

AN ORDINANCE 2008-04-17-0308

ACCEPTING A STATE OF TEXAS DEPARTMENT OF INFORMATION RESOURCES (DIR) CONTRACT TO PROVIDE THE CITY OF SAN ANTONIO WITH GOVERNMENT MANAGED SERVICES ASSESSMENT FOR THE INFORMATION TECHNOLOGY SERVICES DEPARTMENT, FOR A TOTAL COST OF \$255,000.00.

* * * * *

WHEREAS, the Information Technology Services Department (ITSD) has had difficulty filling key positions due to outdated job descriptions and compensation levels; and

WHEREAS, the State of Texas Department Information Resources Contract DIR-SDD-204, for a Government Managed Services Assessment with Gartner Subscription Services would provide ITSD with an independent assessment and review of job descriptions and their corresponding salary/compensation to ensure employee retention and assist in filling of positions to support new technologies; and

WHEREAS, under section 2054.0565 of the Texas Government Code, accepting this offer through the Texas Department of Information Resources meets the requirements for competitive bidding, **NOW THEREFORE**;

BE IT ORDAINED BY THE CITY COUNCIL OF THE CITY OF SAN ANTONIO:

SECTION 1. The offer of Gartner Subscription Services, under the State of Texas Department of Information Resources contract DIR-SDD-204, in the amount of \$255,000.00 to provide the City of San Antonio Information Services Department with an independent assessment and review of job descriptions and their corresponding salary/compensation, is hereby approved. A copy of the Texas Department of Information Resources Contract with Gartner Subscription Services and the bid tabulation are attached hereto and incorporated herein as Attachment 1.

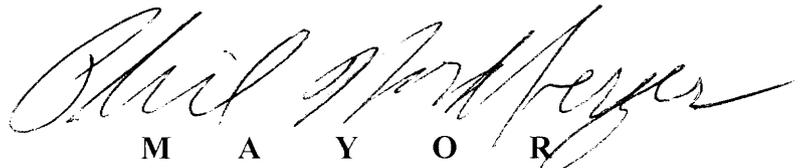
SECTION 2. The amount of \$255,000.00 is appropriated in SAP Fund 74001000, Cost Center 0901010001, and General Ledger 5201040, Fees to Professional Contractors.

SECTION 3. Payment not to exceed \$255,000.00 is authorized to the State of Texas Department of Information Resources (DIR) and should be encumbered with a purchase order.

SECTION 4. The financial allocations in this Ordinance are subject to approval by the Director of Finance, City of San Antonio. The Director may, subject to concurrence by the City Manager or the City Manager's designee, correct allocations to specific Cost Centers, WBS Elements, Internal Orders, General Ledger Accounts, and Fund Numbers as necessary to carry out the purpose of this Ordinance.

SECTION 5. This Ordinance shall be effective on the tenth day after passage.

PASSED AND APPROVED this 17th day of April, 2008.

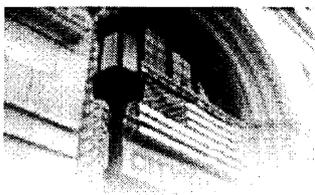

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PHIL HARDBERGER

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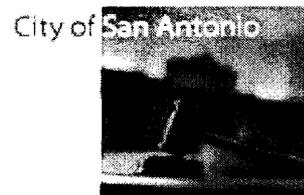

City Clerk

APPROVED AS TO FORM:


City Attorney

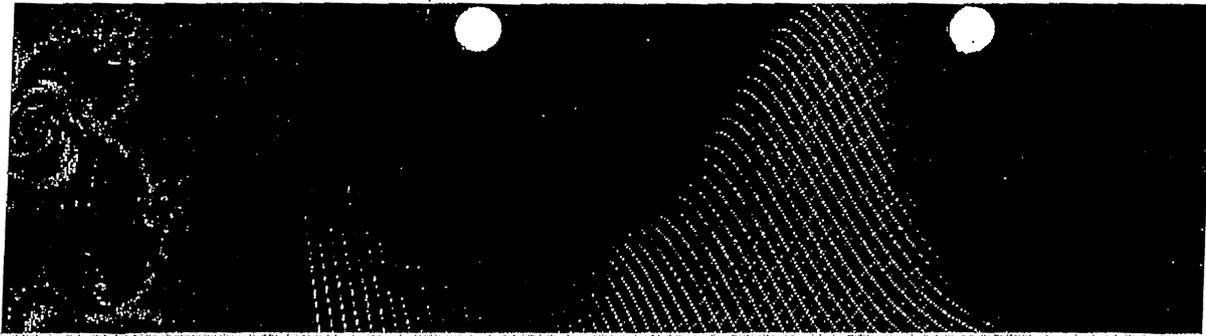


Request for
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ACTION

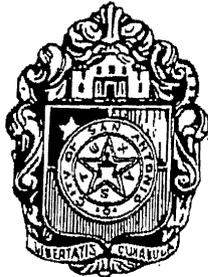


Agenda Voting Results - 11

Name:	7, 8, 10, 11, 13, 14, 16, 17, 21, 22, 23, 24, 25A, 25B, 29, 30A, 30C, 30D, 30E						
Date:	04/17/2008						
Time:	10:41:10 AM						
Vote Type:	Motion to Approve						
Description:	An Ordinance accepting a State of Texas Department of Information Resources (DIR) contract to provide the City of San Antonio with Government Managed Services Assessment for the Information Technology Services Department, for a total cost of \$255,000.00. [Sharon De La Garza, Assistant City Manager; Janie Cantu, Director, Purchasing & Contract Services]						
Result:	Passed						
Voter	Group	Not Present	Yea	Nay	Abstain	Motion	Second
Phil Hardberger	Mayor		x				
Mary Alice P. Cisneros	District 1	x					
Sheila D. McNeil	District 2		x				
Jennifer V. Ramos	District 3		x				
Philip A. Cortez	District 4		x				
Lourdes Galvan	District 5		x				
Delicia Herrera	District 6		x			x	
Justin Rodriguez	District 7		x				
Diane G. Cibrian	District 8		x				
Louis E. Rowe	District 9		x				
John G. Clamp	District 10		x				x



■ ■ ■ ■ A Proposal for
City of San Antonio



IT Organization Alignment of Skills and
Resources

25 February 2008
Engagemen: 222045040

Gartner.

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1.0 Executive Summary

The City of San Antonio (City) is a large municipal organization with approximately 12,000 full-time employees and 2,000 part-time employees in 38 different departments. The Information Technology Services Department (ITSD) supports the City's information technology needs with approximately 250 centralized staff and another 20–25 departmental systems managers

ITSD divisions include the following:

- Geographic Information System (GIS)
- Applications (Mainframe, Web, SAP)
- Infrastructure (MF, Unix, Wintel, Citrix)
- Communications (Telecom, Radio, Networking)
- Business Support; security
- SAP Production Support

ITSD leadership is continuing to undertake initiatives to transformation delivery of IT services including the following:

- Went live with SAP software for enterprise resource planning 3 years ago
- Legacy applications are planned for retirement
- Preliminary review completed for application replacements using COTS products
- A draft catalog of services has been developed
- Processes are being enhanced within context of ITIL framework
- Received approval to evaluating salary banding approach

The ITSD leadership also is undertaking a key initiative to assess and align IT organization skills and resources with the organization's strategic direction. Critical to this effort is the development of job families and job descriptions that ensure the organization has a clearly defined career path for its staff and alignment with its service delivery model for the future.

1.1 Project Objectives

As the City undertakes this IT organization alignment of skills and resources initiative, it is interested in developing job families, job descriptions, and an updated compensation structure that help facilitates the recruitment and retention of skilled IT resources. Specific project objectives include the following:

- Update job descriptions and associated compensation to be in line with City's IT strategic direction and industry best practices
- Determine fit of current IT staff resources with updated job descriptions and compensation recommendations
- Provide a two to three-year transition roadmap that supports improved alignment of City IT organization service needs and IT organization skills.

1.2 Gartner Approach

The goal of Gartner's proposed approach is to provide the City with the level of information required to make decisions about the future organization and mitigate risks, as well as the steps that must be taken to ensure organizational alignment with the business strategy and to become a high performing IT organization. It will provide a broad view of the City's IT strategic directions and supporting IT service delivery organization. A roadmap will be provided to establish initiatives where further depth of analysis and execution are required (e.g., training and sourcing).

Gartner offers a unique capability to develop job families, job descriptions, and compensation recommendations based on industry best practices. It also offers the use of a trademarked skills self-assessment tool that is configurable to specific City needs. Gartner will use the results of these two efforts to assess the gaps in the City's ability to support its overall strategic direction and develop recommendations for improvement.

Vital to our approach is the involvement of City leadership, management, and employees in the process to build commitment and mitigate implementation risks.

The proposed methodology is illustrated on figure 1.

Figure 1. Proposed Methodology



1.3 Key Benefits of Gartner Approach

The proposed Gartner approach to assist the City includes a structured approach that will help ensure that assistance is focused in the areas where we can provide the most value to the City in achieving its project goals and objectives.

The key benefits of our proposed approach include:

- **Understanding of Public Sector** - By combining our Research and Consulting methodologies with the practical experience we have gained through our engagements with numerous state and local government organizations, Gartner has developed comprehensive assessment models and organization design solutions that focuses on the unique needs of public sector organizations.
- **Rigorous and Proven Methodologies**—Gartner has successfully assisted thousands of public sector organizations. As a result, the City is assured that our methodologies, intellectual capital, and tools and templates are well-tested and have resulted in successful completion of similar projects.
- **A Trusted and Objective Third Party.** Gartner's independence is critically important. At a time when alliances between major consultants and technology suppliers have clouded the landscape, Gartner remains resolutely objective. Our only allegiance is to helping our clients achieve results with solutions that make sense.

- **Depth of Resources**—We have identified key resources for this engagement that have decades of relevant experience in planning, designing, selecting, sourcing and implementing organizational and technology solutions. These resources encompass senior level experts and industry thought leaders in IT strategy, organization design, IT human capital management, IT management and operations processes, program management, and government applications systems.
- **Benchmarking Databases**—Gartner is the only consulting firm that has an extensive database that can be utilized to compare metrics relevant to total cost of ownership (TCO), service costs, and IT processes. Our quantitative and qualitative databases are refreshed every 18 months and include data from many organizations with similar workload and complexity factors to your own.
- **Credibility**. During debates about the merits of software vendors, technology products and companies, a common question throughout the industry is, "What does Gartner say?" Gartner has a name and reputation that is well-known and respected throughout the IT industry. We are known for fact-based, well-tested independent recommendations. Our national and international credibility will help the City gain buy-in and support for the decisions made during the engagement.

1.4 Gartner Difference

The key factors that differentiate Gartner as a trusted partner and advisor for the City are summarized on Table 1.

Table 1. The Gartner Difference

Key Consulting Criteria	Does Your Consultant:	Gartner Position	Gartner Difference
Independence	Sell hardware?	No	Gartner is not a systems integrator with preferred partner relationships. Our sole focus is your business needs.
	Sell software business solutions?	No	
	Perform systems integration?	No	
Objectivity	Have a track record and business model that ensure objective recommendations?	Yes	Because of our objectivity, we've been the trusted thought leader in the IT arena for over 25 years. Our research assessments and prognostications influence the entire industry.
Industry Perspective	Possess industry wide research?	Yes	Through our interactions with 45,000 clients in 10,000 distinct organizations worldwide, we can bring both quantitative and qualitative context to your IT decisions, and help you make those decisions with confidence and efficiency.
	Possess industry wide benchmarks?	Yes	
	Possess direct experience with similar initiatives around the world?	Yes	
Depth of Resources	Have the ability to draw on expertise and resources across a broad range of technology topics?	Yes	We have 650 analysts worldwide, 550 consultants, and operations in 75 countries. Our proprietary Knowledge Map includes 800 technology and business topics.

Key Consulting Criteria	Does Your Consultant:	Gartner Position	Gartner Difference
Public Sector Knowledge	Possess specialized knowledge in government business and programs?	Yes	Many Gartner consultants and research analysts have worked in or with government for years. We understand the crucial differences between the public and private sectors.
	Understand government budgeting and procurement?	Yes	
Credibility	Have a reputation and brand that help sell your decisions?	Yes	A survey of 1,100 business technology professionals, conducted by Optimize magazine, found Gartner to be the analyst company with the most influence over how CIOs purchase or implement technology—nearly twice the influence of the nearest competitor. We are quoted an average of 70 times a week in the world's top-tier business press.

2.0 Gartner Firm Qualifications

Gartner, Inc. (NYSE: IT) delivers the technology-related insight necessary for our clients to make the right decisions, every day. Gartner serves 10,000 organizations, including chief information officers and other senior IT executives in corporations and government agencies. The Company consists of Gartner Research, Gartner Executive Programs, Gartner Consulting and Gartner Events. Founded in 1979, Gartner is headquartered in Stamford, Connecticut, U.S.A., and has 3,700 associates, including 1,200 research analysts and consultants in 75 countries worldwide.

Gartner brings unique and unparalleled resources to bear on the challenges facing business and technology executives:

- **Gartner Research.** The source of the data and insight that flow continuously—from our vast network of 650 analysts in 75 countries—out to our clients.
- **Gartner Executive Programs.** The world's largest IT executive community, where 3,500 senior IT executives—3,100 of whom are CIOs—go for customized advice and peer exchange opportunities.
- **Gartner Consulting.** The world's leading consultancy for the business of technology, with 2,000 engagements delivered annually by 550 consultants.
- **Gartner Events.** The world's largest IT conference provider, attracting over 35,500 technology and business professionals who benefit from the insight and networking opportunities at our 70+ annual events.

Gartner Consulting is a fact-based, knowledge-centric consultancy. We have direct access to some of the smartest people in the IT world through our analyst network, plus proprietary research, original publications, the latest facts and figures, and benchmarking data. No other consultancy has all this at their fingertips, which is why our knowledge-driven insight is so valuable to our clients.

We combine best practices, experience and creativity to help our clients within six specialty areas:

- **Strategy and Architecture**—Aligning IT direction with the business strategy through determining the appropriate business model, organizational structure, skills and competencies, governance and IT management processes
- **Risk Management**—Developing the right plans for business continuity/disaster recovery, security of information assets and compliance with regulatory requirements
- **Performance Optimization**—Exploiting opportunities to optimize the effectiveness, efficiency and quality of IT, developing a value-driven catalog of services with mechanisms for managing and communicating performance, and delivering with peak efficiency
- **Critical Program Management**—Managing risk, schedules and costs to ensure successful, on-strategy delivery of major programs/key Initiatives, with a project management office to assess project status, provide IT insight and make objective recommendations
- **Sourcing**—Determining the right sourcing and sourcing management options, including strategy, vendor selection, contract negotiation, partnership building, performance assessment and management implementation

- **Go-to-Market Strategies**—Validating market and product decisions to accelerate profitable growth and close the gap between aspirations and results

Public Sector Program Experience

Gartner has been assisting public sector organizations for over 25 years. Gartner has worked with thousands of public sector agencies around the world, including federal, state and local government agencies, public utilities, and public education. In addition, Gartner provides a vital transfer of information from our vast array of private sector clients to our public sector clients, infusing best practices from all industries.

Few outsiders understand the complexity and interlocking relationships of government organizations. Gartner understands this, and has in-depth experience in many key "sub-vertical markets" within the public sector, including the following examples:

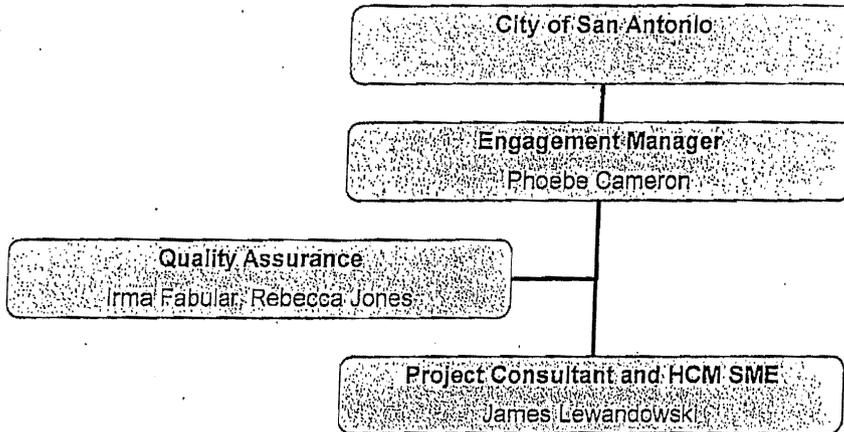
- Health and human services (including welfare, child support, Health Insurance Portability and Accountability Act of 1996 [HIPAA], and other areas)
- Finance and human resources
- Education (including higher education, K-12)
- Public safety (including law enforcement, fire protection and prevention and emergency medical services)
- Justice (including courts, correctional institutions, and other justice agencies)
- Transportation
- Tax
- Public works
- Elections/voting
- Natural resources and environmental protection

2.1 Project Team

We will create a team of consultants and analysts who have the appropriate experience and expertise to perform the engagement described in the proposal and who have worked on similar engagements in public sector organizations. The consulting team will be assigned directly to the project, while research analysts will be used on an as-needed basis.

Key roles within the proposed engagement schedule are shown in Figure 2. Biographies of the proposed individuals are included as an attachment to this proposal.

Figure 2. Project Team



Our proposed project team structure and roles and responsibilities are described below.

- **Engagement Manager/Project Executive.** Provides executive leadership and direction to the project team, including the framework for project approach and deliverables. Has responsibility for success of the Gartner engagement, including review of deliverables. Coordinates with the client's project executive sponsor(s). Responsible for day-to-day project operations, ensuring timely completion of work plan tasks and deliverables with the highest quality. Ensures that the appropriate Gartner resources are utilized in the most effective manner to meet client needs and commitments. Coordinates with the client's project manager or coordinator.
- **Quality Reviewer.** Ensures overall quality of deliverables and client satisfaction. Conducts internal review of key client deliverables with Gartner project team prior to delivery to client.
- **Project Consultant.** Works closely with client to complete work plan tasks and high-quality deliverables. Conducts data collection and analysis, and assists in development of deliverables.
- **Subject Matter Expert.** Provides depth and breadth of expertise in specific areas to support the development of client deliverables. As appropriate, assists in facilitating client workshops to build consensus around specific strategy areas.

We estimate that we will have a core project team of three to four consultants who will focus on the successful completion of the project. In addition, we will utilize subject matter experts from both our Research and Consulting organizations that will be targeted at specific strategy areas (such as compensation and sourcing). Our consultants are senior professionals with extensive background in the area of IT organization assessments the alignment of IT organization skills and resources.

2.2 Relevant Experience

Gartner has extensive experience in helping clients align IT organization skills and resources through assessment of skills and the development of job families and job descriptions.

Table 2 provides sample list of clients that highlights some of Gartner's organizational planning and assessment capabilities and qualifications with public sector organizations. Detailed summaries of the work performed on select projects are also provided in this section.

Table 2. Organizational Planning and Assessment Projects

Client Name	Project Name	Client Name and Telephone
City of Winnipeg	Corporate Information Technology—Business Transformation	Mr. Rodger Guinn Director, ERP Project +1-204-986-5656
U.S. Air Force SAF/XCI	C&I Workforce Transformation Strategy Study	Ms. Essye Miller +1-703-588-1526
U.S. House of Representatives	Organizational Assessment and Recommendations	Mr. Dan Doody, CIO +1-202-226-2352
Government of Saskatchewan	IT Services and GIS Governance and Strategic Directions	Mr. John Law (former provincial CIO), Deputy Minister of Saskatchewan Highways & Transportation +1-306-787-7486
Commonwealth of Virginia State Corporation Commission	IT Skills Assessment	Mr. Phillip Duke DeHaas, Council to the Commission +1-804-371-9778 duke.dehaas@scc.virginia.gov
US Patent and Trademark Office	IT Skills Assessment	Mr. John Doll, Director +1-571-272-8250 john.doll@uspto.gov
State of Iowa Division of Data Management	IT Skills Assessment	Mr. Steve Mosena, CIO +1-571-272-8250 smosena@dhs.state.ia.us

City of Winnipeg

Client and Project:	City of Winnipeg Corporate Information Technology—Business Transformation
Project Location:	Winnipeg, Manitoba, Canada
Gartner's Involvement:	<p>Gartner assisted the City of Winnipeg in developing a strategy to transform its Corporate Information Technology (CIT). The project included:</p> <ul style="list-style-type: none"> ■ Identifying the business and technology organizational change drivers ■ Establishing a performance baseline and identifying improvement opportunities for key services delivered by CIT ■ Defining a target-state model for the delivery of IT services within the City of Winnipeg—the model included the identification of: <ul style="list-style-type: none"> □ The services to be delivered □ Delivery responsibility—centralized vs. departmental □ Management processes and key roles required—including governance such as strategic planning and definition of policies and standards □ Overall IT Governance mechanism and processes required to support a shared services model ■ Preparing the necessary implementation plan to support the transformation ■ Developing a Business Case to support the transformation strategy and implementation plan ■ Formulating a communication plan and overall strategy to engage the appropriate stakeholders at the City and to drive consensus and endorsement for the transformation initiative <p>Gartner has worked with the City of Winnipeg for seven years.</p>
Key Personnel:	<p>Mathew Soong—Engagement Manager Compta Luckiram—Project Manager Irma Fabular—Quality Assurance Review</p>

United States Air Force

<p>Client and Project:</p>	<p>U.S. Air Force SAF/XCI C&I Workforce Transformation Strategy Study</p>
<p>Gartner's Involvement:</p>	<p>Gartner was tasked to accomplish the following mission in this project:</p> <ul style="list-style-type: none"> ■ Produce a total workforce to enhance net-centric operations and enable force projection to the AF, Joint and Coalition Forces with focus on: <ul style="list-style-type: none"> □ More expeditionary and modular forces □ Alignment with Joint initiatives, new organizational relationships and new technology □ Standardization of mission and function at many levels □ Use of industry best practices—drive efficiencies in the sustaining workforce □ Sustainable mix of Active, Reserve Component and Civilian force structure ■ Look for efficiencies in sustaining base ops to resource new Combat and Expeditionary Communications requirements ■ Advocate FY08 fixes now ■ Provide transition strategy for GIG/NCES <p>Description of Services: As a first step Gartner conducted a baseline assessment and gap analysis study in the initial phases of this project. An extensive number of GFI materials were reviewed and selected interviews were conducted. Gartner presented at the end of Phase 2 a gap analysis study and operational concept model with 55+ findings and suggested improvements. Using the gap analysis and guidance from the Air Staff as a basis, Gartner conducted additional discovery interviews in the C&I community to develop actionable workforce transformation recommendations. At the end of Phase 3, eight (8) strategic recommendations were presented to SAF/XC.</p> <p>Accomplishments: All eight (8) Gartner workforce transformation recommendations were approved and validated by the client. Gartner is currently supporting the SAF/XCI with the development of a C&I Strategic Transformation Plan that is focused on executing all eight (8) recommendations.</p> <p>One of the major accomplishments in this project was the development of a unique operational concept view of the C&I community across the deployed and sustaining area that received very positive feedback from several GOs.</p>
<p>Key Personnel:</p>	<p>Engagement Manager—Kevin Gologly Project Manager—Anja Allen Lead Measurement Analyst—David Bank Executive Sponsor—Jeff DePasquale</p>

United States Army

Client and Project:	U.S. ARMY PERSCOM PERSINSD Organization Assessment and Design
Gartner's Involvement:	<p>PERSINSD needed to prepare to deliver information technology services to a merged U.S. Army PERSCOM, managing increased demand for and importance of IT services with shrinking resources. At the same time, it had to respond to the Department of Defense (DOD) and the Department of the Army (DA) centralization of network technology and personnel applications through DIMHRS and eHRS.</p> <p>Gartner supported PERSINSD's requirements by:</p> <ul style="list-style-type: none"> ■ Evaluating the current organization design and designing a more efficient and effective structure that merged the three PERSCOM locations. ■ Identifying and defining the roles and competencies necessary to implement the organization design. ■ Assessing PERSINSD's organizational health with respect to the characteristics of high-performing IT organizations, identifying risks, and making recommendations for improvements. High-performing organization characteristics include: <ul style="list-style-type: none"> <input type="checkbox"/> Leadership <input type="checkbox"/> Culture and values <input type="checkbox"/> Work processes <input type="checkbox"/> Organization structure <input type="checkbox"/> Professional development <input type="checkbox"/> Career development <input type="checkbox"/> Rewards and recognition ■ Assessing the current skill levels of employees and identifying gaps to support a future training plan and leverage skills across the merged enterprise. ■ Evaluating change readiness and identifying an implementation strategy and short- and long-term actions critical to achieving organizational effectiveness and efficiency. <p>As a result of the engagement, PERSINSD had the target-state framework to support the AHRC merger and position the command to respond to uncertain future information technology service requirements. The results provide the direction for improving organizational performance in support of the Department of the Army's personnel transformation programs.</p>
Key Personnel:	Jim Bresson—Engagement Manager Rebecca Jones—Project Manager

U.S. House of Representatives

Client and Project:	U.S. HOUSE OF REPRESENTATIVES Organizational Assessment, Recommendations and Technology Strategy	
Period of Performance:	Start Date: January 2004	Completion Date: August 2004
Gartner's Involvement:	<p>Gartner conducted a comprehensive assessment for the House of Representatives of the CAO/HIR IT programs. This effort included performing specific diagnostics to evaluate the effectiveness and efficiencies of current IT business and operational capabilities related to management processes, staff skills and competencies and organizational structure. The project included the following three distinct workstreams:</p> <ul style="list-style-type: none"> ■ Organizational Analysis and Design—Gartner performed a high-level analysis of the organization, roles, responsibilities, skills, competencies and structure, in order to determine current performance characteristics and capabilities for both the HIR and CAO organizations. We examined each organization separately, to develop their specific baseline profiles. We interviewed leaders and managers across both HIR and CAO organizations to understand CAO/HIR ideas regarding the future state, as well as information regarding current operational-related concerns, challenges and organization culture and values. ■ Management Process Maturity Assessment—Addressed the CAO/HIR's concern as to the effectiveness and efficiency of its IT management processes. Gartner leveraged the Control Objectives for Information and related Technology (CobIT[®]) framework for assessing the effectiveness and efficiency of CAO/HIR's IT management processes. ■ Cost Benchmarking—Gartner performed a broad, high-level assessment of the client's IT organization efficiency and business alignment based on both quantitative and qualitative indicators for eight functional areas. We quantitatively analyzed each area and compared it to peer averages (peers are similar IS organizations selected from the Gartner database) to establish "relative performance." These measurements and comparisons provide the basis for identifying cost and efficiency gaps between current and potential performance. The comparative analysis also identified key findings and "common threads." This process ensured a thorough assessment and generated a single metric of cost-efficiency for each functional area. This analysis reflected the total workload profile and overall cost-efficiency. <p>At the conclusion of the separate workstreams, Gartner provided a synthesis of the data that corroborated or further explained anomalies, identified critical gaps and outlined actionable recommendations to close gaps.</p>	
Key Personnel:	James Lewandowski—Engagement Manager Larry Bradley, Jr.—Project Manager	

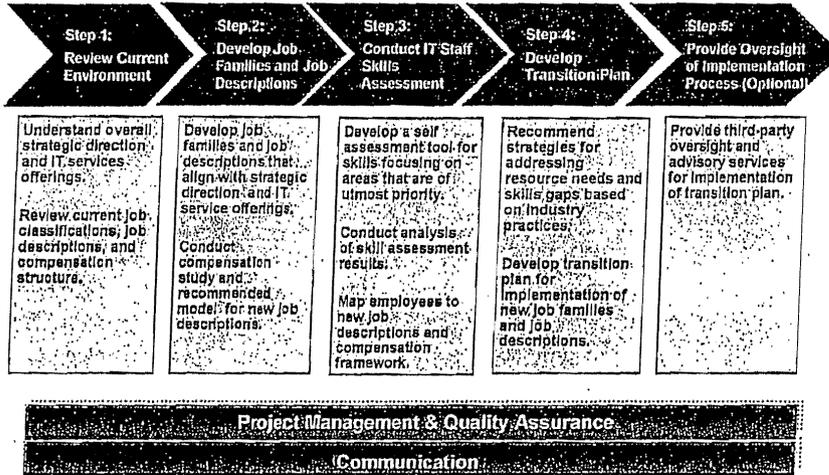
Province of Saskatchewan, Canada

Client and Project:	Province of Saskatchewan, Canada IT Services and GIS Governance and Strategic Directions
Project Location:	Regina, Canada
Gartner's Involvement:	<p>Gartner conducted several engagements with the Government of Saskatchewan, including the following:</p> <p>GIS Governance and Strategic Directions: Gartner assisted Saskatchewan government to define governance and funding approaches for province-wide GIS operations and data management. Subsequently, the Government re-engaged Gartner to assist in establishing province-wide GIS strategic directions, objectives and measures, including considerations for public safety, emergency communications and automatic vehicle location. These engagements included review of GIS best practices in the U.S. and Canada, including governance, data management, standards and funding approaches.</p> <p>IT Services Transformation: As a result of growing budgetary constraints, the Government of Saskatchewan embarked on a province-wide initiative to evaluate opportunities for leveraging its information technology capabilities and resources.</p> <p>This initiative is the first step in defining a strategic direction for the Government in developing a new IT services model. The key objectives of the project were to accomplish the following:</p> <ul style="list-style-type: none"> ■ Gain a common understanding and consensus regarding the role of IT, and IT services delivery within the Government ■ Define guiding principles for business and for IT ■ Develop an enterprisewide high-level understanding of existing IT organizations, assets and services ■ Gain consensus on the approach for moving forward with conducting an IT services enhancement and transformation initiative, including considerations for a centralized IT model. <p>As a result of the Gartner engagement, the Government is moving forward with consolidation of its infrastructure and service delivery organizations, and is evaluating strategic sourcing and contract consolidation opportunities.</p>
Key Personnel:	Irma Fabular—Engagement Manager

3.0 Statement of Work

This section describes our statement of work (SOW) consistent with the Gartner methodology illustrated below. In addition, Gartner deliverables and responsibilities, and City responsibilities are included.

Figure 3. Project Approach



Step 0. Project Initiation

The purpose of this task is to ensure a well-planned and structured project approach. At the onset of the project, the Gartner team will conduct a project planning conference call to identify who should participate in the project initiation meeting and to confirm key dates, identify interview candidates, identify what documents are available for review, and to plan any communication from the project sponsor to participants.

Upon completion of the project planning activities, the Gartner project team will conduct a Project Initiation Meeting with the City's project team, Steering Committee and other key stakeholders. The main objective of the meeting will be to confirm the final project plan and project goals, objectives, approach, deliverables, acceptance criteria and project governance structure. This is a critical step that sets the foundation of the project and will establish project management and control processes. In addition, Gartner will take advantage of this time with key stakeholders by introducing best practices models and frameworks with the City project sponsor and key executives. Finally, the joint team will outline the project governance structure that clearly defines roles and a communication plan, both for the core team and external stakeholders. Ideally, we would like to schedule discovery interviews immediately following the project initiation meeting.

Gartner Responsibility:

- Develop initiation presentation
- Review and confirm the goals and objectives of the project

- Develop/review final project work plan and schedule including task durations, assignments and review of key dates and milestones

City Responsibility:

- Provide facilities for meetings and schedule participants
- Participate in initiation meeting
- Confirm project governance structure and deliverable acceptance criteria
- Provide requested background documentation including the following:
 - IT Strategic Direction
 - Job Classifications and Job Descriptions
 - Compensation Structure
 - Past Skills Assessment Results
 - Employee Recruitment, Training, and Retention Program Information

Gartner Deliverables:

- Project Initiation presentation
- Work plan and schedule

Step 1. Review Current Environment

The key objective of this task is to ensure common understanding of the City's current IT service delivery environment, vision for its future IT strategic directions, and current job descriptions and compensation structure. Gartner will review documentation, conduct up to 12 interviews with business sector and IT leadership, as well as key stakeholders identified by the City. Some of the interviews may be group interviews. The purpose of the interviews is to gather information that helps us understand the City's requirements for alignment of its IT organization skills and resources.

Task 1. Understand Business and IT Strategic Directions

To be effective, high performing organizations align their operations with business strategies. Assessment of an organization's efficiency and effectiveness is done in the context of its strategic direction. Misalignment leads to inefficiency, lack of shared direction, confusion, and poor customer satisfaction.

Gartner will review documented strategies and plans and through the interview process confirm overall alignment and satisfaction levels.

Task 2. Review Background Documentation

Gartner will also review documentation that helps us understand the current environment, vision for the future, and gaps between the resources required to support the current and future directions. Gartner will work with the City to obtain relevant documentation, including, but not limited to:

- Business strategies
- IT strategic planning documents
- IT service portfolio
- IT organization structure
- IT job classifications and job descriptions
- IT compensation structure
- Relevant HR policies
- IT staff recruitment and retention program documentation

Task 3. Prepare Assessment Key Findings and Recommendations

Gartner will document its interview and document review key findings and recommendations that impact the development of engagement deliverables. These findings and recommendations will focus on:

- Alignment of current job classifications, job descriptions and compensation structure with industry best practices
- Alignment of IT strategic direction with existing staff resources

These key findings and recommendations also will be used to facilitate the configuration of the skills assessment tools that will be used in Step 3.

Gartner Responsibility

- Review background documentation
- Prepare and submit interview questions at least 2 days in advance of interviews
- Conduct up to 12 one-on-one or group interviews over a one-week period
- Prepare assessment key findings and recommendations

City Responsibility:

- Provide Gartner with background documentation in soft copy wherever possible
- Provide facilities for interviews and schedule participants
- Provide feedback on interview questions
- Prepare for interviews and work sessions using Gartner provided materials

Gartner Deliverables

- Interview questions
- Key findings and recommendations

Step 2. Develop Job Families and Job Descriptions

Gartner will use the information gathered and assessed during Step 1 to develop job families and job descriptions that are aligned with the City's strategic direction and that reflect industry best practices. Gartner will also conduct a compensation study that will help the City determine whether it needs to change its compensation structure in support of its new job descriptions.

Task 1. Develop Job Families and Job Descriptions

Based on its review of the City's current 7 job classifications and job descriptions, Gartner will work with the City to develop job families and job descriptions that enable the City to recruit and retain qualified staff to support its IT service environment. Gartner will provide best practice examples of job families and job descriptions and modify them based on unique City needs. Gartner will work with the HR organization to ensure these job families and job descriptions fulfill City requirements.

Task 2. Conduct Compensation Study

Upon completion of Task 1, Gartner will conduct a compensation study that will help the City understand whether its current compensation structure can support the new job families and job descriptions in a competitive recruiting environment. Gartner will leverage existing compensation study information as well as evaluate local compensation data.

Task 3. Develop Recommendations

Gartner will use the compensation study results and data gathered during Step 2 to develop recommendations for how the City can improve its compensation structure to ensure it can effectively recruit and retain qualified staff. We will also develop recommendations regarding alignment of the IT organization with the new job family structure.

Gartner Responsibility

- Develop job families
- Develop job descriptions
- Conduct compensation study
- Develop recommendations
- Review job families, job descriptions, and compensation recommendations with the Project Team and Steering Committee

City Responsibility

- Provide feedback on draft job families and job descriptions
- Review and provide feedback on draft recommendations
- Provide additional information as needed

Gartner Deliverables

- Job Families
- Job Descriptions
- Recommended Compensation Structure
- Recommendations regarding Alignment of IT Organization with New Job Family Structure

Step 3. Conduct IT Skills Assessment

Understanding and effectively utilizing the skills necessary to optimize your existing IT organization, and effectively transitioning to new and emerging technologies, is a top priority of

many IT executives today. Where your business is today, and where it needs to be tomorrow is easier to answer than, "Do my people have the skills necessary to meet the business needs of tomorrow?" Gartner will work with the City to conduct a skills self-assessment that helps answer this question. The inventory will provide the City with the information necessary to support redeployment of resources, better management of recruiting and training strategies, as well as support alignment of staff to its new classification structure and job descriptions.

Task 1. Prepare IT Staff Skills Self-Assessment Tool

Based on the results of its data gathering and completion of job classifications and job descriptions, Gartner will work with the City's project team to gather the data necessary to configure Gartner's *skillpower*[™] self-assessment tool. This process will include the completion/configuration of:

- Skills Selection
- Participant and Organization Questions
- Reports
- Participant IDs
- Help Desk Strategy & Plan
- Communications Strategy & Plan

Task 2. Facilitate Data Collection Process

Gartner will work with the City's project team to facilitate the data collection process. The City will be asked to appoint a single point of contact who will work with Gartner to distribute the survey and answer questions staff have while completing the survey.

The IT Skills Inventory will be implemented over the Internet in two phases over a 3-4 week period. In Phase 1, participants will access the *skillpower*[™] site using their assigned login ID or the unique URL provided to them through email. Once the employees have answered the required questions, selected and rated their skills, they will signed-off on their results. Over this two (2) week period the City Inventory Support Representative and the Project Manager will be responsible for supporting participants and managing the progress. Among the responsibilities are:

- Project Manager:
 - Reviewing status reports and sending out the appropriate communications to participants (using the communication templates provided)
 - Providing status once a week to the Project Sponsor
 - Achieving 90%-100% participant and manager IT Skills Inventory completion rate
- Inventory Support Representative:
 - Supporting participant and manager questions during the two IT Skills Inventory phases.
 - Contacting the Gartner Support Representative if support is needed to resolve issues or to answer questions.

Task 3. Validate IT Staff Skills Self-Assessment Results

Once Phase 1 is complete, the managers will begin Phase 2 by logging into skillpower™ and approving the results of all direct reports. During this phase each manager's role is to assure the accuracy of the inventory results and to click the "Approve" button for each direct report. Upon completion of Phase 2, which will occur over a 1-2 week period, Gartner will bring skillpower™ down and begin to process the results. Should a manager disagree with a staff member's self assessment, the manager can override the result and will be asked to meet with the staff member to discuss why they changed the rating. Gartner will work with the City to generate a report that indicates where managers and staff differed in their responses to facilitate further understanding of City skill self-assessment results.

Task 4. Prepare Assessment Findings and Recommendations

Gartner will review the self-assessment results and develop findings and recommendations that will help the City improve its alignment of the IT organization with skills and resources. Gartner will generate a number of reports that facilitate an understanding of the City's self-assessment results including:

- **Skill Summary:** Includes a summary of all skills in the inventory and provides the count of participants distributed across the proficiency rating scale for each skill.
- **Skill Summary (Bench Strength):** Includes a summary of all skills that participants selected in the inventory sorted in descending order by the combined number of participants with Advanced or Master proficiency.
- **Skill Summary (20 Advanced):** Includes a summary of the top 20 skills that have the highest number of participants with Advanced proficiency.
- **Skill Summary (20 Master):** Includes a summary of the top 20 skills that have the highest number of participants with a Master proficiency.
- **Skill Summary (No Advanced and Master):** Includes a summary of skills that participants selected but do not have Advanced or Master proficiency.
- **Skill Summary (Front End):** Includes a summary of skills that participants who selected "Front End & Analysis" as the function that best represents the work they perform on a daily basis, sorted in descending order by the combined number of participants with an Advanced or Master proficiency.
- **Skill Summary (Development):** Includes a summary of skills that participants who selected "Development & Delivery" as the function that best represents the work they perform on a daily basis, sorted in descending order by the combined number of participants with an Advanced or Master proficiency.
- **Skill Summary (Infrastructure):** Includes a summary of skills that participants who selected "Infrastructure & Support" as the function that best represents the work they perform on a daily basis, sorted in descending order by the combined number of participants with an Advanced or Master proficiency.
- **Cat Summary (Bench Strength):** Includes a summary of skill categories that participants selected in the inventory sorted in descending order by the combined number of participants with Advanced or Master proficiency.
- **Training Requested:** Includes all the skills that participants requested training on.

- **Training Requested by Function:** Includes all the skills that participants requested training on by functional area.
- **Skills Universe:** Includes all the skills that were initially loaded into skillpower™.
- **Skills Not Selected:** Includes the skills that were not selected by any of the participants.

Gartner Responsibility

- Configure the skillpower™ tool based on City needs
- Assess City skill self-assessment results and prepare recommendations

City Responsibility

- Provide Gartner with the data necessary to configure the skillpower™ tool
- Facilitate the data collection process to achieve a 100% participation rate if possible
- Ensure managers participate in the data validation process

Gartner Deliverables

- Skills Assessment Findings and Recommendations Including:
 - Recommended mapping of staff to new job family structure

Step 4. Develop Transition Plan

Gartner recognizes transition to the future state IT organization requires planning and stakeholder engagement. To build commitment and minimize risk, Gartner will develop a high level roadmap that outlines transition milestones, dependencies, an estimated schedule, resource requirements, and communication, risk management, and change management plan requirements. Gartner will review the implementation roadmap with the City to ensure there is an understanding of the scope of work required for successful implementation.

Gartner will present the implementation plan to the City's executive team, as appropriate, to solicit further executive sponsorship and support for the transformation of its IT organization.

Gartner Responsibility

- Develop transition plan with prioritized activities
- Develop communications strategy
- Conduct up to two hour discussion on transition plan, including communications strategy

City Responsibility

- Schedule meeting participants and coordinate facility needs
- Participate in transition plan development discussions
- Provide additional information as needed

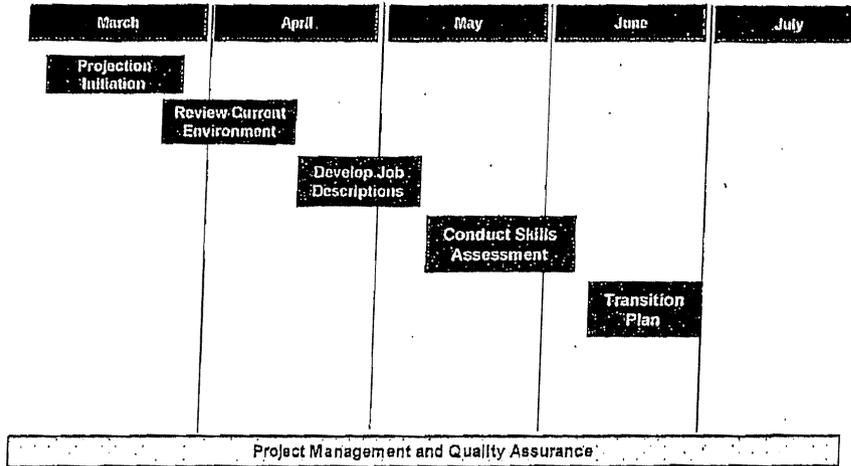
Gartner Deliverables

- Transition Plan
- Communications Strategy

3.1 Project Schedule

Gartner estimates it will take between 13 and 16 weeks to complete this engagement. Gartner will use reasonable business efforts to complete the engagement in accordance with the schedule below. The time it takes Gartner and City to execute a legally binding contract, and the cooperation and availability of City personnel, as well as third parties, may impact the schedule. Depending on the start date of the engagement, major holiday or trade show periods may also impact the schedule. Gartner will advise the City of any necessary schedule changes as they arise.

Figure 4. Estimated Project Schedule



3.2 Summary of Deliverables

Step	Deliverables
Step 0. Project Initiation	<ul style="list-style-type: none"> ■ Work Plan and Schedule ■ Project Initiation Presentation
Step 1. Review current Environment	<ul style="list-style-type: none"> ■ Assessment Key Findings and Recommendations
Step 2. Develop Job Families and Job Descriptions	<ul style="list-style-type: none"> ■ Job Families and Job Descriptions ■ Recommended Compensation Structure ■ Recommendations Regarding Alignment of IT Organization with New Job Family Structure
Step 3. Conduct IT Skills Assessment	<ul style="list-style-type: none"> ■ Findings and Assessment ■ Recommended Mapping of Staff to New Job Family Structure
Step 4. Develop Transition Plan	<ul style="list-style-type: none"> ■ Transition Plan with Prioritized Activities ■ Communications Strategy

4.0 Project Cost

The professional fee to complete this engagement is \$225,000. Travel and related expenses are in addition to our fees and are estimated at a not to exceed amount of \$30,000. The total project budget is \$255,000.

- Gartner will submit expense invoices for payment monthly as incurred.
- Invoices are payable 30 days from the date of invoice. While we do not itemize billing for professional services, we agree and will comply with any reasonable requests for records substantiating our invoices.

A breakdown of our fees is included below.

Table 3. Payment Milestones

Milestones	Professional Fee	Completion Criteria
Review Current Environment	\$40,000	Project initiation meeting completed, interview questions submitted, and assessment key findings and recommendations submitted.
Develop Job Families and Job Descriptions	\$70,000	Job families and job descriptions submitted.
Conduct Compensation Study	\$40,000	Compensation study completed, recommendations regarding compensation structure submitted, and recommendations regarding alignment of IT organization with new job family structure submitted.
Conduct IT Skills Assessment	\$40,000	Skills assessment tool configured, validation of results completed, assessment key findings submitted, and recommended mapping of staff to new job family structure submitted.
Develop Transition Plan	\$35,000	Transition plan with prioritized activities and communications strategy submitted.
Total Professional Fee	\$225,000	
Out-of-Pocket Travel Expenses (not to exceed amount)	\$30,000	
Total Project Budget	\$255,000	

As a standard practice, Gartner's fees encompass more than our consultants' time, including:

- Administrative support to produce high-quality deliverables.
- Ad hoc internal support from Gartner Research on specific engagement issues. Customers of Gartner Research already have access to our unparalleled research information databases and support from our research analysts. Direct participation by Gartner Research analysts on a consulting engagement is quoted using applicable rate schedules. However, our consultants additionally avail themselves of ad hoc internal consultation time with Gartner Research analysts on particular engagement-related issues, including briefings on late-breaking industry developments that have not yet been published through Gartner Research. This latter assistance is provided at no additional charge to the client, since it is included within Gartner's consulting fees.

5.0 Contract

This proposal is in accordance with rates, terms and conditions of the existing contract with the State of Texas #DIR-SDD-204. This proposal, together with the terms and conditions referred to in this section, are intended to constitute the contractual relationship between the parties with respect to this engagement.

5.1 Client Commitment

We have found, based on our extensive experience working with government agencies, that a collaborative and cohesive effort between Gartner and City's project team members is essential to the success of the engagement. Table 4 provides additional information on suggested City resources, roles and responsibilities, and commitment that may help City achieve the Information Technology Organization and Services Transformation objectives.

We recommend a two-tiered project organization structure:

- A steering committee composed of executive-level personnel responsible for providing oversight and direction
- A core project team composed of the City staff responsible for working together with Gartner throughout the project life cycle

In addition, we request that a single point of contact be assigned for project management to be responsible for coordination of City's resources and the overall review and approval processes. Subject matter and technical experts would also be needed to provide input throughout the engagement.

Table 4. City Resources and Key Roles and Responsibilities

City Resources	Key Responsibilities
Project Manager	<ul style="list-style-type: none"> ■ Coordinate project needs, including ensuring allocation of appropriate resources for data collection, interviews, focus group sessions, and review and approval of key deliverables ■ Collect and assemble required documentation from project stakeholders ■ Coordinate review of survey and other data collection tools ■ Distribute data collection tools to internal City stakeholders ■ Collect and conduct review of survey results from City stakeholders for accuracy and potential data gaps ■ Lead/coordinate efforts to resolve potential project issues ■ Identify subject matter and technical experts to provide input on matters pertaining to the service areas (for example, organization, technology, business process) ■ Communicate project activities, accomplishments and issues to appropriate City stakeholders and Gartner project manager ■ Coordinate review of work products and provide single point of contact for assembling input from project participants ■ Help ensure that the project is organized and that the necessary resources are identified and committed to achieving project needs
Executive Sponsor	<ul style="list-style-type: none"> ■ Champion the project ■ Solicit buy-in from other executives as findings and recommendations are presented

City Resources	Key Responsibilities
	<ul style="list-style-type: none"> ■ Keep project focused on achieving key objectives established
Steering Committee	<ul style="list-style-type: none"> ■ Provide executive guidance on project ■ Prepare for workshops by reviewing workshop materials and participate in discussions
IT Staff	<ul style="list-style-type: none"> ■ Complete the IT Skills Assessment survey within expected timeframes
IT Managers	<ul style="list-style-type: none"> ■ Complete the IT Skills Assessment survey within expected timeframes ■ Validate staff self assessment results and if modify results, consult with staff to discuss reasons for doing so
Subject Matter and Technical Experts	<ul style="list-style-type: none"> ■ Provide timely input on data collection needs ■ Review pertinent project work products and deliverables ■ Accurately present City information during work sessions and interviews to provide input for IT service areas

5.2 Proposal Validity Period

This proposal is valid for 60 days from the date on this proposal.

5.3 Assumptions

Please note the following assumptions on which our proposed Statement of Work and pricing are based.

1. Resumes of key personnel provided in this proposal assume a project start date of March 2008. If the actual project start date is different, proposed individuals may not be available. In this event, we will work with City to identify alternative personnel with appropriate skills and background.
2. The work effort described in this proposal assumes that City personnel are available to assist in the project as defined in the Statement of Work. In the event that City personnel are not available, a change of scope may be necessary.
3. City will designate a project manager to act as the primary point of contact to Gartner for this project. The City project manager will be expected to work closely with the Gartner employees as needed and will: (a) approve project priorities, detailed task plans and schedules; (b) notify Gartner in writing of any project or performance issues; and (c) assist in resolving project issues that may arise.
4. Project pricing assumes that Gartner will conduct 12 Interview sessions over a period of one week and that City will arrange all interviews with City personnel.
5. The due diligence (as-is) data is reasonably available via interviews and documentation review.
6. Major milestones will not be delayed due to actions or decisions by City.
7. City will review and approve documents within five business days. If no formal approval or rejection is received within that time, the deliverable is considered to be accepted by City.
8. City personnel will be made available per the final project schedule.
9. With the exception of meetings and workshops, Gartner work will be performed at Gartner locations.

10. Office space, telephones and modem lines will be made available for Gartner staff at City locations for on-site project time.
11. Gartner will have access to printing/copying services at City locations.
12. City is to schedule City resources for project activities and provide meeting facilities as necessary.
13. All deliverables will be developed using Microsoft products (for example, Project, Excel, Word and PowerPoint).

5.4 Scope

The scope of the effort encompasses the City of San Antonio's central IT organization. Department-level IT organizations will not be assessed, but will be considered from an IT process linkage perspective.

5.4.1 Changes to Scope

All City requests for changes to this Proposal must be in writing and must set forth with specificity the requested changes. As soon as practicable, Gartner shall advise City of the cost and schedule implications of the requested changes and any other necessary details to allow both parties to decide whether to proceed with the requested changes. The parties shall agree in writing upon any requested changes prior to Gartner commencing work.

As used herein, "changes" are defined as work activities or work products not originally planned for or specifically defined by this Proposal. By way of example and not limitation, changes include the following:

- Any activities not specifically set forth in this Proposal
- Providing or developing any deliverables not specifically set forth in this Proposal
- Any change in the respective responsibilities of Gartner and City set forth in this Proposal, including any reallocation or any changes in engagement or project manager staffing
- Any rework of completed activities or accepted deliverables
- Any investigative work to determine the cost or other impact of changes requested by City
- Any additional work caused by a change in the assumptions set forth in this Proposal
- Any delays in deliverable caused by a modification to the acceptance criteria set forth in this Proposal
- Any changes requiring additional research analyst time or changes to research analyst resources

5.5 Authorization

By signing below, City agrees to the terms of this SOW and represents that this SOW, together with the State of Texas DIR-SDD-204 Agreement constitutes the contractual relationship between the parties with respect to this engagement.

SUBMITTED ON BEHALF OF GARTNER, INC.

Irma J. Fabular

SIGNATURE

Irma Fabular, Vice President

PRINT NAME AND TITLE

25 February 2008

DATE

AGREED ON BEHALF OF CITY OF SAN ANTONIO

SIGNATURE

PRINT NAME AND TITLE

DATE

Billing Address (please mark corrections)	Client PO Number
City of San Antonio	POnumber
Accounts Payable	
515 S. Frio Street	
San Antonio, Texas 78207	
Telephone: +1-CBphone	

■ ■ ■ ■ ■ Appendices

Appendix 1. Professional Biographies

Following are the project team members who will likely work on this proposed engagement. In the event that the individuals proposed herein are not available, Gartner will substitute another qualified professional with similar expertise and credentials.

Irma J. Fabular
Vice President, Gartner

Irma Fabular has more than 20 years of experience in information technology. She specializes in strategic planning, needs assessment, procurement and vendor selection, contract negotiations, and project oversight. During the last 12 years with Gartner, Ms. Fabular has completed various consulting engagements that encompass procurement and implementation of enterprise technology solutions; assessment of IT/business alignment; development of IT service delivery models; establishment of project management office and IT governance; and strategic sourcing.

Her recent experience includes the following:

- City of Winnipeg—provided quality assurance for the City's IT service delivery transformation project. Gartner conducted benchmarking of current services as well as determined an enterprisewide IT services model.
- Province of Saskatchewan, Canada—conducted several engagements including government-wide assessment of IT services to determine opportunities for centralization, shared services, and strategic sourcing. Also assisted with development of governance and funding model with the crown corporation (Internal Services Corporation) responsible for geomatics support and maintenance.
- Government of the Northwest Territories—assessed the Government's IT infrastructure services delivery model to determine an effective organization structure that is based on customer-centric services and processes. Used ITIL framework for process assessment.
- State of Colorado Department of Public Safety—assessed the Department's IT services delivery organization and provided recommendations for re-organizing current structure based on customer service expectations and Integrated IT process considerations.
- City of New York—defined structure and roles and responsibilities for the program management office (PMO) that oversees the City's \$1B+ consolidation initiative pertaining to 911 emergency communications for police, fire, and medical services.
- University of Michigan—directing project to assess effectiveness and maturity of the IT infrastructure service delivery organization. ITIL framework is being used to assess overall effectiveness and maturity process. Also included is road map planning and project oversight of implementation.
- State of North Dakota—directed team on study to optimize IT infrastructure service delivery and processes. This encompassed use of the ITIL framework to assess process effectiveness, and a benchmarking study to determine staffing vs. workload comparison.
- Minnesota State Colleges and Universities—assessed administrative systems solutions, including ISRS; assisted with development of an enterprise architecture planning framework and IT governance to support the framework; completed administrative systems review project.
- University of Kansas—directed a project to define IT services and associated costs for the University's infrastructure services team.
- Kentucky Department of Education—directed project team efforts to assist in assessing the efficiency and effectiveness of current IT capabilities in the areas of IT governance, project management, investment management and third-party vendor management. Utilized Gartner cost benchmarking database to assess efficiencies.

- County of San Diego—conducted several engagements including: a) countywide assessment of existing portfolio of applications, which included rollout of IT investment management processes and tools throughout the organization; b) project oversight for \$60M enterprise solutions implementation encompassing HR, payroll, and financials; c) assessment of a jail management system; and d) implementation of an emergency dispatching system.
- City of San Diego—conducted several engagements including: a) development of the City's first IT strategic plan that encompasses assessment of enterprisewide applications to support the city's goals and objectives and b) IV&V and project oversight of enterprise applications systems implementation, e.g., criminal records management system for Police Department, HR system, and financial management system.
- State of Minnesota Office of Technology—assisted in statewide rollout of a project management office (PMO), which encompassed development of strategic direction and goals, project management methodology framework, training and certification, and coaching and mentoring strategies.
- State of Arizona Department of Economic Security—assessed plans and procurement documents for implementation of "no wrong door" initiative, and recommended risk mitigation measures.
- County of Maricopa (2.8 million population)—developed an e-procurement strategy for the Materials Management Department, which include business process review and RFP development.
- California Highway Patrol—completed a feasibility study report for the California Highway Patrol's statewide 9-1-1 system used in over 20 communications centers. This included integrated public safety applications including geographic information systems, automatic vehicle location, interfaces, and disaster recovery.

Her previous experience includes the following:

- San Diego Fire Department and the San Diego Sheriff's Department—Ms. Fabular managed complex multi-platform information systems for these Departments, each serving a population of over 1.2 million. In those capacities, she was responsible for the entire systems' development life cycle and operational maintenance, including software, hardware, network and staff resources. This includes management of public safety systems integrated with a regional geographic information system and automatic vehicle location (AVL) systems.
- UCSD Medical Center, Computer Sciences Corporation, and IMED Corporation—Ms. Fabular held positions where she specialized in systems analysis and design, database management and software engineering for various automated systems for healthcare, finance, HR, payroll, and manufacturing.

Ms. Fabular holds a master of science degree in systems management with emphasis in information systems from the University of Southern California, and a Bachelor of Science degree in business administration from San Diego State University.

James Lewandowski
Associate Director, Gartner Consulting

James Lewandowski has more than 20 years of experience in IT- and HR-related activities. He joined Gartner in 2000 and works out of the Arlington, Virginia office. He consults as a subject-matter expert in the area of organizational development. He has extensive experience in conducting organizational assessments that provides clients a comprehensive view of their organization's strengths and weaknesses as compared to "best-in-class" organizations. Mr. Lewandowski brings to our client engagements broad project management and process design knowledge, technical leadership experience and a practical hands-on familiarity in running IT organizations.

Mr. Lewandowski's recent assignments have included:

- For **House of Representatives** — assessed the effectiveness and efficiency of the Office of the Chief Administration Office (CAO) ability to accomplish its information technology roles within the U.S. House of Representatives. Compared the CAO's current practices and structure with industry best practices and structures of organizations of similar size and mission. Provided recommendations to improve organizational effectiveness through re-designing organizational structures, roles and responsibilities.
- For **US Patent and Trademark Office** — led integrated project team that assessed the readiness of the OCIO to successfully execute the 21st Century Strategic Plan and developed executable recommendations to address any gaps. Developed a roadmap for the USPTO OCIO to support USPTO business areas in fulfillment of the 21st Century Strategic Plan goals.
- For **US Alcohol, Tobacco and Firearms**- led integrated project team that analyzed current outsourcing contracts and internal costs against industry peers. Developed a concept of operations and supporting organizational structure to support transition to an agile, flexible, and highly effective supplier of information technology to ATF and the DOJ community.
- For **US Marine Corp System Command** — led team in evaluating current acquisition process. Analyzed organizational options to improve USMC efficiency and ultimately benefit the war fighter by providing more robust business and weapon systems in a more timely and cost-effective manner.
- For a **\$23 billion telecom company** - provided IT organization with design and high-level process recommendations that significantly increase internal efficiencies. Enabled client to realize more than \$4 million in IT cost savings during first year of implementation.
- For **\$15 billion international clothing manufacturer**—developed IT job families and defined new roles for IT organization moving from a highly decentralized environment to a centralized organization. Project manager for installation of career development software application that provides an online tool for employees to manage their own careers and gives the company an overview of current competencies and skills resident in the IT organization.

Prior to joining Gartner, Mr. Lewandowski was a senior portfolio manager for IBM. His responsibilities included developing and managing the work authorization process for the AT&T outsourcing agreement. His work with the initial AT&T outsourcing agreement contributed to the

awarding of all AT&T application development to IBM. Prior to IBM, he spent 15 years at AT&T where he developed sales automation tools for AT&T's 10,000 account executives and directed the development of AT&T's business data warehouse.

Mr. Lewandowski holds a bachelor's degree in economics from Michigan State University, a master's degree in economics from the London School of Economics, and an MBA and Ph.D. work in economics and statistics from the University of Chicago.

Phoebe E. Cameron*Director, Gartner Consulting*

Phoebe Cameron's areas of expertise include feasibility studies, procurement assistance, business and IT strategic planning incorporating balanced scorecard methodology, performance measurement, IT governance, IT portfolio management, business process and workflow analysis, organizational analysis and administration. Ms. Cameron has worked with public agencies at the federal, state and local levels for more than 15 years.

Her experience includes the following:

Business and Information Technology Strategic Planning and Governance

- Project Manager for the New York City Health and Hospitals Corporation (HHC) IT Governance Project. HHC engaged Gartner to assess its existing IT governance structures and develop recommendations for implementing a more effective IT governance structure in alignment with its newly developed IT strategic plan. This effort involved conducting interviews with the HHC CIO and project manager. It also involved assessing governance documents and observing IT governance meetings. Ms. Cameron was responsible for conducting these activities as well as documenting the current and future governance structures for review with HHC leadership. Ms. Cameron facilitated a workshop with stakeholders and has prepared additional materials facilitating communication of the new governance structures to be adopted by HHC over the next several months. Ms. Cameron will also be responsible for developing charters for each of the new bodies and helping the CIO communicate how these entities will facilitate improved IT decision-making in the future.
- Project Manager for the City of New York IT Strategic Plan. This project involved working with City subject matter experts to build upon the IT Strategic Direction and craft an overall IT Strategic Plan for the City. This Plan includes IT Strategic Initiatives and a roadmap for implementation. Ms. Cameron was responsible for the overall project management of ten teams that worked to define more than 20 IT Strategic Initiatives. She also led two teams as an expert in 311/CRM and social services.
- Engagement manager for the City of Boston CRM/WOM Implementation Project. This project involved working with City leadership to develop an appropriate enterprise-wide CRM/WOM implementation strategy and plan for the City. This project involved assessing existing CRM/WOM applications within existing call centers. It also involved conducting interviews and surveys with customer service managers and staff to assess the City's overall needs for an enterprise CRM/WOM system. Based on the data gathered, Ms. Cameron worked with the Gartner team to help develop a strategy that met the City's particular goals and objectives related to improved customer service delivery. Ms. Cameron was responsible for ensuring the team applied Gartner CRM/WOM and IT strategy best practices. She was also responsible for ensuring the City's needs were met by Gartner deliverables.
- Project Manager for the City of New York IT Strategic Direction. This project involved conducting interviews and workshops with City business and IT leadership to develop an enterprise-wide IT strategic direction for the City. Ms. Cameron was responsible for conducting interviews, preparing workshop materials and facilitating workshops with City stakeholders. She also helped develop the final deliverables for the City including presentations and an IT Strategic Direction final report.

- Engagement manager for the City of Sacramento 311 Program Implementation Project. This project involves working with City leadership to develop an appropriate 311 strategy, given City priorities and resources. Ms. Cameron has facilitated workshops with internal and external stakeholders to conduct data gathering and define an overall strategy and organizational design for the 311 call center. She has also developed an implementation plan and initial budget estimates for Phase 1. The strategy and implementation plan cover governance, process, information technology and telecommunications systems and support, and organizational design for the 311 Program.
- Project manager for the California State Water Resources Control Board strategic planning process. This project's first phase involved developing and facilitating a priority-setting approach, facilitating meetings with stakeholders and preparing the priority setting results. The second phase involved conducting internal and external stakeholder interviews and focus groups, facilitating leadership workshops used to develop strategic plan elements, and preparing the final draft strategic plan. The final phase involved helping facilitate the implementation and evaluation of tracking and reporting processes related to the strategic plan. Ms. Cameron was responsible for client relations, managing project scope and contracts.
- Project manager for the State of Washington Department of Labor and Industries (L&I) IT Organizational Alignment and Change Management Project. This project involved assessing L&I's current governance, IT architecture and IT portfolio management processes. Based on this assessment, recommendations were made and reviewed in a workshop setting with executives and key stakeholders. Ms. Cameron helped facilitate implementation of tools and processes that will ensure L&I successfully implements these recommendations.
- Project manager for the City of Sacramento Enterprise Technical Architecture (ETA). This project involved identification of business and technical drivers, assessment of the City's technical architecture baseline and facilitation of ETA workshops. These workshop discussions led to decision making by key City IT stakeholders regarding the City's desired ETA and how it would transition to that architecture during the next two years. This project also included the development of a final report that includes a description of strategies, summary of the ETA, a migration plan for the next 18 months, and ETA principles.
- Project manager for the Franchise Tax Board IT Governance Project. This project involved documenting and assessing existing governance bodies and processes within the organization. Ms. Cameron conducted interviews with key internal stakeholders, facilitated project team meetings, prepared deliverables, presented findings, and helped facilitate discussions with leadership regarding proposed changes to the organization's IT governance structures and processes.

Feasibility Study Reports (FSRs) and IT Procurement Plans (ITTPs)

- Engagement manager for the California Department of Industrial Relations Cal/OSHA Program Enterprise Information System Project. This project is focused on evaluating and preparing a business case and procurement plan for the replacement of nine disparate systems with a single enterprisewide system that facilitates data exchange and the tracking and analysis of all relevant program information. As engagement manager, Ms. Cameron is responsible for ensuring Gartner methodology and deliverables meet client expectations. As an expert in California FSR and ITTP requirements,

Ms. Cameron is also helping advise the client and team members in the FSR and ITPP development process. Ms. Cameron is responsible for final quality assurance of all deliverables.

- Engagement manager for the California Department of Rehabilitation Enterprise Rehabilitation System Project. This project was focused on evaluating and preparing a business case and procurement plan for the replacement of an antiquated mainframe case management and cashing system with a commercial off-the-shelf (COTS) product. Ms. Cameron was responsible for ensuring Gartner methodology and deliverables met client expectations. Ms. Cameron facilitated decision-making sessions with leadership to ensure they fully support the investment in this critical project. Ms. Cameron was responsible for final quality assurance of all deliverables.
- Subject matter expert for the California Department of General Services Fleet Management Analysis and Reporting System. This project involves preparation of the business case and procurement plan for a new data warehouse solution that will enable the State to track and report on the State's fleet assets. As subject matter expert, Ms. Cameron is responsible for advising the project team and client in the FSR and ITPP development and approvals processes. Ms. Cameron also prepared the FSR economic analysis worksheets that present the budgetary and return-on-investment numbers associated with this project.
- Lead consultant for the California Secretary of State, Elections Division Statewide Voter Registration Database Project. As lead consultant, Ms. Cameron was responsible for development of the business case for the feasibility study, including identification of system requirements. This project involved conducting sessions with county stakeholders as well as with State stakeholders internal and external to the Department. As an expert in California FSR requirements, Ms. Cameron also helped advise the client and team members in the FSR development process. Ms. Cameron was also responsible for developing the economic analysis worksheets, fully documenting assumptions related to proposed solution cost estimates.
- Project manager for the California Department of Alcoholic Beverage Control FSR for the enhancement or replacement of its CABIN system. As project manager, Ms. Cameron was responsible for managing the project team, project logistics, and acting as the primary contact for the Department. This project involved reviewing existing system data, interviewing internal and external stakeholders, conducting a requirements focus group, and conducting the alternatives analysis necessary to select the appropriate solution. The Department of Finance approved implementation of the first project phase involving replacement of the Department's infrastructure in preparation for replacement of the CABIN system. This project phase has been completed. In order to obtain approval for the second phase involving selection and implementation of a new COTS solution, the Department was asked to submit a revised FSR focusing on this phase only. Ms. Cameron helped develop this revised FSR and supporting ITPP. The FSR and ITPP have been approved by the control agencies.
- Consultant for the California Department of Conservation for the Division of Recycling Integrated Information Systems (DORIIS) Project. As a consultant on the project, Ms. Cameron was responsible for conducting interviews with internal and external stakeholders to help define the current environment and develop system requirements. This project also involved conducting the alternatives analysis by issuing and assessing responses to a request for information (RFI) from vendors as well as interviews with similar state agencies regarding their solutions and whether they would be applicable to

the State of California. When the Division was asked by the Department of Finance (DOF) to update the FSR, Ms. Cameron participated as lead consultant responsible for updating the business case so that it reflected changes in the Division's business environment. She was also responsible for updating the project and risk management plans and economic analysis worksheets so that they reflected additional DOF project phasing requirements. This FSR has been approved by control agencies.

- Engagement manager for the Department of Industrial Relations, Office of Self-Insurance Plans Feasibility Study Report for the redesign or replacement of its SIP Oracle Online system. As engagement manager, Ms. Cameron was responsible for ensuring the project team's deliverables met SIP's expectations and Gartner's quality standards. Ms. Cameron also acted as a consultant on this engagement, responsible for data gathering and analysis, facilitating client meetings, and writing and editing FSR sections.

Procurement Assistance

Including Requirements Definition, Workflow Process Mapping and request for proposal (RFP) Development

- For the City and County of Denver, served as project manager and a lead consultant where we assessed the suitability of a specified CRM solution for Denver's CRM/3-1-1 needs. Activities included requirements definition, a gap analysis to ascertain suitability of the product, and a cost-benefit analysis, and presentation of findings and recommendations to Denver's executive management team.
- Engagement manager for the California Department of Alcoholic Beverage Control system replacement project. As engagement manager, Ms. Cameron ensured deliverables met client expectations and satisfied State procurement guidelines. Ms. Cameron helped facilitate procurement team evaluation sessions, ensuring State procurement guidelines were followed consistently. This procurement led to the selection of a new COTS licensing and case management system that will be implemented in 2006.
- Lead consultant for the California Secretary of State, Elections Division Statewide Voter Registration Database Project. As lead consultant, Ms. Cameron was responsible for development of RFP-level requirements. This project involved facilitating sessions with county stakeholders as well as with State stakeholders internal and external to the Department. As an expert in California procurement processes, Ms. Cameron also helped advise the client and team members in the RFP development process.
- Project manager for the California Department of Industrial Relations, Division of Labor Standards Enforcement Case Management and Licensing System Procurement project. As project manager, Ms. Cameron was responsible for managing the project team, project logistics, and acting as the primary contact for the Department. This project involved defining the procurement strategy, preparing a project charter, mapping existing workflow processes, defining system requirements, conducting COTS product market research, preparing the procurement documents, facilitating the procurement process and working with State control agencies to ensure the process complied with State procurement rules. Ms. Cameron worked with the proposal evaluation team and the Department of General Services to evaluate final proposals. Ms. Cameron also helped update the final FSR as the last step required to complete the control agency approval process. This FSR was approved and the Department is currently implementing the new

COTS system. Gartner was contracted to provide oversight of implementation and Ms. Cameron is participating in this effort as well.

- Consultant and lead consultant for the Department of Conservation for the Division of Recycling Integrated Information Systems (DORIIS) procurement project. As consultant, Ms. Cameron was responsible for facilitating work sessions documenting existing work processes for inclusion in the RFP. As lead consultant, Ms. Cameron was responsible for updating the RFP to reflect changes in State procurement guidelines as well as in the proposed solution updated by the Division. Ms. Cameron was also responsible for final review and editing of the RFP, ensuring all feedback obtained from internal reviews had been incorporated into the final Draft RFP to be reviewed by the Department of General Services (DGS). This RFP was approved by DGS and the procurement is currently underway.

Her previous experience includes the following:

- The United Way, San Francisco—Associate Vice President, where she facilitated focus groups, directed the design of a multimillion-dollar fund allocation process, and assessed funded programs' ability to achieve target goals and objectives. Program assessment included conducting site visits and a review of program outcomes for local agencies. Ms. Cameron staffed and trained volunteers working on the United Way Helpline, a central call center referring callers to appropriate Bay Area health and human services provided by local government and non-profit agencies. Ms. Cameron also assisted in the development of a business strategic plan for a department with The United Way.

Ms. Cameron earned a master's degree in business administration from the Graduate School of Management at the University of California at Davis. She also graduated from Occidental College in Los Angeles with a bachelor of arts degree in history. Ms. Cameron received training in the balanced scorecard approach and methodology from the Balanced Scorecard Collaborative, founded and led by the Drs. David Norton and Robert Kaplan.

Rebecca Z. Jones*Director, Gartner Consulting*

Comment [FC1]: Do we want to keep Rebecca's bio in here?

Rebecca Jones has more than 20 years experience bridging the worlds of human capital management and information technology. She has assisted both private and public sector clients to improve business alignment and performance by building strong human capital strategies and business action plans, as well as managing implementation projects. Ms. Jones focuses on projects related to, organization transformation, organization structure, project management, change management, teambuilding, management development, career development, governance, strategic sourcing and training.

Based in McLean, Virginia, she joined Gartner's Federal human capital practice, which provides consulting, software solutions and syndicated research in the area of HR, in 2000. She has been a frequent speaker on Human Capital issues at Gartner events, including the GCON and the Sourcing Summit. She has also presented a program on Change Management for the Defense University.

Recent assignments include:

Organizational Planning and Assessment Services

- Served as project manager for a Federal security agency—recommended a human capital strategy for the acquisition and retention of critical competencies and skills that responded to the President's management agenda and generational diversity issues.
- Served as project manager for a major Department of Commerce line of business—identified the OCIO people, process and technology required to achieve its 21st. Century Strategic Plan, assessed the current state, identified gaps, and recommended action plans.
- Served as project manager for a 24,000-person DOD organization—developed a program and training to transition the organization from a transactional to a strategic organization.
- Served as subject matter expert for a municipal Justice Agency—conducted an organization assessment, competency evaluation, an organization strategy to improve organizational efficiency and effectiveness.
- Served as project manager for an HHS organization—developed and supported the development of a new structure to manage a major line of business. Developed organization design, communication strategy and plan, transition management approach, and roles and responsibilities.

Strategic Program Support

- Served as subject matter expert for a major financial organization—developed a communication strategy and plan, organization design, and impact analysis to support their sourcing strategy.
- Served as subject matter expert for a major federal agency with 50 offices across the United States—enabled their e-government strategy through the development of a new organization structure, communication plan, leadership competency model, staffing analysis and skill inventory.
- Served a project manager for a DOD Command—enabled the transformation of the organization through the merger of three locations, and improved efficiency and

effectiveness by conducting an organization assessment, skill inventory, and developing a new organization design.

- Served as subject matter expert for a federal financial institution—designed career paths and competency models that aligned the organization with PMA and Clinger-Cohen compliance requirements, provided greater opportunity for staff development, and ensured the skill and competency levels met organization requirements.
- Served as subject matter expert for a major federal agency—conducted a human capital evaluation and risk assessment that identified organization strengths and weaknesses and change readiness. Developed a communication strategy as a component of a sourcing strategy. Made recommendations to enable the transition to a new management model that aligned more closely with the President's Management Agenda.
- Served as subject matter expert for an HHS agency—supported the implementation of a new organization model, finalized the organization structure and advised the transition team on change management requirements.
- Served as subject matter expert for a Justice Department agency—Developed stakeholder requirements, organization design, and concept of operations to improve performance in a multi-sourced environment.
- Served as project manager for a DOD agency developed a workforce plan and job families to improve organization effectiveness.
- Served as project manager for a state technology authority—designed a retained organization design for the strategic sourcing of the telecommunications division. Deliverables included an organization structure, key roles and responsibilities and a process review. The new design ensured the state was able to transform to their new delivery model. Directed the development of new job descriptions and compensation program for the retained positions.
- As a subject matter expert for a DOD MACOM—designed the human capital component (organization design, governance structure, roles) in support of a strategic CONOPs.
- As subject matter expert for a major federal agency—conducted an organization assessment and developed a new structure and roles to improve the relationship with their service provider.
- As subject matter expert for a DOD Command—assessed the efficiency and effectiveness of the current organization structure, analyzed issues, and made recommendations for improvement.
- As subject matter expert for an HHS agency—developed a leadership competency model and training program to improve the management of their sourcing business model.

Ms. Jones spent five years as Assistant Vice President of Technical Training and Organization Development for Reliance Information Technology where she directed the merger of the IT functions of two organizations. Prior to joining Reliance, Ms. Jones spent 13 years at Insurance Services Office, where she was Group Manager of Human Resources. In this role she directed a department responsible for recruiting, compensation, benefits, employee relations, training, and organization development for the IT division.

Ms. Jones received a bachelor's degree in American studies from Douglass College—Rutgers University and an MSW in organization development/group process from Washington

University-St. Louis. She has attended Stevens Institute of Technology Information Technology Management program.

Any questions regarding this proposal
should be addressed to:

Irma Fabular
Vice President
Gartner, Inc.
7676 Hazard Center Drive
Suite 80
San Diego, CA 92108
Telephone: +1 619 542 4811
Facsimile: +1 619 542 4801
E-mail: irma.fabular@gartner.com

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Gartner:

FOR THE PROCUREMENT OF PROFESSIONAL SERVICES BY GARTNER FOR AN ASSESSMENT OF
ITSD.

BENCHMARKING SOLUTIONS TO DEVELOP APPROPRIATE MEASUREMENTS FOR CONTINUOUS
MANAGEMENT OF IT ENVIRONMENT.

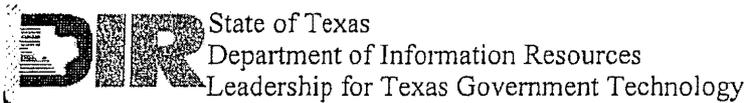
OPTIMIZATION - GOVERNMENT MANAGED SERVICES ASSESSMENT AND IT ROADMAP

SEE PAGES 14 - 16, ATTACHMENT A OF DIR-SDD-204 CONTRACT WITH GARTNER

Appendix A
Standard Terms and Conditions For Services Contracts

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Gartner Subscription Services

Gartner, Inc. provides subscription services to Texas governmental entities through DIR.

How to Order

- Contact the Gartner representative for product and pricing information.
- The Gartner representative will send you an order form via fax or e-mail.
- Generate a purchase order, made payable to the **Department of Information Resources**, Vendor ID 331-331-3313-300.
Note: You must reference contract number **DIR-SDD-204** on your purchase order.
- Fax your purchase order and signed order form to DIR at **512-475-4759**, Attention: Tracy Limon.

Contract Information

To access PDF files, use the free [Adobe Acrobat Reader](#).

- Contract [DIR-SDD-204](#) expires 08/22/2008 (76 KB)
- [Appendix A](#), Standard Terms (149 KB)
- [Exhibit A](#), Other Services and Fee Schedule (116 KB)
- [Exhibit B](#), Subcontracting Plan (240 KB)
- [Amendment 1](#) (28 KB)
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- [Amendment 3](#) (20 KB)

Contacts

Product Information

[William Whitehair](#)
Phone: 512-264-0785

Contract Information

[Joan Scott](#)
Phone: 512-475-3290



Department of Information Resources
300 West 15th St., Suite 1300
Austin, TX 78701 ([Map & Directions](#))
1-512-475-4700

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[Link Policy](#) | [Compact with Texans](#)
[DIR Contacts](#) | dirinfo@dir.state.tx.us

Last updated January 14, 2008

STATE OF TEXAS
DEPARTMENT OF INFORMATION RESOURCES

CONTRACT FOR SERVICES

GARTNER, INC.

1. Introduction

A. Parties

This Contract for Services is entered into between the State of Texas, acting by and through the Department of Information Resources (hereinafter "DIR") with its principal place of business at 300 West 15th Street, Suite 1300, Austin, Texas 78701, and Gartner, Inc. (hereinafter "Vendor"), with its principal place of business at 56 Top Gallant Rd., Stamford, CT 06902-7747.

B. Compliance with Procurement Laws

This Contract is the result of compliance with applicable procurement laws of the State of Texas. DIR issued a posting on the Texas Building and Procurement Commission's Electronic State Business Daily, posting number DIR-SDD-TMP-066, on August 9, 2005, for Gartner, Inc. Research and Advisory Services.

C. Order of Precedence

This Contract; Appendix A, Standard Terms and Conditions For Services Contracts; Exhibit A, Other Services and Fee Schedule; and Exhibit B, Vendor's Historically Underutilized Business Subcontracting Plan, are incorporated by reference and constitute the entire agreement between DIR and Vendor. Each purchase order under this Contract that is accepted by vendor will be subject to this Contract. In the event of a conflict between the documents listed in this paragraph, the controlling document shall be this Contract, then Appendix A, then Exhibit A, and finally Exhibit B. No additional term and condition of a purchase order issued by a customer can weaken this Contract.

2. Service Offerings

Services available under this Contract are limited to Gartner, Inc. Research and Advisory Services as specified below. Vendor may incorporate changes to their services offering; however, any changes must be within the scope of services awarded based on the posting described in Section 1.B above.

In order to remain current and timely in its Service offerings, Vendor may make minor modifications from time to time in the content of any Service. If Vendor discontinues any Service in its entirety, Customer may, at its option, receive a substitute Service of equal value of the discontinued Service.

A) Reference Subscription Services

Reference services allow the Customer to access Gartner Core Research. Gartner Core Research includes but is not limited to: Gartner blogs, Gartner Fellows, Magic Quadrants, Hype Cycles, Alerts, Perspectives, Guides, Newstakes, Teleconferences, Executive Summaries, Gartner Dataquest Market Databook Topline.

B) Advisor Subscription Services

Advisor Subscription Services include: all services listed above in Reference Subscription Services, Unmetered Inquiry, Talking Technology Series, Teleconference Access, and one Gartner Summit Event ticket.

C) Other Services

In addition to subscription services, Customers may purchase other services specified in Exhibit A.

3. Pricing

Customers purchasing services under the Contract may negotiate more advantageous pricing or participate in special promotional offers. In such event, a copy of such better offerings shall be furnished to DIR upon request.

If pricing for services available under the Contract is provided at a lower price to: (i) an eligible Customer who is not purchasing those services under the Contract or (ii) any other entity or consortia authorized by Texas law to sell said services to eligible Customers, then the available price in the Contract shall be adjusted to that lower price. The Contract shall be amended within ten (10) business days to reflect the lower price.

A. Subscription Services Pricing

The determination of and pricing for Subscription Services as set forth in Sections 2.A and 2.B, is specified below.

1) Vendor will provide DIR with a list of Customers that wish to procure the subscription services no later than August 1 of each year of the contract. This list shall include, but will not be limited to Customer entity name, Customer contact person, telephone number, number of Customer Users, and a summary of subscription services to be procured.

2) Vendor's aggregated list of Customer Users will determine which pricing tier listed below the State of Texas Customer will be charged for subscription services.

3) Any Customer that purchases subscription services after the initial order has been placed will receive the subscription services at a prorated amount. The prorated amount will be based on the then-current pricing tier for the State of Texas customers.

4) All price quotes provided by the Vendor to the Customer will include DIR's 2% administrative fee.

5) Pricing to the Customer for the subscription services is listed below. The pricing includes the DIR administrative fee. Pricing is based on an individual per User seat.

SUBSCRIPTION SERVICES PRICING

# of Users	Customer Price-Advisor Subscription	Customer Price-Reference Subscription
1 - 9	\$15,300	\$9180
10 - 24	\$8772	\$7140
25 - 49	\$7548	\$4896
50 - 99	\$6528	\$3978
100 - 249	\$5712	\$2652
250 +	\$5304	\$2346

B. Other Services

- 1) The prices to Customer for other services, as set forth in Section 2.C are specified in Exhibit A.
- 2) All price quotes provided by the Vendor shall include DIR's 2% administrative fee.

4. Access by Electronic Delivery

- A) Upon payment of the Subscription Service fees, Vendor will provide Customer with passwords to permit electronic access to the Services for up to the maximum number of Users specified in the Purchase Order. A User is an individual named by the Customer who is licensed by Vendor to use the Services. Customer will limit access to the Services to the number of Users specified in the Purchase Order. Customer may substitute a User without Vendor's prior approval if: (i) a User leaves Customer's employ, or (ii) a User's job function has substantially changed, so that the User's access to the Services is no longer deemed necessary by Customer. If Customer wishes to substitute a User for any other reason, Customer must obtain Vendor's prior written approval to do so, which approval, if requested on an occasional and limited basis, will not be unreasonably withheld.
- B) Multiple usage of individual Seat User Passwords represents a violation of use under this contract. Such instances of misuse include, but are not limited to (a) Users who share Password Ids with others who sign in simultaneously, (b) Users who sign back into Vendor's web site (Gartner.com) within 2 hours without logging off Vendor's Web

Vendor Contract No. _____

Site, (c) Users who open multiple browsers (clicking in on their internet browser icons) while they have a session active on Vendor's web site (Gartner.com), or (d) Users who act in a manner that may infringe and violate U.S. Copyright Laws by reproducing and distributing excessive multiple copies of Research publications for other non-Users in their organization. Upon Vendor's discovery of such misuse of Services, Vendor shall request in writing that the Customer either (1) stop the conduct that represents a misuse of the Seat license; or (2) purchase additional Seats to correspond to the usage. In the event of further misuse by the End User, Vendor may deactivate User's password and access to the Services.

- C) Each User who accesses the Services by the Vendor Web site will receive a password. Customer shall notify Vendor when a User is no longer entitled to use a password so that Vendor may cancel that password and issue a new password for a replacement User, if any. Users may not share passwords. Each User may (i) print one copy of Vendor individual research documents for the User's personal use, for the benefit of the Customer; (ii) make limited copies and/or excerpts from individual research documents for *internal* presentations or reports to be shared with other Customer personnel in the same venue; and, (iii) circulate copies of the Services, electronic or otherwise, only to other Users. Such copies may not be further reproduced or distributed.
- D) User's may not reproduce or distribute the Services *externally* without Vendor's prior written permission, except Customer may externally use an individual research document in its entirety if it purchases a reprint for the individual document. Customer may excerpt from the Services only if Customer obtains the prior written approval of Vendor's Relations Department, at quote.requests@gartner.com. Any approved external use of the Services must comply with Vendor's Copyrighted Materials -- Usage and Quote Policy, which may be viewed on Vendor Relations section of gartner.quotes.com. Services may not be stored by Customer on any information storage and retrieval system.
- E) The Services are owned by Vendor or its licensors and are protected by copyright and other applicable laws. Vendor reserves all rights to the Services not expressly granted to Customer under this Agreement.
- F) Customer shall to inform all Users that Vendor may monitor activity on its web site, including access to and use of the Services by individuals Users. Vendor may monitor activity on Vendor's web site including access and use of the Services by individual Users who have acquired Research or Advisory Seats under the Contract. Upon mutual request of the parties, each agrees to provide the other with available records or other relevant evidence of usage compliance applicable only to the Research and Advisory Services provided under the Contract.

5. Notification

All notices under this Contract shall be sent to a party at the respective address indicated below.

If sent to the State:

If sent to the Vendor:

Vendor Contract No. _____

Sherri Parks, Service Delivery Division
Department of Information Resources
300 W. 15th St., Suite 1300
Austin, Texas 78701
Phone: (512) 475-4700
Facsimile: (512) 475-4759
Email: sherri.parks@dir.state.tx.us

Bill Mohan, Director, Government
Contracts
Gartner, Inc.
8405 Greensboro Dr., 6th Floor
McLean, VA. 22102
Phone: (703) 226 - 4845
Facsimile: (703) 226- 4703
Email: bill.mohan@gartner.com

6. Authorized Exceptions to Appendix A, Standard Terms and Conditions for Services Contracts.

1) **Appendix A, Section 3, Definitions**, is amended to include the following:

- G. **Services** – are the research services purchased by Customer.
- H. **User** - is the individually named user who is licensed to use the Services.

2) **Appendix A, Section 4.B, Modification of Contract Terms and/or Amendments**, is amended to delete paragraph 2 in its entirety.

3) **Appendix A, Section 4 , General Provisions**, is amended to included as follows:

G. This Agreement is for the benefit of the parties only. None of the provisions of this Agreement are for the benefit of, or enforceable by, any third party. It is the intention of Vendor and Customer that no third party shall have the right to (i) rely on the Services provided by Vendor, or (ii) seek to impose liability on Vendor as a result of the Services.

4) **Appendix A, Section 5.A, Customer Price**, is deleted in its entirety.

5) **Appendix A, Section 5.B, Customer Discount**, is deleted in its entirety.

6) **Appendix A, Section 5.E, Travel Expense Reimbursement**, is deleted in its entirety.

7) **Appendix A, Section 6.B.1, Vendor Website**, is hereby restated as follows:

Vendor will maintain a website specific to the service offerings under the Contract which is clearly distinguishable from other, non-DIR Contract offerings at Vendor's website. The website must include: the services offered, service specifications, Contract pricing, contact information for Vendor, instructions for obtaining quotes and placing Purchase Orders. The Vendor's website shall list the DIR Contract number, display the DIR logo in accordance with the requirements in paragraph C of this Section, and contain a link to the DIR website for the Contract.

8) **Appendix A, Section 7, Purchase Orders, Invoices, and Payments**, is restated in its entirety as follows:

A) Customer will contact Vendor for a services quote. This quote will include following: customer entity, contact name, address, telephone number, product information, number of Customer Users, and price as specified in Section 3 for subscription services or in Exhibit A for other services. Quote must include the DIR administrative fee.

B) Customer will issue a Purchase Order payable to DIR and forward the Purchase Order and Vendor quote to DIR, Service Delivery Division, Contract Management Section by fax (512) 475-4759. For the services under Exhibit A, State agency Customers shall also provide a statement to DIR that either: i) Subchapter B of Chapter 2254, Texas Government Code, is inapplicable to the services being requested; or ii) Customer has complied with the requirements of Subchapter B of Chapter 2254, Texas Government Code, with respect to the requested services.

C) Upon receipt of all necessary paperwork DIR will issue a Purchase Order and forward the Purchase Order and quote form to Vendor via fax or electronic mail.

D) Vendor will provide services to the Customer.

E) Vendor will invoice DIR for the order at the price specified on the DIR Purchase Order. The price specified on the DIR Purchase Order shall be the price of the Services listed on the quote form less the DIR 2% administrative fee. Invoices shall be issued in compliance with Chapter 2251, Texas Government Code.

F) Payments will be made to Vendor by DIR in accordance with Chapter 2251, Texas Government Code.

9) **Appendix A, Section 8.A.1, State Contract Administrator**, is restated in its entirety as follows:

DIR shall provide a Contract Administrator whose duties shall include but not be limited to: i) supporting the marketing and management of the Contract, ii) advising DIR of Vendor's performance under the terms and conditions of the Contract, and iii) periodic verification of pricing.

10) **Appendix A, Section 8.B.1, Reporting Responsibility**, is deleted in its entirety.

11) **Appendix A, Section 8.B.2, Detailed Monthly Report**, is deleted in its entirety.

12) **Appendix A, Section 8.B.4, DIR Administrative Fee**, is deleted in its entirety.

13) **Appendix A, Section 8.B.5, Accurate and Timely Submission of Reports**, is deleted in its entirety.

14) **Appendix A, Section 8.D, Contract Administration Notification**, is restated as follows:

- 1) Upon execution of the Contract, Vendor shall provide DIR with written notification of the following: i) Vendor Contract Administrator name and contact information, ii) Vendor sales representative name and contact information, and iii) name and contact information of Vendor personnel responsible for submitting summary of services.
- 2) Upon execution of the Contract, DIR shall provide Vendor with written notification of the following: i) DIR Contract Administrator name and contact information.

15) **Appendix A, Section 9.A.2, Infringements**, is amended to include the following:

- d) Vendor warrants that the Services, in the form provided by Vendor, will not violate or infringe upon the intellectual property rights of any third party.

16) **Appendix A Section 9.A. Infringements**, is amended to include the following:

3) DISCLAIMER OF ALL OTHER WARRANTIES.

VENDOR EXPRESSLY DISCLAIMS ALL WARRANTIES, EXPRESS OR IMPLIED, STATUTORY OR OTHERWISE, INCLUDING, WITHOUT LIMITATION, ANY IMPLIED WARRANTIES OF MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE, AND WARRANTIES AS TO ACCURACY, COMPLETENESS OR ADEQUACY OF INFORMATION. ALL SERVICES SPEAK AS OF THE PUBLICATION DATE AND VENDOR HAS NO OBLIGATION TO ADVISE CUSTOMER OF ANY CHANGE IN THE INFORMATION OR VIEWS CONTAINED IN THE SERVICES. THE SERVICES ARE INTENDED SOLELY AS A RESEARCH TOOL AND ARE NOT MEANT AS SPECIFIC GUIDES TO ACTION.

17) **Appendix A, Section 9.G, Confidentiality**, amended to include the following paragraphs:

- 3) Vendor agrees to keep confidential any information communicated by Customer to Vendor in connection with this Contract that Customer desires Vendor to keep confidential provided that such material 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. 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 Vendor; (3) entered the public domain through no fault of Vendor subsequent to Customer's

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communication to Vendor; (4) is in Vendor's possession free of any obligation of confidence at the time of Customer's communication to Vendor; or (5) is communicated by the Customer to a third party free of any obligation of confidence. Additionally, Vendor may disclose such information to the extent required by legal process.

4) Vendor is in the business of researching and analyzing information technology and this obligation of confidence shall not apply to information obtained by Vendor's research, analysis or consulting organization from sources other than the employees receiving confidential information provided under this Agreement.

18) Appendix A, Section 10.B.1, Termination for Non-Appropriation, is restated in its entirety as follows:

DIR may terminate its Purchase Order to Vendor, in whole or in part, if funds sufficient to pay its obligations under the Contract are not appropriated by the governing body on behalf of local governments, or by the Texas legislature on behalf of state agencies. In the event of non-appropriation, Vendor will be provided ten (10) calendar days written notice of intent to terminate.

19) Appendix A, Section 10.B.3, Termination for Convenience, is restated in its entirety as follows:

DIR or Vendor may terminate the Contract, in whole or in part, by giving the other party thirty (30) calendar days written notice. DIR may terminate a Purchase Order, in whole or in part, if it is determined by the Customer and DIR that Vendor will not be able to deliver services in a timely manner to meet the business needs of the Customer.

20) Appendix A, Section 10.B.4.b, Termination for Cause, Purchase Order, is restated in its entirety as follows:

DIR or Vendor may terminate a Purchase Order upon the occurrence of a material breach of any term or condition: (i) of the Contract, or (ii) included in the Purchase Order. The non-defaulting party shall give the defaulting party thirty (30) calendar days from receipt of notice to cure said default. If the defaulting party fails to cure said default within the timeframe allowed, the non-defaulting party may, at its option and in addition to any other remedies it may have available, cancel and terminate the Purchase Order.

21) Appendix A, Section 10.B.5, Customer Rights Under Termination, is restated in its entirety as follows:

In the event the Contract expires or is terminated for any reason, a Customer shall retain its rights under the Contract and the Purchase Order issued by DIR with respect to all services ordered and accepted prior to the effective termination date.

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22) Appendix A, Section 10.B.6, Vendor Rights Under Termination, is restated in its entirety as follows:

In the event a Purchase Order is terminated or the Contract expires or is terminated for any reason, DIR shall pay all amounts due for services ordered prior to the effective termination date and ultimately accepted by the Customer.

23) Appendix A, Section 10.C, Force Majeure, is restated in its entirety as follows:

DIR, Customer, or Vendor may be excused from performance under the Contract for any period when performance is prevented as the result of an act of God, strike, war, civil disturbance, epidemic, or court order, provided that the party experiencing the event of Force Majeure has prudently and promptly acted to take any and all steps that are within the party's control to ensure performance and to shorten the duration of the event of Force Majeure. The party suffering an event of Force Majeure shall provide notice of the event to the other parties when commercially reasonable. Subject to this provision, such non-performance shall not be deemed a default or a ground for termination. DIR may terminate whole in part a Purchase Order if it is determined by the DIR and the Customer that Vendor will not be able to deliver services in a timely manner to meet the business needs of the Customer.

This Contract is executed to be effective as of the date of last signature.

GARTNER, INC.

**The State of Texas, acting by and through the
Department of Information Resources**

Authorized By: signature on file

Authorized By: signature on file

Name: William F. Mohan, Jr.

Name: Brian S. Rawson

Title: Director, Government Contracts

Title: Director of Service Delivery

Date: 9-22-05

Date: 9/19/05

Legal: 9/19/05

