

**SUBMITTAL TO THE BOARD OF SUPERVISORS
COUNTY OF RIVERSIDE, STATE OF CALIFORNIA**

338



FROM: Riverside County Information Technology (RCIT)

SUBMITTAL DATE:
April 14, 2016

SUBJECT: Approve enrollment in the Gartner Information Technology Research subscription services, for two years, without Securing Competitive Bids. [All Districts]; [Total cost \$412,079, RCIT, Department of Public Social Services (DPSS), Riverside University Health System (RUHS), and Assessor-County Clerk-Recorder (ACR) operating budgets].

RECOMMENDED MOTION: That the Board of Supervisors:

1. Approve enrollment in the Gartner Information Technology Research subscription through the County of Ventura agreement, effective May 1, 2016 through April 30, 2018, in the amount of \$412,079, without securing competitive bids; and,
2. Authorize the Purchasing Agent, in accordance with Ordinance No. 459 based on the availability of funding and as approved by County Counsel to: (a) sign amendments that do not change the substantive terms of the agreement; (b) sign amendments to the compensation provision that do not exceed an increase of up to \$70,000 to allow for additional needs department requests; and (c) sign the Gartner Enrollment Form.

BACKGROUND:

Summary
(See page 2)

Steve Reneker
Chief Information Officer

FINANCIAL DATA	Current Fiscal Year:	Next Fiscal Year:	Total Cost:	Ongoing Cost:	POLICY/CONSENT (per Exec. Office)
COST	\$ 34,340	\$ 206,040	\$ 412,079	\$	Consent <input type="checkbox"/> Policy <input checked="" type="checkbox"/>
NET COUNTY COST	\$	\$	\$	\$	
SOURCE OF FUNDS: RCIT, DPSS, RUHS and ACR operating budgets				Budget Adjustment: No	
				For Fiscal Year: 16/17-17/18	

C.E.O. RECOMMENDATION:

APPROVE

BY:

Jennifer L. Sargent

County Executive Office Signature

MINUTES OF THE BOARD OF SUPERVISORS

FORM APPROVED COUNTY COUNSEL
DATE 4-14-16
BY: ANITA C. WILLIS

PURCHASING & FLEET SERVICES
Lisa Brandl, Director
Departmental Concurrence

- A-30
- 4/5 Vote
- Positions Added
- Change Order

Prev. Agn. Ref.:

District:

Agenda Number:

BACKGROUND:

3-39

**SUBMITTAL TO THE BOARD OF SUPERVISORS, COUNTY OF RIVERSIDE, STATE OF CALIFORNIA
FORM 11: without Securing Competitive Bids. [All Districts]; [Total cost \$412,079, RCIT,
Department of Public Social Services (DPSS), Riverside University Health System (RUHS), and
Assessor-County Clerk-Recorder (ACR) operating budgets].**

DATE: April 14, 2016

PAGE: 2 of 3

Summary (continued)

RCIT has utilized Gartner's core research services for independent analysis on new technology and technology directions, such as Social Networking, Constituent Relationship Management (CRM), Cloud Computing, Converged Networks and other emerging technologies. The availability of their expertise in these areas has assisted RCIT with the development of technology strategies, standards, and guidelines. Gartner also provides industry technical experts capable of assisting organizations with vendor selections and assists organizations in making effective decisions and selections in a market where technology and communication providers continue to be volatile. In addition, Gartner assists in pricing negotiations to ensure best values are received and comparable to other similar sized organizations.

In the Fall of 2003, the County of Ventura, on behalf of the California County Information Services Directors Association (CCISDA), conducted a Request For Proposal for industry research firms for award to all responsible vendors. This was done in an effort to obtain volume pricing through a consolidating government-purchasing vehicle. The original contract was awarded to Gartner in May 2004 and is intended for City, County and other local government entities. The County of Riverside took advantage of the contract award and was able to convert to the lower pricing. The County of Ventura contract award has been renewed for the period of May 1, 2016 to April 30, 2017.

In addition to RCIT, the consolidated agreement will include: Assessor-County Clerk-Recorder, Department of Public Social Services, and Riverside University Health System as additional users.

Impact on Citizens and Businesses

Gartner's service will improve the quality of RCIT's technical support.

SUPPLEMENTAL:

Contract History and Price Reasonableness

The Board of Supervisors initially approved the purchase of Gartner, Inc., services on May 1, 2013, (agenda item 3-22) for RCIT and the Assessor-County Clerk-Recorder, followed by December 2, 2014 (agenda item 3-11) for DPSS. This proposed renewal agreement will consolidate all departments onto a single agreement.

The pricing available through County of Ventura's contract represents a 7% discount off of Gartner's retail pricing.

Year 1 and 2 (RCIT, Assessor & RUHS)

RCIT = \$43,100 (1 IT Leadership Team Leader & 2 Workgroup Essential Members)
RUHS = \$43,100 (1 IT Leadership Team Leader & 2 Workgroup Essential Members)
Assessor = \$27,300 (1 Gartner for IT Leader Advisor license)
Subtotal = \$113,500
Plus 2.5% Ventura Processing Fee = \$2,838
Annual Fee = \$116,338
Term: 5/1/2016 – 4/30/2018

Year 1 (DPSS)**

Annual Fee = \$86,220
Plus 2.5% Ventura Processing Fee = \$2,156
Total Fee = \$88,376
Term: 5/1/2016 – 4/30/2017

**SUBMITTAL TO THE BOARD OF SUPERVISORS, COUNTY OF RIVERSIDE, STATE OF CALIFORNIA
FORM 11: without Securing Competitive Bids. [All Districts]; [Total cost \$412,079, RCIT,
Department of Public Social Services (DPSS), Riverside University Health System (RUHS), and
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DATE: April 14, 2016

PAGE: 3 of 3

Year 2 (DPSS)**

Annual Fee = \$88,807

Plus 2.5% Ventura Processing Fee = \$2,220

Total Fee = \$91,027

Term: 5/1/2017 – 4/30/2018

**DPSS pricing is based on their agreement signed on 5/5/15 for the period 5/1/15 through 4/30/18. All substantive terms of this agreement remain the same.

Total cost year 1: \$204,714

Total cost year 2: \$207,365

Gartner

Enrollment Form



Complete this form and send it with your purchase order to:

Attention: Sandra Nanalis (County of Ventura)
Fax: (805) 654-3394, E-mail: Sandra.Nanalis@ventura.org
And
Attention: David Kennison (Gartner – So. California)
Fax (866) 519-4740, E-mail: david.kennison@gartner.com
Attention: Winston Blackwell (Gartner – No. California)
E-mail: winston.blackwell@gartner.com

Payment should be made to:

County of Ventura
Information Technology Services Department
800 South Victoria Ave. L#1100
Ventura, CA 93009
County of Ventura TIN #: 95-6000944

Name: Steve Reneker Title: CIO
Organization: County of Riverside
Address: 3450 14th Street
City: Riverside Zip Code: 92501
Fax#: _____ Email: Steve.Reneker@rivcoit.org Telephone #: (951) 955-3778

The County of Ventura is the contract host, but the service is provided by Gartner, therefore, all questions regarding the service should be directed to Gartner.

Service usage entitlements are governed by Gartner's usage guidelines which can be found at the following URL: [Gartner Policies: Usage Guidelines](#) .

By signing below, I am agreeing to procure the above-referenced services from Gartner, Inc., via the County of Ventura Research & Advisory Services contract 4667, and agree to the terms and conditions of that agreement.

By signing below, I also agree that services to be provided by Gartner to my agency shall be delivered only after the County of Ventura has confirmed receipt of payment or purchase order from my agency.

This form should be used as your authorization for payment to County of Ventura. Payment and PO should be made out to "County of Ventura Information Technology Services Department" and sent to the address shown above. If your organization requires a separate invoice from County of Ventura, please check here:

Signature

Date

Printed Name

Title

FORM APPROVED COUNTY COUNSEL
BY: Neal R. Kipnis 9/14/16
DATE

2016 GARTNER SERVICES ORDER SCHEDULE (RCIT, Assessor & RUHS)

Gartner Service	Service Level	Qty	Annual Fee	Total
RENEWAL SERVICES ¹				
Core Research	Advisor		\$8,930	
	Reference		\$4,610	
Core Connect Upgrade for Core Research ³	Advisor		\$4,260	
Gartner for IT Executives	Signature		\$93,500	
	CIO		\$85,700 (S), \$76,200 (M)	
	Essentials		\$57,400 (S), \$51,300 (M)	
	Delegate Add-on ²		\$39,900	
	IAS Advisor Add-on		\$10,200	
NEW SERVICES				
Team Solutions				
Executives Programs Leadership Team ²	Leader		\$79,200	
	Delegate or Delegate Leader		\$38,900	
	Partner or Partner Leader		\$62,800	
	Advisor or Advisor Leader		\$29,800	
	Cross Function		\$21,500	
	Role		\$15,300	
Executives Programs Leadership Team with Industry Advisory Services ³ (One Industry)	Leader		\$84,700	
	Delegate or Delegate Leader		\$48,400	
	Partner or Partner Leader		\$71,100	
	Advisor or Advisor Leader		\$38,300	
	Cross Function		\$24,000	
	Role		\$17,500	
Enterprise IT Leadership Team ⁴	Leader		\$53,100	
	Advisor		\$27,300	
	Cross Function		\$16,600	
	Role		\$10,100	
	Essentials		\$7,900	
Enterprise IT Leadership Team with Industry Advisory Services ⁵ (One Industry)	Leader		\$63,300	
	Advisor		\$34,700	
	Cross Function		\$20,500	
	Role		\$12,200	
	Essentials		\$7,900	
Industry Advisory Services Team ^{4,4} (One Industry)	Leader		\$34,700	
	Advisor		\$34,700	
	Cross Function		\$20,500	
	Role		\$12,200	
	Essentials		\$7,900	
IT Leadership Team ^{4,4}	Leader	2	\$27,300	\$54,600
	Advisor		\$27,300	
	Cross Function		\$16,600	
	Role		\$10,100	
	Essentials	4	\$7,900	\$31,600
Gartner for Marketing Leaders Team ⁸	Leader		\$33,450	
	Advisor		\$33,450	
	Reference		\$11,800	
Individual Solutions				
Executives Programs Individual Solutions	Member		\$84,100 (S), \$74,700 (M)	
	Member Basic		\$57,400 (S), \$51,300 (M)	
	Two Onsite Meetings Add-on ²		\$15,000	
Executives Programs Individual Solutions with Industry Advisory Services (One Industry)	Member		\$92,400 (S), \$83,000 (M)	
	Member Basic		\$65,900 (S), \$59,800 (M)	
	Two Onsite Meetings Add-on ²		\$15,300	
Enterprise IT Leaders	Advisor		\$63,500 (S), \$53,100 (M)	
	Two Onsite Meetings Add-on ²		\$15,100	
Industry Advisory Services ⁴ (One Industry)	Advisor		\$43,300 (S), \$34,700 (M)	
	Reference		\$29,200 (S), \$20,600 (M)	
Gartner for IT Leaders ⁴	Advisor	1	\$37,000 (S), \$27,300 (M)	\$27,300
	Reference		\$25,900 (S), \$16,000 (M)	
Core Connect	Advisor		\$33,300 (S), \$23,900 (M)	
	Reference		\$22,200 (S), \$12,600 (M)	
Multi-users Solutions				
Gartner for Technical Professionals ⁷ (Per Agency)	SMB Agency < 4k Employees	Advisor	\$53,100	
		Reference	\$35,400	
	Agency < 12k Employees	Advisor	\$105,100	
		Reference	\$70,700	
Department	Advisor	\$105,100		
	Reference	\$70,700		
Gartner for Technology Planner SMB (for Agency with <4k Employees)	All modules		\$53,100	
	Essentials - three modules		\$45,000	
	Essentials - two modules		\$34,400	
	Essentials - one module		\$21,100	
Gartner for Technology Planner (for Agency with 4k+ Employees)	All modules		\$105,100	
	Essentials - three modules		\$88,900	
	Essentials - two modules		\$68,000	
	Essentials - one module		\$41,700	
Gartner for Technical Professionals for Higher Education University/College ² (per designated campus)	Advisor		\$53,100	
	Reference		\$35,400	
Value-add Services				
Strategic Advisory Services	Internal		\$14,200	
	Remote		\$7,100	
Event Tickets ³	2016 Symposium		\$4,000	
	2016 T1 Summit		\$2,750	
	2016 Summit		\$2,350	
	2016 Seminar		\$2,550	
	2016 Catalyst		\$2,750	
Contract Dates (please fill in the box starting with month): 05/01/2016 - 04/30/2017			Subtotal:	\$115,600
			Ventura Fee (2.5% of subtotal)	\$2,828
			TOTAL:	\$116,338

CONDITIONS:

1. "Single-user" applies to a buying center that has one individual license; "Multi-user" applies to a buying center that has at least two qualifying licenses within the same agency or municipality. To qualify for multi-user price levels, services must be ordered on the same Service Agreement or Purchase Order and reflect a common "Bill To" address. Strategic Advisory Services, Events, and Add-on services do not contribute towards multi-user pricing qualification.
2. The determination of "current users" for the purpose of the receipt of "Renewal Services" pricing shall be those actual users of the applicable service as of the specified date shown below and continuously renew the service thereafter:
 - a. Core Research license holders as of February 29, 2012.
 - b. IT Executive license holders as of April 30, 2015.
3. The Core Connect Advisor Upgrade is only available to Core Research Advisor license users. The upgrade fee is in addition to the Core Research Advisor annual fee and cannot be pro-rated.
4. Core Research to Gartner for IT Leaders or Industry Advisory Services promotional migration options may be available. Please check with your Gartner Account Executive for details.
5. Each Executive Programs Leadership Team must consist of one Leader and three (3) to ten (10) Team Members. A maximum of one Leader per Team. A Team with one Leader and less than three (3) Team Members is permissible so long as one of the Team Member is a Delegate or Partner. All Team Member licenses must be coterminous with the Leader license. Executive Programs Leadership Team with Industry pricing is for one industry and all licenses in an Executive Programs Leadership Team with Industry must purchase access to the same industry.
6. Each Team must consist of one Leader and three (3) to ten (10) Team Members. A maximum of one Leader per Team. All Team Member licenses must be coterminous with the Leader license. Industry Advisory Services Team pricing is for one industry and all licenses in an Industry Advisory Services Team must purchase access to the same industry.
7. Gartner for Technical Professionals services require a minimum spend on Gartner licenses. For agencies of 4,000 employees or less the minimum spend in Gartner licenses is \$30,400, for agencies over 4,000 employees it's \$60,800
8. These products have limited availability and/or eligibility requirements. Please check with your Gartner Account Executive before ordering
9. Ticket prices apply to orders received by December 31st of the Event year as indicated. For example, Symposium 2016 Unit Price applies to orders received on or before December 31, 2016. 2017 ticket prices have not be released; please check with account representatives for pricing at the time of purchase for 2017 ticket pricing.
10. Gartner Account Executive can provide multi-year pricing options upon Client's request. Any multi-year price quote is expressly conditioned upon the individual Client agreeing to waive its right to terminate for convenience (T for C). The pricing for Year 2 and Year 3 will be listed on the completed Enrollment Form. Year 1 will be listed in the Enrollment Form Order Schedule above; Year 2 and Year 3 will be listed at the bottom of the Enrollment Form. The order will contain the following terms:
 - (a) This is a promotional offer for a [insert desired number of years] year, non-cancellable term. Upon Year [0] Contract Term End Date any additional or renewal purchases shall be at the then-current Gartner – Ventura County price.
 - (b) Notwithstanding subsection (a) above, Client may terminate Years [2 and/or 3] of this enrollment form, upon at least thirty days prior written notice, in the event Client does not receive appropriated funds from its funding authority, as a result of ordering activity cut-backs. However, if in the event the Client invokes its termination right herein, Client may not re-order the Service at the migration price but will be subject to Gartner's then-current Ventura County pricing.
11. Upon request, Gartner Account Executive can provide a price quote for an initial subscription period for limited periods in excess of twelve (12) months (i.e. 13 – 15 months) to align new subscribers with this Agreement's annual renewal/refresh cycle.

**This agreement also incorporates the multi-year contract on file with Gartner and the County of Riverside DPSS. Per the request of The County of Riverside RCIT we are including the Gartner services for DPSS on the same agreement with RCIT, referenced below as Year 2 (DPSS) and Year 3 (DPSS)."

Year 2 (RCIT, Assessor & RUHS)

Annual Fee = \$113,500
Plus 2.5% Ventura Processing Fee = \$2,838
Total Fee = \$116,338
Term: 5/1/2017 – 4/30/2018

Year 2 (DPSS)**

Annual Fee = \$86,220
Plus 2.5% Ventura Processing Fee = \$2,155.50
Total Fee = \$88,375.50
Term: 5/1/2016 – 4/30/2017

Year 3 (DPSS)**

Annual Fee = \$88,807
Plus 2.5% Ventura Processing Fee = \$2,220.18
Total Fee = \$91,027.18
Term: 5/1/2017 – 4/30/2018

STEVE RENEKER
Chief Information Officer

DAVE ROGERS
Chief Technology Officer



LOUIS RAJA ARUL DOSS, ACIO
Enterprise Applications Bureau
VEVA HARGUINDEGUY, ACIO
Converged Communications Bureau
JIM SMITH, ACIO
Technology Services Bureau
DAVE ROGERS, CTO
Business Relationship Management

To: Board of Supervisors/Purchasing Agent **Date:** April 11, 2016
Via: RCIT, Procurement Contract Specialist
From: Steve Reneker, Chief Information Officer
Subject: Sole Source Procurement for Gartner Information Technology Subscription

The below information is provided in support of my Department requesting approval for a sole source. Outside of a duly declared emergency, the time to develop a statement of work or specifications is not in itself justification for sole source.

1. **Supplier being requested:** Gartner
2. **Vendor ID:** 0000025073 - County of Ventura
3. **Supply/Service being requested:**
Gartner Information Technology Research Subscription
4. **Alternative suppliers that can or might be able to provide supply/service and extent of market research conducted:**
None
5. **Unique features of the supply/service being requested from this supplier, which no alternative supplier can provide:**
RCIT has utilized Gartner Inc's core research services for independent analysis on new technology and technology directions such as Social Networking, Constituent Relationship Management (CRM), Cloud Computing, Converged Networks and other emerging technologies. The availability of their expertise in these areas has assisted RCIT with the development of technology strategies, standards, and guidelines. Gartner also provides industry technical experts capable of assisting organizations in their vendor selections and assists organizations in making effective decisions and selections in a market where technology and communication providers continue to be volatile. In addition, they assist in pricing negotiations to ensure best values are received and comparable to other similar sized organizations.

6. Reasons why my department requires these unique features and what benefit will accrue to the county:

Gartner provides industry technical experts that assist organizations in their vendor selections. Their services help organizations make effective decisions and selections in a market where technology and communication providers continue to be volatile. In addition, they assist in pricing negotiations to ensure best value is received and comparable to other similar sized organizations.

7. Period of Performance: From 5/1/2017 to 4/30/2018 (total number of years)

Is this an annually renewable contract? No Yes
 Is this a fixed-term agreement: No Yes

8. Identify all costs for this requested purchase. If approval is for multiple years, ongoing costs must be identified below. If annual increases apply to ongoing costs such as CPI or other contract increases, provide the estimated annual cost for each consecutive year. If the annual increase may exceed the Purchasing Agent’s authority, Board approval must be obtained. (Note: ongoing costs may include but are not limited to subscriptions, licenses, maintenance, support, etc.)

Description:	FY 1617	FY 1718	FY__	FY__	FY__	Total
One-time Costs:						
<i>(Insert description)</i>						
Ongoing Costs:						
<i>Subscription</i>	\$204,714	\$207,365				\$412,079
Contingency	\$70,000	\$70,000				\$140,000
Total Costs	\$274,714	\$277,365				\$552,079

Note: Insert additional rows as needed

9. Price Reasonableness:

In the Fall of 2003, the California County Information Services Directors Association (CCISDA) went out to RFP for Industry Research firms to award to all responsible vendors. This was done in an effort to obtain better volume pricing through consolidating government-purchasing vehicle. This three (3) year contract was awarded to Gartner in May 2004 and is intended for City, County and other local government entities. The County of Riverside has taken advantage of the contract award and has been able to convert to the lower pricing realized from this effort. The contract award has been renewed by CCISDA for the period of May 1, 2016 to April 30, 2017 by County of Ventura on Amendment #12. County of Riverside enrollment will be in the aggregate amount of \$412,079.00 inclusive of two (2) Gartner Core Research subscriptions and one (1) Gartner for IT Executives subscription for RCIT and one (1) Gartner for IT Leaders subscription for the Assessor-Clerk Recorder.

The Board of Supervisors initially approved the purchase of Gartner Inc. services on May 1, 2013, (agenda item 3-22) for RCIT and the Assessor – County Clerk – Recorder’s Office as well as approval on December 2, 2014 for DPSS. This new agreement will add both DPSS and RUHS as part of RCIT’s consolidation process. The pricing available through County of Ventura’s contract represents a 7% discount off of Gartner’s retail pricing.

10. Does moving forward on this product or service further obligate the county to future similar contractual arrangements or any ongoing costs affiliated with this sole source? (Maintenance, support, or upgrades, if so, please explain)?

No

11. Projected Board of Supervisor Date (if applicable): _____

April 26, 2016


Steve Reneker, Chief Information Officer

4/15/16
Date

Purchasing Department Comments:

Approve

Total
412,079.00

Approve with Condition/s

Disapprove

Not to exceed: \$

One time

Annual Amount through _____


Purchasing Agent

4/14/16
Date

16-513
Approval Number

(Reference of Purchasing Documents)

List Attachments: