

# Jail Information Management System (JMS) Modernization Support Proposal

Prepared for:  
San Bernardino County Sheriff's Department

19 September 2025

Engagement Number: 660009916 | Version 4 (revised January 23, 2026)



# Cover Letter

Dear Dustin:

Gartner is pleased to present our Proposal to support the San Bernardino County Sheriff's Department in modernizing its Jail Information Management System (JMS). We recognize that your current system is costly to operate and maintain, and makes it challenging to connect data, technology, and workflows with other systems. Our team understands the importance of moving to a modern, integrated solution that incorporates best practice processes, supports your business and technology goals, and is sustainable for the future.

JMS modernization is a significant, multi-year effort affecting all detention staff and justice partners. Gartner is uniquely qualified to guide this transformation for SBCSD. Our team has over 175 years of combined public safety and justice experience, supporting similar projects for New York City, Clayton County, and Santa Clara County.

We offer objective, unbiased guidance tailored to SBCSD's needs. Our research-based frameworks, deep local experience, and understanding of all stakeholders ensure a smooth transition. Gartner's long-standing relationship with San Bernardino County means we are already familiar with your operational environment.

Our actionable business and technology insights and hands-on expertise help organizations like SBCSD make informed decisions and achieve lasting results. We can help you confidently move forward at each step, beginning with strategy and needs assessment, and continuing through solution selection, implementation, and benefits realization.

Thank you for considering Gartner to support you in this critical initiative. Please see the enclosed Proposal for details. If you have any questions, contact me at 310-270-7971 or [kimberly.katsuyama@gartner.com](mailto:kimberly.katsuyama@gartner.com).

Sincerely,



Kimberly Katsuyama  
Managing Partner, Gartner Consulting

# Table of Contents

	<b>01</b>	<b>Executive Summary</b>	Page 4
	<b>02</b>	<b>Value Proposition for SBCSD</b>	Page 8
	<b>03</b>	<b>Statement of Work</b>	Page 16
	<b>04</b>	<b>Investment Summary</b>	Page 43

# Executive Summary

# JIMS Modernization – Case for Change

## Current Environment

- **Overcrowding** challenges due to the high volume of county, state, and federal inmates housed.
- **Resource Strains** managing daily operations, including bookings, cell assignments, and routine tracking of incarcerated persons.
- **Impeded Operational Efficiency** and manual workarounds – limited reporting capabilities, and workflows can't be easily modified.
- **High Cost** to operate and maintain legacy solution.
- **Lack of Integration** with other Justice and service delivery partners inhibits data sharing to address critical issues like homelessness.

## Benefits of Modern JMS

- **Resource Optimization** through automation that can reduce administrative burden on staff and improve the time to perform tasks such as intake, processing, and assignments.
- **Digital Documentation** to improve data accuracy, data sharing, and facilitate faster retrieval of incarcerated person information.
- **Improved Safety and Security** through real-time tracking data of incarcerated persons and improved cybersecurity capabilities.
- **Enhanced Data Insights** through operational analytics, planning capabilities, and enhanced reporting.

## Partnership with Gartner

- **Experienced Public Safety Justice (PSJ) team** that works with Sheriff's Offices and other Correctional agencies across North America to plan for and implement Jail Management Systems, including LA County, Santa Clara, NYC, and Philadelphia.
- **Structured Guidance of a Complex, Multi-Year Endeavor** that will affect all aspects of the organization, including:
  - Defining SBCSD-specific requirements and needs
  - Building organizational readiness to plan for and realize the benefits of a JMS
  - Providing an in-depth understanding of the relevant software and services vendors and their differentiators
  - Creating a model to maximize the operational benefits of a JMS system

# Background and Gartner Response

## Our Understanding

- The San Bernardino County Sheriff's Department (SBCSD) serves **the largest geographical county** in the US. SBCSD operates four county jails, provides marshal services for the county courts, and covers 14 cities through contract law enforcement services.
- Overseen by an elected Sheriff/Coroner/Public Administrator, SBCSD's 4,200 staff provides collaborative law enforcement solutions that meet the needs of the community.
- SBCSD currently relies on a **30-year-old, custom-developed mainframe Jail Information Management System (JMS)**, which is costly to operate and difficult to integrate with or extract data from. Further, few staff members possess the expertise to continue to maintain the system.
- There is an urgent need to plan for and implement a modern, integrated Jail Management Solution (JMS) that **aligns with broader justice and health technology systems, leverages modern features, and is sustainable to operate.**
- JMS modernization will be a **complex, multi-year endeavor** that affects detention staff as well as a multitude of core justice partners. SBCSD is seeking an advisor to **guide and accelerate JMS modernization** through targeted expertise and advisory services.

## Gartner Response

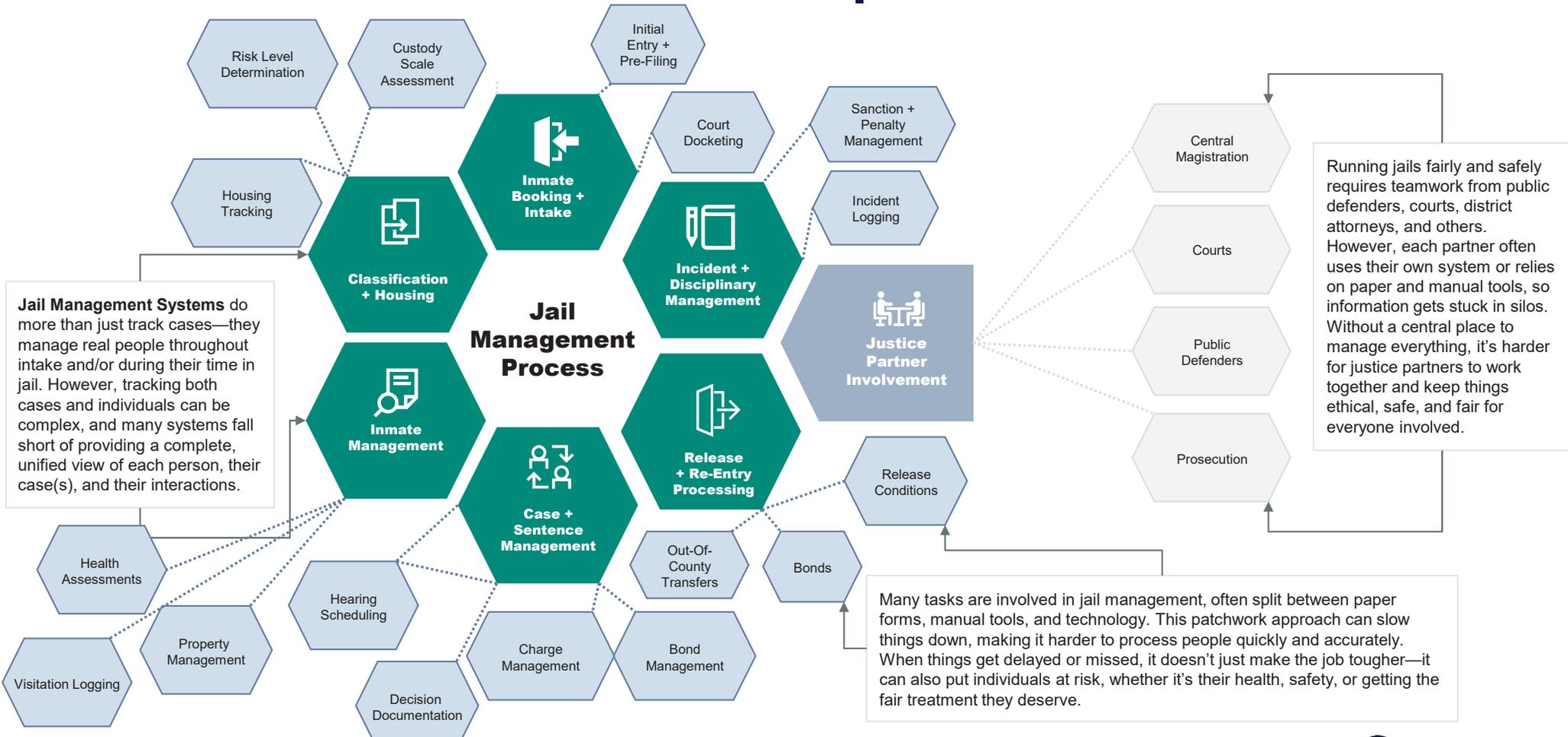
Gartner's team of Public Safety and Justice (PSJ) experts work with sheriffs' departments across the US to support mission-critical technology planning and modernization initiatives, including the procurement and implementation of JMS systems. By leveraging our PSJ experts and best practice frameworks, methodologies, and proprietary insights, Gartner will:

- ✓ Develop a comprehensive JMS modernization strategic plan and roadmap that considers SBCSD's unique challenges, capabilities, and key priorities and reflects peer perspectives as well as vendor market capabilities.
- ✓ Prepare a business case that includes a total cost of ownership (TCO) for the solution, including internal resource costs and anticipated vendor costs over the assumed duration of the modernization roadmap.
- ✓ Document the business and technical requirements for technology and services in a solicitation package and guide SBCSD through a robust, proven sourcing and procurement methodology to select and contract with solution vendor(s).

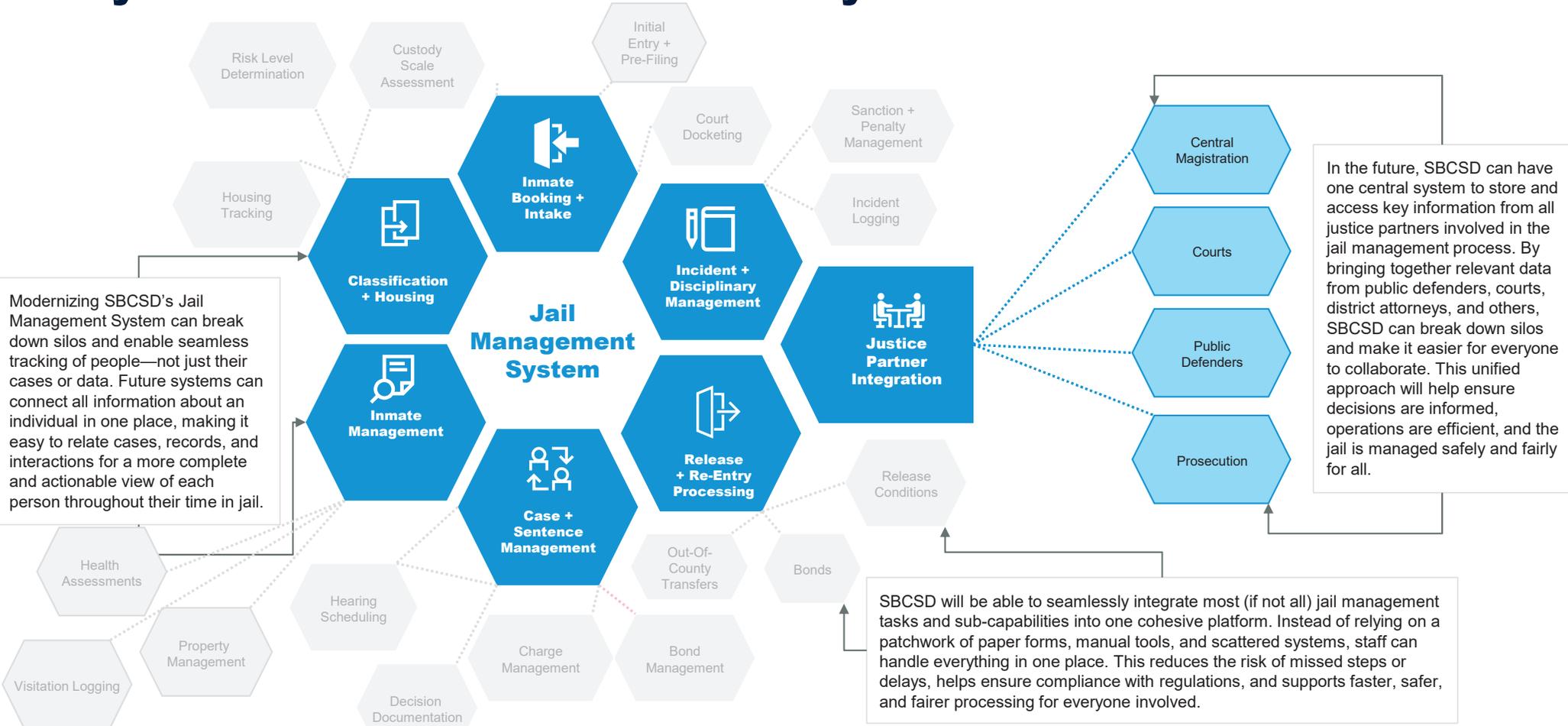
In addition to the above, Gartner can provide the following **optional services** to augment SBCSD legacy modernization capabilities:

- Planning and execution of organizational readiness and change management efforts to maximize stakeholder buy-in and elevate county preparedness to begin implementation once a solution has been selected.
- Project management, implementation oversight, and program assurance services to orchestrate modernization activities and ensure schedule, budget, and vendor contract compliance.

# What makes JMS modernization complex?



# Why is JMS Modernization Necessary?



# Value Proposition for SBCSD

# Why bring on Gartner?



## Experience

- Gartner has worked with dozens of criminal justice agencies nationwide, including Sheriff's offices like yours.
- We have experience advising every type of criminal justice organization, giving us a clear understanding of how all the different teams and roles connect—especially in the context of jail management.
- Our work spans the full project lifecycle, from conducting needs assessments to supporting successful implementations. We know how to identify the right questions and requirements early on, helping you avoid issues and surprises down the road.



## Strategy

- Gartner recognizes that designing an effective jail management solution requires a deep understanding of all key stakeholders—including corrections, the Sheriff's office, the courts, the District Attorney, and other justice partners.
- Our experience ensures that jail management solutions are not developed in isolation but are integrated as part of a more connected and collaborative criminal justice system.
- We focus on delivering solutions that provide long-term value—tools and recommendations that extend beyond the needs assessment to support future procurement, implementation, and ongoing operations.



## People

- Gartner's team includes professionals with direct, hands-on experience working within and for the criminal justice system.
- Our dedicated Public Safety and Justice Practice brings together experts who have partnered closely with a wide range of criminal justice agencies.
- The team combines broad project experience across multiple justice agencies with deep expertise in specialized areas.
- Our staff not only design effective technology solutions but also work with agencies to help them adapt their operations and realize tangible improvements in efficiency and outcomes.

### Similar Projects

- ❑ **Clayton County - JMS & Court System Replacement Strategy**
- ❑ **NYC DOC – JMS Modernization**
- ❑ **Philadelphia Department of Prisons – JMS Agile Modernization Project Assessment**

### Proven Approach

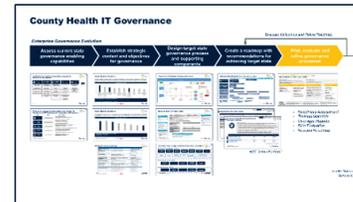
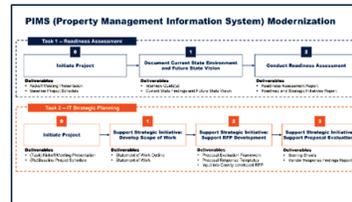
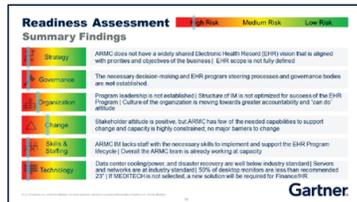


### Team Make Up

- ❑ **Over 175 years of combined public safety and justice experience**
- ❑ **Team includes former prosecutors, defense attorneys, and public servants**
- ❑ **Staff with both local (Southern California) and national criminal justice experience**

# Gartner: A Trusted Technology Partner for San Bernardino County

Year(s)	Department	Engagement Focus Areas
2018–2020	ARMC	Electronic Health Record (EHR) Readiness & Strategy, IT Org Assessment and EHR Procurement Support
2020	ATC	Payment Processing Services Contract Negotiation Support
2019–2022	ARC	Property Information Management System (PIMS) Modernization Strategy, Sourcing Support, Implementation Oversight, and Code Audit (when implementation vendor canceled contract)
2021	ITD	IT Governance Operating Model and Health Services IT Governance Strategy
2024–2025	HR & ITD	Human Capital Management (HCM) Modernization Strategy and Sourcing Support



Our experience with San Bernardino County ensures we hit the ground running—delivering results that matter

# Gartner's Impact: Guiding SBCSD's JMS Modernization



## JMS Modernization Planning

Empower SBCSD to make informed, confident decisions by providing **clear comparisons of technology and procurement options** that align with operational needs and future goals.

Enable successful modernization with expert recommendations and a detailed roadmap, ensuring SBCSD **selects and implements the optimal JMS solution.**

## Vendor Solicitation & Selection

Streamline SBCSD's procurement process with tailored requirements, vendor evaluation support, and expert negotiation support to **secure the best-fit solution.**

Ensure **confident, compliant, decision-making** and successful contract execution through effective evaluation and comprehensive documentation.

## Readiness & Change Support

Enable SBCSD to **streamline business operations** and enhance cross-agency collaboration by aligning stakeholder engagement and change management efforts with the new JMS solution.

Empower SBCSD to optimize resource allocation, clarify roles, and proactively manage risks, **ensuring smoother transitions and more efficient operations** as they adapt to the modernized JMS.



## On-Going Project Management Support

**Drive progress**, maintain accountability, and proactively manage risks, issues, and dependencies through tools like RAID logs and structured reporting.

Own the project schedule and coordination, ensuring **timely execution and smooth transitions** from solicitation through implementation for a successful Jail Information Management System modernization.



# Project Spotlight

## Clayton County – JMS & Court System Replacement Strategy

Gartner helped Clayton County address critical breakdowns in jail management processes by looking at their justice system holistically and identifying all of the factors contributing to those breakdowns. Gartner’s recommendations for system replacement and process change touch every aspect of the criminal justice lifecycle. By doing so, we are providing Clayton County with a road map for course correction and growth.

### Approach

- Gartner was asked to assess the current systems supporting Jail and Courts. Gartner assessed the current operational and technical environment to define a comprehensive **needs assessment supported by a future state vision**.
- Through interviews, research and demonstrations, the team identified several areas of need and significant exposure to the County.
- Gartner also leveraged unique insights into the **JMS & Court systems vendor market** to inform and facilitate decision-making on the most **suitable system replacement recommendations** that supports Clayton County’s respective mission.
- Based on the information gathered, Gartner has laid out a roadmap with specific emphasis on:
  - A schedule that aligns with Clayton’s priorities and resource availability.
  - Organizational Change Management that addresses departmental silos and resistance to change.
  - A governance structure to manage and mitigate risks.

## Sample Deliverables

**Current JMS Vendor Market Capabilities**  
Gartner aligned Clayton County Needs Assessment against Vendor Capabilities

**FUNCTIONALITY**

- All vendors provide approximately 85% of the client's requirements (CJIB).
- Highly configurable forms, workflow, alerts.
- Modern JMS solutions offer a wide range of customization and flexibility in order to work holistically. Advanced features such as business intelligence, AI/ML, automation and predictive analytics are becoming standard.

**CONFIG.**

- Leading solutions include highly configurable Forms, Workflow, Rules, Notifications, etc.
- System access and presentation of data is complex and not user-friendly for department users.
- Focus on configurability can bring challenges in achieving process efficiency. Clients should look to vendors that provide separate and/or "ready configuration" that can be tweaked.

**BI / REPORTING**

- Out of the box reporting, queries and dashboards are becoming the standard for Clayton County to monitor workflow and system performance.
- Mobile and digital reporting will allow real-time data capture and shared data without IT.
- Advanced BI capabilities include predictive, trend analysis and actionable dashboards.
- Enhanced reporting and mobile operations. Modern data driven decision making, compliance and regulatory requirements, and reporting requirements address.

**TECHNOLOGY**

- Generally, modern solutions in terms of architecture.
- Multiple deployment options available, on-prem or hosted in the cloud.
- Most of the vendors require data to be copied and follow best practices for deployment and updates, resulting in the transfer of data to be a pain.

**QUALS**

- Similar while / quality across vendors.
- Generally strong performance with AI/ML capabilities experience available.
- Services are increasingly offering extensive support and training to ensure successful implementation and ongoing system performance. This includes feedback services, on-site training, and customer support.

**APPROACH**

- Applies 12 to 18 month implementation period.
- Vendor training and support is a key differentiator. Strong training and support is essential for successful implementation and ongoing system performance.
- Most vendors can accommodate a phased implementation approach, such as pilot programs, on-going and on-demand support.
- Flexibility in implementation options, such as on-premise, cloud-based, and hybrid solutions can be a key differentiator.

See Appendix A

Strong Alignment  Limited Alignment

RESTRICTED DISTRIBUTION © 2024 Gartner, Inc. and/or its affiliates. All rights reserved.

Gartner

**Project Implementation Timeline & Cost**

Total anticipated program duration: 36 to 40 Months (From RFP Development to System Implementation & Integration)  
Total Benchmark Cost: \$24M to \$28M (5-year expenditure, including annual maintenance)

Program could potentially pay for itself within 5 years through operational savings including improved hearing scheduling, opportunities to reduce release processing times, jail population reduction and other efficiencies.

**JMS Duration: 24 to 36 months**

- CRFP Development: 6 months
- JMS Minimum Viable Product: 12-18 months
- JMS Implementation (remaining modules): 6-12
- Benchmark Cost: \$19.14 M

**CMS Duration: 24 to 36 months**

- CRFP Development: 6 months
- JCMS Implementation (Installation and baseline configuration): 6-12 months
- JCMS Implementation (Magistrate, State, Superior Courts): 6-12 months each
- Benchmark Cost: \$19.14 M

**DHS Duration: 24 – 36 months**

- CRFP Development: 6 months
- JDH Implementation (Data Foundation): 6-12 months.
- JDH Implementation (Integration Platform): 12-18 months
- Benchmark Cost: \$4.4 M

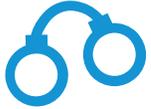
**Benchmarking Costs: Range \$26-\$28 Million**

	JMS	CMS	DHS
Implementation	\$10M - \$12M	\$10M - \$12M	\$4M - \$6M
Annual Maintenance	\$1,000,000	\$1,000,000	\$1,000,000
Professional Services	\$1,000,000	\$1,000,000	\$1,000,000
Hardware	\$1,000,000	\$1,000,000	\$1,000,000
Software	\$1,000,000	\$1,000,000	\$1,000,000
Other	\$1,000,000	\$1,000,000	\$1,000,000
<b>Total</b>	<b>\$12,000,000</b>	<b>\$12,000,000</b>	<b>\$5,000,000</b>

RESTRICTED DISTRIBUTION © 2024 Gartner, Inc. and/or its affiliates. All rights reserved.

Gartner





# Project Spotlight

## NYC DOC – JMS Modernization

A large City Department of Corrections (DOC) sought Gartner’s assistance with replacing its 30+ year old legacy JMS and supporting systems, many of which utilized outdated platforms and presented significant operational risks

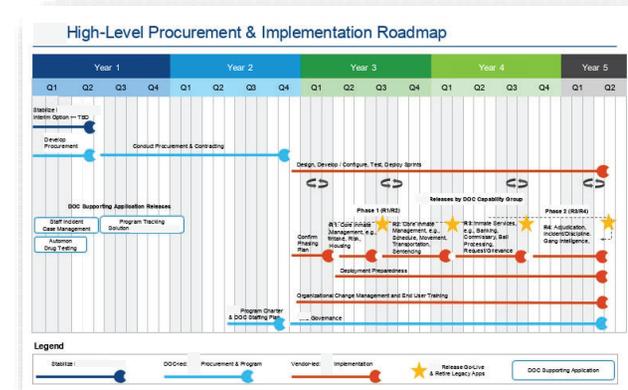
In parallel, the DOC wanted to assess its Program Tracking needs and document requirements from its 3rd party program providers, with the goal of further improving program delivery outcomes and reducing recidivism

The DOC had previously attempted multiple times to replace its JMS. The DOC had IT Infrastructure considerations that potentially limited its ability to support alternate solution options. The DOC relied heavily on manual processes and physical documentation, and there was resistance to changing well-established procedures.

Gartner’s Approach:

- Conducted a capabilities assessment of the legacy JMS and supporting systems
- Developed a business capability model and process flows, through a series of client workshops, to document the DOC’s operations and identify current and future-state gaps
- For Program Tracking, collaborated with the DOC, program leadership and former program participants to identify operational and technology needs and gaps
- Developed extensive functional and technical requirements as input for a modern JMS RFP, based on industry leading practices, client context and documented future needs
- Developed a conceptual business architecture for the desired future state of JMS
- Facilitated extensive engagement with operational stakeholders to document requirements and build consensus on modernization program and objectives
- Provided independent/objective guidance and hands-on execution of critical strategy, planning, RFP and pre-implementation components of DOC’s JMS modernization program

## Sample Deliverables



Market Scan Summary  
Jail Management / Offender Management Solutions

Legend: Favorable (Green), Neutral (Yellow), Unfavorable (Red)

	Score Category		
	Stability & Maturity	Solution Configurability	Solution Integration
	●	●	●
	●	●	●
	●	●	●
	●	●	●
	●	●	●



# Project Spotlight

## Philadelphia Department of Prisons – JMS Agile Modernization Project Assessment

Philadelphia Department of Prisons (PDP) undertook a major initiative to renew its legacy Jail Management platform with a modern generic foundation platform. The City contracted a major System Integrator to follow an Agile methodology for configuration and customization required to address the complex business process needs of one of the nations largest municipal/county Jail operations.

After a failed implementation project, PDP approached Gartner to undertake a project audit assessment of the architecture and project approach to develop a sourcing strategy that would provide a foundation for a new Case Management platform aligned to the capabilities and capacity of the PDP and the City.

Gartner has provided a comprehensive roadmap for the agency, a market assessment of potential vendors, complete requirements, RFP and evaluation criteria to support PDP as it undertakes this critical transformation.

### Sample Deliverables

#### Executive Summary

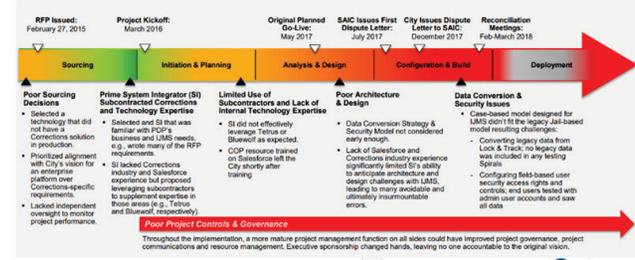
Gartner's options analysis revealed a phased implementation approach is possible, and separating legacy Lock & Track functional among multiple Best of Breed applications would be appropriate



CONFIDENTIAL AND PROPRIETARY | © 2018 Gartner, Inc. used by affiliate. All rights reserved. Gartner

#### Executive Summary

The timeline of events from the Lessons Learned revealed key challenge areas for the City to focus on going forward in JMS 2.0



CONFIDENTIAL AND PROPRIETARY | © 2018 Gartner, Inc. used by affiliate. All rights reserved. Legend: ▲ Key Project Challenge, ▽ Key Project Milestone. Gartner





# Project Spotlight

## Santa Clara County (SCC) – JMS/Probation CMS Agile Modernization Project Assessment

Gartner was selected by the County to complete an assessment on three separate but related projects to implement a Jail Management System (JMS), Adult Probation Case Management System and a Juvenile Probation and Detention System. All three projects were using the same vendor solution built on the Microsoft Dynamics platform. The platform solution was a CJIS compliant, configurable platform with accelerator components supplemented with custom development.

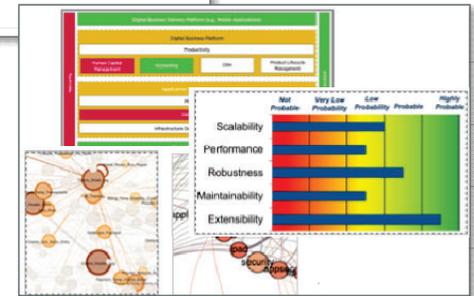
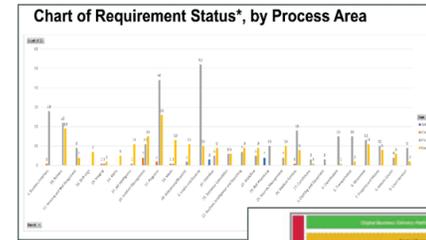
The JMS project used an agile product methodology to configure the solution, while the Probation and Juvenile Detention projects utilized a more waterfall approach to development. All projects were significantly behind schedule.

Gartner was engaged to provide an analysis of each project to determine:

- The viability of the platform for each of the projects
- The completeness of the solutions (estimates to complete)
- Assessment of key deliverables (project plan, schedule, requirements, technical architecture, test plans, configuration plans, integration plans, data migration plans, etc.)
- Identification of solution options and the most viable go-forward option for delivering required functionality

Gartner’s assessment provided SCC with an accurate reflection of current state and an actionable go forward plan for each of the projects.

### Sample Deliverables

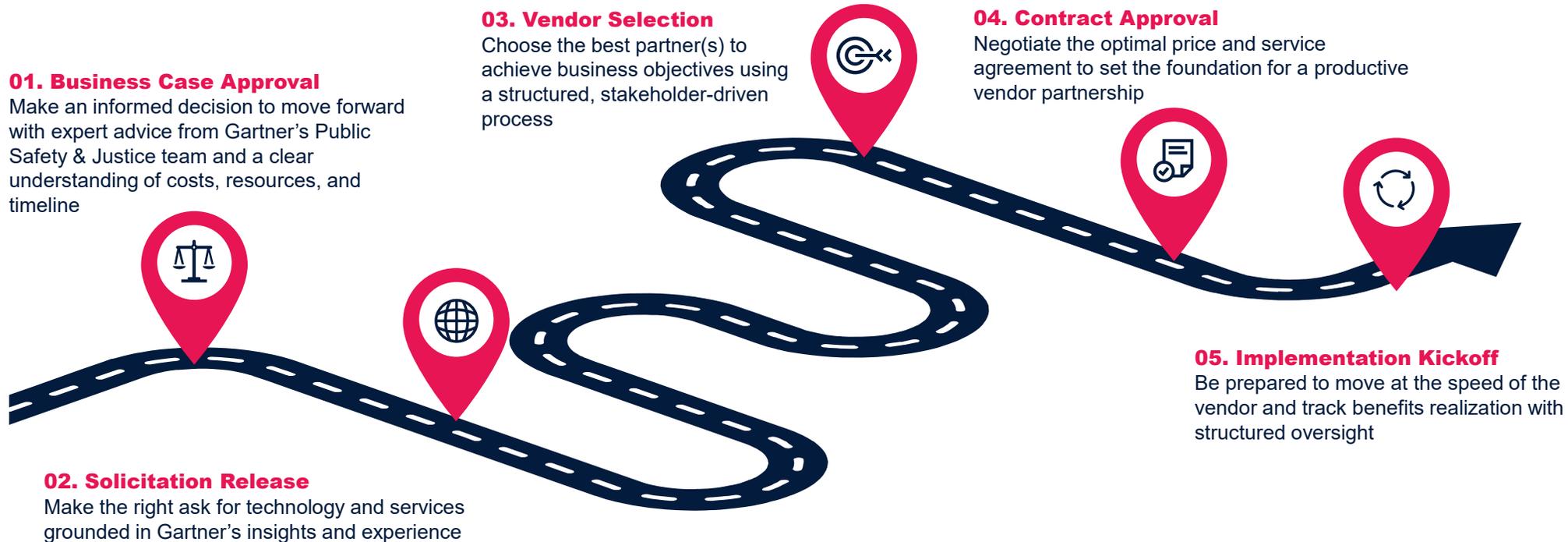


	Engines	Mobile Innovation Cloud	Microsoft Cloud App	Package	Stack/State (Dynamics) Cloud/SCC
Overall	78	54	77	83	82
Architecture	96	95	88	92	71
Visibility	84	91	91	91	81
Data Security	79	95	83	88	
Adaptive Access Control (AAC)	80	100	100	83	
Threat Protection	96	100	98	100	
User and Entity Behavior Analytics	83	100	90	83	
Cloud Security Posture Management	48	92	90	80	
Scalability and Infrastructure	87	81	73	89	
Management and Operation	93	94	79	51	
API-Supported Cloud Apps	74	95	70	63	
Reverse-Proxy-Supported Cloud Apps	97	100	100	68	

# Statement of Work

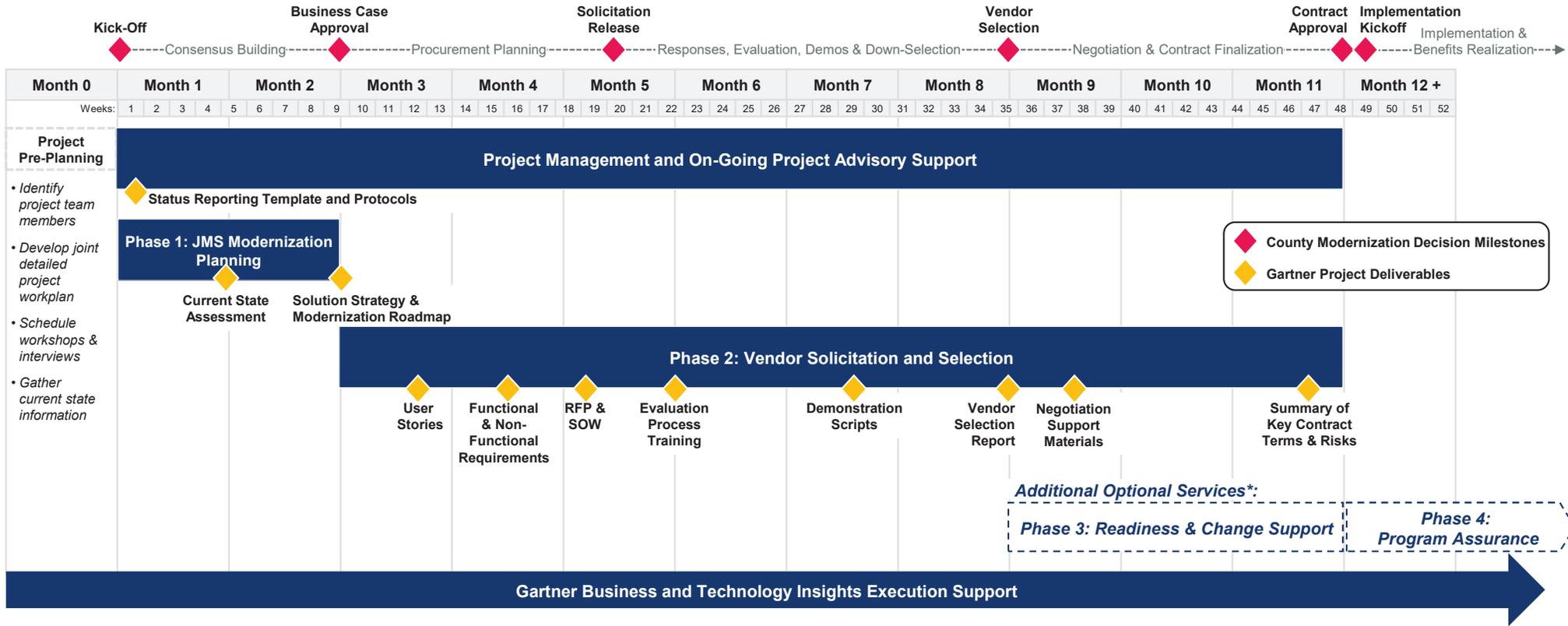
The Statement of Work section, which is incorporated into the Proposal, sets forth Gartner's detailed technical approach, schedule, staffing and assumptions.

# With Gartner's support, you'll empower decision makers with the information they need to confidently advance your modernization efforts—keeping the JMS project on track and moving forward



# Engagement Schedule

Gartner anticipates completion of this engagement within 48 weeks, as detailed in the following figure. This schedule is dependent on the assumptions included in this Proposal.



\* Detailed approach, scope, timeline, & pricing for optional Phase 3 and Phase 4 Services to be determined. Estimated monthly pricing is included in the Investment Summary on page 46.

# Phase 1: JMS Modernization Planning

# Phase 1 | JMS Modernization Planning: Approach Summary

0

## Project Preparation

X Weeks: Through Week 1

- Submit background document request
- Conduct project pre-planning meeting with the SBCSD PM and core team
- Establish guiding principles and priorities
- Confirm stakeholder landscape (internal, external, vendors)
- Confirm SBCSD-Gartner project communications plan
- Develop draft and final **Project Schedule**
- Agree to **Status Reporting Protocol** – template, cadence, delivery method and audience
- Conduct project launch meeting with SBCSD sponsors, leadership, and key stakeholders
- Schedule and prepare for interviews and workshops

1

## Understanding Needs

4 Weeks: Week 1 – 4

- Conduct discovery interviews and workshops with SBCSD stakeholders to assess the current state of jail management business operations, workflows, and pain points, and to understand the underlying business needs.
- Build a custom **Business Capability Model** that documents and visualizes core jail management processes.
- Inventory the current technical ecosystem supporting jail operations – including applications, infrastructure, integrations, and services.
- Assess the alignment between current technology and business needs, highlighting risks and areas for enhancement.
- Document current IT governance structures and practices in collaboration with SBCSD.
- Consolidate all findings into a comprehensive **Current State Assessment**, detailing business operations, technical environment, and capability mapping to inform future planning.

2

## Options & Cost Considerations

3 Weeks: Week 4 – 6

- Conduct a structured **Market Scan** to identify leading vendors and emerging technologies.
- Develop and evaluate a range of **Solution Alternatives**—including build, buy, and hybrid approaches—based on operational requirements and future goals.
- Engage stakeholders in workshops to review market findings and collaboratively refine solution alternatives.
- Analyze vendor offerings and industry benchmarks to ensure recommendations are informed by current market realities and innovation trends.
- Synthesize market intelligence and alternative analysis into clear, actionable recommendations, enabling confident decision-making and strategic alignment.

3

## Future State Strategy & Planning

3 Weeks: Week 6 – 8

- Define the future goals and vision for SBCSD's jail management system and document a clear **Solution Strategy**.
- Outline what's needed for success, including key resources and risk mitigation strategies, to ensure the strategy is implemented effectively.
- Develop an end-to-end **Modernization Roadmap** that describes technology, people, and process changes to achieve operational goals, including sequenced initiatives, milestones, and dependencies.
- Build a **Business Case** for SBCSD's JMS modernization, including a Total Cost of Ownership (TCO) analysis, expected benefits, risks, and an implementation timeline to support informed decision-making.
- Facilitate an executive workshop to approve moving forward with the next phase – Solution Solicitation and Selection.

- Project Schedule**
- Status Reporting Protocol**

- Current State Assessment**
- Business Capability Model**

- Market Scan**
- Solution Alternatives**

- Business Case, Solution Strategy & Modernization Roadmap** (inc. Final Assessment Summary/ Recommendations)
- Executive Summary Briefing**

# Phase 1 Step 1: Understanding Needs

## Gain an understanding of SBCSD's goals and challenges

### Objective

- Working with SBCSD Subject Matter Experts, Gartner will identify what are the key business drivers that will be used to assess available solutions on the market.

### Activities Performed by Gartner

- Interview SBCSD stakeholders and hold workshops to understand current operations, workflows, and challenges.
- Review and document all technology, systems, and integrations supporting jail operations.
- Assess how well current technology meets business needs and identify any gaps or risks.
- Work with SBCSD to document IT governance structures and practices.
- Develop a visual business capability model showing key jail management processes.
- Hold workshops to validate the business capability model with identified / key SMEs.
- Share draft findings and models with SBCSD for feedback and make updates as needed.
- Finalize and deliver the current state assessment and business capability model, reflecting all stakeholder input.

### Work Products / Deliverables

- Current State Assessment
- Business Capability Model

### Formal Interviews / Workshops:

- Up to 10 Discovery Interviews
- Up to 6 Current State Workshops

## IMPACT

- Understanding of current capabilities
- Clarity on business needs, pain points, and inefficiencies in jail operations.
- Consensus on current functionality and operational needs by documenting development support models and alternative solutions being used.
- Creates a clear set of criteria and requirements to assess available market solutions.

# Phase 1 Step 2: Options and Cost Considerations

## Develop an understanding of the possible solutions available

### Objective

- Based on the needs of San Bernardino County, identify which market solutions (e.g., COTS, custom development, low code platform) could support San Bernardino County going forward.

### Activities Performed by Gartner

- Research and identify top vendors and new technologies that best fit SBCSD's needs.
- Gather input from stakeholders through interviews and workshops to understand solution objectives and goals.
- Develop and assess solution options (build, buy, hybrid) based on SBCSD's needs.
- Hold workshops to review market findings and discuss solution alternatives with stakeholders.
- Collect feedback and refine solution options and recommendations.
- Compare vendor offerings and industry standards to support final recommendations.
- Share draft deliverables with SBCSD for review and update as needed.
- Finalize and deliver the market scan and solution alternatives, ensuring stakeholder input is reflected.

### Work Products / Deliverables

- Market Scan
- Solution Alternatives

### Formal Interviews / Workshops:

- Up to 2 Workshops
- Includes up to 3 x 1 hr Findings Briefings (Cost Options Briefing, Market Alternatives, Summary for Senior Stakeholders)

## IMPACT

- An objective assessment of the solutions available to San Bernardino County and their potential fit to the Jail's processes and pain points.
- High-Level understanding of Cost Considerations and total cost of ownership financial impact of alternatives under consideration.
- Based on fit of the solutions being considered, considerations for additional initiatives to address gaps unique to San Bernardino County.

# Phase 1 Step 3: Future State Strategy & Planning

## Creating a roadmap for San Bernardino County to support Jail Operations

### Objective

- Provide San Bernardino County with a clear set of recommendations and a roadmap to support the development of a robust business case for funding approval, and an implementation roadmap to close gaps and achieve the target state of a sustainable and integrated solution.

### Activities Performed by Gartner

- Conduct in-depth analysis of information gathered from stakeholder interviews, needs assessments, options evaluations, and cost considerations.
- Meet with SBCSD leaders to define future goals and vision for the future JMS leveraging results of previous discovery / needs assessment conducted.
- Document a clear solution strategy that aligns with SBCSD's goals and vision.
- Identify key resources, success factors, risks to support successful implementation.
- Create a detailed modernization roadmap outlining technology, people, and process changes, with sequenced initiatives, milestones, and dependencies.
- Develop a business case that includes total cost of ownership, expected benefits, risks, and an implementation timeline.
- Compile the solution strategy, modernization roadmap, and business case into a comprehensive final deliverable.
- Organize and lead an executive workshop to present the final deliverable and key findings.

### Deliverables

- Business Case, Solution Strategy & Modernization Roadmap
  - includes Final Assessment Summary and Recommendations
- Executive Summary Briefing

### Formal Interviews / Workshops:

- 1 Executive Workshop Planning Session
- 1 Executive Workshop

## IMPACT

- A roadmap that SBCSD can leverage for budgeting and planning.
- Tools and justifications for moving forward with the next phase of the project, including an RFP and selection process.

# **Phase 2: Vendor Solicitation & Selection**

# Phase 2 | Vendor Solicitation & Selection: Approach Summary

1

## Requirements Development

6 Weeks: Week 9 – Week 14

- Confirm project priorities and vendor expectations for the JMS with SBCSD leadership, jail operations staff, and external justice partners.
- Develop baseline **User Stories** reflecting the needs of jail staff and other system users, to be expanded into detailed functional requirements for the new JMS.
- Collaborate with SBCSD stakeholders—including custody staff, records personnel, and external justice partners—through user story workshops to review, refine, and validate user stories.
- Facilitate workshops to capture technical requirements, data and analytics objectives, usage scenarios, and integration needs with other justice and county systems.
- Develop comprehensive functional and non-functional requirements for the JMS.
- Conduct requirements validation sessions to confirm and finalize all system and services requirements.

- User Stories**
- Functional & Non-Functional Requirements**

2

## Solicitation Materials Development

6 Weeks: Week 15 – Week 20

- Agree to procurement timeline, activities, and roles & responsibilities with County Procurement team and SBCSD.
- Conduct workshops with SBCSD and the County Procurement team to define evaluation criteria, prioritization, and weighting.
- Draft SBCSD-specific sections of the RFP and Statement of Work (SOW)—such as Minimum Qualifications, Pricing Template, and Scope of Work—while coordinating with the County on general procurement sections.
- Facilitate a validation workshop with SBCSD and County Procurement to review the draft RFP and SOW, gather feedback, and clarify requirements.
- Submit the final draft **RFP and SOW** to SBCSD for release.
- Document evaluation process and prepare **Evaluation Process Training Materials**.

- Solicitation Package**
- Evaluation Process Training Materials**

3

## Evaluation Support

16 Weeks: Week 21 – Week 36

- Train SBCSD evaluators on RFP requirements, evaluation criteria, and scoring process. Gartner will not score or influence scores but will ensure evaluators are well-prepared.
- Support SBCSD during the vendor response period by assisting with Q&A as appropriate.
- Aggregate and summarize results from County scoring tool to support the down selection process.
- Collaborate with SBCSD to develop **Demonstration Scripts** and facilitate vendor solution demos.
- Facilitate meetings with SBCSD to review proposals, discuss demo findings, and support finalist selection.
- Provide summary meeting notes and internal reference materials for the evaluation committee and SBCSD leadership.
- Prepare a **Vendor Selection Report** summarizing the evaluation process, demo results, and SBCSD's final vendor selection.

- Demonstration Scripts**
- Vendor Selection Report**

4

## Negotiation & Contracting Support

12 Weeks: Week 37 – Week 48

- Support SBCSD in ensuring the final contract accurately reflects all requirements and commitments outlined in the RFP.
- Advise SBCSD during negotiations to help secure the most competitive pricing and optimal value.
- Customize **Negotiation Support Materials** (checklists, communications, standard terms, etc.) for the SBCSD negotiations team.
- Assist SBCSD in reviewing the vendor's proposed team and timeline to confirm alignment with project expectations.
- Summarize **Key Contract Terms & Risks** and provide guidance on contract terms to help safeguard SBCSD's interests, including deliverables, performance standards, and accountability.
- Facilitate communication between SBCSD and the vendor to promote clarity, resolve issues, and enable a smooth contract execution process.

- Negotiation Support Materials**
- Summary of Key Contract Terms & Risks**

# Phase 2 Step 1: Requirements Development

## Define, clarify, and document business requirements

### Objective

- Develop a comprehensive set of functional and non-functional requirements for SBCSD's future system, aligned with stakeholder needs and technical expectations.

### Activities Performed by Gartner

- Review SBCSD documentation, including current systems and data models.
- Participate in sessions to understand SBCSD's technical ecosystem.
- Develop baseline business user stories for requirements gathering.
- Collaborate with stakeholders through workshops to review and refine user stories.
- Create detailed functional and non-functional requirements based on finalized user stories.
- Conduct requirements validation sessions with stakeholders.
- Facilitate workshops to capture technical requirements, data and analytics goals, usage expectations, and integration needs.

### Deliverables

- Business User Stories
- Functional Requirements
- Non-Functional Requirements

### Interviews / Meetings

- Up to 12 x 2hr Requirement Validation Sessions (6 Functional Groups – 2 x 2hr sessions)
- Up to 2 x 2hr High-Level Requirement Review Briefings

## IMPACT

- Ensures all system requirements are clearly defined, prioritized, and aligned with SBCSD's operational and technical needs.
- Reduces project risk by validating requirements with stakeholders, minimizing gaps and misalignments early in the process.
- Facilitates smoother implementation and integration by addressing technical expectations and data needs upfront.

# Phase 2 Step 2: Solicitation Materials Development

## Develop robust and effective solicitation materials reflecting business need

### Objective

- Develop and finalize a comprehensive RFP and SOW that accurately reflect SBCSD's priorities, requirements, and vendor expectations for the upcoming procurement process.

### Activities Performed by Gartner

- Conduct discovery workshops with key stakeholders to confirm SBCSD priorities and vendor expectations.
- Develop SBCSD-specific sections of the RFP and SOW, including Minimum Qualifications and Scope of Work, based on workshop outcomes.
- Submit draft RFP and SOW for SBCSD review.
- Facilitate validation workshops to review drafts, gather feedback, and clarify requirements.
- Align detailed requirements and integration documents from previous phases with the RFP and SOW.
- Conduct workshops to define evaluation criteria, prioritization, and weighting, ensuring alignment with County requirements and SBCSD priorities.
- Develop clear, easy-to-follow training materials that explain the evaluation process, criteria, etc.
- Review training materials with SBCSD stakeholders to ensure accuracy, clarity, and utility.
- Submit the final draft RFP and SOW to SBCSD for official release.

### Deliverables

- Solicitation Package (Final Draft RFP – sections and appendices)
- Suggested Evaluation Review Package & Criteria (Training Materials)

### Formal Interview / Workshops:

- Up to 6 Iterative Weekly Proposal Progress Reviews (Incremental Development)
- Up to 2 Evaluation Criteria Workshops
- 1 Validation Workshop & Briefing

## IMPACT

- Ensures the RFP and SOW are tailored to SBCSD's unique needs and priorities, improving vendor responses and solution fit.
- Enhances clarity and transparency in procurement requirements, reducing ambiguity for vendors.
- Strengthens the evaluation process by establishing clear criteria and alignment with stakeholder expectations.
- Increases the likelihood of selecting a solution that meets both functional and technical goals.

# Phase 2 Step 3: Evaluation Support

## Provide operational support to aid SBCSD in selecting the best-fit vendor

### Objective

- Support SBCSD throughout the vendor evaluation process to ensure informed, transparent, and effective selection of the best-fit solution.

### Activities Performed by Gartner

- Train SBCSD evaluators on RFP requirements, evaluation criteria, and the scoring process to prepare them for the evaluation process.
- Assist SBCSD during the vendor response period by helping manage questions and answers as appropriate.
- Collect and summarize scoring results from the County's evaluation tool to support the selection process.
- Work with SBCSD to create demonstration scripts and coordinate vendor solution demos.
- Organize meetings to review vendor proposals, discuss demo outcomes, and help SBCSD select finalists.
- Provide meeting notes and reference materials to support the evaluation committee and leadership.
- Prepare a Vendor Selection Report that summarizes the evaluation process, demo results, and the final vendor choice.

### Deliverables

- Demonstration Scripts (and suggested agenda)
- Vendor Selection Report

### Formal Interview / Workshops:

- Up to 4 Evaluation Support Workshops

## IMPACT

- Ensures vendors have a clear understanding of requirements, resulting in higher quality and more relevant proposals.
- Promotes objective and consistent evaluation of vendor responses, supporting fair and transparent selection.
- Equips SBCSD with expert insights and structured feedback to make confident, well-informed decisions.
- Streamlines evaluation, saving time and reducing risk of miscommunication/oversight.

# Phase 2 Step 4: Negotiation & Contracting Support

## Provide SBCSD with negotiation expertise to secure contracts that meet business needs.

### Objective

- Support SBCSD during contract negotiations to ensure a fair, transparent, and favorable agreement that protects County interests and maximizes project value.

### Activities Performed by Gartner

- Review the draft contract to ensure all RFP requirements and assurances are included.
- Advise SBCSD during contract negotiations to help achieve the best pricing and value.
- Prepare negotiation support materials, such as checklists and communication templates, for the SBCSD team.
- Help SBCSD review the vendor's proposed team and project timeline to ensure they meet expectations.
- Summarize key contract terms and risks and provide guidance on important clauses to protect SBCSD's interests.
- Support clear communication between SBCSD and the vendor to resolve issues and ensure a smooth contract process.

### Deliverables

- Negotiation Support Materials
- Summary of Key Contract Terms & Risks

### Formal Interview / Workshops:

- Weekly Negotiation Touchpoints
- Up to 3 Contract Review Workshops

## IMPACT

- Promotes clear and mutual understanding of contract terms, reducing risk of disputes and misunderstandings.
- Secures favorable pricing and protections, maximizing value and minimizing financial risk for SBCSD.
- Strengthens accountability and performance standards, ensuring vendors deliver on commitments.
- Streamlines negotiation process, saving time and facilitating smooth contract execution.

# Additional Optional Services

# Phase 3 | Readiness & Change Support Services: Approach Summary

## Value Proposition

Readiness and Change Support mitigates against the risk of the JMS modernization not meeting expectations

## Drivers

Key causes of missed expectations in legacy modernization:

- Poor alignment with agency strategy and lack of clarity of vision and objectives
- Uninspiring or inconsistent business leadership — viewed as an IT project vs. a business transformation enabled by technology
- Ineffective governance
- Insufficient resources (internal and external) dedicated to the project
- Unclear expectations of roles and responsibilities
- Inadequate upfront project planning
- Resistance to change; fear of new ideas and approaches
- Inadequate attention to data — data cleansing, data migration, data & analytics capabilities, data governance, etc.
- Lack of or weak integration capabilities
- Inadequate go-live and post-go-live planning

## Methodology

Gartner leverages an agile approach to change management to support our clients through significant legacy modernization initiatives.



### Typical Deliverables:

- Project Governance Plan
- Readiness Framework
- Stakeholder Engagement and Communications Plan
- Organizational Change Management Plan
- Data Management Plan
- Target State Operating Model
- Baseline Readiness Assessment
- Resource and Staffing Plan
- Implementation Readiness Assessment

# Phase 4 | Program Assurance Services: Approach Summary

## Value Proposition

Critical transformation programs struggle to realize their intended value without novel, actionable, and material insights.

	Without Value Realization	With Value Realization
On time	12%	60%
On budget	7%	55%
All success metrics achieved	22%	85%

## Drivers

Two main causes of project failure are a lack of governance and insufficient insight into the project environment.

- Organizations typically only perform 1-2 critical transformation projects per decade and lack the insight and deep execution skills necessary for success.
- Unidentified/unmitigated risks across people, process, and technology can become issues negatively affecting quality, scope, schedule, and budget.
- System integrators/vendors leverage client inexperience to focus on system installation instead of achieving client business outcomes.

## Methodology

Program Assurance / Value Realization helps clients monitor, assess, and implement program governance capabilities, gain insights into the project environment, and intervene where necessary to achieve value.

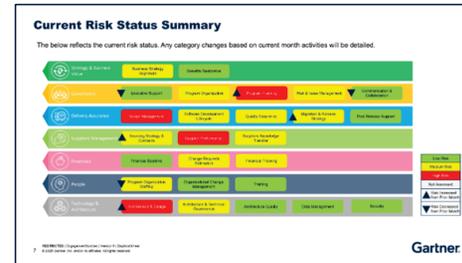
- **Business Value Alignment** evaluates how activities contribute to the strategic business goals.
- **Readiness Assessments** assess the client's readiness and stakeholder alignment to take on an initiative or transition from one phase of an ongoing project to the next.
- **Health Assessments** provide a current state assessment of a program's implementation and risks, including information sharing and organizational politics; they determine health trends by comparing current and baseline health checks.
- **Deliverable Assessments** are qualitative and quantitative evaluations of system integrator/vendor deliverables, including process assessment, architecture quality assessment, and technical domain assessment.
- **Program Oversight** provides continuous, on-the-ground support, including providing industry best practice recommendations.
- **V-Assure**, our value assurance tool, identifies the most impactful risks and issues based on hundreds of best practices and provides transparency through business intelligence (BI) dashboards and reporting on program status and critical decisions.

**Gartner research and benchmarks suggest that government agencies can expect to spend 8-15% of their implementation budget on independent oversight and quality assurance, depending on the project's scale and complexity.**

# Phase 4 | Program Assurance Services: Examples

Gartner has **more than 25 years of experience** providing program assurance services across North America, **delivering over 350 engagements in just the last four (4) years.**

Over the past two years in North America, Gartner has delivered **over 100,000 hours on program assurance engagements.**

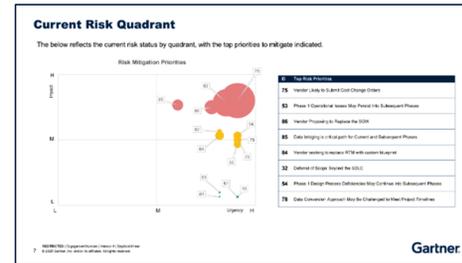


### Gartner's Program Risk and Readiness Assessment shows Strengths and Weaknesses

This assessment reflects the project's areas of assurance as of May 1, 2025. A summary of the key project strengths and weaknesses is below.

Key Areas of Success	Key Areas of Concern
<b>Executive Support and Program Organization</b> These continue to be improved level of engagement between the client and vendor executive leadership, with clear understanding of roles and responsibilities at the Business Lead (BL) level.	<b>Architecture and Design</b> The vendor's integration platform is not finalized, built, or tested and the schedule for these address is unclear, resulting in the technical elements unable to finalize the integration approach, potentially impacting project scope and timeline.
<b>Organizational Change Management</b> Considerable project change and communication efforts are in place to ensure and user engagement and adoption. The change champion program has been successfully rolled out with cross-functional employees.	<b>Program Testing</b> Large volume of mandatory meetings is causing concern among the client and vendor project teams due to redundancies and inefficiencies.
<b>Migration and Release Strategy</b> Despite multiple, unexpected personnel changes, Multi-Factor Authentication (MFA) is being completed 2 months ahead of schedule.	<b>Communication &amp; Collaboration</b> Redundant reporting structures / templates are causing a sense of frustration among the client and vendor project teams.
	<b>Supplier Performance</b> Internal disconnect between the vendor Professional Services/Systems Integrator (SI) and the Technical group, leading to poor communication internally/externally and mismanagement of priorities.

**Gartner**



### The following action items identified in this May Monthly Report need to be addressed with high priority

Month	Action Item	Source	Accountability	Due Date
MAY 1	Continue to actively work together to align on environment, configuration, integrations, and testing configurations/responsibilities that align with contractual obligations. Ensure this alignment is well documented and confirmed by both parties.	Solution Delivery Business Leads - Team Leads Touchpoints Various Contract / Environmental Meetings	Client Vendor	Jun 18, 2025
MAY 2	Complete and streamline open decisions to provide more clarity on what are they being tracked, reviewed and approved within team leads and SMEs.	Business Leads - Team Leads Touchpoints	Client	Jun 6, 2025
MAY 3	Address the gaps in the BRDs and TRDs and workshop decisions by providing more clarity on the completeness of submissions that will be needed for the personable phases, including more details such as will they be in the BRDs, TRDs, or after the workshops.	Business Leads - Team Leads Touchpoints	Vendor	Jun 11, 2025
MAY 4	Use the schedule to track progress, determine late activities, and identify critical path. Impact on go-live dates, resource availability is being set to the table while communicating significant deviations across the project and leadership teams.	Solution Delivery Business Leads - Team Leads Touchpoints BaseCo	Client Vendor	Jun 18, 2025

**Gartner**

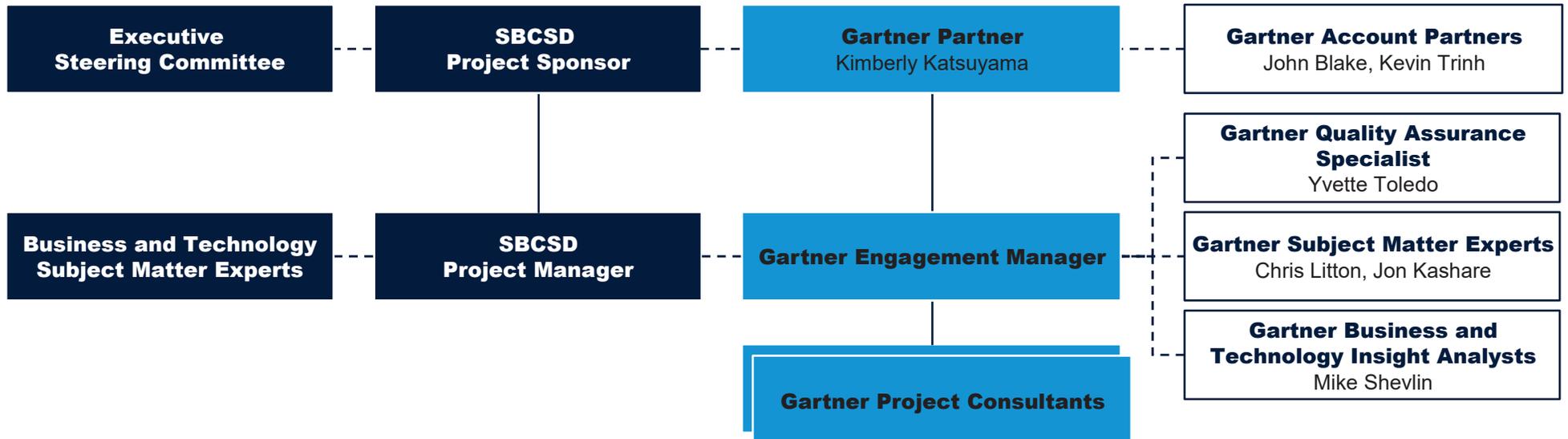


# **Project Controls and Quality Assurance**

# Project Team Overview

## 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 Overview

## Gartner Roles and Responsibilities

Functional Role	Responsibilities
<b>Gartner Partner</b>	<ul style="list-style-type: none"> <li>Oversee alignment of Gartner activities to support SBCSD goals.</li> <li>Build and maintain a long-standing relationship with SBCSD.</li> <li>Provide high-level oversight and become more heavily involved should any issue resolution be necessary.</li> </ul>
<b>Engagement Manager</b>	<ul style="list-style-type: none"> <li>Day-to-day management of engagement initiatives to achieve on-time completion of deliverables that meet quality standards.</li> <li>Act as the primary point of contact for the Gartner team.</li> <li>Work closely with SBCSD to confirm that Gartner is meeting its needs.</li> </ul>
<b>Project Consultant(s)</b>	<ul style="list-style-type: none"> <li>Provide day-to-day consulting support for project steps including data collection/analysis; deliverable creation and review; and presentations to SBCSD.</li> </ul>
<b>QA Specialist</b>	<ul style="list-style-type: none"> <li>Provide quality assurance review of Gartner project plan and Gartner deliverables throughout the engagement.</li> <li>Promote value through use of the Gartner methodologies and proprietary tools.</li> </ul>
<b>Subject Matter Expert(s)</b>	<ul style="list-style-type: none"> <li>Provide industry, solution and service expertise to enhance the Gartner team's recommendations and service delivery.</li> <li>Share insights, leading practices and lessons learned during the engagement as needed.</li> <li>Participate in deliverable review and client presentations as needed.</li> </ul>
<b>Business and Technology Insight Analyst(s)</b>	<ul style="list-style-type: none"> <li>Support the core project team by providing a context-sensitive perspective based on Gartner industry-leading insight.</li> <li>Participate in analysis and comparisons, and review deliverables as needed.</li> </ul>
<b>Gartner Account Partners</b>	<ul style="list-style-type: none"> <li>Oversee that value delivered is seamlessly integrated with all Gartner services to SBCSD and that recommendations are actionable through ongoing Gartner services.</li> <li>Provide additional context aligning this engagement to SBCSD's mission-critical priorities.</li> </ul>

# Engagement and Communication

For each project, Gartner assigns a dedicated Engagement Manager and Managing Partner to oversee and manage project activities and the Gartner team, working closely with the SBCSD Project Manager.

## Gartner Managing Partner

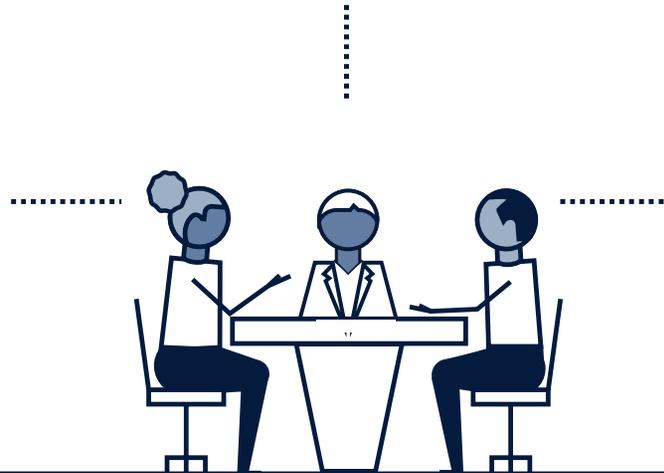
Responsible for monitoring and achieving client satisfaction, providing project oversight, and delivering an additional layer of quality assurance.

## Gartner Engagement Manager

Responsible for managing the project's progress and momentum, confirming Gartner activities support the client's goals, building and maintaining a long-standing relationship with the client, providing high-level oversight of the project and taking action as needed to resolve issues.

## SBCSD Project Manager

Together with the Gartner Engagement Manager, responsible for driving the efforts and participating in regular progress review and risk management. They will agree upon a format and schedule acceptable to SBCSD to report progress on the metrics agreed.



# Project Management and Control

Gartner's project management process guides reporting, risk mitigation and project control throughout the duration of a project:



**Client  
Communication**



**Schedule  
Management**



**Budget  
Management**



**Quality  
Deliverables**



**Performance  
Metrics**



**Risk  
Management**



**Progress  
Reporting**

- Gartner will conduct weekly check-point meetings with your Project Manager and executive stakeholders to facilitate ongoing expectations management and decision making.
- Gartner's periodic status reports summarize our activities and key achievements from the current period, provide updates on the status of our contractual deliverables, and provide an overview of any key risks, issues, and actions we're tracking. The frequency of status reports will be jointly agreed upon during the project's first week.
- Our project communications plan will facilitate the timely, appropriate, and most effective means of coordinating with stakeholders, communicating key messages, and achieving engagement objectives.
- Gartner will be in regular ongoing communication with your Project Manager and any stakeholders necessary to ensure complete awareness of key activities and any actions required to provide efficient control of project change.
- Gartner's Quality Assurance processes ensure that our deliverables remain true to our contractual scope and that they deliver the highest possible value and impact, meeting, if not exceeding, your priorities and expectations.

# Assumptions

## SBCSD's Participation

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

### SBCSD's Participation

- SBCSD will designate a project manager to act as the primary point of contact for this engagement. SBCSD's project manager will be expected to work closely with the Gartner employees as needed and will: (a) approve priorities, detailed step plans and schedules; (b) facilitate 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 SBCSD's personnel are available to assist in the manner defined in this Proposal. If SBCSD's personnel are not available, a change of scope may be necessary.
- SBCSD 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 SBCSD to facilitate drafting of each Deliverable. 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 within 5 days after their delivery.
- SBCSD will schedule SBCSD's resources for engagement activities and provide meeting facilities as necessary.
- SBCSD's personnel will be available per the final project schedule.
- Gartner will formally capture feedback on your overall experience via our client survey. This allows us to quantify our performance on this engagement and achieve a culture of continuous improvement of process and best practice.

# Assumptions

## Data Collection and Key Personnel

### Data Collection

- The due diligence (as-is) data are reasonably available via interviews and documentation review.
- SBCSD 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 52 interviews/workshops over a period of 11 months and that SBCSD will arrange all sessions with SBCSD's personnel. The average interview will be 45 minutes in duration, and the average workshop will be 2 hours or less. Sessions will be a mix of in-person and remote.
- Phase 1 - JMS Modernization Planning, assumes an initial focused discovery task assuming up to 10 interviews, and 2 workshops over 4 days. The Gartner engagement manager will work with SBCSD to arrange all sessions with SBCSD's personnel to maximize the initial on-site value.
- All data collection and interviews/surveys/workshops will take place via remote conferencing (e.g., telephone or video conference) or in person at an SBCSD location as described in this Proposal and/or as agreed to at the project kickoff. Any surveys conducted as part of the work effort described in this Proposal will follow Gartner's confidentiality guidelines.

### Key Personnel

- Names of key personnel provided in this Proposal are included solely for illustrative purposes and do not indicate the commitment of a specific named associate. 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 SBCSD 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.
- Where it is indicated in this Proposal, that a proposed team member is a sub-contractor to Gartner, SBCSD agrees to the inclusion of that individual as a member of the project team so long as the sub-contractor is suitably qualified to provide the services. If such inclusion is not reasonably acceptable to SBCSD, Gartner will be informed at the earliest opportunity and requested to find an alternative team member.

# Assumptions

## Primary Assumptions

### Solicitation Materials Development

- SBCSD will issue a single (1) RFP for combined JMS Software (SW) and/or System Integration (SI) services.
- SBCSD and/or the County Procurement team will compile and release the Solicitation Package incorporating Gartner's Phase 2 work product and deliverables templates without significant modification.

### Requirements, Vendor Proposals, Demonstrations, and Reference Checks

- Gartner will review up to six (6) proposals, participate in no more than four (4) combined SW & SI vendor team demos for no more than two (2) days per team, and all demos/oral presentations will be completed within a four (4) week period.
- One (1) final pricing revision request will be incorporated into the proposal pricing analysis
- SBCSD will manage all direct communications with SW & SI vendors. Gartner will not communicate on behalf of SBCSD with proposers during the procurement phase.
- SBCSD will conduct SW & SI vendor reference checks. Gartner will not conduct reference checks on behalf of SBCSD.

# Assumptions

## Place of Performance and Deliverables

### Place of Performance

- Except as agreed between Gartner and SBCSD, 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 SBCSD'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 SBCSD 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 and PowerPoint).
- 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 within 5 days after their delivery.
- Deliverables will not be made available to anyone outside of the 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](https://gartner.com) or contact the Office of the Ombuds at [ombuds@gartner.com](mailto: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 & Invoicing

Gartner will conduct the engagement as outlined in this Proposal for a firm fixed-price of \$775,000 (plus applicable taxes) inclusive of travel and other reimbursable expenses. Fees will be billed as defined in the table below:

Phase	Deliverables	Milestone	Fees
<b>Phase 1: JMS Modernization Planning</b>	<ul style="list-style-type: none"> <li>▪ Current State Assessment</li> <li>▪ Solution Strategy</li> <li>▪ Modernization Roadmap</li> <li>▪ Business Case</li> </ul>	Week 8	\$225,000
<b>Phase 2: Vendor Solicitation and Selection</b>	<ul style="list-style-type: none"> <li>▪ User Stories</li> <li>▪ Functional &amp; Non-Functional Requirements</li> <li>▪ RFP &amp; Statement of Work</li> <li>▪ Evaluation Process &amp; Training Materials</li> </ul>	Week 20	\$350,000
	<ul style="list-style-type: none"> <li>▪ Demonstration Scripts</li> <li>▪ Vendor Selection Report</li> </ul>	Week 36	\$150,000
	<ul style="list-style-type: none"> <li>▪ Negotiation Support Materials</li> <li>▪ Summary of Key Contract Terms &amp; Risks</li> </ul>	Week 48	\$50,000
<b>Total Fees:</b>			<b>\$775,000</b>

- Gartner will bill for the professional fees at the conclusion of each milestone upon SBCSD’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 agreed schedule which are stated exclusive of all taxes. Payment is due 30 days from 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: 660009916, USD \$775,000 for Consulting. Any pre-printed or additional contract terms included on the PO shall be inapplicable and of no force or effect.



# Investment Summary

## Optional Services

Costs for Optional Phase 3 and Phase 4 services are contingent on the level of support the County requires and will be finalized at a future date and incorporated into a future Statement of Work. Estimated fees for planning purposes are provided in the table below:

Phase	Anticipated Activities and Deliverables	Estimated Timeframe	Estimated Fees
<b>Phase 3: Readiness &amp; Change Support</b>	<ul style="list-style-type: none"> <li>▪ Assess Implementation Readiness and Organizational Change Readiness</li> <li>▪ Develop Organizational Change Management Plan</li> <li>▪ Prepare Implementation Resource and Staffing Plan</li> <li>▪ Establish Implementation Project Structure, Processes, and Tools</li> </ul>	3 months – in parallel with Vendor Negotiations and Contract Finalization	\$195,000 (fixed fee)
<b>Phase 4: Program Assurance</b>	<ul style="list-style-type: none"> <li>▪ Provide Ongoing Expert Guidance and Coaching to SBCSD Implementation Project Team</li> <li>▪ Establish and Support Vendor Management Capabilities</li> <li>▪ Publish Monthly Executive Risk and Issue Briefings</li> <li>▪ Conduct Independent Readiness Assessments for Key Implementation Milestones</li> <li>▪ Provide Augmented Project Management Support (as needed)</li> </ul>	TBD – dependent upon implementation timeline and deployment approach for selected vendor(s)	\$30 – \$90K (monthly price range varies based on extent of support needed)

# Changes to Scope and Additional Terms & Conditions

## Changes in Scope

- The scope of this engagement is defined by this Proposal. All SBCSD's 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 SBCSD 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.
  - Providing or developing any deliverables not specifically set forth in this Proposal.
  - Any change in the respective responsibilities of Gartner and SBCSD, 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 SBCSD.
  - Any additional work caused by a change in the assumptions set forth in this Proposal.
  - Any delays in deliverable caused by modification of acceptance criteria in this Proposal.
  - Any changes to Business and Technology Insight Analysts' time or resources.

# 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 90 days from 23 January 2026.

## 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.

RESTRICTED | 660009916 | Version 4 | 19 September 2025 (revised January 23, 2026)

48 © 2025 Gartner, Inc. and/or its affiliates. All rights reserved.

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.

---

SIGNATURE

Kimberly Katsuyama, Managing Partner

---

PRINT NAME AND TITLE

---

DATE

### AGREED ON BEHALF OF San Bernardino County Sheriff's Department

---

SIGNATURE

Dawn Rowe, Chair, Board of Supervisors

---

PRINT NAME AND TITLE

---

DATE

---

ADDRESS



# Contacts

## **Kimberly Katsuyama**

Managing Partner  
Gartner Consulting  
Telephone: +1 (310) 270-7971  
Kimberly.Katsuyama@gartner.com

## **Chris Litton**

Sr. Managing Partner  
Gartner Consulting  
Telephone: +1 (250) 882-0207  
Chris.Litton@gartner.com

## **Jon Kashare**

Sr Managing Partner  
Gartner Consulting  
Telephone: +1 (203) 923-0753  
Jonathan.Kashare@gartner.com