

**REPORT/RECOMMENDATION TO THE BOARD OF SUPERVISORS  
OF SAN BERNARDINO COUNTY  
AND RECORD OF ACTION**

June 28, 2022

**FROM**

**BOB DUTTON, Assessor-Recorder-County Clerk**

**SUBJECT**

Amendment to Agreement with Gartner, Inc. for Consulting Services

**RECOMMENDATION(S)**

Approve **Amendment No. 4 to Agreement No. 19-380** with Gartner, Inc. increasing the agreement amount by \$273,190, from \$980,200 to a total agreement amount of \$1,253,390, revising the scope of work to include additional consulting services for the Assessor's Property Information Management System Modernization Project, and extending the term for an additional three months from June 30, 2022, for a total agreement term of June 24, 2019 through September 30, 2022.

(Presenter: Bob Dutton, Assessor-Recorder-County Clerk, 382-3254)

**COUNTY AND CHIEF EXECUTIVE OFFICER GOALS & OBJECTIVES**

**Improve County Government Operations.**

**Operate in a Fiscally-Responsible and Business-Like Manner.**

**FINANCIAL IMPACT**

Approval of this item will not result in the use of additional Discretionary General Funding (Net County Cost) as the amendment amount of \$273,190 will be funded by revenue in the Assessor's State Supplementation for County Assessors (SSCA) Program Special Revenue Fund. This fund received revenue from the SSCA Program and the County General Fund during fiscal years 2018-19 through 2020-21. The County matched the SSCA Program funds at the rate of one dollar for every two dollars in program funds. The recommended amendment would increase the agreement amount by \$273,190, from \$980,200 to a total agreement amount of \$1,253,390. Sufficient appropriation and revenue have been included in the Assessor-Recorder-County Clerk's (ARC) 2022-23 SSCA Program (3110002756) budget.

**BACKGROUND INFORMATION**

Since June 2019, Gartner, Inc. (Gartner) has been assisting the Assessor Division of ARC with Property Information Management System (PIMS) strategy development, readiness assessment, preparation of a Request for Proposal (RFP) for the PIMS Modernization Project (Project), process documentation, and PIMS Project implementation support. Gartner is an industry leader in offering comprehensive technology research and advisory services, including government-specific analysis.

On September 15, 2020 (Item No. 17), the Board of Supervisors (Board) approved Agreement No. 20-876 with Array Information Technology, Inc. (Array) for system integration services related to the PIMS Project. On November 16, 2021 (Item No. 19), the Board approved an

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Assignment and Assumption Agreement No. 21-836 with Array and CGI Technologies and Solutions, Inc. (CGI) for the assignment of Agreement No. 20-876 including any amendments, exhibits, attachments, supplements, order, and statements of work from Array to CGI, with no change to the contract terms and conditions. CGI terminated this agreement on June 9, 2022.

Staff from the Assessor Division of ARC, Innovation and Technology Department (ITD), and Gartner have been involved with CGI in a process to transfer PIMS Project knowledge and deliverables. Moving forward, Assessor and ITD staff recognize the benefit of additional consulting services from Gartner for completing an Applied Structured Research Analysis (ASRA) that will assist with the continuing PIMS Project. The PIMS Project has significant custom software development that warrants the use of an ASRA or more commonly known as a code audit. An audit of this nature is a comprehensive analysis of computer code with the intent to discover use of appropriate coding techniques and validation of the use of industry best practices, and to identify violations of programming conventions to minimize programmatic bugs and prevent potential cyber security breaches. The results of the ASRA will help identify the efforts that are needed to complete the like-for-like code transformation and assist with determining the best path forward for completing the PIMS Project.

The recommended amendment would enable the Assessor Division to revise the scope of work to include additional consulting services for an ASRA of the PIMS Project, increase the agreement amount by \$273,190 for a total agreement amount of \$1,253,390, and extend the term of the agreement to complete this scope of work for three months, from June 30, 2022, for a total agreement term of June 24, 2019 through September 30, 2022.

On June 11, 2019 (Item No. 13), the Board approved Agreement No. 19-380 with Gartner to provide consulting services for upgrading the Assessor's PIMS from June 24, 2019 through June 23, 2020, in the amount of \$380,200.

On March 24, 2020 (Item No. 15), the Board approved Amendment No. 1 to Agreement No. 19-380 with Gartner to expand the scope of work to include the development of detailed future state specifications for enhancing the functionality of PIMS after or in parallel with the initial modernization or refactoring scope, in the amount of \$150,000, increasing the original contract amount of \$380,200 to \$530,200.

On October 27, 2020 (Item No. 20), the Board approved Amendment No. 2 to Agreement No. 19-380 with Gartner to extend the term of the agreement by one year from June 23, 2020, for a total agreement term of June 24, 2019, through June 30, 2021, with no change to the contract amount of \$530,200.

On June 22, 2021 (Item No. 16), the Board approved Amendment No. 3 to Agreement No. 19-380 with Gartner increasing the agreement amount by \$450,000, from \$530,200 for a total agreement amount of \$980,200, revising the scope of work to include additional consulting services for upgrading PIMS, and extending the term by one year from June 30, 2021, for a total agreement term of June 24, 2019, through June 30, 2022, with one one-year option to extend the term of the contract.

### **PROCUREMENT**

In 2003, the California County Information Services Directors Association (CCISDA) solicited bids from industry research firms to obtain better volume pricing through consolidated government demand for services. In order to provide reduced rates for these services, Gartner requested that one of the CCISDA members administer a contract with them for the benefit of all

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CCISDA members, including San Bernardino County. The County of Ventura assumed this role and contracted with Gartner. The initial three-year contract between Gartner and the County of Ventura ended in 2006, but has been renegotiated and extended each year thereafter. The County of Ventura's current contract term commenced on March 12, 2019, and is in effect through March 11, 2024, as a result of an RFP conducted by CCISDA in 2019. In 2017, the County of Ventura ended their role as fiscal agent for the contract and no longer assesses an administrative fee. Members pay Gartner directly for their subscriptions, but are still able to benefit from the County of Ventura's contract terms and pricing.

County Policy No. 11-04 requires departments to obtain Board approval for the procurement of services over \$200,000 annually.

**REVIEW BY OTHERS**

This item has been reviewed by County Counsel (Kaleigh Ragon, Deputy County Counsel, 387-5455) on June 16, 2022; Innovation and Technology Department (Larry Ainsworth, Chief Information Officer, 388-5501) on June 16, 2022; Purchasing (Bruce Cole, Supervising Buyer, 387-2148) on May 26, 2022; Risk Management (Victor Tordesillas, Director, 386-8621) on May 27, 2022; Finance (Carl Lofton, Finance Analyst, 387-5404) on June 10, 2022; and County Finance and Administration (Paloma Hernandez-Barker, Deputy Executive Officer, 387-5423) on June 14, 2022.

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Record of Action of the Board of Supervisors  
San Bernardino County

**APPROVED (CONSENT CALENDAR)**

Moved: Janice Rutherford Seconded: Col. Paul Cook (Ret.)  
Ayes: Col. Paul Cook (Ret.), Janice Rutherford, Dawn Rowe, Joe Baca, Jr.  
Absent: Curt Hagman

Lynna Monell, CLERK OF THE BOARD

BY   
DATED: June 28, 2022



cc: ARC - Gaeta w/agree  
Contractor - C/O ARC w/agree  
File – Confidential w/attach  
File - w/agree

CCM 07/18/2022