

Permitting Transformation Office Proposal

Prepared for:
San Bernardino County
Land Use Services (LUS)

March 2, 2026 (revised July 15, 2026)
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Cover Letter

Dear Miguel:

Our recent assessment of the Accela solution for Land Use Services (LUS) made one thing clear: the department's challenges are not caused by Accela's technical limitations, but by longstanding gaps in governance, process alignment, and data integrity. It is time to move from analysis to action.

We propose establishing and operating a **Permitting Transformation Office**, a dedicated office that will turn the Accela Optimization Roadmap into measurable operational improvement. Gartner is well-positioned to lead this effort. Our team has completed over 100 licensing, permitting, and regulatory business and technology engagements with peer jurisdictions across North America. We will serve as your advocate and control tower, sequencing initiatives, enforcing decision rights, unifying priorities across departments, and making certain that foundational improvements such as workflow redesign, financial controls, data governance, and system administration are completed before configuration begins. Focusing on these fundamentals first will resolve issues that hindered previous efforts and put LUS on the path to lasting success.

With Gartner, the County gains a sustainable operating model through a Build-Operate-Transfer approach. We will set up governance frameworks, create a single prioritized backlog, and manage daily program controls. As the project advances, we will transition these capabilities to your team, empowering LUS to maintain and improve the system independently, without ongoing reliance on external consultants.

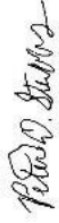
The results will be clear and transformative: a simplified, transparent customer experience, a single source of truth for financial and operational data, and a fully functional system delivered in under 2 years. This maximizes your current Accela investment and avoids the cost and delay of a complete system replacement.

We understand the urgency of improving service delivery and protecting County revenue. A Transformation Office is a disciplined, coordinated solution to ensure lasting success. We look forward to discussing how Gartner can help San Bernardino County drive accountability and real progress. Please see the enclosed proposal for details.

Sincerely,



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The Case for a Permitting Transformation Office

LUS seeks to improve the efficiency and effectiveness of its operations and the level of service provided to its customers



What changes in governance, operations, and service delivery must LUS make to fully realize the benefits of a reconfigured Accela platform and operate it as a modern, high-performing system that improves outcomes for customers and staff?

Land Use Services Context

- Land Use Services (LUS) is experiencing significant challenges with its current Accela platform for permitting and data tracking, hindering LUS's ability to effectively manage permitting, inspections, and land development workflows.
- Despite migrating from on-premise to Accela cloud, core issues persisted — reinforcing that the challenges are organizational and operational rather than technical.
- LUS has decided to assess and pursue options for optimizing the Accela software to alleviate the issues that have been experienced and improve the overall user experience for customers and staff.
- A Gartner assessment clarified that LUS's challenges are rooted in governance, process, and data, not the Accela platform itself.

High Level Pain Points

1. Usability
2. Data, reporting, and analytics
3. Fees and financial management
4. Workflows and automation
5. Support, training, and governance



Outcomes LUS is Driving Toward

- A simpler, more transparent customer experience that accelerates permit progress
- Consistent, standardized workflows that reflect LUS business processes and can be enforced in Accela
- Trusted, actionable data and analytics for operational decisions and financial accuracy
- Stronger governance and controls to protect revenue and guide platform changes
- A sustainable operating model that enables continuous improvement

What We Understand About LUS Today

	LUS doesn't have a technology problem, it has an Accela operating model problem ▪ Issues stem from governance gaps, fragmented workflows, undefined ownership, and inconsistent data standards. ▪ These conditions would undermine any system, regardless of vendor or configuration.
	Accela has never been aligned with how LUS actually operates ▪ Workflows, fees, business rules, and data structures were never harmonized across divisions. ▪ As a result, rework, manual workarounds, and exceptions have become the norm.
	No single group owns the product, the backlog, or decisions ▪ Priorities differ across divisions; vendor work is uncoordinated; changes enter the system without standards or governance. ▪ This creates instability, long cycle times, and inconsistent customer experience.
	Staff have the right intent but operate without clarity, tools, or consistent guidance ▪ Training and SOPs are informal or outdated. ▪ Reporting is inconsistent; KPIs are not defined or visible.
	LUS is ready for transformation — but cannot achieve it without structure and leadership ▪ The County has committed to Accela, invested significantly, and wants improvement. ▪ What's missing is a disciplined, end-to-end operating model to manage people, processes, data, and technology together.

A Gartner-led Transformation Office will provide LUS with the structure and accountability to achieve meaningful improvements



Gartner's Role: Transformation Leadership

- **Establish and Run the Transformation Office:** Stand up and operate a Transformation Office that provides clear ownership, decision rights, and portfolio-level control across all Accela and permitting modernization initiatives.
- **Plan and Orchestrate Roadmap Execution:** Rigorous project management planning and oversight to keep Accela optimization efforts within target budgets and timelines.
- **Provide Continuous Program & Value Assurance:** Apply program assurance to manage risk, reduce rework, and ensure outcomes and benefits are defined, tracked, and realized.
- **Provide Market-Informed, Vendor-Neutral Guidance:** Leverage Gartner's regulatory expertise to guide decisions, align vendors, and prepare LUS for future capabilities.



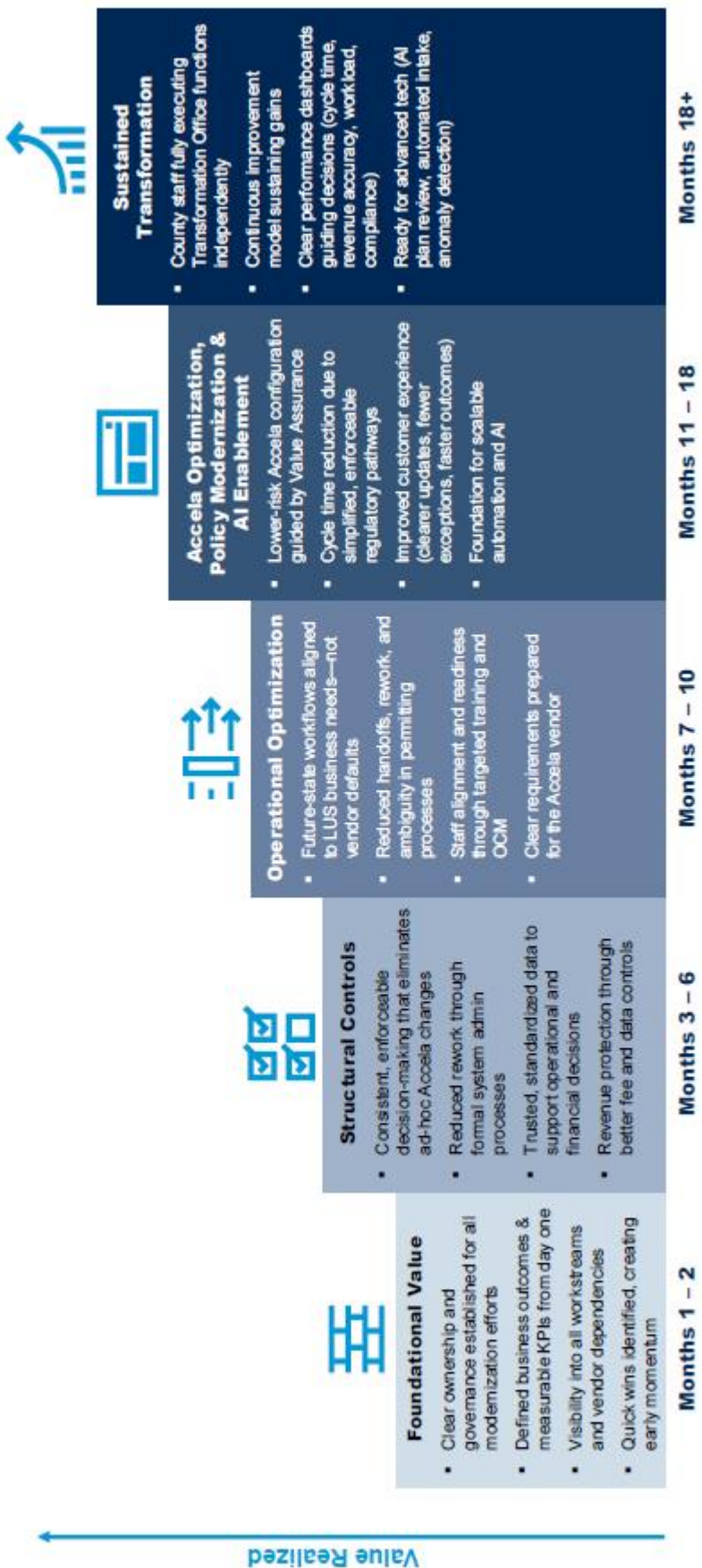
What this Enables for the County and LUS

- **Clear Governance and Strategic Alignment:** A single, well-documented strategic direction with clear accountability and faster, higher-quality decisions across departments and vendors.
- **Transparent Tracking and Measurable Results:** The ability to define, measure, and report progress and benefits, giving leadership confidence that investments are delivering value.
- **Accelerated and Lower-Risk Accela Optimization:** Reduced rework by addressing root-cause issues before advancing to higher-value functionality.
- **Stronger Operational Controls:** Improved oversight of configuration, and changes, reducing risk while improving revenue transparency and control.
- **Readiness for Future Capabilities:** A stable foundation that allows LUS to responsibly adopt advanced automation and AI.

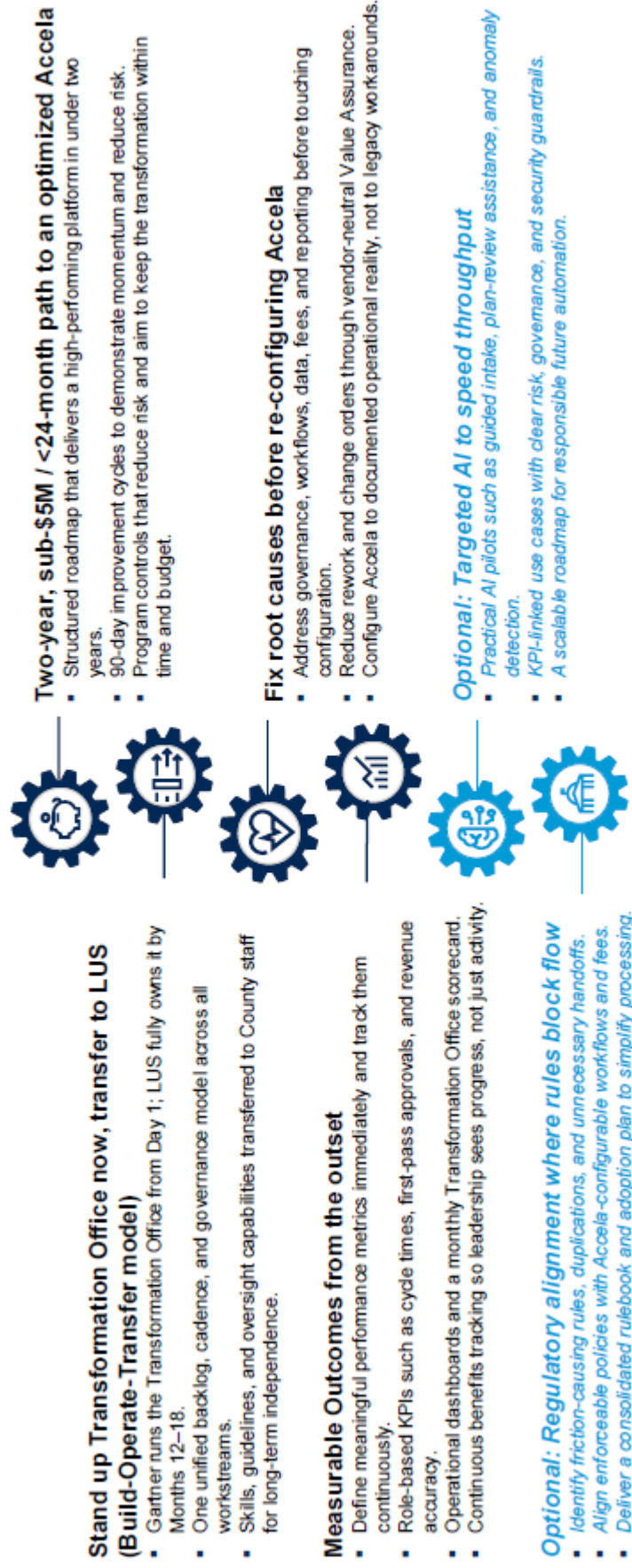


Without a Transformation Office, Accela Optimization efforts risk repeating the same patterns that hampered the 2017 implementation and more recent cloud migration.

The proposed approach is designed for LUS and SBC to realize continuous, incremental value



The Transformation Office is an investment in LUS's operating model to enable lasting operational and technical performance

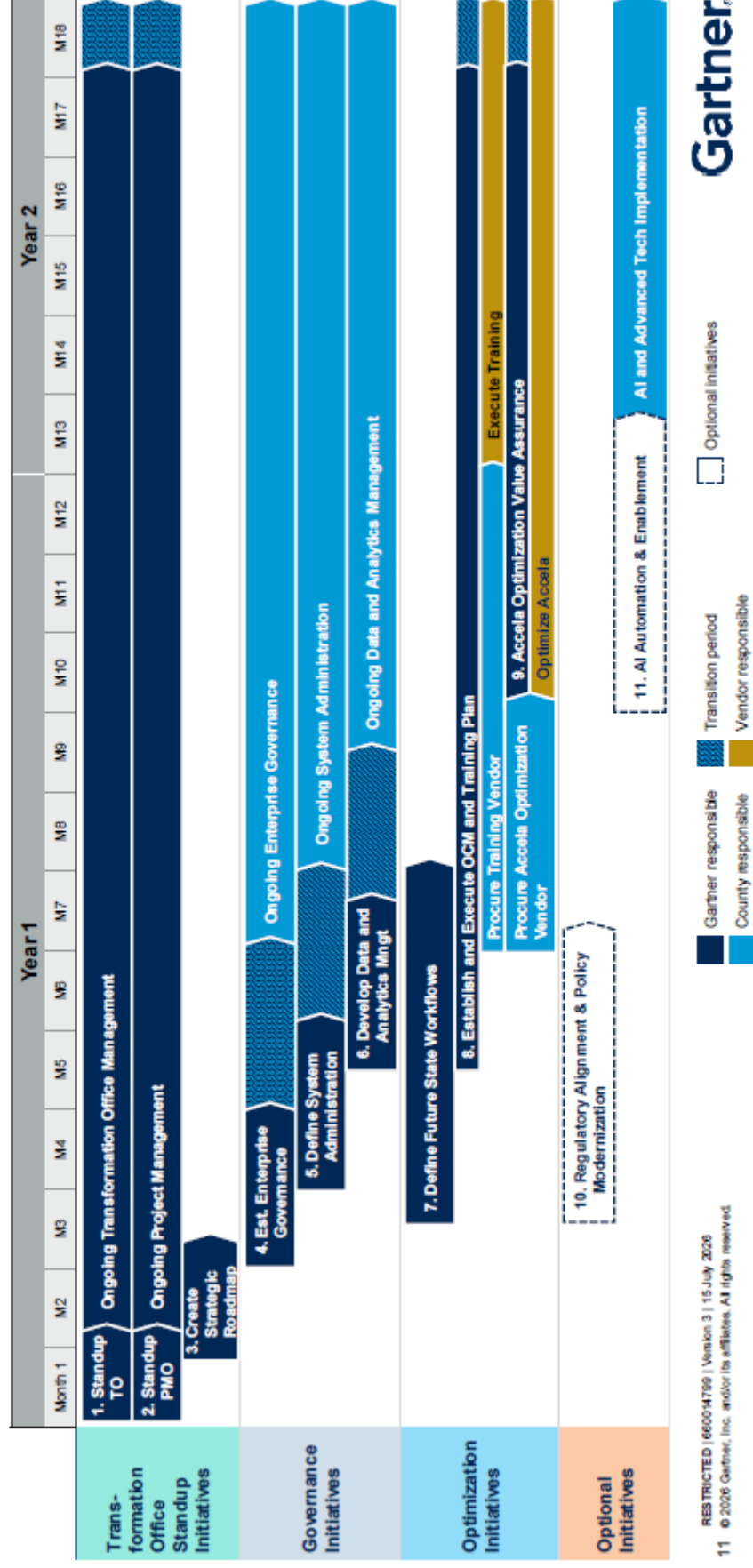


Statement of Work

The Statement of Work section, which is incorporated into the Proposal, sets forth Gartner's detailed technical approach, schedule, staffing and assumptions.

Gartner proposes an 18-month timeline to establish the Transformation Office and iteratively transition ownership to LUS

This schedule is dependent on the assumptions included in this Proposal.



Description of Initiatives (1 of 2)

	1	2	3	4	5
Activities	Startup & Manage Transformation Office (TO) - Stand up a Transformation Office to orchestrate the portfolio, run integrated program controls, and provide a single track for planning, risk, financials, and benefits tracking. - Support Accela vendor negotiations & management	Startup & Manage Project Management Office (PMO) - Stand up a Project Management Office (PMO) to coordinate LUS resources and work streams throughout the Contract period. - Ensure alignment between Gartner and County teams.	Create Strategic Roadmap - Refine and govern the multi-year roadmap, set scope and sequencing (optimize vs. replace), and align investments and milestones to prioritized business outcomes. - Establish a framework to select the Accela configuration vendor.	Establish Enterprise Governance Operationalize cross-department decision rights, standards, and forums to drive consistent, business-led choices and enforceable policies for Accela and related systems.	Define System Administration Combine product ownership, system administration, and vendor/contract management into a single model with SOPs, release/environments management, performance SLAs, and a unified backlog tied to outcomes.
Impact	Creates a centralized hub to manage forward looking technology initiatives.	Provides a single-point of contact for County coordination of initiative tasks.	- Fosters a common understanding of LUS goals and the timeline to achieve them. - Identifies Quick Wins.	Establishes a structure for enterprise-wide decision making that allows for holistic view of the organization, fostering better decisions.	Creates a clear framework for managing solutions that allows for better software-related outcomes and optimized spend.
Deliverables	- Transformation Office Charter - Benefits Tracking Framework	Project Management Playbook	- Future State Roadmap - Tactical Project Plan	Governance Structure and Procedures	Documented System Administration Roles and Responsibilities

Description of Initiatives (2 of 2)

	6	7	8	9
Activities	Data & Analytics Management Establish D&A governance, common definitions, role-based KPIs, and operational dashboards to make performance visible, trusted, and actionable.	Define Future State Workflows - Reengineer end-to-end LUS workflows (including cross-department handoffs) and codify them as the blueprint for configuration, training, and continuous improvement. - Document requirements and high-level design for Acoela configuration.	Establish and Execute OCM and Training Plan Deploy a structured OCM and learning program (personas, coaching, adoption metrics) to accelerate competency, reduce disruption, and sustain new ways of working.	Accela Optimization Value Assurance - Work closely with LUS and the chosen vendor to identify risks, opportunities, and recommended courses of action. - Help ideate the intended outcomes and benefits of the optimization to codify success criteria.
Impact	Builds reporting and tracking capabilities that are directly tied to business outcomes and drive informed decision making.	Creates a set of workflows that are optimized for LUS activities and that can be replicated in a software solution.	- Accelerate readiness and adoption of new workflows and system behaviors. - Reduce disruption through clear roles, communications, and competency-based training.	Expert guidance to manage third-party resources and maximize beneficial outcomes.
Deliverables	- Validated KPIs - Data Governance Framework	- High Level Journey Maps - Detailed Workflows and Step Definitions	- Change Impact Assessment - Stakeholder Engagement Plan - Training Plan	- Monthly Value Assurance Reports - Risk Register with Recommendations

Description of Optional Initiatives

Description of Optional Initiatives		Assumptions for Optional Initiatives
10	11	
Activities	Impact	▪ Engagement & Scope ➢ If the County elects to proceed, a short non-billable scoping exercise will occur to finalize scope, deliverables, pricing, and timeline. ➢ Timeframes shown are approximate and depend on access/availability. ▪ Regulatory Alignment & Policy Modernization (Initiative 10) ➢ In-scope materials: Building Code, Zoning, related policies. ➢ Gartner uses AI-assisted text analytics; Gartner and County SMEs validate findings. ➢ County owns the final policy language and adoption. ▪ AI Automation & Enablement (Initiative 11) ➢ Focus on prioritized, proven use cases tied to CX and cycle time. ➢ Gartner delivers an AI Action Plan. ➢ Responsible-AI guardrails approved by County. <i>If the County elects to proceed with either optional initiative, Gartner will complete a two-week scoping exercise and then submit final scope, deliverables, pricing, and timeline for approval.</i>
Deliverables	▪ Regulatory / Code Update Plan	
	▪ Prioritized List of AI Use Cases ▪ AI Strategy on a Page	

Initiative 0: Project Kickoff

Establish shared project vision and expectations

Objective

- Establish the foundation for a successful engagement delivered on time, within budget, and aligned to LUS's objectives.
- Confirm shared understanding of scope, outcomes, roles, and governance structures required for the Transformation Office and related workstreams.

Activities Performed by Gartner

- Facilitate kickoff meeting with LUS and cross-department stakeholders, including leadership from involved departments.
- Confirm engagement objectives, scope, schedule, milestones, roles, responsibilities, and required resources for Gartner and LUS.
- Review anticipated risks and mitigation strategies informed by previous LUS/Accela implementations and Gartner leading practices.
- Submit documentation request to LUS/County and coordinate access to systems, repositories, and collaboration tools.
- Conduct pre-planning session(s) to confirm logistics (e.g., PMO toolset, data analysis tools, reporting cadence, RAID processes).

LUS's Responsibilities

- Assign a dedicated Project Coordinator to serve as the primary point of contact for Gartner.
- Provide stakeholder lists from LUS, ITD, executive leadership, and other involved departments.
- Ensure attendance of the kickoff by the Project Sponsor, Project Manager, and other key stakeholders as identified in pre-planning.
- Assist in onboarding Gartner team members, including system access and County support procedures.
- Review and respond to Gartner's documentation request and provide the requested materials.
- Participate in planning sessions with Gartner to validate objectives, scope, and risks.

Time Frame

- Approximately 2 Weeks

Deliverables

- Kickoff Meeting Deck** with all meeting materials
- Project Schedule** for all proposed initiatives and activities
- Weekly Status Report Template** to be leveraged for ongoing status reporting

IMPACT

- Clear alignment of leadership and project teams on scope, schedule, decision rights, and expectations.
- Reduced risk through early visibility of potential project challenges and mitigation strategies.
- Faster mobilization as required resources, systems access and working norms are established before workstreams begin.

Initiative 1: Transformation Office Standup and Management Create the Transformation Office framework and governance

Objective

- Build the foundational documentation and structure of the Transformation Office.

Activities Performed by Gartner

- Assemble the core transformation office team and identify roles and responsibilities.
- Draft a transformation office charter that include the mandate, scope, and governance of the transformation office activities.
- Define governance in the form of decision triaging, escalation, and decision rights.
- Co-create transformation objectives and map each to specific metrics/KPIs (units, time buckets, aggregation rules, baselines) that will be tracked in the charter and dashboard.
- Stand up and operate RAID logging, cadence, and governance pathways using PMO playbook practices.
- Develop a communication plan that aligns with stakeholder needs and level of involvement.
- Prepare monthly executive dashboards and facilitate steering meetings.
- Operate the TO day-to-day during the specified period.
- Plan and conduct a transition of Transformation Office ownership to LUS in last month of contract.

LUS's Responsibilities

- Provide stakeholder lists, documentation, and tool access for transformation office setup.
- Approve transformation office charter, governance structure, and meeting cadence.
- Coordinate and ensure adequate meeting attendance from all interested parties.
- Provide facilities, collaboration sites, and distribution channels for governance and communications.
- Take ownership of the Transformation Office following this project.

Time Frame

- Approximately 1 Month (Standup)
- 17 Months (Ongoing Management)

Deliverables

- Transformation Office Charter** that details mandate, scope, and governance
- Benefits Tracking Framework** to establish and maintain ongoing performance and benefits tracking
- Monthly Transformation Office Reports** for executive review

IMPACT

- Provides a centralized hub and ownership and oversight of all recommended initiatives for the comprehensive realization of project goals.
- Sustainable capability as County staff are trained, onboarded, and transitioned into TO leadership, reducing long-term consultant reliance.

Initiative 1: Transformation Office Standup and Management Work Samples

Transformation Management Office Charter on a Page Sample

Vision: Transform into a finance function enabled by advanced analytics and automation that increases operational efficiency and provides cross-functional business partners with the insights that will help achieve the company \$200 million growth target.

Guiding principles:	Objectives	Metrics
1. Business value	Manage the integrated portfolio	(1) Portfolio health (2) Portfolio change load
2. Enterprise perspective	Manage decision frameworks and standards	(1) Stakeholder satisfaction (2) Speed of decisions
3. Risk management	Deliver projects/initiatives	(1) On budget (2) On time and on scope
4. Shared accountability	Partner with stakeholders	(1) Sponsor satisfaction (2) Sponsor engagement
5. Stakeholder partnership	Enable project/product management and delivery roles	(1) Team stability (2) Resource utilization
6. Proactivity	Manage TMO functions	(1) Total cost of TMO resources (2) Estimates vs. actual TMO spend
Key TMO responsibilities	Key TMO staff	Key stakeholders
- Define stakeholder management approach - Engage project sponsors - Prepare business partners to manage projects	- Transformation leader - Process leader - Change/communication leader	- TMO executive sponsor (CFO) - TMO steering committee - Governance partners (IT, HR, commercial)

Source: Gartner
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Client Transformation Vision Statement

Office of Client Strategic Vision	Office of Client Mission	Transformation Vision	Guiding Principles	Transformation Objectives	Target Outcomes
To be the leading and trusted revenue, tax, banking, and investment experts for the Client.	We serve the Client through efficient fee collection and unbundling, cash management, and the responsible investment of public funds.	Enable trusted and efficient tax and permit collection and compliance through innovative modern technologies AI and an outstanding customer experience	- Reliable – Be consistently responsive, nimble, transparent - Resourceful – Leverage professional, quality, multi-disciplinary talent - Customer-centric – Deliver superior, timely, efficient, and quality experiences to all customers - Transparency – Support transparent, decision-making, revenue management and stewardship of public funds.	- Meet customer expectations for a seamless experience through enhanced self-service capabilities with modern, innovative solutions - Streamline, automate, and integrate processes and systems to improve accuracy, efficiency, and productivity for City staff - Enhance system performance, resiliency, security, features, and capabilities	- Increased online usage - Increased user satisfaction scores - Reduced processing time - Reduced security risks - Reduced system downtime - Increased mean time to resolution - Increased data transparency and reporting

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Initiative 2: Project Management Office Standup & Management

Align project goals and objectives with County resources

Objective

- Align project management practices, coordinate resources with project needs, foster consistency, and empower LUS/County stakeholders and departments to achieve the expected outcomes of the Transformation Office.
- Establish Gartner PMO to coordinate all necessary and assigned County resources throughout all initiatives.

Activities Performed by Gartner

- Review project management tools and methodologies with LUS leadership to revise as necessary and confirm for use in planning and coordinating County resources and relevant task tracking.
- Draft needed County resources by workstream and initiative; identify scope and map to departments to provide a cohesive list by project initiative and County department.
- Develop a communication strategy for all County resources, departments, stakeholders, and relevant points of authority.
- Develop RACI for PMO and relevant County resources with guidelines to manage future changes.
- Establish escalation paths for key decisions and risk management.
- Share and adopt practices for continuous improvement.
- Provide ongoing support of and coordination for County resources in the execution of all initiatives.
- Prepare LUS to take over the PMO, and transition ownership in last month of contract.

LUS's Responsibilities

- Review and confirm all proposed management tools to coordinate County resources and track assigned tasks; provide alternative or preferred tools for review if needed to supplement.
- Secure engagement and buy-in from County resources for project initiatives.
- Take ownership of the PMO and staff it accordingly.

Time Frame

- Approximately 1 Month (Standup)
- 17 Months (Ongoing Management)

Deliverables

- Project Management Playbook** that will standardize project management methodologies, clarify roles and responsibilities across workstreams, enable efficient decision-making and risk management, and support continuous improvement and knowledge sharing
- Monthly PMO Status Reports** for executive review

IMPACT

- Serves as the foundational tool designed to guide the County and Gartner teams through the successful implementation and long-term management of the project.
- Coordinates and organizes assigned County resources in the execution of all project initiatives.

Initiative 3: Create Strategic Roadmap

Clearly document future activities needed to reach goals

Objective

- Create a comprehensive, multi-phase roadmap that guides modernization decisions and actions across all workstreams.
- Align desired business outcomes, dependencies, resource needs, and sequencing in a single, actionable plan.

Activities Performed by Gartner

- Lead approximately 6–8 structured strategic working sessions (workshops, interviews, and/or reviews) with LUS, ITD, and partner departments to determine key milestones, prerequisites, and contingencies in a detailed approach.
- Facilitate collaborative sessions to define desired outcomes, guiding principles, success measures, and required capabilities.
- Map business objectives to key initiatives on the roadmap and align strategic direction with intended outcomes.
- Sequence initiatives into a phased roadmap based on impact, dependencies, organizational readiness, and available resourcing.
- Deliver and socialize an actionable Strategic Roadmap that reflects LUS goals, interdependencies, and a recommended approach for the next 18–24 months.
- Include detailed Tactical Project Plan to be maintained and updated monthly.

LUS's Responsibilities

- Coordinate and ensure participation from all required stakeholders, including SMEs from LUS, ITD, and involved departments, for the 6–8 roadmap working sessions.
- Provide business objectives, investment priorities, existing documentation, and any relevant roadmaps or strategies.
- Validate and rank initiatives against organizational goals and strategic priorities.
- Provide requested documentation in a timely manner and review deliverables for accuracy.
- Approve the final roadmap and resource allocation plan.

Time Frame

- Approximately 1 Month

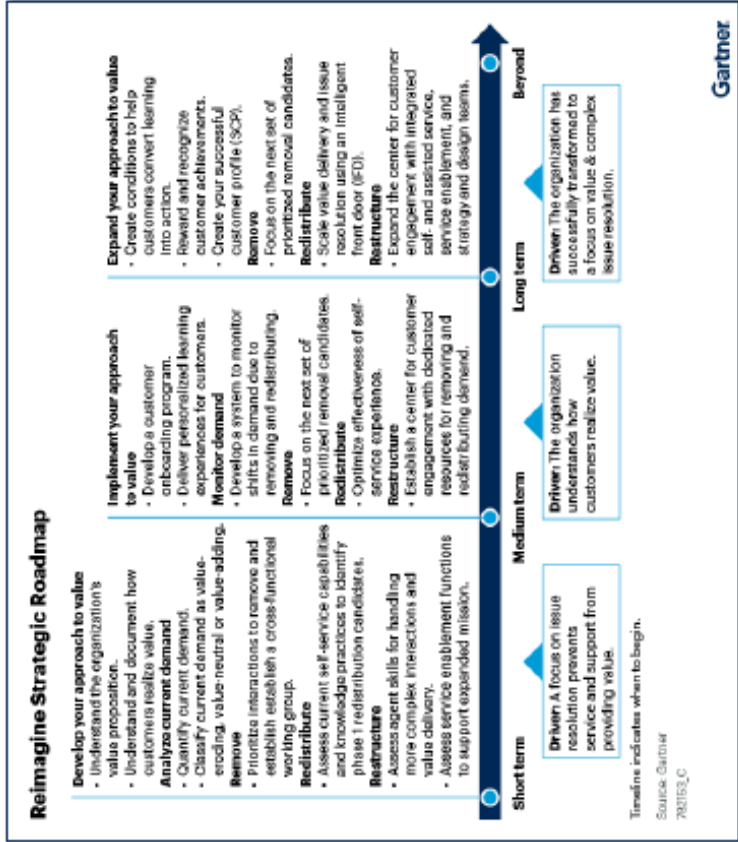
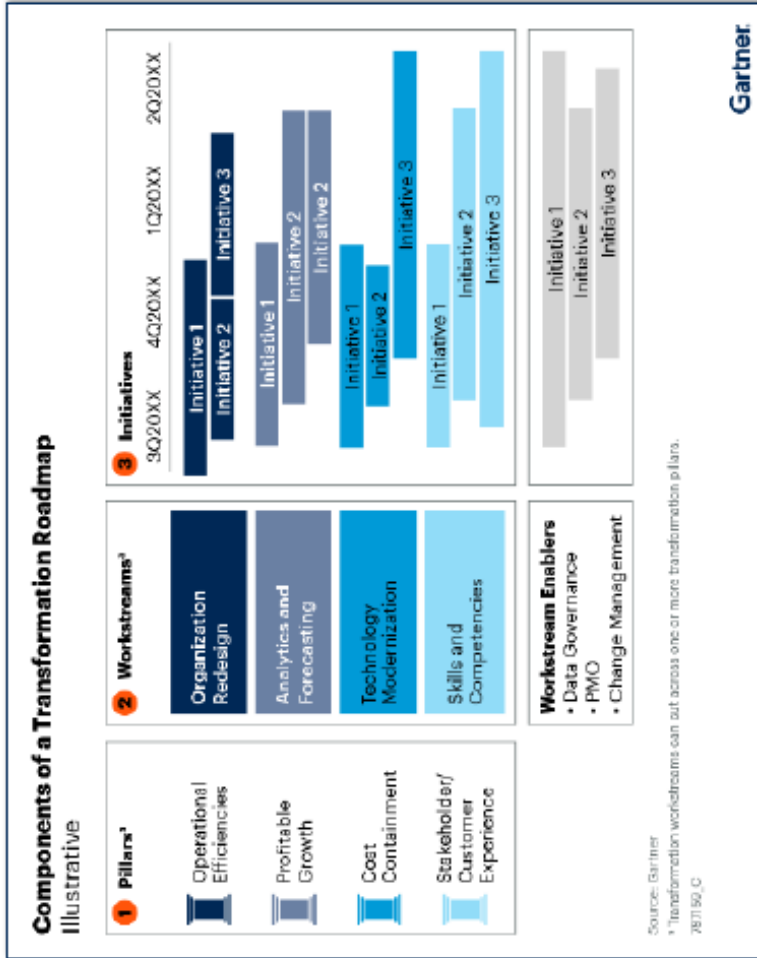
Deliverables

- **Strategic Roadmap** that will include strategic priorities, business objectives, and key initiatives
- **Tactical Project Plan** with details on milestones and time lines, resource allocations, and dependencies

IMPACT

- Creates a common understanding of LUS goals, priorities, and the path to achieving them.
- Identifies Quick Wins with sequencing that accelerates early value delivery.
- Provides a comprehensive, structured plan with clear dependencies and target outcomes to guide all modernization efforts.

Initiative 3: Create Strategic Roadmap Work Samples & Approach



Initiative 4: Establish Enterprise Governance Clarify how enterprise technology decisions are made

Objective

- Create organization-wide alignment on permitting systems governance and decision-making authority.
- Define the structure, roles, and processes required to make consistent, business-led technology decisions across LUS, ITD, and partner departments.

Activities Performed by Gartner

- Conduct an assessment of the current organizational structure and technology landscape for permitting systems as it related to decision making rights and general oversight.
- Assess the level of current maturity as it relates to governance and document gaps between observed processes and best practices.
- Document the risks incurred by the current processes.
- Develop the governance framework and charter.
 - Define roles and responsibilities and boards / committees including for a Change Control Board (CCB).
 - Generate and validate the structure and escalation path that will be utilized for technology decisions.
- Facilitate initial governance meetings through and decision-making process to ease the transition and guide the change.
- Implement the change control and change control workflows, including routing, required documentation, and approval checkpoints.
- Transition management of Enterprise Governance function to LUS after successful standup.

LUS's Responsibilities

- Appoint executive sponsors, program director, and board/committee members; confirm quorum rules and decision thresholds.
- Chair CCB and other governance sessions as appropriate; render scope/schedule/budget decisions per the approved matrix.
- Provide information on how governance is currently managed to support the assessment.
- Supply requested documentation in a timely manner to support review and analysis.
- Validate and sign off on the governance structure and charter.
- Coordinate participation from LUS, ITD, and partner departments for governance creation and standing governance meetings.

Time Frame

- Approximately 2 Months (Gartner Owned)
- Approximately 2 Months (Transition Period)
- Ongoing (County Owned)

Deliverables

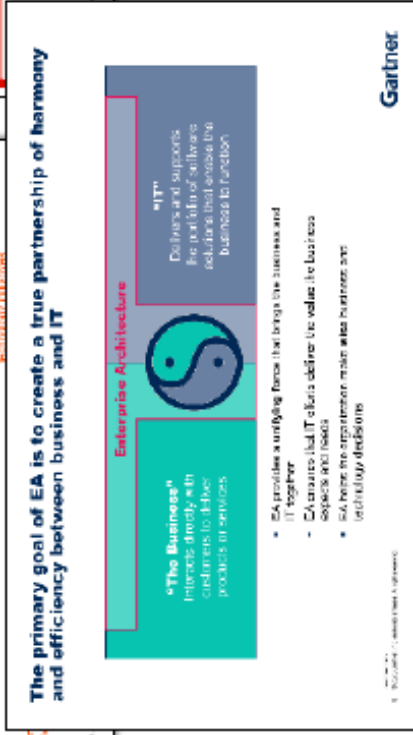
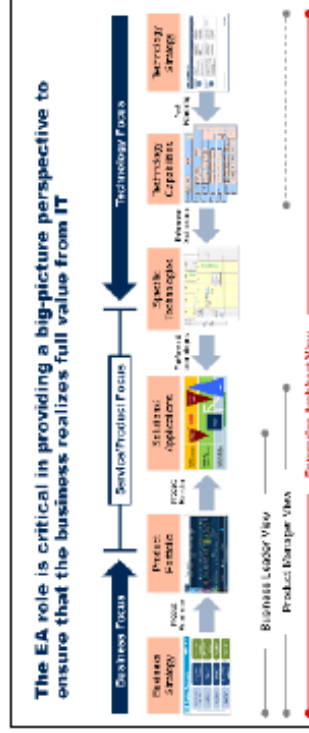
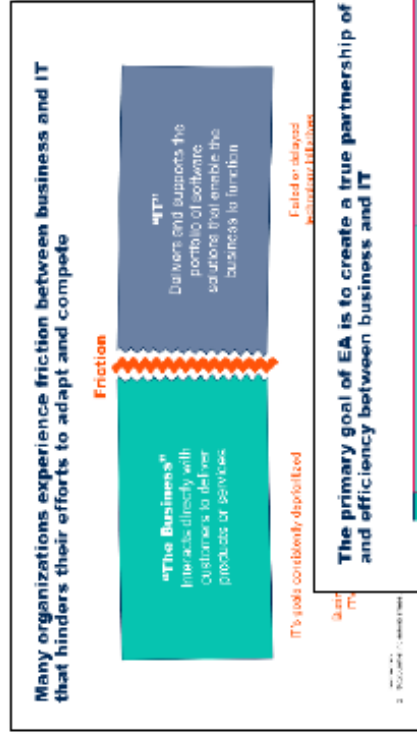
- **Governance Structure and Procedures:** A charter document that clearly outlines how enterprise governance will be managed for San Bernardino County moving forward

IMPACT

- Establishes a coherent structure for enterprise-wide technology decision-making, enabling consistent, business-led choices.
- Improves alignment across departments by providing clear roles, responsibilities, and escalation paths.
- Reduces risk and rework by enforcing standardized governance processes and change control mechanisms.

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Initiative 4: Establish Enterprise Governance Work Samples & Approach



Initiative 5: Define System Administration

Identify system administration roles and structure

Objective

- Clearly define and document the roles, responsibilities, policies, and procedures required for effective system administration.
- Establish a sustainable operating model for managing Acoela and related solutions aligned to best practices.

Activities Performed by Gartner

- Conduct discovery to understand how vendors and software solutions are currently managed, including existing processes, policies, and communication pathways.
- Identify risks created by current system administration practices and document gaps between the current state and best practices.
- Engage and collaborate with stakeholders to ideate the future state.
- Develop a structured framework for system administration that includes: Segmentation of administration roles, a clear RACI matrix, technical guidelines, and monitoring and auditing methodology
- Conduct a workshop to review and validate the draft system administration framework.
- Generate and validate KPIs that will be used to measure system administration success.
- Present the finalized system administration structure, including names assigned to roles for handoff and future County ownership.

- Transition ownership of System Administration management to LUS after successful standup.

LUS's Responsibilities

- Facilitate meeting and workshop attendance.
- Validate and approve system administration structure.
- Operationalize system administration process and report on KPIs.
- Inform vendors of the new roles and lines of communication.
- Assume the management responsibilities of System Administration

Time Frame

- Approximately 2 Months (Gartner Owned)
- Approximately 2 Months (Transition Period)
- Ongoing (County Owned)

Deliverables

- System Administration Roles and Responsibilities** document with all necessary information for hand-off and continued administration by the County

IMPACT

- Establishes a clear and sustainable framework for managing Acoela and related systems.
- Improves consistency, accountability, and quality of configuration and maintenance activities.
- Enhances operational efficiency and reduces risk by aligning system administration practices to best practices.

Initiative 5: Define System Administration Work Samples & Approach

Office Standup
Governance
Optimization
Optional

RACI Overview

The following pages identify the decision rights for each group within the project governance structure. This can be broken down further by identifying the individual participants (e.g., individuals, governance bodies, roles or organizational units) that own the process.

The table includes the topic areas related to the project that require decisions to be made through governance. Each cell in the matrix indicates the participant's involvement in the process or function.

- R** Responsible for making decisions related to the topic/area
- A** Accountable for the results of, and may approve, decisions made about the topic/area.
- C** Consulted by those making decisions related to the topic/area.
- I** Informed about decisions made related to the topic/area.

RACI – Decision Rights (3 of 3)

Project Decision Area/Topic		Roles 2022-23		Executive Committee	PMO	Vendor Team	Program Assurance
Project Decision Area/Topic	Project Decision Area/Topic	Project Decision Area/Topic	Project Decision Area/Topic	Project Decision Area/Topic	Project Decision Area/Topic	Project Decision Area/Topic	Project Decision Area/Topic
	Project Decision Area/Topic	Project Decision Area/Topic	Project Decision Area/Topic	Project Decision Area/Topic	Project Decision Area/Topic	Project Decision Area/Topic	Project Decision Area/Topic

RACI – Decision Rights (2 of 3)

Project Decision Area/Topic		Roles 2022-23		Executive Committee	PMO	Vendor Team	Program Assurance
Project Decision Area/Topic	Project Decision Area/Topic	Project Decision Area/Topic	Project Decision Area/Topic	Project Decision Area/Topic	Project Decision Area/Topic	Project Decision Area/Topic	Project Decision Area/Topic
	Project Decision Area/Topic	Project Decision Area/Topic	Project Decision Area/Topic	Project Decision Area/Topic	Project Decision Area/Topic	Project Decision Area/Topic	Project Decision Area/Topic

RACI – Decision Rights (1 of 3)

Project Decision Area/Topic		Roles 2022-23		Executive Committee	PMO	Vendor Team	Program Assurance
Project Decision Area/Topic	Project Decision Area/Topic	Project Decision Area/Topic	Project Decision Area/Topic	Project Decision Area/Topic	Project Decision Area/Topic	Project Decision Area/Topic	Project Decision Area/Topic
	Project Decision Area/Topic	Project Decision Area/Topic	Project Decision Area/Topic	Project Decision Area/Topic	Project Decision Area/Topic	Project Decision Area/Topic	Project Decision Area/Topic

Initiative 6: Develop Data & Analytics Management Build the foundation for informed decision making

Objective

- Establish and operationalize data and analytics governance, standards, and tracking.
- Define the structures, roles, and processes required to support accurate reporting, analytics, and performance measurement.

Activities Performed by Gartner

- Conduct workshops with LUS, ITD, and other involved departments to assess current data maturity, reporting capabilities, standards, and pain points.
- Assess data quality, standards, and lineage; define a preliminary data cleansing and conversion plan with KPIs.
- Use AI-enabled discovery tools to accelerate analysis for refinement with County SMEs.
- Work with business leaders to define key metrics and reporting needs for operational and strategic decision making.
- Develop a Master Data Management (MDM) Framework that includes governance roles, definitions, data standards, business rules, retention policies, and a reporting/analytics backlog.
- Document and prioritize key analytics use cases to maximize the business value generated through reports, dashboards, and KPI tracking.
- Validate the MDM Framework, KPIs, and analytics prioritization with LUS leadership and finalize for implementation.
- Provide a detailed Data & Analytics transition plan to allow LUS to take ownership of the initiative.

LUS's Responsibilities

- Provide access to data sources, schemas, and historical extracts; identify stewards and SMEs.
- Approve data standards, retention policies, and reporting and taxonomy definitions; prioritize analytics backlog.
- Execute cleansing and validation activities where necessary for relevant data.
- Assign data stewards and analytics SMEs for workshops.
- Review and socialize governance plans.
- Implement tools and processes for data quality monitoring.
- Provide input on reporting and analytics needs and priorities.

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Time Frame

- Approximately 2 Months (Gartner Owned)
- Approximately 2 Months (Transition Period)
- Ongoing (County Owned)

Deliverables

- Validated Key Performance Indicators (KPIs)** which will empower informed decision making and real-time analytics
- Data Governance Framework** to create a clear and mutual understanding of how data is stored, tracked, and managed

IMPACT

- Establishes a consistent data foundation that supports accurate reporting, analytics, and executive decision-making.
- Builds clear roles, standards, and governance to improve data integrity and reduce reporting variability across divisions.
- Provides a prioritized analytics roadmap aligned to business outcomes and operational needs.

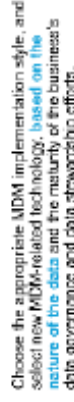
- Office Standup
- Governance
- Optimization
- Optional

Sorting Inference Illustration



Gartner

- Master data management (MDM) is a technology-enabled business discipline that is a core to creating a reliable source of trusted information driven by tools, standards, policies and accountability, which bridges data silos and improves data quality to drive business operations and outcomes.
- An enterprise's MDM technology is effective only when it aligns with the maturity of the business's core governance and data stewardship efforts.
- Gartner's proven approach of implementation cycles for MDM can help technical professionals achieve success and MDM maturity incrementally.



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Initiative 7: Define Future State Workflows

Build workflows around operations, not software

Objective

- Reengineer and document future-state workflows for critical LUS activities.
- Create standardized, replicable workflows (not to exceed 100 total process flows) that reflect operational needs and serve as the blueprint for Accela re-configuration.

Activities Performed by Gartner

- Facilitate workshops with functional areas to map current-state workflows, including handoffs, decision points, and pain points.
- Identify opportunities for improvement and areas requiring redesign based on gaps, inefficiencies, and process variation.
- Document standardized future-state workflows and user journeys, incorporating business rules, routing, validations, and required data elements.
- Validate and finalize the future-state workflows with each area, ensuring alignment with operational needs and cross-department processes.
- Translate finalized workflows into discrete requirements to be used for Accela configuration, vendor direction, training, and change management.
- Use AI tools to analyze workflow steps for improvement opportunities or gaps; review and validate AI-generated insights with project team members.

- Socialize future-state workflows with the selected software vendor to confirm feasibility and alignment with planned configuration.

LUS's Responsibilities

- Assign workflow leads and SMEs to define decisions, priorities, edge cases, and operational requirements during workflow workshops.
- Validate workflow designs, acceptance criteria, and operational readiness impacts.
- Ensure participation from the Project Sponsor, Project Manager, and other key stakeholders, as needed.
- Provide policy and procedure inputs, legacy materials, and supporting artifacts to inform harmonization and standardization across workflows.

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Time Frame

- Approximately 5 Months

Deliverables

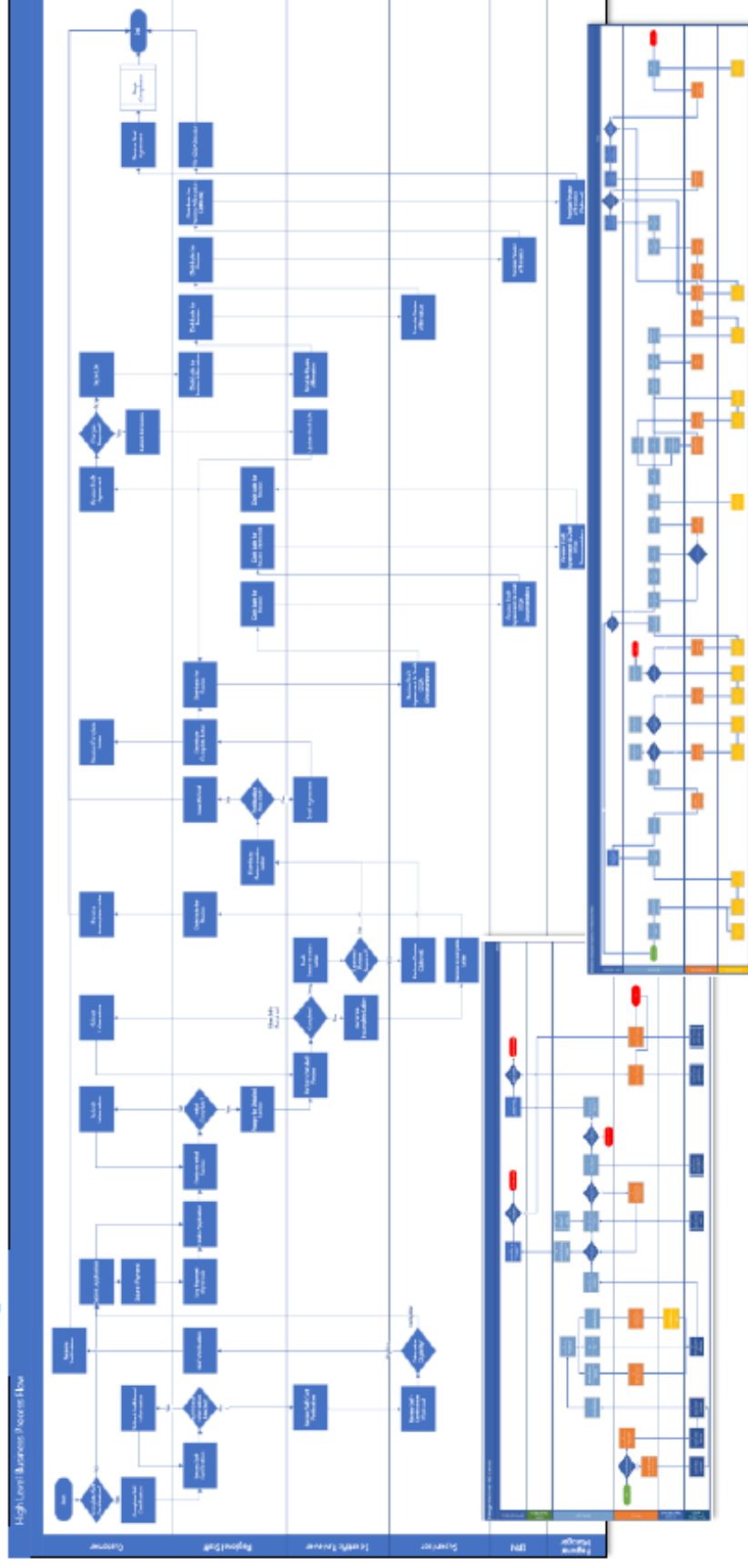
- High Level Journey Maps** detailing intended journeys by persona to align customer experience with process redesign
- Detailed Workflows and Step Definitions** that can be standardized, leveraged for training, and updated as necessary

IMPACT

- Creates a set of optimized workflows that reflect how LUS needs to operate and can be replicated reliably in Accela.
- Standardizes work processes to reduce rework, improve handoffs, and eliminate identified pain points.
- Establishes a strong operational blueprint that anchors system configuration, training, and ongoing process improvement.

Initiative 7: Define Future State Workflows Work Samples

Office Standup
Governance
Optimization
Optional



Initiative 8: Establish and Execute OCM and Training Plan Manage change fatigue and accelerate adoption

Objective

- Build and execute an organization-wide OCM program to drive readiness and adoption.
- Develop a Training Plan aligned to future-state workflows and hand it off to an appropriate vendor for delivery.

Activities Performed by Gartner

- Create a stakeholder map outlining roles, levels of impact, and expedited involvement across all workstreams.
- Develop and validate a business capability model heat-mapped to the volume and significance of change in each area.
- Build the OCM strategy, stakeholder personas, and communications plan; execute the communications cadence and feedback loops (surveys, forums) and refine based on results.
- Produce communications toolkits and executive messaging; support leadership engagement and change sponsorship activities throughout the period of performance.
- Design the Training Plan and knowledge-transfer approach for impacted roles; align to future-state workflows and release scope.
- Define adoption metrics and operate ongoing readiness tracking; report through the Transformation Office/PMO dashboards.
- Coordinate with LUS to transition the Training Plan and required materials to the selected training vendor for delivery.

LUS's Responsibilities

- Provide OCM executive sponsorship and designate an OCM Lead to collaborate with Gartner on execution.
- Approve the OCM strategy, communications plan, and Training Plan.
- Procure/assign a qualified training vendor (or internal training team) to deliver end-user training using the Gartner-developed Training Plan and materials.
- Publish communications via internal channels at the agreed cadence; ensure manager reinforcement and post-go-live support.
- Coordinate participation of SMEs and leaders in readiness activities and pre-go-live exercises.

Time Frame

- Approximately 14 Months

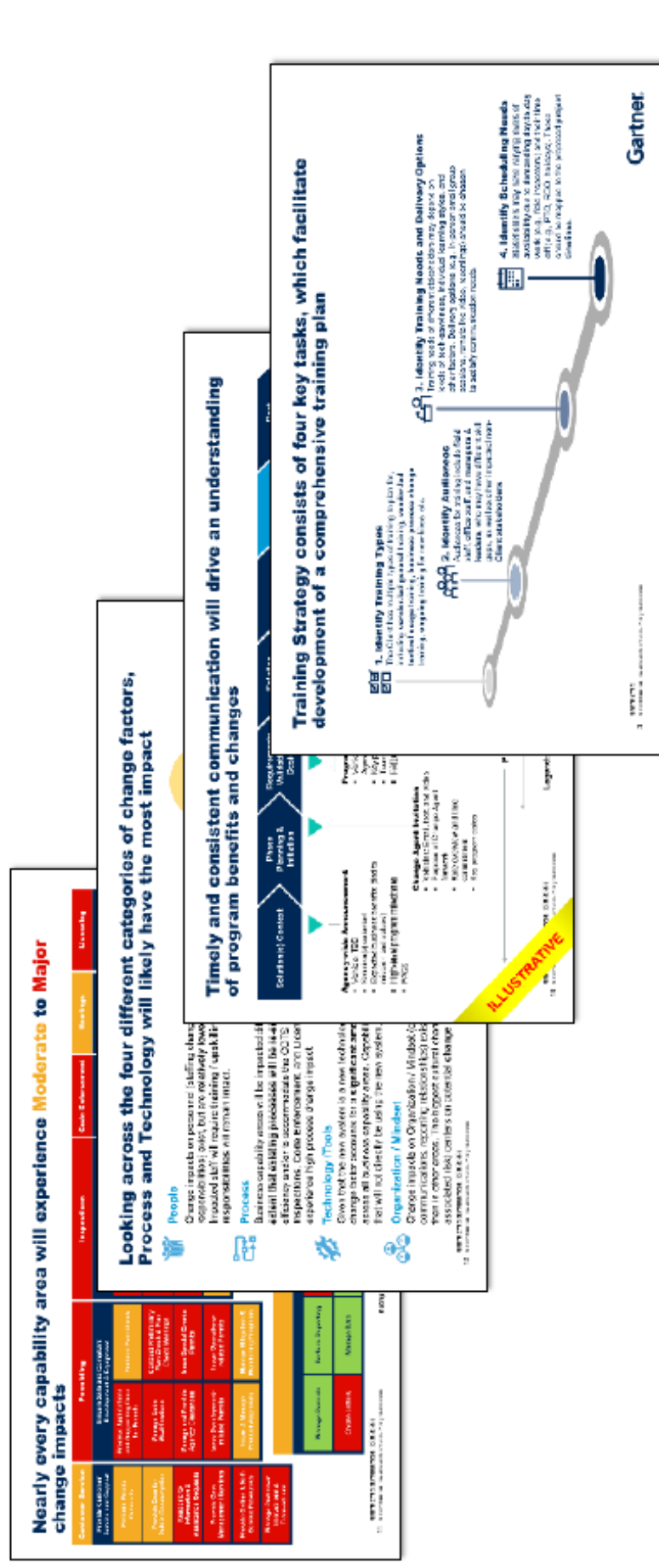
Deliverables

- Change Impact Assessment** that will analyze how changes will impact various areas within LUS and to what extent
- Stakeholder Engagement** to include OCM strategy, personas, communications plan, cadence, channels, and success measures
- Training Plan** with curriculum outline, role-based learning paths, required environments / data, trainer prerequisites, and schedule

IMPACT

- Accelerates readiness and adoption by executing a structured OCM program with measurable outcomes.
- Reduces disruption through clear roles, consistent communications, and targeted manager enablement.
- Ensures training is delivery-ready with a complete plan and materials, while enabling LUS to leverage the best-fit vendor for execution.

Initiative 8: Establish and Execute OCM and Training Plan Work Samples & Approach



Initiative 9: Accela Optimization Value Assurance Keeping the project on track to realize benefits

Objective

- Independently assess risks, opportunities, and dependencies throughout the Accela optimization effort to keep the project on track.
- Provide objective recommendations and oversight to increase quality, reduce rework, and help the County realize intended benefits.

Activities Performed by Gartner

- Assess current Accela configurations, backlogs, and performance; benchmark against leading practices and value-realization frameworks.
- Define an optimization roadmap for permits, licensing, and inspections, prioritizing quick wins and ROI-linked improvements.
- Participate in meetings with SBC and the selected Accela optimization vendor to stay aligned on scope, sequencing, decisions, and risks.
- Identify risks to project success and provide recommended mitigation actions.
- Produce monthly Value Assurance Reports summarizing progress, risks, dependencies, decisions, and recommendations.
- Maintain an active Risk Register updated monthly with recommended actions and owner assignments.
- Establish acceptance criteria and QA checks for configuration changes and validate changes against those criteria.
- Review vendor deliverables (including DEDs, configuration documentation, testing evidence, and release materials) to assess alignment with requirements and quality expectations.

LUS's Responsibilities

- Decide on optimization priorities, release sequencing, and change windows; authorize configuration promotions.
- Execute end-user validation (UAT or business acceptance) and sign off on value measures and configuration changes.
- Provide timely access to vendor deliverables, County documentation, and system environments required for value assurance activities.

Time Frame

- Approximately 9 Months

Deliverables

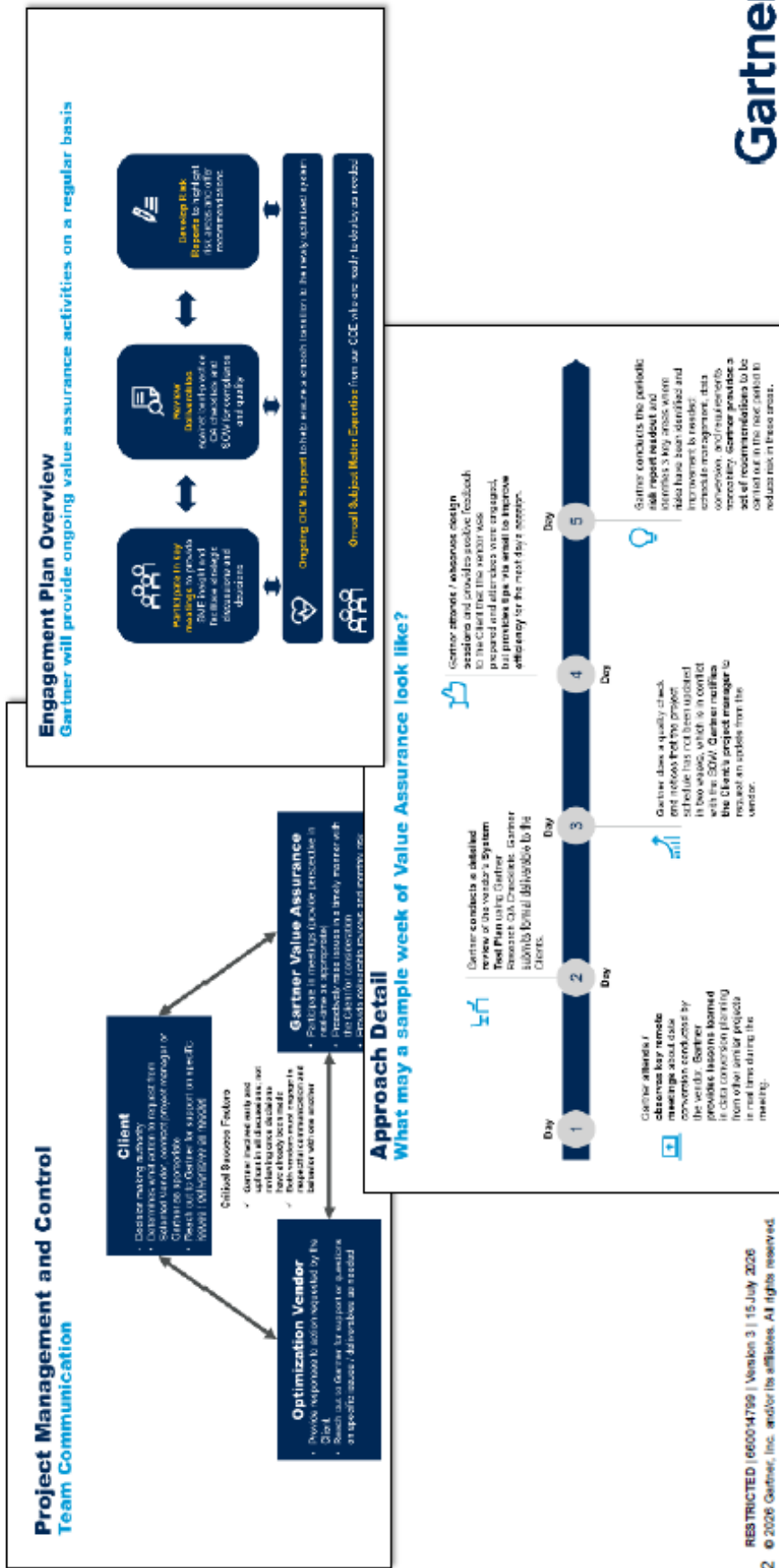
- Monthly Value Assurance Reports** that will assess progress and report on success metrics
- Risk Register with Recommendations** to efficiently track all project risks, any assignments, and mitigation recommendations

IMPACT

- Provides independent, objective oversight to ensure configuration aligns with business needs and leading practices.
- Reduces risk and rework by identifying issues early and guiding vendor activities toward measurable outcomes.
- Helps the Accela Optimization effort to deliver its intended benefits with quality, consistency, and traceability.

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Initiative 9: Accela Optimization Value Assurance Sample Works & Approach



Initiative 10: Regulatory Alignment & Policy Modernization (Optional)

Streamline regulations to enable simpler, faster, enforceable workflows

Objective

- Identify overlaps, redundancies, and ambiguities across Building Code and Zoning regulations that create avoidable handoffs and exceptions.
- Produce actionable recommendations that increase clarity and consistency, forming a foundation for downstream workflow redesign and Accela configuration.

Activities Performed by Gartner

- Conduct targeted discovery with Code, Planning/Zoning, and related stakeholders to define focus areas and current problem points.
- Ingest and normalize relevant ordinances, code sections, policies, and forms for analysis.
- Apply AI-assisted text analytics to cluster, compare, and detect overlap, conflicts, and unclear thresholds; validate findings with County SMEs.
- Facilitate working sessions to draft redlines and policy options; document decision impacts on fees, workflows, and data capture.
- Prepare an implementation plan that maps approved policy changes to workflow updates, training needs, and Accela configuration guardrails.

LUS's Responsibilities

- Provide access to current code, zoning ordinances, policy manuals, forms, prior redlines, and audit findings.
- Designate legal/policy and operational SMEs to participate in analysis reviews and working sessions.
- Confirm the priority topics (e.g., residential vs. commercial, specific entitlement types) and desired policy objectives.
- Review, refine, and approve recommended changes and associated operational implications.
- Coordinate communications and the formal policy adoption process, as required by County procedures.

Time Frame

- Approximately 12 weeks (final timeline to be confirmed after scope alignment)

Scope, Deliverables, and Pricing

- Because this is an optional service, **if the County elects to proceed**, Gartner will conduct a short (non-billable) scoping exercise and then provide **specific deliverables and pricing for approval**

IMPACT

- Reduces ambiguity and exceptions by clarifying rules, thresholds, and responsibilities.
- Shortens cycle times by eliminating redundant reviews and conflicting requirements.
- Aligns enforceable policy with future Accela workflows, fees, validations, and reporting.

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Initiative 11: AI Automation & Enablement (Optional)

Prioritize real-world AI use cases that improve CX and shorten permit cycle times

Objective

- Identify and prioritize AI use cases that measurably improve customer experience and reduce permitting/inspection cycle times.
- Produce an action plan that aligns AI investments to County goals and prepares LUS to proceed with the highest-value initiatives.

Activities Performed by Gartner

- Conduct discovery with LUS, ITD, and frontline staff to identify pain points, bottlenecks, and mission-critical outcomes.
- Compile and vet a library of proven AI use cases from comparable jurisdictions and successful implementations; align candidates to LUS goals.
- Facilitate prioritization workshops to score use cases by expected value, feasibility, risk, data readiness, and change impact.
- Define governance and guardrails for responsible AI (roles, review cadence, data access controls, privacy/security considerations).
- Outline pilot concepts for the top candidates (e.g., guided intake, plan-review assist, auto-notifications, anomaly detection), including required data, environments, success metrics, and owner roles.
- Develop an AI Action Plan that sequences the top use cases, identifies prerequisites and dependencies, and maps handoffs to procurement/implementation vendors.

LUS's Responsibilities

- Provide access to process owners, ITD architects, data stewards, and frontline SMEs for discovery and prioritization sessions.
- Share relevant performance baselines and operational targets (e.g., current cycle times, customer contact volumes, first-pass approval rates).
- Review and approve the prioritized use case list, governance approach, and success metrics.
- Lead or coordinate downstream activities to source implementation vendor(s) and provision tools/environments.

Time Frame

- Approximately 6–10 weeks (final timeline to be confirmed after scope alignment)

Scope, Deliverables, and Pricing

- Because this is an optional service, **if the County elects to proceed**, Gartner will conduct a short (non billable) scoping exercise and then provide **specific deliverables and pricing for approval**
- Typical outputs include a prioritized AI use-case portfolio, pilot concepts with KPI definitions, responsible-AI guardrails, and a time-phased AI Action Plan aligned to County objectives

IMPACT

- Focuses effort on practical, high-value AI use cases tied to measurable outcomes.
- Establishes responsible-AI governance and success metrics before significant investment.
- Provides a clear path to action that LUS can execute with selected implementation partners, aligned to County priorities and constraints.

Gartner

Office Standup
Governance
Optimization
Optional

- 1 Refine Vision
- 2 Build AI Sub-Committee

Output:

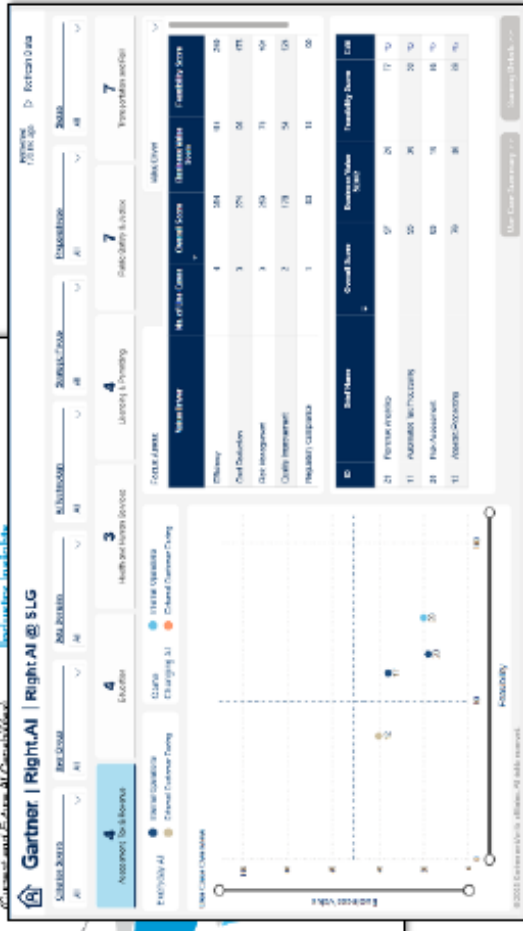
- Updated Client Transformation vision Statement

Output:

Control ID	Control Name	Control Type	Control Status	Control Owner	Control Description
AI-001	AI Model Development	Model Development	Active	AI Team	AI Model Development
AI-002	AI Model Deployment	Model Deployment	Active	AI Team	AI Model Deployment
AI-003	AI Model Monitoring	Model Monitoring	Active	AI Team	AI Model Monitoring
AI-004	AI Model Maintenance	Model Maintenance	Active	AI Team	AI Model Maintenance
AI-005	AI Model Evaluation	Model Evaluation	Active	AI Team	AI Model Evaluation

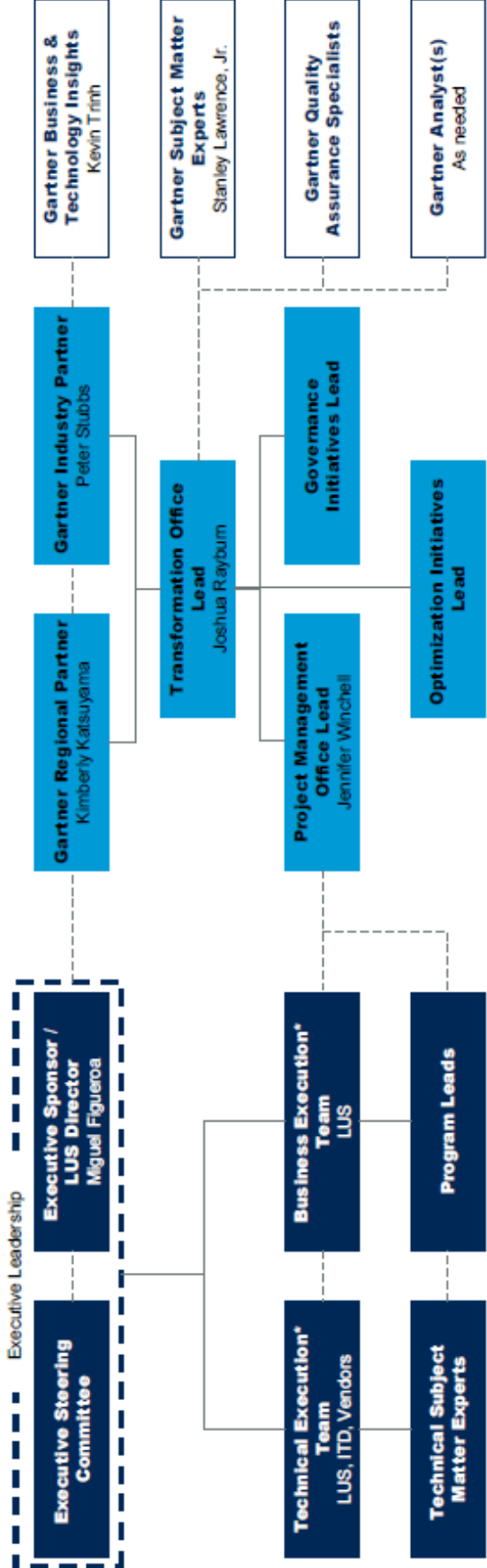
Diagram illustrating the components of a person's head and neck, labeled as 'Head', 'Neck', and 'Shoulders'.

FAST Product Roadmap
Constant and E. Ann McCreedy



Transformation Project Organization Chart

Gartner has created an organization structure for this engagement that provides high-level sponsorship and quality assurance, strong day-to-day project management, a focused team of project consultants, and deep subject matter expertise. Project team members named are proposed to work on this engagement. If any of the individuals proposed herein are not available, Gartner will substitute another qualified professional with similar expertise and credentials



*County leads for key transition areas of Enterprise Governance, System Administration, Data & Analytics Management, OCM & Training, Vendor Management to be identified prior to defined Gartner transition points.

Project Team Overview

Gartner Roles and Responsibilities

Functional Role	Responsibilities
Gartner Partners	- Oversee alignment of Gartner activities to support LUS and San Bernardino County goals. - Build and maintain a long-standing relationship with LUS. - Provide high-level oversight and become more heavily involved should any issue resolution be necessary.
Engagement Manager & Transformation Office Lead	- Day-to-day management of engagement initiatives to achieve on-time completion of deliverables that meet quality standards. - Act as the primary point of contact for the Gartner team. - Work closely with LUS to confirm that Gartner is meeting its needs.
Project Management Office Lead	- Coordinate project activities across the workstreams - Manage the project plan and milestones
Governance Initiative Lead & Optimization Initiatives Lead	Provide day-to-day consulting support for project steps including data collection/analysis; deliverable creation and review; and presentations to LUS.
QA Specialist	- Provide quality assurance review of Gartner project plan and Gartner deliverables throughout the engagement. - Promote value through use of the Gartner methodologies and proprietary tools.
Subject Matter Expert(s)	- Provide industry, solution and service expertise to enhance the Gartner team's recommendations and service delivery. - Share insights, leading practices and lessons learned during the engagement as needed. - Participate in deliverable review and client presentations as needed.
Gartner Analyst(s)	- Support the core project team by providing a context-sensitive perspective based on Gartner industry-leading insight. - Participate in analysis and comparisons, and review deliverables as needed.
Gartner Account Partners	Oversee that value delivered is seamlessly integrated with all Gartner services to San Bernardino County and that recommendations are actionable through ongoing Gartner services.

Project Team Overview

SBC Roles and Responsibilities

Functional Role	Responsibilities
Executive Steering Committee	- Attend steering committee meetings - Vote on project matters escalated to steering committee - Provide strategic guidance on transformation priorities - Review and endorse major change requests or scope adjustments
Executive Sponsor	- Provide strategic and operational guidance to the Transformation Office team to help ensure objectives are met - Provide high-level oversight to the project and become more heavily involved should an issue resolution be necessary - Facilitate leadership communications to ensure executive visibility and engagement
Technical Execution Team	- Validate the technical aspects of Acoela Optimization efforts - Oversee performance, security, and integration testing prior to any rollout - Work with the vendor's technical team to ensure a proper handoff
Business Execution Team	- Develop and own detailed business requirements documents, including acceptance criteria - Provide detailed feedback on business processes - Act as LUS business process SMEs - Participate in test planning and user-acceptance testing to validate process changes
Technical Subject Matter Experts	- Provide technical expertise on relevant, in-scope subjects and topics - Advise on needed requirements or other considerations during planning and optimization
Program Leads	Act as the business liaison(s) for specific LUS departments

Project Management and Control

Gartner's project management process accomplishes the following crucial activities during a project:



Our project management process guides reporting, risk mitigation, and engagement control throughout:

- **Status Meetings:** Weekly TO-led status (day/time TBD) and monthly Steering Committee
- **Weekly Status Report:** Completed; Planned-not-complete (with recovery); Next-up; Issues/decisions; Risks; Action items (owner/date)
- **Stakeholder Comms:**
 - Distributed to Sponsor/PM/workstream leads/ITD/vendors
 - RAID and decision logs in the Transformation Office workspace; escalations via the Change Control Board and/or the Steering Committee
- **Key Risks & Mitigations:**
 - County staffing availability - Mitigation: Gartner runs the Transformation Office for 18 months, provides surge capacity, and cross-trains County staff
 - 3rd-party scope/cost/timing (Accela re-config, training, integrations/reports/dashboards) - Mitigation: Gartner Value Assurance, detailed workflow/requirements and acceptance criteria, governed releases; if re-config exceeds 18 months, Gartner hands off with prioritized backlog and controls to sustain momentum
- Gartner will be in constant communication with LUS stakeholders to facilitate full awareness of activities, the associated timeline, and actions required to enable efficient control of project change.

Assumptions

San Bernardino County's Participation

The deliverables, schedule, and pricing in this Proposal are based on the following assumptions:

San Bernardino County's Participation

- San Bernardino County will designate a project coordinator to act as the primary point of contact for this engagement. San Bernardino County's project coordinator will be expected to work closely with the Gartner employees as needed and will: (a) approve priorities, detailed task plans and schedules; (b) support the scheduling of Gartner interviews with appropriate client personnel; (c) notify Gartner in writing of any engagement or performance issues; and (d) assist in resolving issues that may arise.
- The work effort described in this Proposal assumes San Bernardino County's personnel are available to assist in the manner defined in this Proposal. If San Bernardino County's personnel are not available as defined by the project plan, it may result in a change of scope.
- San Bernardino County will review and approve all documents required to facilitate project execution (collectively "Project Documents") within 5 business days. If no formal approval or rejection is received within this time frame, the Project Documents are considered to be accepted by San Bernardino County.
- San Bernardino County will support the scheduling of County resources for engagement activities, provide meeting facilities as necessary, and provide access to meeting audio records and transcripts for record and analysis.
- San Bernardino County's personnel will be available per the final project schedule. Additional meetings due to unavailable personnel may result in a scope change.
- San Bernardino County will identify individuals to support the transition period efforts for relevant initiatives and oversee their continued management (as indicated in the approach timeline).
- Accela Optimization will be completed by a third-party vendor within the estimated timeframe indicated in the approach timeline; in the event that optimization efforts stretch beyond the 18-month limit of Gartner's contract, San Bernardino County will take on Value Assurance and OCM activities (through a structured transition period with readiness assessments) for the remainder of optimization efforts.
- Gartner will formally capture feedback on your overall experience via our client survey. This allows us to quantify our performance on this engagement and to achieve a culture of continuous improvement in processes and best practices.

Assumptions

Data Collection and Key Personnel

Data Collection

- The due diligence (as-is) data are reasonably available via interviews and documentation review.
- San Bernardino County will provide timely access to all appropriate personnel to be interviewed. These personnel will provide the data necessary to complete this engagement, answer questions, provide existing documentation, and attend working sessions.
- Engagement pricing is based on the assumption that Gartner will conduct up to 30 workshops and 20 interviews for non-optional, in-scope tasks, and that San Bernardino County will arrange all sessions with County personnel.
- Gartner will document up to 100 future state business processes during Initiative 7 (Document Future State Workflows).
- All data collection and interviews/workshops will take place via Microsoft Teams, telephone, or in person at the location as described in this Proposal and/or as agreed to at the project kickoff.
- Artificial intelligence may be used for items such as, but not limited to, summarizing notes and meeting transcripts, reviewing deliverables, generating deliverables, and reviewing client-provided documentation.

Key Personnel

- Upon signing of a contract, we will identify those associates with the appropriate skills and background to deliver fully on the undertakings defined in the Proposal.
- If unforeseen circumstances require the replacement of an associate on an engagement, Gartner will inform San Bernardino County as soon as reasonably possible and substitute appropriate associates with comparable skills.
- Gartner associates identified as Account Partners are not billed for as part of project pricing. Their guidance and support represent a significant value-add to the engagement.

Assumptions

Place of Performance and Deliverables

Place of Performance

- Except as agreed between Gartner and San Bernardino County, all Gartner services will be performed at Gartner locations.
- Office space, telephones, printing/copying services, and access to the open internet will be made available on a reasonable basis to Gartner at San Bernardino County's locations for onsite time.

Deliverables

- Any requests for additional information or resources (beyond the details described in the steps above) that are made by San Bernardino County will be considered a change in scope for this engagement and will be handled accordingly (see Changes to Scope section of this Proposal).
- All deliverables will be developed using Microsoft Office products (e.g., Word, PowerPoint, Excel, Visio, Project).
- All Deliverables, provided by Gartner to Client shall be deemed to be accepted within 5 days of receipt by Client unless Gartner receives written notice of non-acceptance.
- Deliverables will not be made available to anyone outside of Client organization.

Gartner Independence and Objectivity

- Gartner Business and Technology Insight and Gartner Consulting recommendations are produced independently by the Company's analysts and consultants, respectively, without the influence, review or approval of outside investors, shareholders or directors.
- For further information on the independence and integrity of Gartner Business and Technology Insight, see "Guiding Principles on Independence and Objectivity" on our website, gartner.com or contact the Office of the Ombuds at ombuds@gartner.com or +1 203 316 3334.

Investment Summary

The Investment Summary section, which is incorporated into the Proposal, sets forth Gartner's detailed pricing and legal terms.

Investment Summary: Fees, Expenses, Billing and Invoicing

- Gartner will conduct the engagement as outlined in this Proposal for a firm fixed-price of \$2,160,000 (plus applicable taxes), inclusive of travel and other reimbursable expenses. Fees will be billed by milestone per the schedule to the right.
- Gartner will bill for the professional fees at the conclusion of each milestone upon San Bernardino County's acceptance of the deliverable(s) for that milestone. Note, Client shall provide Gartner with notice of acceptance or non-acceptance within 5 days; provided, however, if no response from Client is received by Gartner within such period, then acceptance of the deliverable is assumed.
- Gartner will invoice Client for Services based upon the agreed schedule, which are stated exclusive of all taxes. Payment is due 60 days from the invoice date. Where required, Gartner shall charge, and Client shall pay all applicable sales, use, value-added, or other tax(es) or charge(s) imposed or assessed by any governmental entity upon the sale, use, or receipt of Services, with the exception of any tax(es) imposed on the net income of Gartner. While we do not provide itemized billing for services, we agree and will comply with any reasonable requests for records substantiating our invoices.
- San Bernardino County will provide a Purchase Order (PO) with the following reference: 660014799, USD \$2,160,000 for Consulting. Any pre-printed or additional contract terms included on the PO shall be inapplicable and of no force or effect.

Milestone	Description	Fees
Month 2	Program Management & Value Realization Services (2 months)	\$240,000
Month 4	Program Management & Value Realization Services (2 months)	\$240,000
Month 6	Program Management & Value Realization Services (2 months)	\$240,000
Month 8	Program Management & Value Realization Services (2 months)	\$240,000
Month 10	Program Management & Value Realization Services (2 months)	\$240,000
Month 12	Program Management & Value Realization Services (2 months)	\$240,000
Month 14	Program Management & Value Realization Services (2 months)	\$240,000
Month 16	Program Management & Value Realization Services (2 months)	\$240,000
Month 18	Program Management & Value Realization Services (2 months)	\$240,000
Total Fees:		\$2,160,000

- The fixed-price fees proposed herein are based on the Program Management and Value Realization Services rates established in Exhibit A, Table 2 of Master Agreement No. 9658 for Structured Applied Research and Advisory Services. Consistent with the Master Agreement, the published rates are maximum not-to-exceed weekly rates inclusive of travel and reimbursable expenses.
- The milestone fees set forth herein represent the agreed fixed-price investment for the Services described in this Proposal and are within the applicable pricing limits established under the Master Agreement.

Changes to Scope and Additional Terms & Conditions

Changes in Scope

- The scope of this engagement is defined by this Proposal. All San Bernardino County requests for changes to the Proposal must be in writing and must set forth with specificity the requested changes. As soon as practicable, Gartner shall advise San Bernardino County of the cost and schedule implications of the requested changes and any other necessary details to allow both parties to make an informed decision as to whether they will 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 may include the following:
 - Any activities not specifically set forth in this Proposal.
 - Any prolongation beyond the project duration 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 San Bernardino County, 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 San Bernardino County.
 - Any additional work caused by a change in the assumptions set forth in this Proposal.
 - Any delays in deliverables caused by modification of acceptance criteria in this Proposal.
 - Any changes to Business and Technology Insight Analysts' time or resources.

Additional Terms & Conditions

- Client hereby consents to allow Gartner Consulting to reference the name of the client's organization in connection with the current Gartner solution/ scope of work only in future Gartner Consulting proposals.

Authorization

- When signed by Gartner Inc. and San Bernardino County, this Proposal is incorporated in and governed by County of Ventura master agreement with Gartner, Inc. (Gartner Inc. Ventura County Master Agreement No. 9658 dated April 29, 2025 with County of Ventura). Jurisdictions other than Ventura County are able to use this agreement to procure Gartner offerings. These two documents (the Proposal and governing terms) set forth the relationship between the parties for this engagement.
- This Proposal may be modified at any time provided such changes (i) are agreed by the parties in writing and (ii) where applicable, are in accordance with the Change to Scope provision.
- The Proposal is valid for 60 days from 15 July 2026

Limitation of Liability: Contractor's total liability arising out of this Agreement and the provision of the Services shall be limited to the fees paid by the County under the specific Statement of Work under which such liability arises.

ELECTRONIC SIGNATURES

This Agreement may be executed in any number of counterparts, each of which so executed shall be deemed to be an original, and such counterparts shall together constitute one and the same Agreement. The parties shall be entitled to sign and transmit an electronic signature of this Agreement (whether by facsimile, PDF or other mail transmission), which signature shall be binding on the party whose name is contained therein. Each party providing an electronic signature agrees to promptly execute and deliver to the other party an original signed Agreement upon request.

Gartner requires a signature on the SOW to place Client's order. To the extent, Client's practices are to request Services automatically via Purchase Orders, the Purchase Order will be considered as a valid and binding confirmation without a written signature. Any pre-printed or additional contract terms included on the Purchase Order shall be inapplicable and of no force or effect.

SUBMITTED ON BEHALF OF Gartner, Inc.

Kimberly Katsuyama
Kimberly.Katsuyama@gartner.com 2025-07-14 3:10 PM

SIGNATURE

Kimberly Katsuyama, Managing Partner

PRINT NAME AND TITLE

07/30/2026

DATE

AGREED ON BEHALF OF San Bernardino County

SIGNATURE

Dawn Rowe, Chair, Board of Supervisors

PRINT NAME AND TITLE

DATE

ADDRESS

Gartner



Appendix

About Gartner Consulting and our Regulatory Expertise



For over 40 years, Gartner has helped clients make the right decisions and stay ahead of change

Gartner is the world leader in business and technology insights. We've expanded well beyond our flagship technology insights to provide senior leaders across the enterprise with the indispensable insights, advice, and tools they need to achieve their mission-critical priorities and build the organizations of tomorrow.

Together with our clients, we fuel the future of business so that a more successful world takes shape.



Insights

Industry's largest insights database with 150,000+ documents covering 1,000+ technology and business topics



Advisory Services

Unique perspective for clients delivered via one-on-one interactions with subject matter experts and Gartner Executive Partners



Conferences

Information-packed sessions led by Gartner analysts, peer networking with senior IT and business leaders, and much more



Consulting

Delivering results on initiatives through customized client engagements that address mission critical priorities in an expedited way

Gartner Consulting does not sell or implement software, we drive the strategy, procurement, implementation & benefits realization

We are part of the team

We collaborate with our clients daily, ensuring that your requirements are met and your expectations are exceeded, with a focus on collaboration and knowledge sharing.

Proactive & Evidence-Based

Effective risk management requires early and aggressive risk identification through collaboration and involvement of the relevant stakeholders.



Holistic Approach

Gartner believes that client programs should focus as much – if not more – on the process, organization, benefits, and financial aspects of the initiative as on the technology.

Benefits Realization

Gartner believes that the program only ends when the benefits have been achieved or the program is discontinued for other reasons. Completion of a system rollout or a process rollout is the first step—not the last. Our framework supports the “monitoring” of program benefits to ensure that they are achieved.

Rooted in Gartner Insights

Gartner’s Program Assurance solution is based on Gartner’s Critical Program Management Framework—which embeds Gartner’s philosophy and point of view on how to manage large and complex programs.

Gartner Consulting's Licensing, Permitting and Regulatory (LPR) Industry Service Line

We offer deep experience assisting regulatory organizations to achieve their business and technology goals.

State and local Government agencies have **trusted Gartner** to help navigate their licensing, permitting and regulatory administration challenges since 2007.

40
Associates in Gartner's Industry Service Line

65+
Organizations that have chosen to partner with Gartner Consulting

100+
Successful Gartner Engagements

Gartner partners with regulatory organizations throughout the US and Canada to solve their toughest licensing and permitting problems across varying competencies.

					
Alcohol & Cannabis Regulation	Environmental Protection and Conservation	Gaming and Lottery	Land Use and Building Permitting	Parks and Public Space Management	Professional Licensing

Gartner provides strategic planning, procurement, and implementation oversight services to ensure clients successfully implement solutions that are right-sized to their L&P needs.

						
Strategy and Needs Assessment	Market Scan	Fit-Gap Analysis	Process Improvement	Business Case Development	Procurement Support	Quality Assurance and Oversight

Regulatory Client Summary

Canadian Clients:

- Financial Regulatory Services
- Authority of Ontario
- Transport Canada
- City of Calgary
- City of Ottawa
- Liquor Control Board of Ontario

Washington State Liquor and Cannabis Board (WSLCB)

- Oregon Liquor Control Commission

California Dept. of Fish & Wildlife

- City of San Francisco
- County of San Francisco
- City of San Jose
- Santa Clara County

- County of Los Angeles
- City of Los Angeles
- City of Long Beach
- City of Irvine

- Clark County Dept. of Business License
- Clark County Land Management Office
- NV Secretary of State

San Diego County

- City of Dallas
- Dallas County

City of Austin

- Dept. of Motor Vehicles (DMV)
- Dept. of Licensing and Regulation (TDLR)
- Real Estate Commission (TREC)
- Railroad Commission (TRRC)
- Texas ABC

Maui County

- Dept. of Financial & Professional Regulation
- IL Gaming Board
- IL Env. Protection Agency

Dept. of Environmental Quality (DEQ)

- Ohio Board of Pharmacy

Indiana Professional Licensing Agency

- City of Kenosha

Nebraska Liquor Control Commission

- City of Lakewood
- City of Phoenix

City of Dallas

- Dallas County

City of Austin

- Dept. of Motor Vehicles (DMV)

Dept. of Licensing and Regulation (TDLR)

- Real Estate Commission (TREC)

Railroad Commission (TRRC)

- Texas ABC

City of San Antonio

- City of Houston

Jefferson County

- State of Florida

City of Jacksonville

- City of Port Orange

City of Orlando

- City of Winston-Salem

Mecklenburg County

- Dept. of Environmental Services

City of Charlotte

- City of Winston-Salem

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- MA Dept. of Weights & Measures
- MA Alcoholic Beverage Control Commission (ABCC)
- MA Dept. of Licensing (DOL)
- MA Dept. of Public Health
- MA Dept. of Criminal Justice Information Systems
- Town of Brookhaven
- NYC Dept of Buildings
- NYC Dept Consumer Affairs
- NYC Dept of Health & Mental Hygiene
- NYC Fire Department (FDNY)
- NYC Taxi & Limousine Commission
- City of Chesapeake
- City of Winston-Salem
- City of Charlotte
- Mecklenburg County
- Dept. of Environmental Services
- City of Jacksonville
- City of Port Orange
- City of Orlando

US Federal Clients

- Bureau of Safety and Environmental Enforcement
- U.S. Dept. of the Interior

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Appendix

Case Studies

Gartner supported Nebraska Liquor Control Commission through their modernization



Gartner partnered with the Nebraska Liquor Control Commission (NLCC) to modernize their licensing capabilities by modernizing their business processes and legacy technology.

Through breadth and depth of regulatory expertise, Gartner supported NLCC through the full lifecycle of their modernization journey and surpassed attainment of intended business benefits.



The Problem

The Nebraska Liquor Control Commission faced significant challenges with its outdated processes and systems, necessitating workarounds and manual processing to perform daily operations. The existing system's limitations resulted in several time-consuming steps for processing applications, generating reports, and collecting excise taxes. Furthermore, the agency lacked the technical support and industry-best-practice expertise required to develop detailed system requirements and navigate the vendor market effectively. During the implementation phase, the agency's restricted bandwidth and inexperience with User Acceptance Testing (UAT) posed risks to the project's success.

The Gartner Consulting Solution

- **Strategic Visioning:** Collaborated with NLCC to define and refine their mission, vision, and objectives for the modernization initiative. This strategic alignment ensured that the new system would effectively support the agency's long-term goals and operational needs.
- **Business Capability Analysis:** Conducted an in-depth analysis of NLCC's business capabilities to understand the specific processes and software solutions necessary to achieve desired business benefits. This thorough examination enabled the agency to identify key areas for improvement and align technology solutions with business priorities.
- **Procurement Strategy:** Developed a comprehensive procurement strategy that included crafting detailed RFP requirements, leveraging domain expertise and vendor market knowledge. This strategic approach ensured the selection of a solution that was not only cost-effective but also aligned with NLCC's primary business requirements.
- **Implementation Oversight:** Provided strategic oversight during the implementation, including Independent Verification and Validation (IV&V) services. This oversight equipped NLCC with enhanced vendor, project, and risk management capabilities, ensuring the project remained on track and within scope. Gartner also provided UAT management and oversight to align staff processes with newly developed and configured software.

The Results?

- **Reduced steps to apply for a license by 46% (from 69-37 steps)**
- **Reduced the number of minutes to process a license application by 76% (from 3:30 to 0:51)**
- **Gained a 98% reduction in staff time required for renewals (1,920 annual staff hours reduced to 40 hours)**
- **Increased citations / hearings from inspections by 136% through better use of technology**
- **Time to review and log shipper reports reduced from 25 hours per month to 0.**

Case Study: Transformation management office support

Context

- Client is a leading global CPG company undergoing an enterprisewide digital transformation to a product-centric IT operating model that deepens operational integration between existing business-led digital initiatives (products) and newly envisioned IT platforms and consolidated services.
- Client set aggressive timelines for implementation to both launch and achieve its North Star vision for a new digital operating model. To accelerate and keep pace they needed additional support to set-up and operate a Transformation Management Office (TMO) to coordinate and oversee global IT transformation initiatives and organizational change management.



Approach

- The approach was to use a build, operate, transfer (BOT) approach to accelerate the transformation effort and give the client teams an opportunity to transition and get accustomed to the transformation effort and their new activities.
- Gartner became an integral part of the day-to-day operations of the TMO starting with the setup (TMO charter, reporting/metrics, transformation plan) and then executing the plan driving activities including boarding resources and developing the initial organization communication Day 0, 1, 30 and 60 communications, facilitating planning meetings with IT ELT and CIO-1 teams and driving objective setting/plan development.
- A core TMO objective was to change "how" work gets done (not just changing reporting relationships) and was a key focus area to identify and transform the organization's core "rituals and routines" to drive cross-functional change (e.g., budgeting, ARB, etc.).



Challenges

- IT lacked a business and value driven orientation; creating a gap in governance styles with their business counterparts that already had a product-centric/OKR governance model in place.
- Assigned client resources to the TMO, though dedicated, lacked experience in guiding large-scale transformation; the rest of the organization needed to also sort a balanced focus between run and change activities.
- IT organization required significant change management and comms to set the right tone of engaged collaboration throughout the transformation process.
- The newly structured CIO-1 organizations did not have clarity on their new objectives and gaps, each requiring planning with their new leadership teams.



Benefits

- Transformation effort was launched and executed per plan with ongoing positive responses from the organization, which included a seamless transition of the TMO back to the client — key deliverables included:
 - TMO charter, position descriptions, and initial OCM strategy including a stakeholder analysis, impact assessment, communication & engagement plan, change plan metrics, and Steering Committee status reports.
 - Provided draft communication and engagement materials for IT Town Halls, weekly coffee chats facilitating Q&A sessions, employee change sentiment surveys, and stakeholder education materials for online transformation portal.
 - Developed a 2-year program plan and facilitated implementation strategy planning meetings with CIO-1 change leaders to define implementation activities, and key stakeholders, and validate desired outcomes & metrics.

Case Study: Transformation management office support

Chapter - Transformation Management Office (TMO)

Ensure realization of the future state vision

Objectives

Develop a digital transformation strategy that aligns with the organization's mission and vision, and ensures the organization is prepared for the future state vision.

Key Results

Develop a digital transformation strategy that aligns with the organization's mission and vision, and ensures the organization is prepared for the future state vision.

Success Metrics

Develop a digital transformation strategy that aligns with the organization's mission and vision, and ensures the organization is prepared for the future state vision.

Key Results

Develop a digital transformation strategy that aligns with the organization's mission and vision, and ensures the organization is prepared for the future state vision.

Success Metrics

Develop a digital transformation strategy that aligns with the organization's mission and vision, and ensures the organization is prepared for the future state vision.



Table with 4 columns: Initiative, Status, Description, and Notes. It lists various initiatives and their current status, such as 'Initiative 1' being 'On Track' and 'Initiative 2' being 'At Risk'.

TMO Bi-Weekly Status Report

Executive Summary

Key Metrics

Project Portfolio

Project Details

Project Status

Project Risks

Project Actions

Key Metrics

Project Portfolio

Project Details

Project Status

Project Risks

Project Actions

Table with 4 columns: Initiative, Status, Description, and Notes. It lists various initiatives and their current status, such as 'Initiative 1' being 'On Track' and 'Initiative 2' being 'At Risk'.

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Case Study: Transformation management office support



Their flexibility in being willing to change course and shift in response to a whirling cavalcade of priorities. All managed in an extremely high-quality manner with corresponding artifacts delivered to support long-term value.



— Head of IT Strategy & Architecture, Food and Beverages Company, U.S.A.

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