

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

June 22, 2021

**FROM**

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

**SUBJECT**

Amendment to Contract with Gartner, Inc. for Consulting Services

**RECOMMENDATION(S)**

Approve **Amendment No. 3 to Agreement No. 19-380** with Gartner, Inc. increasing the contract amount of \$530,200 by \$450,000 for a total contract amount of \$980,200; revising the scope of work to include additional consulting services for upgrading the Assessor's Property Information Management System; 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.

(Presenter: Bob Dutton, Assessor-Recorder-County Clerk, 382-3207)

**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 \$450,000 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 (\$1) for every two dollars (\$2) in program funds. The estimated total cost of this contract amendment is not to exceed \$450,000, with projected annual expenditures as follows:

<b>Cost Center</b>	<b>Applicable Service</b>	<b>FY2021-22</b>
3110002756	Consulting Services	\$450,000

The recommended amendment to Agreement No. 19-380 would increase the contract amount of \$530,200 by \$450,000, bringing the total contract amount to \$980,200. Adequate appropriation and revenue have been included in the Assessor-Recorder-County Clerk (ARC) 2021-22 SSCA Program (3110002756) budget.

Should the contract be extended for one additional one-year period beyond the recommended extension, the County may extend Gartner's consulting services at a rate of \$35,000 per monthly deliverable and the cumulate total of the requested optional deliverables shall not exceed \$273,190.

**BACKGROUND INFORMATION**

On June 11, 2019 (Item No. 13), the Board of Supervisors (Board) approved Agreement No. 19-380 with Gartner, Inc. (hereinafter “Gartner”) to provide consulting services for upgrading the Assessor’s Property Information Management System (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. 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.

Since June 2019, Gartner has been supporting Assessor staff with PIMS strategy development, readiness assessment, preparation of a RFP for the PIMS modernization project, and documenting current Assessor processes. Gartner is an industry leader in offering comprehensive technology research and advisory services, including government-specific analysis. In conjunction with Gartner’s recommendation and consultation with the County’s Purchasing Department, ARC chose to bring on a Systems Integrator (SI) to oversee the implementation of the PIMS modernization project. The goal of this project is to upgrade and modernize an outdated legacy application system (PIMS) into a new modern system called the Assessor’s Information Management System (AIMS) that will reduce overall costs, improve system flexibility and security, and increase collaboration between data users.

The SI works with ARC to drive strategy that will bring together multiple systems into a single harmonious and interoperable system. Initially, the project started with ARC’s Administration and Information Technology staff leading the implementation effort of this project as the main point of contact for the SI, but as the project progressed, staff began to recognize the benefit of including additional support to implement this effort, which could be achieved by revising Gartner’s scope of work to include additional consulting services as contained in Exhibit C.

Revising the scope of work would increase the contract amount of \$530,200 by \$450,000 for a total contract amount of \$980,200, and would require extending the term by one year from June 30, 2021, for a total agreement term of June 24, 2019 through June 30, 2022. Should additional services be required beyond the recommended one-year extension, ARC will seek Board approval for an additional extension. All other terms of the contract would remain unchanged.

Approval of this item would improve County government operations and allow the Assessor’s office to operate in a fiscally-responsible and business-like manner.

**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 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

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June 22, 2021**

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 (Kristina M. Robb, Supervising Deputy County Counsel, 387-5455) on May 13, 2021; Innovation and Technology (Larry Ainsworth, Chief Information Officer, 388-0567) on May 25, 2021; Purchasing (Bruce Cole, Supervising Buyer, 387-2148) on May 24, 2021; Risk Management (LeAnna Williams, Director of Risk Management, 386-8623) on May 13, 2021; Finance (Carl Lofton, Finance Analyst, 387-5404) on June 7, 2021; and County Finance and Administration (Robert Saldana, Deputy Executive Officer, 387-4342) on June 7, 2021.

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Record of Action of the Board of Supervisors  
County of San Bernardino

**APPROVED (CONSENT CALENDAR)**

Moved: Joe Baca, Jr. Seconded: Dawn Rowe

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

Lynna Monell, CLERK OF THE BOARD

BY   
DATED: June 22, 2021



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

CCM 06/28/2021