessment and Talent Assessment for all Legal and Compliance functions. General counsel, compliance and ethics, and privacy leaders we work with tell us they are under constant pressure to implement processes that reduce and mitigate risks and increase program effectiveness. Success is more difficult to achieve when legal budgets are decreased or held flat, and business leader's demand faster and less risk-adverse guidance. The regulatory and enforcement landscape continues to evolve and business leaders face pressure to make faster decisions. With Gartner for Legal & Compliance Leaders, leaders will receive personalized service targeted for support of evolving legal and compliance priorities. The product family includes:

- Gartner for Legal & Compliance Leaders Team: Leader, Advisor and Reference
- Gartner for Legal & Compliance Leaders Individual Access

**Gartner for Marketing Leaders** provides the expert advice, objective research and proven tools to increase your marketing impact. We help the world's leading brands benchmark performance with data-driven insights, prioritize investments and areas of improvement, execute mission critical priorities with speed and confidence, stay ahead of trends that matter and connect with marketing peers. Gartner for Marketing Leaders delivers unrivaled marketing guidance through high-touch service and unlimited access to Gartner for Marketers research, including benchmarks, toolkits, case studies and survey findings. The product family includes:

- Gartner for Marketing Leaders Team: Leader, Advisor and Reference
- Gartner for Marketing Leaders Advisor (Single and Multi Users)

**Structured Applied Research Advisory Services** are based on our extensive library of over 2,500 Gartner Research Toolkits covering critical IT capabilities such as Digital Strategy, IT Strategic Plans, IT Service Catalogs, IT Organizational Assessments, Maturity Readiness Assessments, etc.

While some clients have the resources to apply these toolkits themselves, others lack the skills, expertise or manpower to execute on or apply the best practices prescribed in our Research. The offerings below are standardized, template driven and structured to assist our clients with the application of Gartner Research to their specific environment. These structured services delivered by Gartner Consulting are a direct extension of Gartner Research, helping clients translate insights into actions to achieve superior performance and build organizational capabilities.

The Structured Applied Research Advisory Services include the following:

- Digital Strategy and IT Strategic Planning
- Smart Government Readiness Assessment
- Maturity Assessments

**Table 15. Digital Strategy and IT Strategic Planning**

<b>Digital Strategy and IT Strategic Planning</b>	<b>Research Reference</b>
<p>Governments worldwide face multiple, concurrent global and local forces, including political, social and technological, which are rapidly changing their societies. New technologies are constantly emerging, raising citizen and business expectations, and changing citizen behavior as innovations are normalized. Significant changes in how government services are offered and consumed are inevitable. Developing strategies for this new paradigm necessitates a strategic planning process to combine the program area and IT strategies into a single digital strategy. Digital government transformation is a long-term endeavor and governments need sound Digital and Information Technology Strategies so that governments can adapt to the changes they have anticipated and mitigate the risks of changes they cannot anticipate.</p> <p>Gartner Research offers a variety of Digital and IT Strategic Planning Toolkits. Through this structured offering, our Applied Research analysts will assist clients in accelerating the application of these toolkits and allow the IT organization to deliver results faster to its stakeholders.</p> <p>Gartner Activities:</p> <ol style="list-style-type: none"> <li>Conduct Kick-off</li> <li>Review existing documentation</li> <li>Conduct business and IT Stakeholder interviews onsite over the course of 2-3 consecutive business days (based on Complexity)</li> <li>Conduct one half-day workshop to review initial findings and develop IT Vision</li> <li>Conduct gap analysis and develop Strategic Initiatives to address gaps</li> <li>Conduct one half-day onsite workshop to review initiatives</li> <li>Develop mini-charters and implementation roadmap</li> </ol> <p>Gartner Deliverables:</p> <ol style="list-style-type: none"> <li>Kick-off presentation and Status Reports</li> <li>Initial Findings Report</li> <li>IT Vision</li> <li>Gap Analysis</li> <li>Strategic Initiatives to close gaps</li> <li>Implementation Roadmap</li> <li>Recommendations and conclusions</li> <li>Unlimited inquiry privileges to the fulfillment Analyst(s) by telephone during the engagement</li> </ol>	<p>Gartner Research is fueled by thought leaders and research analysts who understand that digital government requires an evolution of the organization, from IT and the program area functioning separately to an integrated model where IT and the program areas work collaboratively within a newly constructed, fully digital organization.</p> <p>Gartner analysts cover all areas of digital and IT strategies for government, including: strategic citizen impacts, governance, data and information analytics, Internet of Things, open data marketplaces, applications and complex architectures for cities, local, state, and federal governments and urban regions.</p> <p>Collectively, our analysts cover the specific functions of government, such as: transportation, mobility, micro-grid and buildings. These government-specific insights serve as the foundation for our consulting methodologies and applied research frameworks.</p> <ul style="list-style-type: none"> <li>Toolkit: IT Strategy Template 2.0 — Embedding Information and Technology in Business Strategy*</li> <li>Toolkit: Best of ... Data and Analytics Strategies</li> <li>Toolkit: Let's Get Digital: A Template for Digital Business Strategy</li> <li>Toolkit: Information and Technology Strategic Plan Template</li> </ul>

\*Please reference Section 0 for sample Gartner research documents and toolkits

**Table 16. Smart Government Readiness Assessment**

Smart Government Readiness Assessment	Research Reference
<p>Gartner is the leading authority on the trends and maturity of smart government initiatives. Gartner Research client inquiries for smart cities strategy has increased 350% from 2015 to 2017, with the trend continuing to increase into 2018. Gartner provides a structured advisory consulting Smart Government Readiness Assessment to support all levels of government to better enable enterprise-wide transformation and buy-in. The City of Henderson, in collaboration with Gartner, has embarked on an ambitious plan to harness technology and data to improve everything from transportation infrastructure to public safety and transparency. Their <a href="#">Smart City Strategy</a>, available publicly, illustrates a representation of the insights and support Gartner can provide.</p> <p>Our Applied Research analysts provide fact-based consulting services to help governments deliver high citizen value through their smart Community initiatives. We bring together objective Research insights, Benchmarking data, problem-solving methodologies and hands on experience to improve the return on smart technology investments, reduce risk, and innovate services.</p> <p>Gartner Activities:</p> <ul style="list-style-type: none"> <li>a. Conduct Kick-off</li> <li>b. Review existing documentation &amp; catalog Smart Technologies and Assets (including contract vehicles)</li> <li>c. Conduct business and IT Stakeholder interviews onsite over the course of 2-3 consecutive business days (based on Complexity)</li> <li>d. Conduct one half-day workshop to identify and prioritize Smart Government opportunities</li> <li>e. Conduct gap analysis and develop Strategic Initiatives to address gaps</li> <li>f. Conduct one half-day onsite workshop to review initiatives</li> <li>g. Develop 5-Year Smart Government Strategy and Roadmap</li> </ul> <p>Gartner Deliverables:</p> <ul style="list-style-type: none"> <li>a. Kick-off presentation and Status Reports</li> <li>b. Initial Findings Report</li> <li>c. Smart Government Mission &amp; Vision</li> <li>d. Gap Analysis</li> <li>e. Strategic Initiatives to close gaps</li> <li>f. Implementation Roadmap</li> <li>g. Recommendations and conclusions</li> <li>i. Unlimited inquiry privileges to the fulfillment Analyst(s) by telephone during the engagement</li> </ul>	<p>Gartner Research is fueled by thought leaders and research analysts responsible for the most trusted and referenced insights related to smart city initiatives worldwide.</p> <p>Gartner analysts cover all areas of the smart cities industry, including: strategic citizen impacts, governance, data and information analytics, Internet of Things, open data marketplaces, applications and complex architectures for cities, local, state, and federal governments and urban regions.</p> <p>Collectively, our analysts cover the specific functions of government, such as: transportation, mobility, micro-grid and buildings. These government-specific insights serve as the foundation for our consulting methodologies and applied research frameworks.</p> <ul style="list-style-type: none"> <li>• Toolkit: Use Scenarios to Plan for the Future of Smart Mobility 2025, December 2018*</li> <li>• Research Note: Hype Cycle for Smart City Technologies and Solutions, 2018</li> <li>• Research Note: The CIO's Role in Smart City Leadership Regardless of Who Is in Charge, June 2018</li> <li>• Research Note: Industry Data Governance Is Key to Developing a Smart City Platform, November 2017</li> <li>• Research Note: Turning Smart Cities Into Intelligent Urban Ecosystems, June 2018</li> </ul>

\*Please reference Section 0 for sample Gartner research documents and toolkits

**Table 17. Maturity Assessments**

<b>Maturity Assessments</b>	<b>Research Reference</b>
<p>Through our Applied Research analysts providing structured Maturity Assessment Offering, we leverage Gartner Research's ITScore Assessment Tools and Toolkits to measure a client against other government entities of similar size and budget across a variety of domains, including:</p> <ul style="list-style-type: none"> <li>• Enterprise View</li> <li>• Applications</li> <li>• Infrastructure and Operations</li> <li>• Procurement and Vendor Management</li> <li>• Program and Project Management</li> <li>• Data Analytics and Business Intelligence</li> <li>• Security and Risk Management</li> </ul> <p>Gartner Activities:</p> <ol style="list-style-type: none"> <li>a. Conduct Kick-off</li> <li>b. Review existing documentation</li> <li>c. Conduct business and IT Stakeholder interviews onsite over the course of 2-3 consecutive business days to identify IT maturity goals (based on Complexity).</li> <li>d. Conduct one half day workshop Per IT Score assessment area to identify initial maturity level assets &amp; capabilities.</li> <li>e. Conduct gap analysis and develop Strategic Initiatives to address gaps between IT Maturity and IT Vision.</li> <li>f. Conduct one half-day onsite workshop to review initiatives</li> <li>g. Develop mini-charters and implementation roadmap</li> </ol> <p>Gartner Deliverables:</p> <ol style="list-style-type: none"> <li>a. Kick-off presentation and Status Reports</li> <li>b. Initial ITScore Assessment Results</li> <li>c. IT Vision</li> <li>d. Gap Analysis</li> <li>e. Strategic Initiatives to close gaps</li> <li>f. Recommendations and conclusions;</li> <li>g. Unlimited inquiry privileges to the fulfillment Analyst(s) by telephone during the engagement</li> </ol>	<p>Gartner Research offers a variety of Maturity Assessment Toolkits, including our ITScore Assessment Tool. Integrated with IT Key Metrics Data, Gartner ITScores are holistic sets of interactive maturity assessments designed to help CIOs and IT leaders evaluate the maturity of both the IT organization as a provider of IT services, and the enterprise as a consumer of information technology.</p> <p>Unlike other IT maturity assessments, Gartner ITScore measures an organization's capabilities within the context of enterprise culture, behaviors and capacity for leadership — factors that dramatically impact IT's effectiveness and its ability to contribute real business value.</p> <ul style="list-style-type: none"> <li>• Toolkit: Checklist for ITScore Program and Portfolio Management Maturity Assessment, October 2018*</li> <li>• Toolkit: Enterprise Information Management Maturity Assessment, December 2017</li> <li>• Research Note: ITScore for Strategy and Execution, October 2017</li> <li>• Research Note: ITScore for Infrastructure and Operations, July 2017</li> <li>• Research Note: ITScore for IT Vendor Management, March 2018</li> <li>• Toolkit: Four Steps to Maximize Your ITScore Technology Sourcing and Procurement Maturity Assessment, March 2018</li> </ul>

\*Please reference Section 0 for sample Gartner research documents and toolkits

## 4.0 Financial Statement

Offeror must provide current financial statements or latest annual report. Offerors must make a definitive statement regarding their financial ability to perform the requirements hereunder.

Financial statements are defined as: (1) balance sheets; (2) income statements; (3) cash flow statements; and (4) statements of shareholders' equity.

**Complies.** Gartner, Inc. is a public company with 1,263 holders of record of our common stock on January 31, 2018. As such, it is subject to the reporting requirements and other regulations of the Securities Exchange Act of 1934, as amended. Gartner files publicly available annual, quarterly and other current reports with the Securities and Exchange Commission, and provides an annual report to shareholders. Gartner's Dun & Bradstreet (DUNS) Number is **09-722-0180**. Summary year-over-year financial statistics are presented in the table below. More detailed financial data can be found at [investor.gartner.com](http://investor.gartner.com).

### ***Recent Annual Reports***

[2017 Gartner Annual Report](#)

[2016 Gartner Annual Report](#)

[2015 Gartner Annual Report](#)

**Table 18. Selected Financial Statistics Year Over Year**

<b>Income</b>	<b>2017</b>	<b>2016</b>	<b>2015</b>	<b>2014</b>
<b>Revenue/Sales</b>	\$3.31 billion	\$2.44 billion	\$2.16 billion	\$2.02 billion
<b>Net Income</b>	\$3.28 million	\$193.6 million	\$175.6 million	\$183.8 million

<b>Balance Sheet</b>	<b>2017</b>	<b>2016</b>	<b>2015</b>	<b>2014</b>
<b>Cash and Cash Equivalents</b>	\$538.9 million	\$474.2 million	\$373.0 million	\$365.3 million
<b>Total Assets</b>	\$7.3 billion	\$2.4 billion	\$2.2 billion	\$1.90 billion
<b>Total Debt</b>	\$3.28 billion	\$702.5 million	\$825.0 million	\$405.0 million
<b>Stockholders' Equity (Deficit)</b>	\$983.5 million	\$60.9 million	\$(132.4) million	\$161.2 million



## **5.0 Appendix A — Exemplary Service Agreement**

Please see the pages below for Gartner's exemplary service agreement, encompassing all standard terms, conditions and payment terms.

## Gartner, Inc. Service Agreement for \_\_\_\_\_ (“Client”)

This Service Agreement (“SA”) is between Gartner, Inc. of 56 Top Gallant Road, Stamford, CT 06904 (“Gartner”) on behalf of itself and all wholly-owned affiliates of Gartner, Inc. and Client of <Insert Client Company Address> (“Client”), and includes the Master Client Agreement between Gartner and Ventura County California dated <Insert Month/Year> the terms of which are incorporated by reference, and all applicable Service Descriptions. This SA constitutes the complete agreement between Gartner and Client. Client agrees to subscribe to the following Services for the term and fees set forth below.

### 1. DEFINITIONS AND ORDER SCHEDULE:

**Services** are the subscription-based research and related services purchased by Client in the Order Schedule below and described in the Service Descriptions. Service Names and Levels of Access are defined in the Service Descriptions. Gartner may periodically update the names and the deliverables for each Service. If Client adds Services or upgrades the level of service or access, an additional Service Agreement will be required.

**Service Descriptions** describe each Service purchased, specify the deliverables for each Service, and set forth any additional terms unique to a specific Service. Service Descriptions for the Services purchased in this SA may be viewed and downloaded through the hyperlinks listed in Section 2 below or may be attached to this SA in hard copy, and are incorporated by reference into this SA.

<u>Service Name</u>	<u>Level of Access</u>	<u>Quantity</u>	<u>Name of User to be Licensed</u>	<u>Contract Term Start Date</u>	<u>Contract Term End Date</u>	<u>Annual Fee</u> \$	<u>Total Fee</u> \$
				<b>Total Services:</b>	<b>(Excluding applicable sales tax)</b>		

### 2. SERVICE DESCRIPTIONS:

<u>Service Name/ Level of Access</u>	<u>Service Description URL</u>

### 3. PAYMENT TERMS

Gartner will invoice Client annually in advance for all Services. Payment is due 30 days from the invoice date. Client shall pay any sales, use, value-added, or other tax or charge imposed or assessed by any governmental entity upon the sale, use or receipt of Services, with the exception of any taxes imposed on the net income of Gartner.

Please attach any required Purchase Order (“PO”) to this SA and enter the PO number below. If an annual PO is required for multi-year contracts, Client will issue the new PO at least 30 days prior to the beginning of each subsequent contract year. Any pre-printed or additional contract terms included on the PO shall be inapplicable and of no force or effect. All PO’s are to be sent to [purchaseorders@gartner.com](mailto:purchaseorders@gartner.com). This SA may be signed in counterparts.

### 4. CLIENT BILLING INFORMATION

\_\_\_\_\_  
Purchase Order Number

\_\_\_\_\_  
Billing Address

*Invoice Recipient Name*

*Invoice Recipient Email*

*Invoice Recipient Tel. No.*

**5. AUTHORIZATION**

**Client:**

**Gartner, Inc.**

\_\_\_\_\_  
*Signature/Date*

\_\_\_\_\_  
*Signature/Date*

\_\_\_\_\_  
*Print Name and Title*

\_\_\_\_\_  
*Print Name and Title*

**IF USING A DIGITAL SIGNATURE, PLEASE  
CONFIRM THE FOLLOWING AS A  
CONDITION OF CONTRACT EXECUTION:**

[ ] By ticking this box, I agree that by affixing my digital signature hereunder I am attesting that: (i) this is my own personal legal signature; and (ii) I am a duly authorized signatory for my company. My signature verifies that the information provided to Gartner hereunder is subscribed by me, under penalty of false statement and material breach of contract.

## **6.0 Appendix B — Sample Engagement Plan**

Please see the page below for a representative Engagement Plan typically conducted by our Service Delivery Team.

# Client Engagement

Client Initiatives and Challenges	Activities					Expected outcomes			
	Next 30 days	30-60 days	60-90 days	90+days					
<b>IT Strategic Plan / Roadmap:</b>  Develop IT Strategy that aligns with Business Priorities. Engage business stakeholders. Enhance organizational effectiveness		Meet with Executive Partner to gain understanding of existing IT and business strategy components. Outline next steps.		Leverage Gartner template for creation of IT Strategy – <a href="#">Toolkit: Information and Technology Strategic Plan Template</a>		IT STRATEGY WORKSHOP – Gartner facilitated workshop with IT Team to begin the journey in developing the IT Strategy.		Work with Executive Partner to develop a draft 1-page strategy document	Accelerate the process to create a strategy that will align with the business objectives
		Review foundational research on IT Strategy Framework and approach, including Digital Business Strategy. Leverage CEB tool – <a href="#">IT Strategic Planning Process Map</a>		Analyst Inquiry to discuss IT components of strategy including required capabilities. Identify best practices to document and communicate.		Analyst inquiry focused on communicating the Strategy.		Develop a concise and business focused communication document that will resonate with executive leadership	Improved understanding of how IT contributes to the success of SANDAG
		Analyst inquiry to discuss current state of strategy and determine best approach to create a revised strategy that will better align with the business.		Meet with Executive Partner to document progress on strategy and review action plan for next steps		Leverage <a href="#">A Handbook for Effective IT Strategic Planning - Volume I &amp; II</a>		Attend Gartner Symposium Event to broaden knowledge on driving digital transformation and aligning IT strategy with the business	

<div></div> Call – Review & Plan	<div></div> Partner Consultation	<div></div> Review Research	<div></div> Symposium	<div></div> CIO Forum	<div></div> Analyst Briefing
<div></div> Inquiry w/Analyst	<div></div> Facilitated Networking	<div></div> Networking Event	<div></div> Onsite Workshop	<div></div> CEB Research.	<div></div> Best Practice Toolkit



## **7.0 Appendix C — Service Descriptions**

Please see the pages below for the service descriptions of all the offerings proposed.

# Ventura County

RFP 5962

Table 2 - Service Descriptions

Service	Service Description URL
<b>TEAM PLUS SOLUTIONS</b>	
<b>Executive Programs Leadership Team Plus</b>	
Leader	<a href="http://www.gartner.com/it/sd/sd_ep_team_plus_leader.pdf">http://www.gartner.com/it/sd/sd_ep_team_plus_leader.pdf</a>
Partner Member	<a href="http://www.gartner.com/it/sd/sd_ep_team_plus_partner.pdf">http://www.gartner.com/it/sd/sd_ep_team_plus_partner.pdf</a>
Partner Leader	<a href="http://www.gartner.com/it/sd/sd_ep_team_plus_partner_leader.pdf">http://www.gartner.com/it/sd/sd_ep_team_plus_partner_leader.pdf</a>
Delegate Member	<a href="http://www.gartner.com/it/sd/sd_ep_team_plus_delegate.pdf">http://www.gartner.com/it/sd/sd_ep_team_plus_delegate.pdf</a>
Delegate Leader	<a href="http://www.gartner.com/it/sd/sd_ep_team_plus_delegate_leader.pdf">http://www.gartner.com/it/sd/sd_ep_team_plus_delegate_leader.pdf</a>
Advisor Member	<a href="http://www.gartner.com/it/sd/sd_ep_team_plus_advisor.pdf">http://www.gartner.com/it/sd/sd_ep_team_plus_advisor.pdf</a>
Advisor Leader	<a href="http://www.gartner.com/it/sd/sd_ep_team_plus_advisor_leader.pdf">http://www.gartner.com/it/sd/sd_ep_team_plus_advisor_leader.pdf</a>
Cross Function	<a href="http://www.gartner.com/it/sd/sd_ep_team_plus_cf.pdf">http://www.gartner.com/it/sd/sd_ep_team_plus_cf.pdf</a>
<b>Executive Programs Leadership Team Plus with Industry (one industry)</b>	
Leader	<a href="http://www.gartner.com/it/sd/sd_ep_team_plus_industry_leader.pdf">http://www.gartner.com/it/sd/sd_ep_team_plus_industry_leader.pdf</a>
Partner Member	<a href="http://www.gartner.com/it/sd/sd_ep_team_plus_industry_partner.pdf">http://www.gartner.com/it/sd/sd_ep_team_plus_industry_partner.pdf</a>
Partner Leader	<a href="http://www.gartner.com/it/sd/sd_ep_team_plus_industry_partner_leader.pdf">http://www.gartner.com/it/sd/sd_ep_team_plus_industry_partner_leader.pdf</a>
Delegate Member	<a href="http://www.gartner.com/it/sd/sd_ep_team_plus_industry_delegate.pdf">http://www.gartner.com/it/sd/sd_ep_team_plus_industry_delegate.pdf</a>
Delegate Leader	<a href="http://www.gartner.com/it/sd/sd_ep_team_plus_industry_delegate_leader.pdf">http://www.gartner.com/it/sd/sd_ep_team_plus_industry_delegate_leader.pdf</a>
Advisor Member	<a href="http://www.gartner.com/it/sd/sd_ep_team_plus_industry_advisor.pdf">http://www.gartner.com/it/sd/sd_ep_team_plus_industry_advisor.pdf</a>
Advisor Leader	<a href="http://www.gartner.com/it/sd/sd_ep_team_plus_industry_advisor_leader.pdf">http://www.gartner.com/it/sd/sd_ep_team_plus_industry_advisor_leader.pdf</a>
Cross Function	<a href="http://www.gartner.com/it/sd/sd_ep_team_plus_industry_cf.pdf">http://www.gartner.com/it/sd/sd_ep_team_plus_industry_cf.pdf</a>
<b>Enterprise IT Leadership Initiative Team</b>	
Leader	<a href="http://sd.gartner.com/sd_eitl_it_leader.pdf">http://sd.gartner.com/sd_eitl_it_leader.pdf</a>
Advisor Member	<a href="http://sd.gartner.com/sd_eitl_it_advisor_member.pdf">http://sd.gartner.com/sd_eitl_it_advisor_member.pdf</a>
<b>Enterprise IT Leadership Initiative Team with Industry (one industry)</b>	
Leader	<a href="http://sd.gartner.com/sd_eitl_it_industry_leader.pdf">http://sd.gartner.com/sd_eitl_it_industry_leader.pdf</a>
Advisor Member	<a href="http://sd.gartner.com/sd_eitl_it_team_industry_advisor_member.pdf">http://sd.gartner.com/sd_eitl_it_team_industry_advisor_member.pdf</a>
<b>Enterprise IT Leadership Team Plus</b>	
Leader	<a href="http://www.gartner.com/it/sd/sd_eitl_team_plus_leader.pdf">http://www.gartner.com/it/sd/sd_eitl_team_plus_leader.pdf</a>
Advisor Member	<a href="http://www.gartner.com/it/sd/sd_eitl_team_plus_advisor_member.pdf">http://www.gartner.com/it/sd/sd_eitl_team_plus_advisor_member.pdf</a>
Cross Function Member	<a href="http://www.gartner.com/it/sd/sd_eitl_team_plus_cf_member.pdf">http://www.gartner.com/it/sd/sd_eitl_team_plus_cf_member.pdf</a>
<b>Enterprise IT Leadership Team Plus with Industry (one industry)</b>	
Leader	<a href="http://www.gartner.com/it/sd/sd_eitl_team_plus_industry_leader.pdf">http://www.gartner.com/it/sd/sd_eitl_team_plus_industry_leader.pdf</a>
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<b>IT Leadership Team Plus</b>	
Leader	<a href="http://www.gartner.com/it/sd/sd_itl_team_plus_leader.pdf">http://www.gartner.com/it/sd/sd_itl_team_plus_leader.pdf</a>
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<b>Executive Programs Leadership Team with Industry (one industry)</b>	
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Cross Function	<a href="http://www.gartner.com/it/sd/sd_ep_team_industry_cf.pdf">http://www.gartner.com/it/sd/sd_ep_team_industry_cf.pdf</a>
Role Member	<a href="http://www.gartner.com/it/sd/sd_ep_team_industry_role.pdf">http://www.gartner.com/it/sd/sd_ep_team_industry_role.pdf</a>
<b>Enterprise IT Leadership Team</b>	
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Role Member	<a href="http://www.gartner.com/it/sd/sd_eitl_team_role_member.pdf">http://www.gartner.com/it/sd/sd_eitl_team_role_member.pdf</a>
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Advisor Member	<a href="http://www.gartner.com/it/sd/sd_itl_team_advisor_member.pdf">http://www.gartner.com/it/sd/sd_itl_team_advisor_member.pdf</a>
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Member Basic	<a href="http://www.gartner.com/it/sd/sd_ep_member_basic.pdf">http://www.gartner.com/it/sd/sd_ep_member_basic.pdf</a>
Two Additional Meetings Add-on	<a href="http://www.gartner.com/it/sd/sd_ep_2_addl_meetings.pdf">http://www.gartner.com/it/sd/sd_ep_2_addl_meetings.pdf</a>
<b>Executive Programs with Industry (one industry)</b>	
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Industry Advisory Services Advisor Add-on (one industry)	<a href="http://www.gartner.com/it/sd/sd_iasg_advisor_eitl.pdf">http://www.gartner.com/it/sd/sd_iasg_advisor_eitl.pdf</a>
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Reference	<a href="http://www.gartner.com/it/sd/sd_iasg_reference.pdf">http://www.gartner.com/it/sd/sd_iasg_reference.pdf</a>
<b>Core Connect</b>	
Advisor	<a href="http://www.gartner.com/it/sd/sd_core_connect_advisor.pdf">http://www.gartner.com/it/sd/sd_core_connect_advisor.pdf</a>
Reference	<a href="http://www.gartner.com/it/sd/sd_core_connect_reference.pdf">http://www.gartner.com/it/sd/sd_core_connect_reference.pdf</a>
<b>IT News and Insight</b>	
IT News and Insight	<a href="http://www.gartner.com/it/sd/sd_it_news_insight.pdf">http://www.gartner.com/it/sd/sd_it_news_insight.pdf</a>
<b>MULTI-USER RESEARCH SERVICES</b>	
<b>Gartner for Technical Professionals Department</b>	
Advisor Department	<a href="http://www.gartner.com/it/sd/sd_techpro_advisor_dept.pdf">http://www.gartner.com/it/sd/sd_techpro_advisor_dept.pdf</a>
Reference Department	<a href="http://www.gartner.com/it/sd/sd_techpro_reference_dept.pdf">http://www.gartner.com/it/sd/sd_techpro_reference_dept.pdf</a>
<b>Gartner for Technical Professionals Advisor Team</b>	
Advisor Team	<a href="http://www.gartner.com/it/sd/sd_techpro_advisor_team.pdf">http://www.gartner.com/it/sd/sd_techpro_advisor_team.pdf</a>
<b>Technical Professionals Small &amp; Midsize Business (SMB) per agency with less than 4000 employees</b>	
Advisor SMB	<a href="http://www.gartner.com/it/sd/sd_techpro_advisor_smb.pdf">http://www.gartner.com/it/sd/sd_techpro_advisor_smb.pdf</a>
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<b>OTHER SERVICES</b>	
<b>Strategic Advisory Services</b>	
Remote Advisory Session	<a href="http://www.gartner.com/it/sd/sd_sas_remote.pdf">http://www.gartner.com/it/sd/sd_sas_remote.pdf</a>
Internal Advisory Session	<a href="http://www.gartner.com/it/sd/sd_sas_internal.pdf">http://www.gartner.com/it/sd/sd_sas_internal.pdf</a>



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Symposium Ticket	<a href="http://www.gartner.com/it/sd/sd_symp_event_ticket.pdf">http://www.gartner.com/it/sd/sd_symp_event_ticket.pdf</a>
Summit Ticket	<a href="http://www.gartner.com/it/sd/sd_summit_event_ticket.pdf">http://www.gartner.com/it/sd/sd_summit_event_ticket.pdf</a>
Catalyst Conference Ticket	<a href="http://www.gartner.com/it/sd/sd_catalyst_event_ticket.pdf">http://www.gartner.com/it/sd/sd_catalyst_event_ticket.pdf</a>
<b>RENEWAL ONLY SERVICES</b>	
<b>IT Executives - Renewal Only</b>	
IT Executives CIO Signature	<a href="http://www.gartner.com/it/sd/sd_ite_cio_sig.pdf">http://www.gartner.com/it/sd/sd_ite_cio_sig.pdf</a>
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IT Executives CIO Essentials	<a href="http://www.gartner.com/it/sd/sd_ite_cio_essentials.pdf">http://www.gartner.com/it/sd/sd_ite_cio_essentials.pdf</a>
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## **8.0 Appendix D — Sample Research Documents**

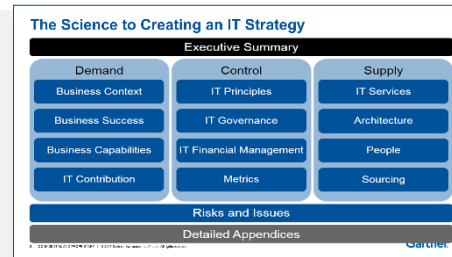
Please see the pages below for the sample research documents and toolkits provided to illustrate the application of Gartner's Structured Applied Research Services.

# Example Artifacts and Tools - IT Strategy

## Toolkit: How to Run an IT Strategy 2.0 Kick-off

- To provide everyone involved with a common and shared understanding of the context and direction of IT Strategy 2.0, CIOs should start with a kick-off for the core team and stakeholders. This Toolkit contains the presentation materials and agenda for such a kick-off.

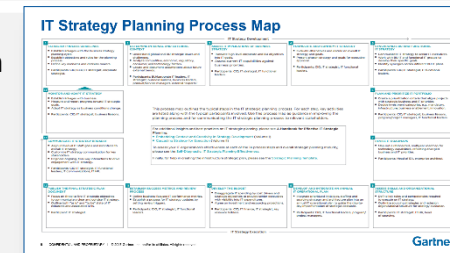
## The Art of the One-Page IT Strategy



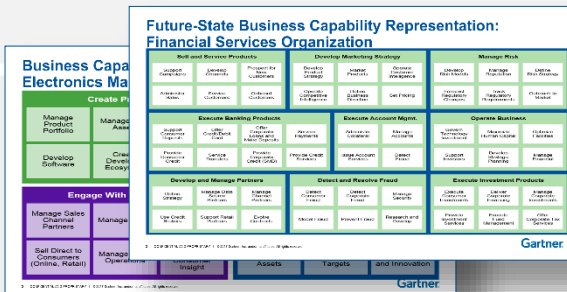
- Strategy can be an art or a science. Most CIOs and IT leaders experience more personal and organizational success when they demonstrate how IT contributes to business success using an artful approach to strategy development.

## CEB - IT Strategic Planning Process Map

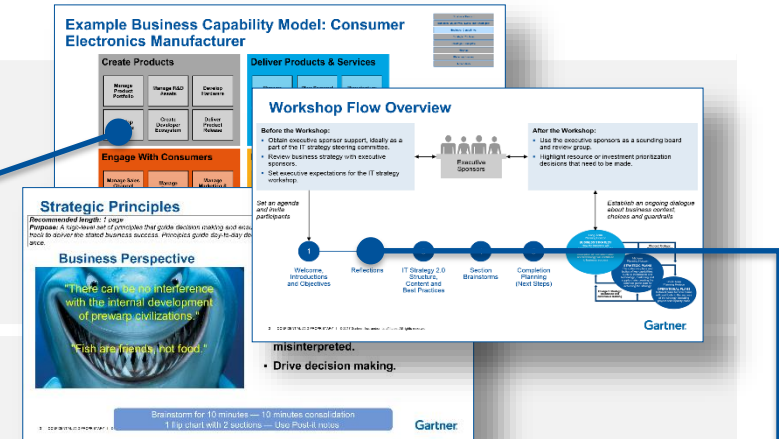
- This process map outlines the typical steps in the IT strategic planning process. For each step, key activities are listed along with the participants involved. Use the process map as guidance in improving the planning process and for communicating the IT strategic planning process to relevant stakeholders.



## Business Unit IT Strategies



- Enterprises struggle to determine which business capabilities they should centralize, leave local to the business unit level, or approach in a hybrid manner. We provide a framework to help CIOs and non-IT leaders collaboratively make quality decisions regarding central versus business unit IT.



# Toolkit: IT Strategy Template 2.0 — Embedding Information and Technology in Business Strategy

**Published:** 17 May 2018   **ID:** G00351677

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**Analyst(s):** Ian Cox, Monika Sinha, Noah Rosenstein, Lee Weldon

This Toolkit offers guidance to CIOs for creating an information and technology strategy that can be either embedded as a core part of the business strategy or contained in a separate document. It should be used to address the long-term strategic planning horizon in the enterprise.

## When to Use

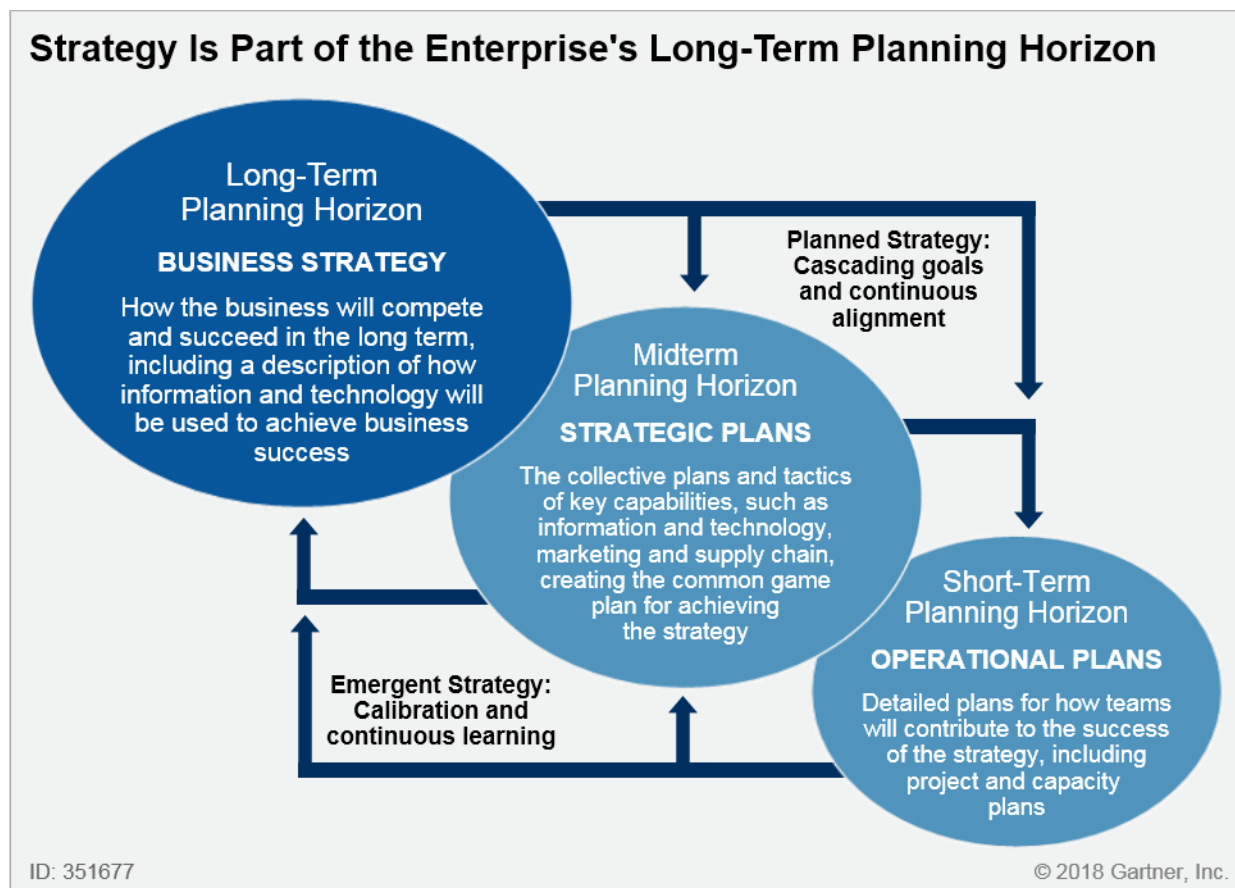
Strategy seeks to clarify how the enterprise will compete and succeed in its chosen markets or, for the public sector, how the enterprise will achieve its mission. Enterprises should have only one strategy, the business strategy, and information and technology must be a core part of it (see "Information and Technology Strategy for the Enterprise on the Cusp of Digital Business"). This means that the effort of creating an IT strategy must shift away from creating a separate document focusing on the IT organization, and instead toward creating a set of inputs, or key chapters, that are embedded directly in the business strategy.

This Toolkit provides guidance for how to write a business strategy that addresses how information and technology will be used to achieve success. For cases where there is still resistance to adequately addressing information and technology as part of the business strategy, or where the business strategy has not been clearly articulated, this Toolkit also includes a template for a separate information and technology strategy.

These templates are relevant for both public- and private-sector organizations. This Toolkit is called Version 2.0 because it is an evolution of Gartner's original IT strategy template (see "IT Strategy Template").

This Toolkit should be used to address the long-term strategic planning horizon in the enterprise (see Figure 1). Often, this long-term horizon focuses on three or more years into the future, but this length may vary depending on the industry, competitive factors and economic challenges. Separate documents should be created for the midterm and short-term planning horizons (the strategic plan and operational plan, respectively).

Figure 1. Strategy Is Part of the Long-Term Planning Horizon for the Enterprise



Source: Gartner (May 2018)

The target for this Toolkit is to produce a set of inputs to be included in a business strategy. In cases where a separate information and technology strategy document still needs to be produced, it should be created in as close collaboration as possible with the business strategy, and should be positioned as an input to the business strategy, rather than a separate strategy.

## Downloadable Attachments

### 351677\_integrated\_strategy.docx

This document contains detailed instructions for using the Gartner template to create an integrated business, information and technology strategy.



**351677\_it\_strategy.docx**

This document contains detailed instructions for using the Gartner template to create a separate information and technology strategy that can be positioned as an input to the business strategy.

**351677\_integrated\_strategy.pptx**

This slide deck contains visualization ideas for using the Gartner template to create a PowerPoint version of an integrated strategy. It is intended for organizations that prefer to document their strategy using PowerPoint, but should not be mistaken for a presentation of the strategy, which requires more tailored messaging for different audiences.

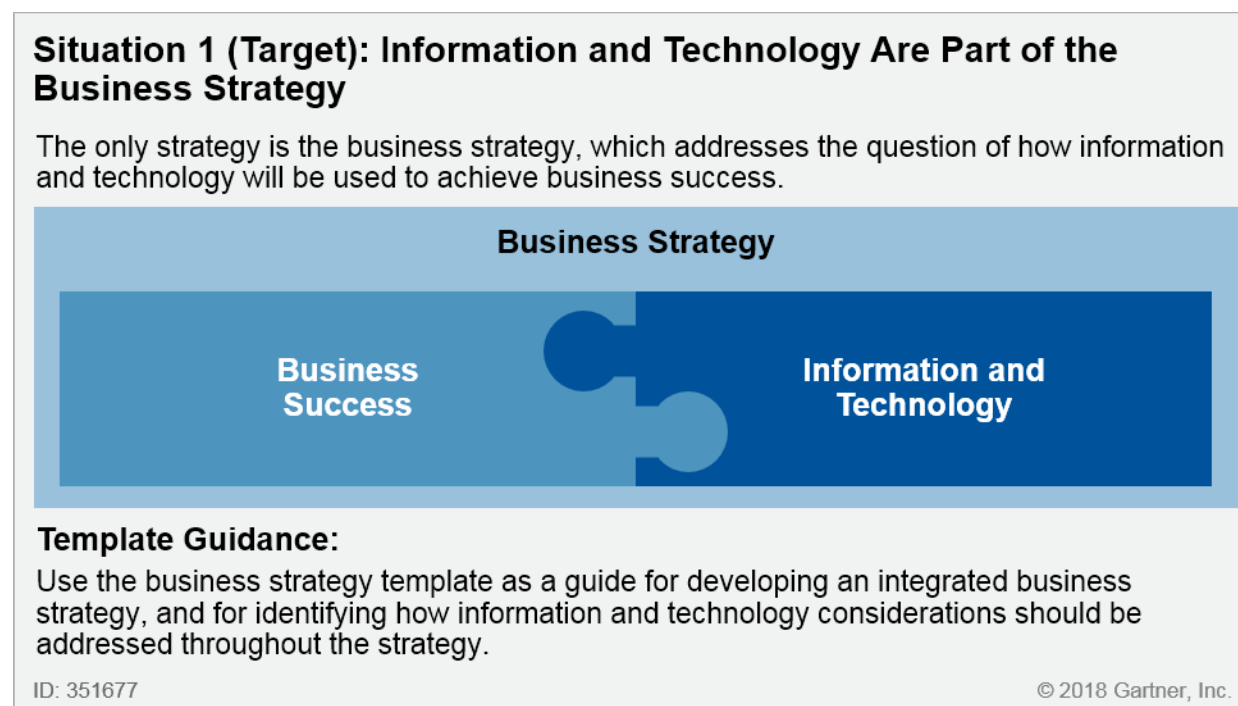
**351677\_it\_strategy.pptx**

This slide deck contains visualization ideas for using the Gartner template to create a PowerPoint version of a separate information and technology strategy. It is intended for organizations that prefer to document their strategy using PowerPoint, but should not be mistaken for a presentation of the strategy, which requires more tailored messaging for different audiences.

**Directions for Use**

Typically, the enterprise will be in one of the three situations described below looking to create an information and technology strategy (see Figure 2, Figure 3 and Figure 4):

**Figure 2. Information and Technology Are Part of the Business Strategy**



Source: Gartner (May 2018)

Figure 3. A Separate Information and Technology Strategy Document Exists as an Input to Business Strategy

### Situation 2: A Separate Information and Technology Strategy Document Exists as an Input to Business Strategy

In cases where there may still be resistance to adequately addressing information and technology as part of the business strategy, a separate information and technology strategy document may still need to be produced. However, this should be created in as close collaboration as possible with the business strategy, and should be positioned as an input to the business strategy.



#### Template Guidance:

Use the separate strategy template to create a separate information and technology strategy document that can be positioned as an input to business strategy.

ID: 351677

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Source: Gartner (May 2018)

Figure 4. A Separate Information and Technology Strategy Document Exists in the Absence of a Documented Business Strategy

### Situation 3: A Separate Information and Technology Strategy Document Exists in the Absence of a Documented Business Strategy

In cases where the business strategy has not been documented or clearly articulated, the information and technology strategy must fill this gap by including a draft of assumed strategic business outcomes that information and technology are shaping or enabling. These drafted business outcomes should then be discussed and validated with the business leadership team.



#### Template Guidance:

Use the separate strategy template as a guide for identifying the business strategy content that should be clarified as an input to planning the information and technology strategy. Then follow the instructions in the template to document the information and technology strategy.

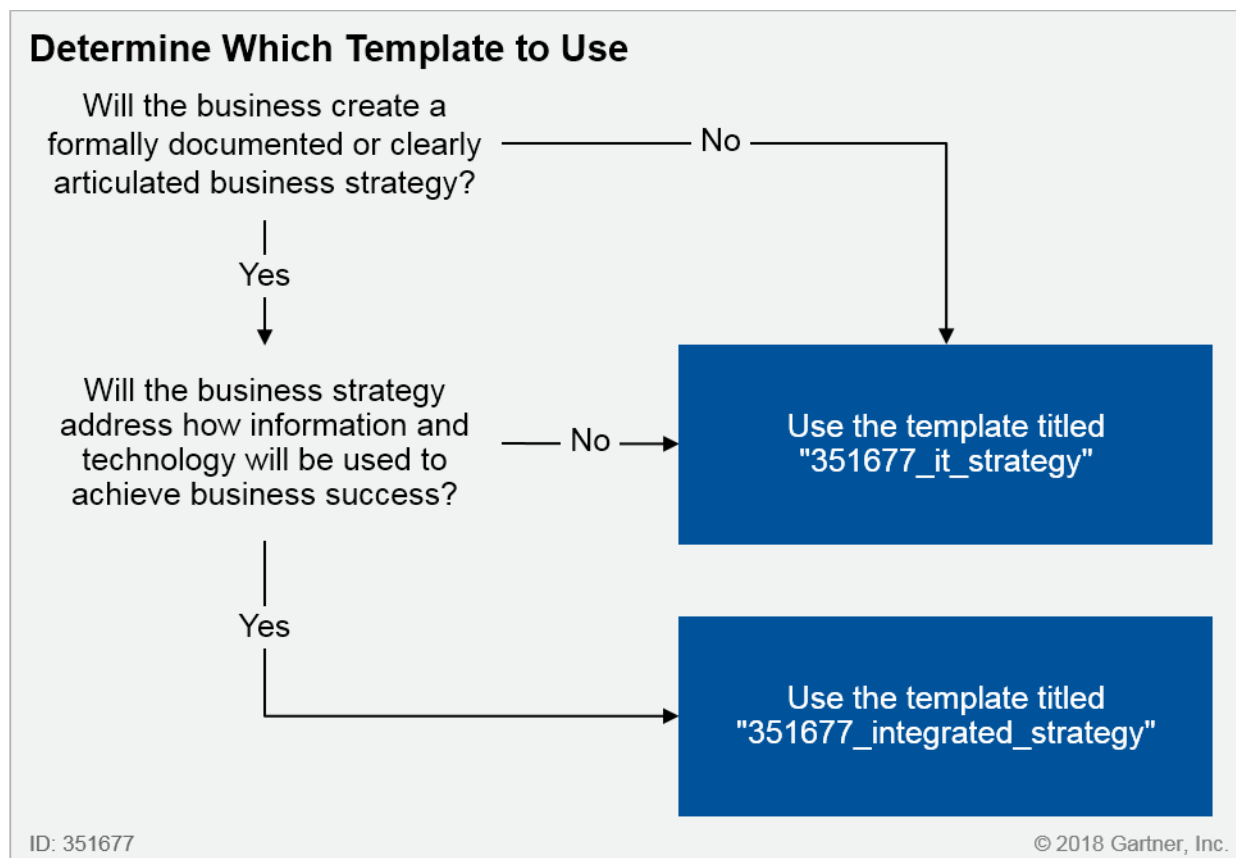
ID: 351677

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Source: Gartner (May 2018)

CIOs can use the decision tree in Figure 5 to ensure that they are using the correct version of this template based on their unique situation.

Figure 5. Use the Correct Version of This Template



Source: Gartner (May 2018)

## Gartner Recommended Reading

*Some documents may not be available as part of your current Gartner subscription.*

"Information and Technology Strategy for the Enterprise on the Cusp of Digital Business"

"The Case for Change: Why Digital Business Needs a New Approach to Strategy"

"Strategic Actions Describe the Path to Success"

"Strategic Principles Act as Guardrails to Success"

"Words Matter: Use the Right Language when Developing Strategy"

"Toolkit: How to Run an IT Strategy 2.0 Kickoff"

"A CIO's Framework for Communicating Strategy"

"Integrate Organizational Change in the Strategic Planning Process"

"How to Create an Information and Technology Strategic Plan"

"Toolkit: Information and Technology Strategic Plan Template"

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#### More on This Topic

This is part of an in-depth collection of research. See the collection:

- Information and Technology Strategy for the Enterprise on the Cusp of Digital Business

## **GARTNER HEADQUARTERS**

### **Corporate Headquarters**

56 Top Gallant Road  
Stamford, CT 06902-7700  
USA  
+1 203 964 0096

### **Regional Headquarters**

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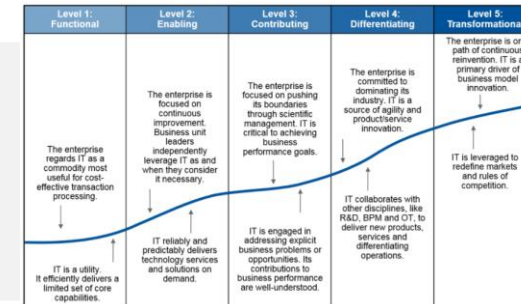
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# Example Artifacts and Tools – IT Maturity

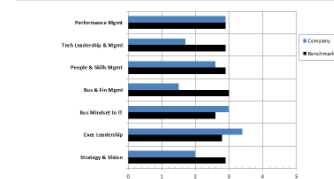
## ITScore – Gartner's IT Maturity Assessment Tool

- Assess a specific IT capability or multiple capabilities - then complete the Executive View survey to learn how well your IT organization is positioned to meet the needs of your enterprise's top priorities.



## Research Analyst Discussions to Review Assessment Results

Executive View Overall Score: Level 2.8



IT has a proactive and collaborative relationship with the business. Primarily focused on operational improvements through process management and engineering. Leaders are accountable for delivering benefits, measured by improvements in business metrics

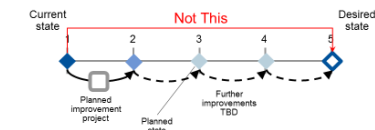
Gartner

- A one-on-one analyst discussion can assist with the identification of specific area of opportunity and recommended prioritized actions that will result in improved capabilities.

## Action Plan Customized to Your Desired Level of Maturity

- On-Site Gartner facilitated Workshops are leveraged in collaboration with the IT Leader and his/her leadership team to create an action plan that will result in improvements to IT capabilities.

Plan for Continuous, Incremental Improvement



As you evaluate areas of action ask this question:  
"At the end of the day what is the impact?"

Gartner

## Develop an Effective Communication Plan (Case Studies)



- The ITScore model and assessments shape the story leaders try to tell and the journey undertaken, in business-oriented terms. Used in conjunction with proactive communication, deliberate organizational change management and targeted leadership development, ITScore forms the basis for a transformation program for improved maturity.



# Toolkit: Checklist for ITScore Program and Portfolio Management Maturity Assessment

**Published:** 26 October 2018   **ID:** G00361296

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**Analyst(s):** Lars Mieritz

As an integral preparation element, we offer an overview of the statements that program and portfolio management leaders must address when completing the online ITScore Program and Portfolio Management Maturity Assessment.

## When to Use

Maturity models are a proven approach IT leaders can use to improve the effectiveness of their management processes.<sup>1</sup> Role-based maturity models are a mix of organizational culture, individual capabilities and the organization's capability maturity.

Deciding the right next steps in any organizational development exercise is important. We regularly speak with clients who have been exploring the ITScore models and are wondering whether they should complete the assessment or whether they have the knowledge to do so.<sup>2</sup> Others wonder whether they should delegate the assessment to their teams or whether completing the assessment requires sensitive information.

Use our Checklist for ITScore Program and Portfolio Management Maturity Assessment to prepare. It will give you an understanding of the statements that your organization must address when completing the online ITScore Maturity Assessment for Program and Portfolio Management. Additionally, gain further insights about setting up and completing ITScore assessments by reading ["ITScore Frequently Asked Questions"](#) on the dedicated ITScore landing page.

Use Gartner's "ITScore for Program and Portfolio Management" online diagnostic tool to determine the relative maturity of your program and portfolio management (PPM) function. Solicit input from all key stakeholders to arrive at a collective position about which and how many processes your organization can assimilate at any one time. We have designed the PPM Maturity Model to help leaders of project-oriented organizations communicate with executive management about the state of the PPM function. It enables PPM leaders to compare their organizations' PPM processes and attributes with those in the Gartner model, focusing attention on the areas that need the greatest improvement. Many do this cyclically as part of a periodic review of their PPM capabilities.

## Downloadable Attachments

### **itscore\_chklist\_ppm.docx**

This checklist for ITScore PPM maturity assessment provides an overview of the statements that respondents must address when completing the online ITScore Program and Portfolio Management Maturity Assessment.

## Gartner Recommended Reading

*Some documents may not be available as part of your current Gartner subscription.*

“ITScore for Program and Portfolio Management”

“ITScore for Program and Portfolio Management: Maturity Assessment Trends Through 2017”

“Supercharge Your Resource Management to Support Advanced PPM Maturity”

“Tackle Your IT PMO’s Program and Project Resource Challenge by ‘Flanking’ It”

“Developing a Charter to Guide PMO Implementations”

### Evidence

“ITScore for the Enterprise”

<sup>2</sup> Gartner interaction history from 2018 shows the PPM research team experienced a 25% increase in client interactions involving maturity during 3Q18 compared with 3Q17.

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### Corporate Headquarters

56 Top Gallant Road  
Stamford, CT 06902-7700  
USA  
+1 203 964 0096

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# Toolkit: Use Scenarios to Plan for the Future of Smart Mobility 2025

**Published:** 6 December 2018    **ID:** G00368918

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**Analyst(s):** Carsten Isert, Michael Ramsey

CIOs in smart mobility and automotive can use this Toolkit to create an individualized smart mobility scenario plan. By selecting the driving forces for specific regions and market positions, CIOs can modify the Gartner-provided scenarios and determine the most relevant recommendations and actions.

## When to Use

This Toolkit is part of a series called “Use Scenarios to Plan for the Future of Mobility 2025.” The research “Introduction: Use Scenarios to Plan for the Future of Smart Mobility 2025” describes the process, an overview of the scenarios and an overview of the driving forces. Subsequent reports detail the individual scenarios and the general driving forces for the industry (see “Use Scenarios to Plan for the Future of Mobility 2025: The Driving Forces”). We highly recommend reading these before using the Toolkit.

With this Toolkit, CIOs can refine smart mobility scenario planning for the future. This can be done by refining the driving forces, which can vary significantly based on the region where companies are located, the markets that the companies serve and unique market positions. The accompanying Excel tables in this Toolkit were integral to Gartner’s own research for scenario planning.

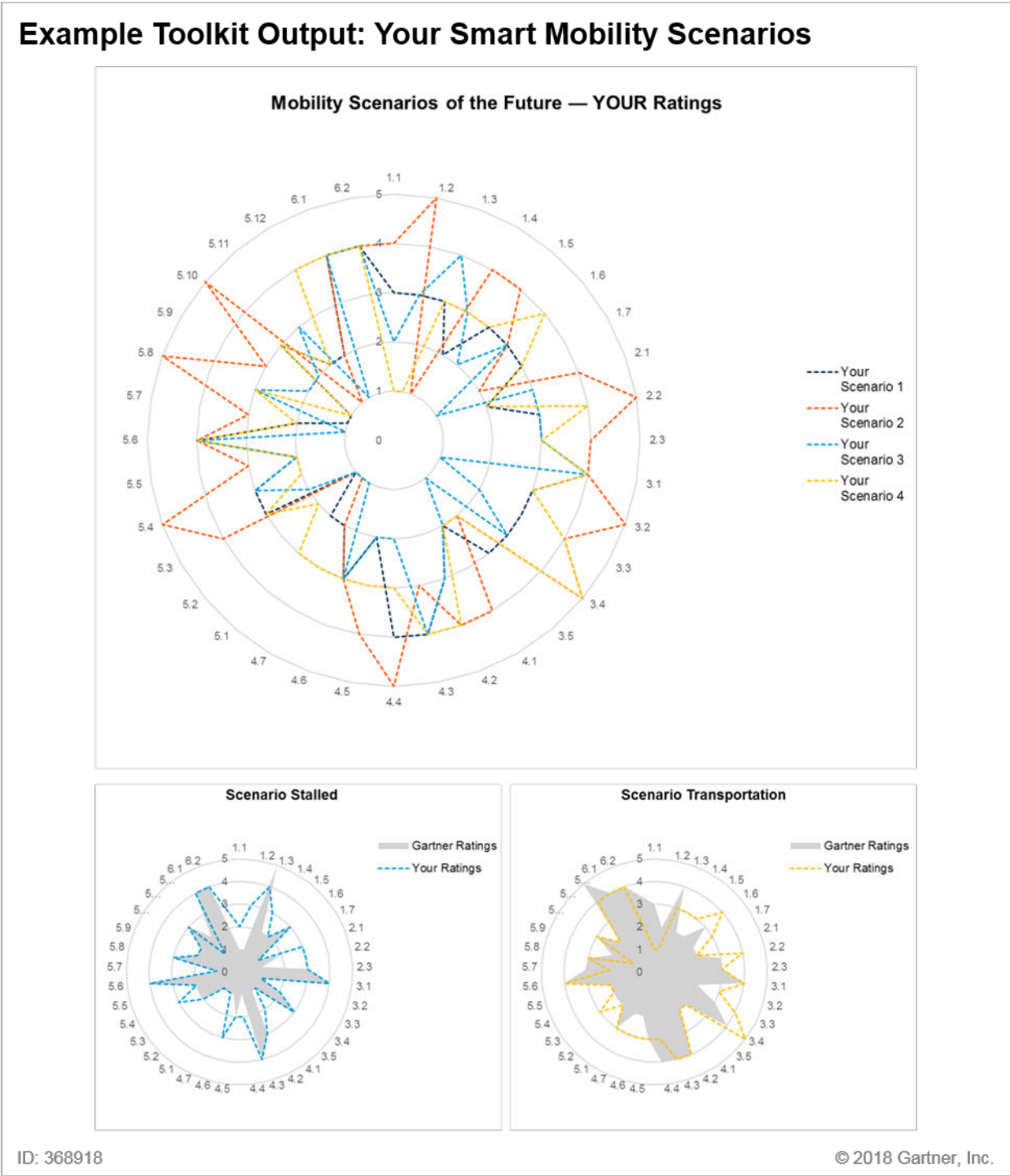
In combination with the value model described in “The Impacts of the Emerging Smart Mobility Value Model,” this Toolkit supports CIOs in planning their actions toward optimization of their key performance indicators (KPIs). The KPIs could be, for example, growth of business, digitalization, new business opportunities and service models. CIOs can use the driving forces to map to specific viewpoints by:

- Modifying the driving forces, based on their unique viewpoint, and selecting the most relevant forces
- Deriving company-specific scenarios, and visualizing the driving forces in each of the scenarios
- Selecting individualized actions from a catalog of recommendations

Figure 1 shows a visualization output of the Toolkit for the driving forces as radar charts. In each of the radar charts, the driving forces are represented by a number — for example, 1.1 is the

“International consistency of autonomous driving regulations.” The colored lines each represent a scenario, with the respective ratings of the driving forces shown in the figure. The upper chart compares your ratings of the four different scenarios that you can generate. The lower charts show a comparison of your ratings for two scenarios — Stalled and Transportation, compared with the original Gartner ratings. These figures can be used to guide the planning process with visual comparisons as described below (see Figure 1).

Figure 1. Example Toolkit Output: Your Smart Mobility Scenarios



Source: Gartner (December 2018)



Filling out the data and rating the driving forces and actions will take a significant amount of preparation and work. We recommend that a single person prepare the content and then moderate a workshop for a small team executing the rating, as described in the Directions for Use section below. You should plan to spend at least four hours for this workshop. If desired, Gartner offers support for the organization and execution of such a workshop.

## Downloadable Attachments

### **368918\_smart\_mobility\_scenarios.xlsx**

This Excel worksheet enables CIOs to rate the Gartner-provided driving forces from their unique viewpoints, derive a set of scenarios for 2025, visualize the differences and select relevant actions for those scenarios.

#### **Directions for Use**

The Excel worksheet in this Toolkit enables you to generate your company-specific scenarios, based on your unique position within the market. All ratings are on a scale from 1 to 5, with 1 being the lowest rating and 5 being the highest.

#### **Selecting the Most Relevant Forces**

Within the Excel Toolkit, driving forces can be amended from Gartner's default values to your own values in the Driving Forces worksheet. We recommend starting with a complete review of all the driving forces and low and high bookends in the Driving Forces worksheet. The table in this sheet lists, in Column F, the driving forces for the smart mobility of the future.

The driving forces are clustered into six areas (Column A), and the range of possible futures for each driving force is spanned by a low bookend and a high bookend (Columns G and H). For example, the low bookend for international consistency of autonomous driving regulations means that there will be little consistency, and the high bookend means that regulations are consistent worldwide.

Gartner has rated each of the driving forces in the Excel table, as described in "Use Scenarios to Plan for the Future of Mobility 2025: The Driving Forces." We used these ratings to identify the four most relevant scenarios for our research series.

To begin adapting the Toolkit for your requirements, review and adapt the following fields:

1. **Importance for CIO — Column C:** Rate how important each specific force is for you as a CIO to consider and understand on a scale of 1 to 5, with 1 being the most important and 5 being the least relevant.
2. **Relevant for Scenario Differentiation — Column D:** Rate if you think a particular driving force will be relevant to differentiate the scenarios for your company with yes or no.

3. **Influenceable by CIOs — Column E:** Rate how much influence you have on this driving force. You can select yes, partially or no.

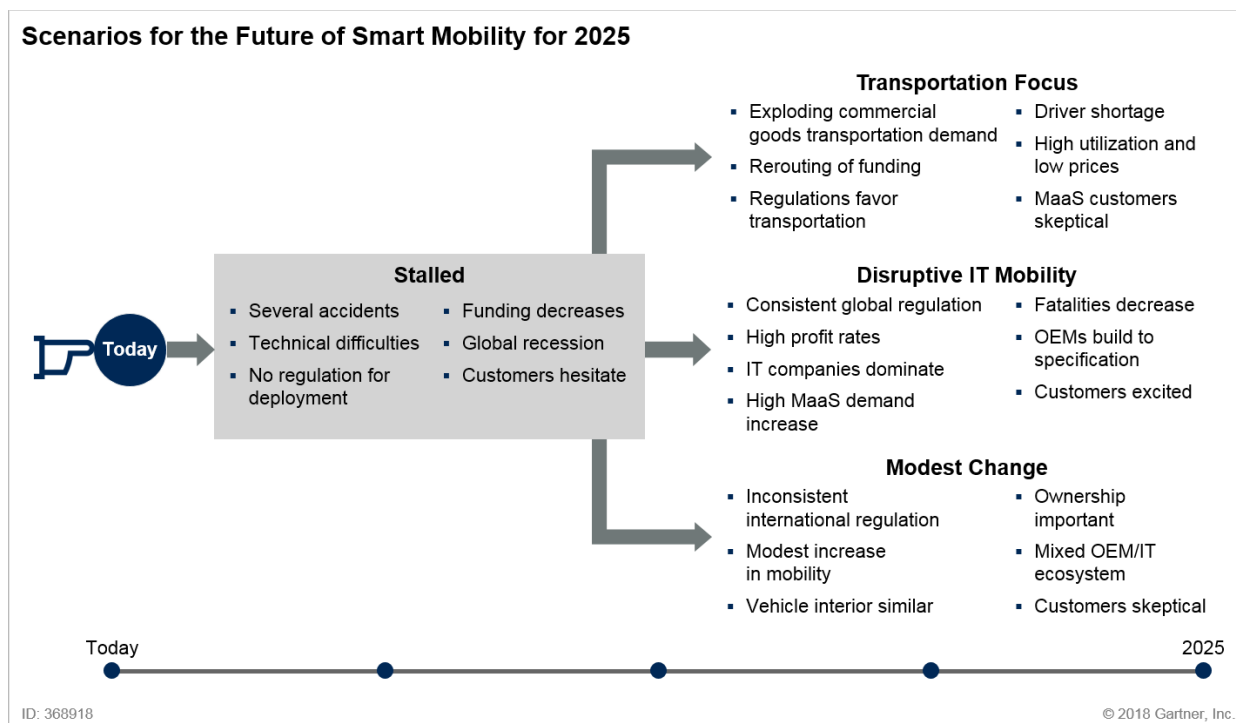
Of course, you can also reinterpret these questions to roles other than the CIO. Those categories will help filter for the most relevant driving forces and focus on a manageable set. Gartner recommends focusing on a set of, at most, 10 differentiating forces to have a good overview. If there are comments or background about the decision for a particular rating, you can enter those in Column M.

## Generating the Scenarios

In our original research process, the rating of the driving forces was structured in a combinatorial way into a large number of potential scenarios. Those were checked against consistency so that they lead to overall reasonable stories. Later on, they were discussed in the international Gartner research community and with clients from international players in the industry. As a result, we included insight from the most relevant markets in Europe, Asia/Pacific and North America in the Gartner ratings provided in Columns N to Q.

The Gartner research process then reduced the number of scenarios to the four most differentiating and relevant scenarios, and we gave them descriptive names. Those scenarios were selected for publication and are shown in Figure 2.

Figure 2. Scenarios for the Future of Smart Mobility for 2025



MaaS = mobility as a service

Source: Gartner (December 2018)

The rating was done on a scale from 1 to 5 for each scenario. A rating of 1 signals the low bookend of a driving force, and a rating of 5 the high bookend.

To adapt your scenario plan for your specific situation, take the following steps, while always thinking toward the targeted time frame, which Gartner has set to 2025:

1. Use the filters in Columns C, D and E of the Driving Forces worksheet to generate a better overview and reduce the number of driving forces to approximately 10 that are most relevant to your situation.
2. Start from the ratings provided by Gartner in Columns N to Q, using a particular scenario that you feel is closest to your situation. Initially, Gartner copied the values from the scenarios in Columns N through Q to Columns I through L in the same order. Later on, we changed a few values so that the initial charts show some differences. You may want to copy the ratings again or keep those that are already there.
3. Select one of your scenarios in Columns I through L, and assign ratings based on the most relevant driving forces you selected.
4. After you have assigned ratings for the most important forces, we recommend removing the filters from the less important driving forces, and providing the ratings for those to make sure that each scenario tells a consistent story. Driving forces that you assume are common across all scenarios, or make assumptions about, can be rated with the same value for all scenarios.
5. Repeat the same procedure for as many as four scenarios.
6. After working with the scenarios for some time, look at the visualization of the data in the Driving Forces Graphs worksheet.

Those visualizations adapt to the number of selected forces from the filters in Columns C, D and E. Some examples are depicted in Figure 1. These figures enable the comparison of your ratings against other scenarios you rated, as well as against the Gartner-provided ratings. The number of scenarios shown can also be controlled by clicking into the graph and selecting the filter options that appear to the right side of the top figure. The chart on the upper right can help make sure that the scenarios you generated have significant differences, as well as to see where they have common drivers.

The charts in the lower row enable you to compare your ratings to Gartner's predefined scenarios and see where you experience differences, based on your situation, geography or interpretation.

As a final and very important step of this stage, we recommend giving descriptive names to the scenarios. The names should resonate well within your organization and should be thought-provoking. If your specific viewpoint shows differences from the Gartner ratings, we highly recommend using different names to make clear distinctions.

Print out the visualizations, detail those scenarios in a few bullet points for easier understanding and put all of this on a whiteboard. The arrangement of these scenarios depends on the outcome of the planning and your creativity. However, you may use the clues for visualization from general scenario planning or from the visualization of the Gartner scenarios as shown in Figure 2.

## Determining the Best Actions

The names of your scenarios have been copied from the Driving Forces worksheet, in the headers of Columns I to L, to the Actions worksheet. In the Actions sheet, you can also find a list of 52 recommendations or actions. Each recommendation is already clustered into one of six categories in Column C, which mostly match the categories used for the driving forces. However, we replaced the ecological area with strategy as this is where a lot of the differentiation and action can be done:

1. Orga: Related to the internal organization
2. Tech: Related to technology
3. Strategy: Related to the company strategy
4. Customer: Related to customers and society
5. Economy: Related to economic issues
6. Regulation: Related to legal and regulatory issues

In Columns M through P, each action is rated by Gartner with respect to the four scenarios shown in Figure 2. Additionally, the recommendations are rated by specific players in the market in Columns H through L. Gartner identifies the five most relevant players as:

1. IT
2. Startups
3. Retail
4. Tiers 1, 2 and 3
5. OEM

The ratings provided by Gartner are generalized for each column. That means the rating in Column H for players from the IT industry is averaged with respect to all scenarios. On the other hand, the rating in Column M is averaged for all players in the smart mobility ecosystem with regard to the Modest Change scenario. You can use these ratings as a baseline when selecting your market position and refine these ratings based on your viewpoint.

This table gives you a lot of room for individualization, according to the scenarios you selected, the type of player you are and your unique position in the market.

We recommend proceeding with these ratings according to the clusters, which can be selected in Column C. Filter to a specific cluster — for example, Tech — and rate for each scenario how much the recommendation in Column B will help you specifically. The item codes in Column A are provided for easier reference to this set of recommendations.

Finally, sort the actions by the score given for each scenario to identify the top priorities to focus on. These ratings will give you a good planning tool to select the actions that are relevant in all scenarios and are, therefore, easily decided on. Actions and recommendations that are different in

these scenarios become strategic options that must be decided once specific indications for scenarios emerge.

## Gartner Recommended Reading

*Some documents may not be available as part of your current Gartner subscription.*

“Introduction: Use Scenarios to Plan for the Future of Smart Mobility 2025”

“Use Scenarios to Plan for the Future of Mobility 2025: The Driving Forces”

“The Impacts of the Emerging Smart Mobility Value Model”

“Hype Cycle for Connected Vehicles and Smart Mobility, 2018”

“Automotive and Smart Mobility CIOs Must Play a Crucial Role in the Autonomous Driving Technology Stack”

“Market Insight: Prepare for Surging Semiconductor Business Opportunities Driven by Autonomous Vehicles”

“Supply Chain Brief: Autonomous Trucking Adoption Timeline — 2020 or 2030?”

“Best Practices for Making Money From Connected Vehicles, Part 1: Strategy and Organization”

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56 Top Gallant Road  
Stamford, CT 06902-7700  
USA  
+1 203 964 0096

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**Any questions regarding this Proposal  
should be addressed to:**

David Kennison  
Sales Manager  
Gartner, Inc.  
7676 Hazard Center Drive  
Suite 810  
San Diego, CA 92108  
Telephone: +1 239 851 0029  
Email: david.kennison@gartner.com

**This Proposal was prepared for  
California County Information Services Directors Association:**

Cliff Chroust  
Purchasing Agent  
California County Information Services Directors Association  
County of Ventura  
General Services Agency  
Procurement Services  
800 S. Victoria Ave., L#1080  
Ventura, CA 93009  
Email: cliff.chroust@ventura.org



# county of ventura

**David J. Sasek, P.E.**  
Director

**GENERAL SERVICES AGENCY**

800 South Victoria Avenue, L#1000  
Ventura, CA 93009  
(805) 654-3700

January 31, 2019

SUBJECT: County of Ventura Request for Proposal (RFP) #5962  
**IT Research and Advisory Services - Notice of Intent to Award**

This is to inform you of the County's intent to award Request for Proposal (RFP) #5962 for IT Research and Advisory Services to Gartner Inc. upon successful contract negotiations and approval of elected Board of Supervisors.

The Evaluation Committee concluded that Gartner proposal demonstrated the highest degree of responsiveness to the requirements.

If you have any questions about this Notice of Intent to Award letter, please call me at (805) 654-3750 or e-mail me at [Cliff.Chroust@ventura.org](mailto:Cliff.Chroust@ventura.org)

Sincerely,

A handwritten signature in blue ink, appearing to read "Cliff Chroust", is written over the word "Sincerely,".

CLIFF CHROUST  
Purchasing Agent

C: File: RFP 5962

Paul R. Young  
Chief Deputy Director  
Facilities & Materials

Greg Bergman  
Deputy Director  
Administrative Services

Ron Van Dyck  
Deputy Director  
Parks Department

Christopher Melton  
Deputy Director  
Fleet Services