

EHR Implementation Support

- **Program Management/Quality Assurance**
- **Biannual Risk and Progress Assessments**
- **Knowledge Transfer and Capacity Building**

Prepared for: Arrowhead Regional Medical Center
May 1, 2019



Engagement Number: 330056579 | Version #1

Cover Letter

Dear Mr. Boatman:

Gartner, Inc. (Gartner) is pleased to provide Arrowhead Regional Medical Center (ARMC) with this Proposal for Electronic Health Record (EHR) Implementation Support. Gartner believes that this work is essential for ARMC to achieve a successful EHR implementation and that we are uniquely positioned to provide these services.

Gartner Consulting has been working with the ARMC EHR planning team for more than a year and is very familiar with the landscape and challenges. Furthermore, our Consultants have, over recent years, provided other organizations with similar EHR implementation support services including the Los Angeles County Department of Health Services. In addition, Gartner Consulting teams have direct access to the world-class Gartner Research Analysts who closely track EHR trends and developments, frequently publishing on a wide range of topics related to EHR strategy, selection, implementation and benefits realization.

Our offer is valid for 60 days from the submission date of this Proposal.

If this Proposal meets your requirements, please sign the Authorization Page and return the entire Proposal to Hannes Scheidegger via email to Hannes.Scheidegger@gartner.com.

Please contact me at +1 530 400 7147 or via email at Hannes.Scheidegger@gartner.com if you have any questions. We thank you for this opportunity and look forward to assisting ARMC with this key initiative.

Sincerely,



Senior Managing Partner, Gartner Consulting

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Executive Summary



Executive Summary (1 of 2)

	Description
Gartner's Understanding of ARMC's Requirement	<ul style="list-style-type: none">▪ Arrowhead Regional Medical Center's (ARMC) vision is "to develop and expand a delivery system that continuously improves population health; grow market share through expansion and strategic partnerships; and continue to build upon our current expertise, while expanding to create competitive service lines."▪ In support of the vision, ARMC has embarked on an effort to replace it's current Electronic Health Record (EHR) solution – MEDITECH CS 5.67 – with a new EHR system.▪ ARMC is in the contracting phase of a procurement and acquisition process with Epic for EHR software and implementation services.▪ The 70+ person implementation team will be led by an ARMC EHR Project Director with significant support from Epic▪ ARMC has requested a proposal from Gartner for Project Management/Quality Assurance and other implementation support services.
ARMC's Objectives and How Gartner Consulting will Meet Them	<ul style="list-style-type: none">▪ The overall objective of Gartner's proposed engagement is to help ensure the success of the EHR implementation—i.e., the system is designed, configured and deployed on time, within budget, with high quality, and with the full scope of planned functionality.▪ The scope of Gartner's proposed engagement is:<ol style="list-style-type: none">1. Program Management/Quality Assurance (PM/QA) services during the EHR implementation, focused on the project itself<ul style="list-style-type: none">- Provide ongoing advisory services and Program Management Support, applying proven project management controls- Monthly Quality Assurance Reports with findings and recommendations2. Risk and Progress Assessment Reports<ul style="list-style-type: none">- Biannual Risk and Progress Assessment Reports delivered by a team independent from the PM/QA team, covering a larger stakeholder base- Identify implementation project risks at critical execution milestones and propose appropriate mitigations3. Knowledge Transfer and Capacity Building<ul style="list-style-type: none">- Access to ad hoc consulting services in support of the EHR implementation- Ongoing support through "Gartner for IT Leaders - EITL" Advisory Services

Executive Summary (2 of 2)

Description	
Gartner Approach and Deliverables	<p>This engagement proposal is divided into three components as shown below. Gartner recommends the coverage provided by using all three components. However, ARMC may opt to purchase any combination.</p> <ol style="list-style-type: none">1. The Program Management/Quality Assurance (PM/QA) team will be on-site regularly and attend all key project meetings (a combination of on-site and remote). They will provide analysis and recommendations, as well as guidance to address implementation, change management, technical, and organizational issues as they arise. This support will be both reactive (in response to requests raised by ARMC) and proactive (notification to ARMC of issues and risks that should be addressed).2. The biannual Risk and Progress Assessment team will perform short-term engagements just prior to critical execution milestones using a structured risk analysis framework to alert ARMC of any upcoming project risks. Input into this process are interviews with a broad range of stakeholders from both within the project and outside (ARMC executives, clinicians, nurses, administrators). The deliverable is a detailed assessment relevant to the upcoming milestone including findings and actionable recommendations for course corrections to ensure a successful project outcome (similar to the Readiness Assessment completed by Gartner in 2018).3. Knowledge Transfer and Capacity Building will be provided through a Gartner for Enterprise IT Leader – EITL subscription that provides ARMC leadership with access to a seasoned technology leader for ongoing thought leadership, towards successful delivery of critical business, and technology initiatives. In addition, ARMC can trigger professional services as needed in support of unanticipated or under-resourced activities during the EHR implementation. <ul style="list-style-type: none">▪ The deliverables of this engagement will support the EHR Project Team in achieving their objectives by:<ul style="list-style-type: none">▪ Providing unbiased and experienced guidance throughout the course of the EHR implementation.▪ Ensuring that the ongoing design, build, testing and implementation of the EHR is consistent with the ARMC EHR Vision.▪ Conducting ongoing assessments of EHR implementation progress against timelines and benchmarks, and provide feedback to the EHR implementation team.▪ Identifying potential challenges and barriers affecting the EHR implementation and work with the implementation team, ARMC leadership, and external stakeholders to address challenges and barriers.▪ Evaluating reports and other EHR implementation materials for signs of developing issues and risks and provide recommendations to mitigate risks to the EHR implementation team.

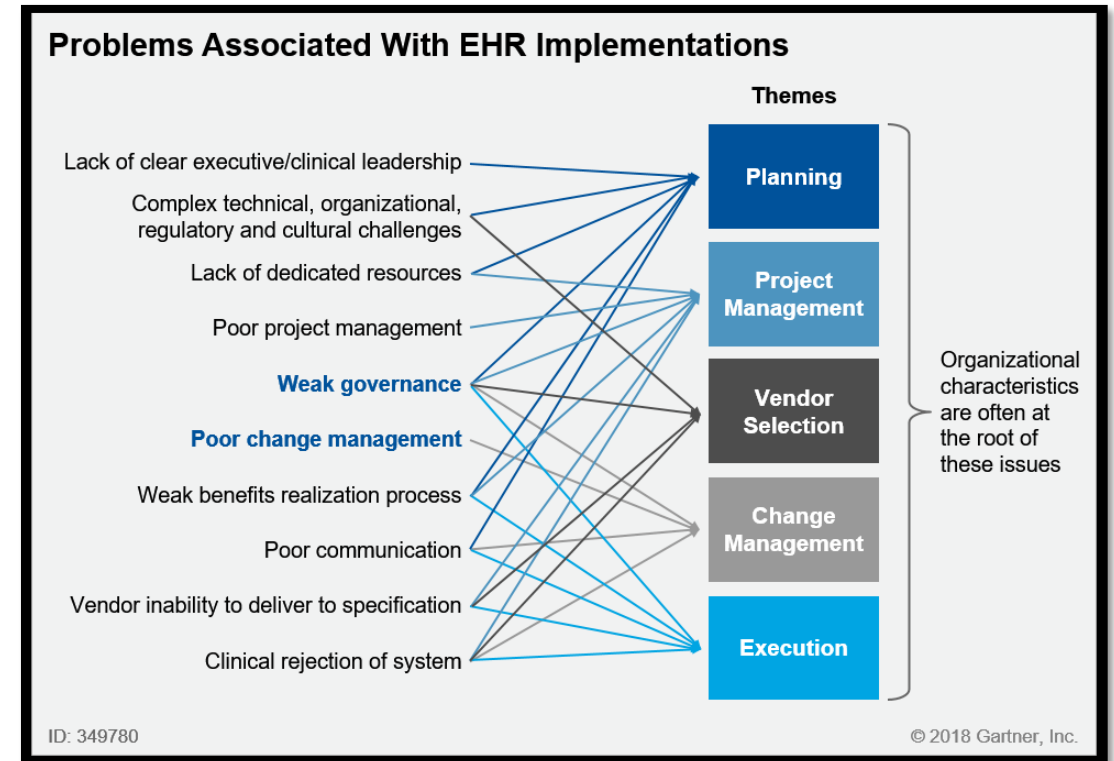


Gartner Point of View



Gartner Point of View

- Electronic Health Records (EHR) implementations are a **complex, challenging and risk-intensive undertaking** for healthcare organizations and their Executives. Implementing an EHR system on time and on budget always involves difficult technical, organizational, regulatory and cultural issues, and this is especially true if the system must support multiple hospitals or other facilities.
- EHR programs continue to **consume a large amount of capital** and cause a significant increase in related IT expense budgets. However, many organizations are ill-prepared to derive the maximum value.
- **Gartner has observed both successful and problematic EHR implementations.** Common characteristics at the root cause of those that have issues include:
 - Inadequate planning
 - Flawed project management
 - Deficiencies in vendor management
 - Ineffective change management
 - Faulty execution
- **Large and complex projects like this require ongoing monitoring of issues and the early identification and proactive management of risks.**



Lessons Learned From Healthcare Delivery Organizations' Electronic Health Record Implementations, Published 10 September 2014 - ID G002667

Gartner Point of View (cont'd)

- Gartner's structured framework for monthly reporting on program risks and issues as well as the biannual, 360-degree Risk Assessment involving stakeholders from outside the project will ensure that **risk indicators are brought to ARMC leadership early** and before they result in project delays or cost overruns.
- Risk indicators include, but are not limited to the following:
 - Not adhering to clear design principles can result in “over-configuration” and risk acceptance and adoption
 - Not receiving periodic physician feedback on screens and workflow during system build may result in a suboptimal solution
 - Lack of empowered working groups to make trade-offs between capturing coded, discrete data and smooth provider workflow
 - Lack of agreement on, and adoption of, EHR documentation standards across all user roles reducing the benefits of the EHR
 - Lack of communication to and understanding by clinicians and nurses greatly increase the risk of adoption
- Gartner is uniquely positioned to assist ARMC through its EHR implementation due to its understanding of ARMC and the expertise and experience of the proposed team with recent EHR implementations.

Gartner Rates Each of the Focus Areas Using the Criteria Below

Risk Levels	Risk Rating Definitions
Low	Green — Risk area is being managed according to best practices and there is no material impact from this risk area on project success at this time.
Medium	Yellow — Risk area is being managed according to some best practices, but others are missing. There is a potential material impact from this risk area on project success that needs to be addressed proactively at this time. Recommendations for risk areas assigned this rating are important to ensure optimal project operation.
High	Red — Risk area is in need of best practices mitigation to avoid downstream ramifications. There is a definite material impact from this risk area on project success if this area is not addressed now. Recommendations for risk areas assigned this rating are essential for mitigating project risk.
White	White — Risk area is not being evaluated because it is too early in the project. Risk area will be evaluated at a later date.
Gray	Gray — Risk area is not being evaluated because it is too early in the project. Risk area will be evaluated at a later date.

Overall Project Risk Assessment

EHR Close-out	EHR Operations (including Optimization and Enhancements)	EHR Extensions: Department of Public Health	FLM
Operational Governance	Operational Governance	Operational Governance	Operational Governance
Operational Budget	Operational Budget	Operational Budget	Operational Budget
Ongoing Scope and Requirements Management	Ongoing Scope and Requirements Management	Ongoing Scope and Requirements Management	Ongoing Scope and Requirements Management
Resource Management	Resource Management	Resource Management	Resource Management
Operational Communication	Operational Communication	Operational Communication	Operational Communication
Ongoing Training	Ongoing Training	Ongoing Training	Ongoing Training
Adoption and Optimization	Adoption and Optimization	Adoption and Optimization	Adoption and Optimization
Reporting/BI	Reporting/BI	Reporting/BI	Reporting/BI
Business Process Support	Business Process Support	Business Process Support	Business Process Support
Vendor Maint. Support	Vendor Maint. Support	Vendor Maint. Support	Vendor Maint. Support
Ongoing Security	Ongoing Security	Ongoing Security	Ongoing Security
Technical Infrastructure Support	Technical Infrastructure Support	Technical Infrastructure Support	Technical Infrastructure Support
DR/Bus. Continuity Support	DR/Bus. Continuity Support	DR/Bus. Continuity Support	DR/Bus. Continuity Support
Bus Value Mgmt and Benefits Harvesting	Bus Value Mgmt and Benefits Harvesting	Bus Value Mgmt and Benefits Harvesting	Bus Value Mgmt and Benefits Harvesting

Recommendations
Reporting
Business and IT Operations Support

Gartner Engagement Objectives

Gartner Engagement Objectives

Our Understanding of the Current Situation

- Arrowhead Regional Medical Center's (ARMC) vision is "to develop and expand a delivery system that continuously improves population health; grow market share through expansion and strategic partnerships; and continue to build upon our current expertise, while expanding to create competitive service lines."
- ARMC is currently in the contracting phase of a procurement and acquisition process with Epic for EHR software and implementation services.
- Per the schedule proposed by Epic, ARMC training will start in October 2019 and a 12 month implementation would begin in December.
- For their part of the implementation work, ARMC will be fielding a 70+ person team led by a contracted Project Director and composed of a mix of staff and temporary resources.
- The EHR will be the largest and most complex IT project ever undertaken by ARMC.



Gartner Response

- To support preparation for the EHR Program, Gartner has been working with the ARMC team for over a year in assessing readiness, cost estimation, organization planning, etc.
- Gartner can support the success of the EHR Program by providing objective oversight in a number of dimensions:
 1. Program Management/Quality Assurance (PM/QA)
 2. Biannual Risk and Progress Assessments
 3. Knowledge Transfer and Capacity Building (KTCB) (ad-hoc projects and Gartner Research support)
- Gartner recommends this comprehensive three-tiered approach to:
 1. Ensure that daily issues affecting quality, scope, budget and/or schedule will be surfaced quickly and effectively mitigated.
 2. Deliver an in-depth view of progress and risks for the EHR Program at four critical decision points.
 3. Provide ARMC the flexibility to spinoff critical tasks or mini-projects to experienced Gartner resources, as well as access to Gartner Analysts.



Statement of Work

- **Engagement Overview**
 - **Approach Detail**
 - **Summary of Deliverables**
 - **Deliverable Timeline**
- 

Engagement Overview

- Gartner is proposing to provide services to ARMC in three principal Workstreams:
 - **Program Management/Quality Assurance (PM/QA)** services during the EHR implementation focusing on the implementation project
 - Provide ongoing advisory services and Project Management Support, track adherence to schedule and contract, and deliver monthly QA reports applying proven project management controls
 - Monthly Quality Assurance Reports with findings and recommendations
 - **Risk and Progress Assessment Reports**
 - A separate and independent Gartner team will conduct four, approximately biannual, 360 degree risk assessments during the project planning and implementation phases. These assessments cover a broad range of stakeholders from within and outside the project:
 1. Implementation readiness,
 2. Implementation start readiness,
 3. Mid-project assessment,
 4. Go-live readiness
 - Identify implementation project risks just prior to critical execution milestones and propose appropriate mitigations
 - **Knowledge Transfer and Capacity Building (KTCB)**
 - Knowledge Transfer and Capacity Building will be provided through a Gartner for Enterprise IT Leader – EITL subscription that provides ARMC leadership with access to a seasoned technology leader for ongoing thought leadership towards successful delivery of critical business and technology initiatives.
 - In addition, ARMC can trigger professional services as needed in support of unanticipated or under-resourced activities during the EHR implementation. Specific activities and deliverables will be documented in form of a Task Order.

Workstream 1: Program Management and Quality Assurance (PM/QA)

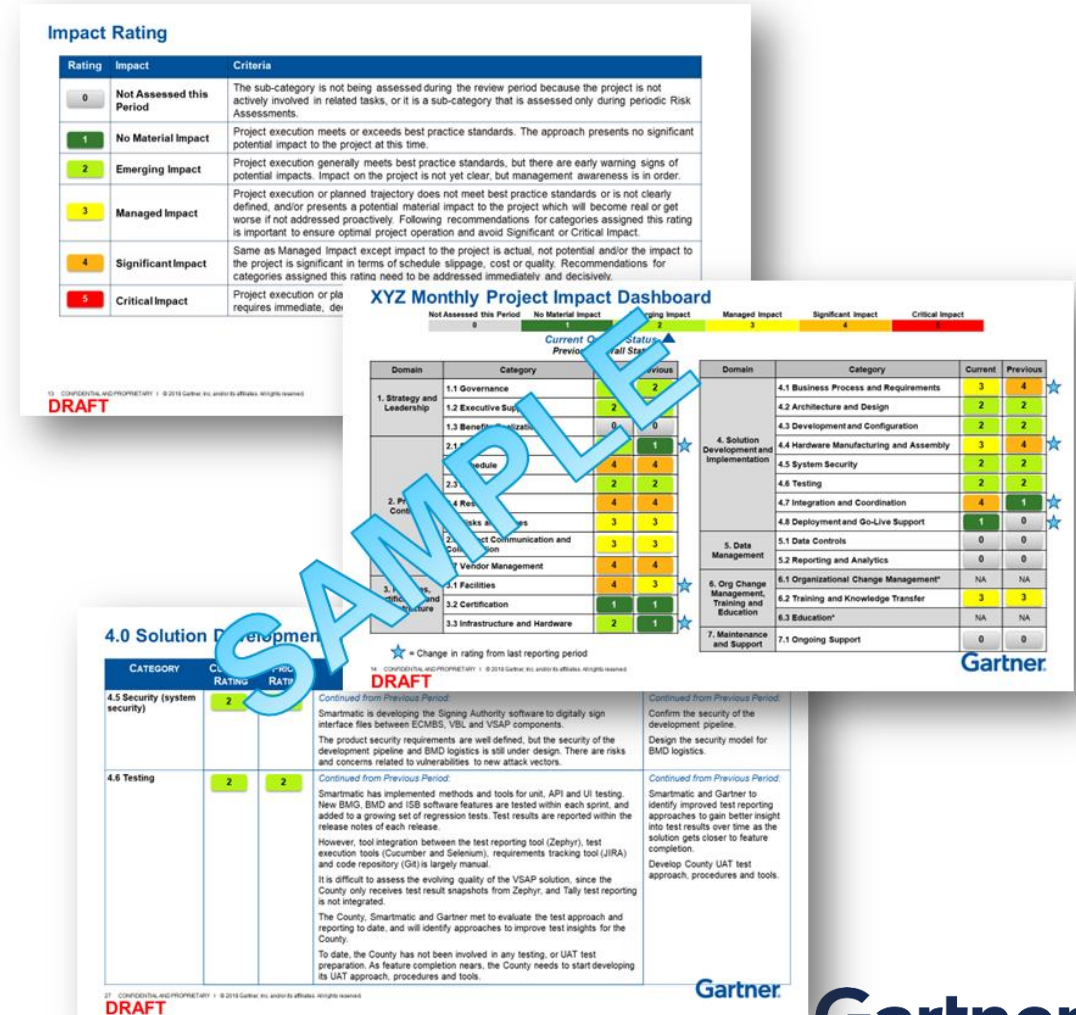
Sample Deliverables

Description

1. The **Program Management/Quality Assurance (PM/QA)** team will be on-site regularly and attend all key project meetings (a combination of on-site and remote). They will provide analysis and recommendations, as well as guidance to address implementation, change management, technical, and organizational issues as they arise. This support will be both reactive (in response to requests raised by ARMC), and proactive (notification to ARMC of issues and risks that should be addressed).

Value to ARMC

- The monthly PM/QA report will provide ARMC leadership with **an ongoing, independent and objective view** of project progress. Focused on the week-to-week progress, Gartner will provide an independent third party assessment of how the joint ARMC and Epic teams are progressing toward project milestones.



Workstream 1: Program Management and Quality Assurance (PM/QA)

Early warning of potential quality, scope, schedule or budget issues will allow ARMC to take corrective action lessening negative impacts

Objective

- Deliver independent and unbiased Quality Assurance reports
- Gartner will be embedded in the Epic implementation attending key project, status and steering committee meetings as well as gathering information from within the project team
- On the basis of experience, Gartner consultants, with research support if needed, will assess project status and earned value, and identify risks and recommended mitigations.

Activities Performed by Gartner (per report)

- Monitor and participate in project activities as needed to ensure they are complying with the stated project
- Attend key project meetings including Project Status and Steering Committee meetings
- Proactive monitoring of Program risk areas including schedule, human resources, financial, technical, organization, project management, and communications
- Conduct up to 10 interviews monthly with the ARMC EHR team and stakeholders
- Develop monthly report

Deliverable(s)

- Twelve monthly reports throughout the Epic implementation
 - A written report will be delivered monthly, but significant issues will be raised immediately to ARMC leadership on an ongoing basis.
- Typical content will include:
 - Overall project progress and health
 - Risk analysis
 - Mitigation recommendations
 - Schedule/Earned value assessment
 - Contractual obligations being met

Time Frame

- 12 months beginning January 2020

ARMC's Responsibilities and Participants

- Schedule and/or participate in interviews

Workstream 2: Biannual Risk and Progress Assessments

Sample Deliverables

Description

1. The biannual **Risk and Progress Assessment** team will perform short-term engagements leading up to critical execution milestones using a structured risk analysis framework to alert ARMC of any upcoming project risks and occurring project issues. Input into this process are interviews with a broad range of stakeholders from both within the project and outside (ARMC executives, clinicians, nurses, administrators). The deliverable is a detailed assessment relevant to the upcoming milestone including findings and actionable recommendations for course corrections to ensure a successful project outcome (similar to the Readiness Assessment completed by Gartner in 2018).

Value to ARMC

- The Biannual Risk and Progress assessments will provide ARMC leadership with **a periodic, outward looking 360-degree view** on project progress. In addition to reporting on readiness to proceed with the next project phase, this report is focused on milestones and events that are months (and not weeks) in the future and require longer resolution times.

Gartner Rates Each of the Focus Areas Using the Criteria Below

Risk Levels	Risk Rating Definitions
Low	Green — Risk area is being managed according to best practices and there is no material impact from this risk area on project success at this time.
Medium	Yellow — Risk area is being managed according to some best practices, but others are missing. There is a potential material impact from this risk area on project success that needs to be addressed proactively at this time. Recommendations for risk areas assigned this rating are important to ensure optimal project operation.
High	Red — Risk area is in need of best practices mitigation to avoid downstream ramifications. There is a definite material impact from this risk area on project success if this area is not addressed now.
White	
Gray	

Recommendation as "yellow" or "red" in some cases, re

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Overall Project Risk Assessment

EHR Close-out	EHR Operations (including Optimization and Enhancements)	EHR Extensions: Department of Public Health	ELM
Operational Governance	Operational Governance	Governance	System/Project Governance
Operational Budget	Operational Budget	Risk Management	Risk Management
Ongoing Scope and Requirements Management	Ongoing Scope and Requirements Management	Project Management	Scope Management
Resource Management	Resource Management	Project Management	Resource Management
Operational Communication	Operational Communication	Project Management	Communication Management
Ongoing Training	Ongoing Training	Project Management	Training
Adoption and Optimization	Adoption and Optimization	Project Management	Adoption and Optimization
Reporting/B1	Reporting/B1	Project Management	Reporting & BI
Business and IT Operational Support	Business and IT Operational Support	Project Management	Business and IT Operational Support
Vendor Maint. Support	Vendor Maint. Support	Project Management	Vendor Maint. Support
Ongoing Security	Ongoing Security	Project Management	Ongoing Security
Technical Infrastructure Support	Technical Infrastructure Support	Project Management	Technical Infrastructure Support
DR/Biz. Continuity Support	DR/Biz. Continuity Support	Project Management	DR/Biz. Continuity Support
Bus Value Mgmt and Benefits Harvesting	Bus Value Mgmt and Benefits Harvesting	Project Management	Bus Value Mgmt and Benefits Harvesting

Recommendations

Reporting

Facilities with the abilities, standards, and tools to meet their specific needs. The dissatisfaction at the leadership level is actively working with leadership to address needs.

Systems and IT Operations Support

The AMS and EHR resource issue to the possible within County constraints.

• Downtime has not improved, and may even have gotten worse.

• Review significant performance and outage issues, with root cause analyses at EHR Leadership call.
• Formalize the validation and release processes for introducing changes into production.

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Workstream 2: Biannual Risk and Progress Assessments

Focused 360 degree assessments at various critical project junctures will provide ARMC the basis for making key decisions

Objective

- Deliver unbiased in-depth Risk and Progress Assessments
- Gartner consultants independent from the PM/QA team will gather information via interviews from a broad range of stakeholders across ARMC.
- Using a structured framework, and our extensive experience with similar engagements, Gartner consultants will assess program readiness to proceed to the next project stage, identify risks and issues, and provide recommendations for mitigation and resolution.
- Gartner will provide a written report approximately biannually to Executive Leadership.

Activities Performed by Gartner (per assessment)

- Leverage Gartner frameworks to provide biannual Risk and Progress Assessments with recommendations regarding project status and risk anticipation, prevention and mitigation
- Conduct up to 20-30 interviews with the ARMC EHR team and stakeholders across the organization.
- Review deliverables and status, risk, and issue documents to incorporate findings into the Risk and Progress Assessment

Activities (con't)

- Develop a Risk and Progress Assessment including a summary for all risk areas that are relevant and discussion of key findings to describe the root causes for the elevated risk levels and Risk Recommendations along with specific action plan comments and dependencies
- Review and finalize the findings and recommendations with the ARMC EHR Project Director and relevant stakeholders and then with the ARMC IT Steering Committee

Deliverable(s)

- Four biannual Risk and Progress Assessment:
 1. Planning readiness (June 2019)
 2. Implementation start readiness (December 2019)
 3. Mid-project assessment (June 2020)
 4. Go-live readiness (December 2020)

Time Frame

- 8 weeks per assessment

ARMC's Responsibilities and Participants

- Schedule and/or participate in interviews and findings review

Workstream 3: Knowledge Transfer and Capacity Building (KTCB) Deliverables

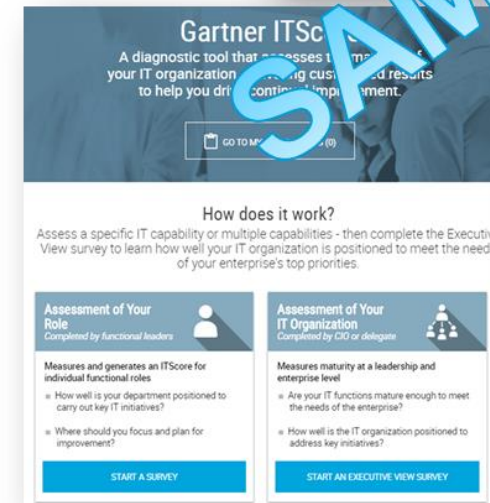
Description

- **Knowledge Transfer and Capacity Building** will be provided in two ways:
 - **Workstream 3a: Professional services as needed** in support of unanticipated or under-resourced activities during the EHR implementation. This may include activities such as Onboarding and Orientation of EHR Project team members, planning related to the ERP/EHR Interface, Benefits Realization planning, Change Management and Communications Planning.
 - **Workstream 3b: Gartner for Enterprise IT Leader (EITL)** subscription that provides ARMC leadership with access to a seasoned technology or PMO leader for ongoing thought leadership towards successful delivery of critical business and technology initiatives.

Value to ARMC

- Gartner's ability to quickly mobilize skilled consultants in a variety of subject matter areas will allow ARMC to address unanticipated needs quickly without causing a delay to the overall EHR project.
- Gartner EITL licenses will provide users with unlimited access to Gartner's 115,000 research documents, toolkits and templates, along with 1,200+ technology analysts. These resources will be leveraged to support ARMC's critical priorities resulting in validation and support for direction, improved maturity, team time savings, cost savings, and risk mitigation.

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Workstream 3a: Knowledge Transfer and Capacity Building (KTCB)

Consulting Services to address the unanticipated needs that ARMC will have during the EHR implementation

Objective

- Establish a pool of contingency funding that gives the ARMC the flexibility to quickly engage Gartner to assist with a variety of potential tasks.
- This task begins with a written request from the EHR Program Director and/or Associate Administrator.
- No cost would be incurred by ARMC without a written authorization for a specific Scope of Work to be determined as needs arise.

Example Gartner Activities

- Develop initial versions of project artifacts in partnership with ARMC staff, helping ARMC staff to develop the deliverables (e.g., program/project charters, work plans/schedules, task lists)
- Train ARMC staff in the use of templates and provide feedback
- Develop tools and processes (e.g. status reporting tools, risk logs, issues logs), provide training to ARMC staff so that the staff can take ownership for ongoing utilization of the tools and processes, provide feedback and guidance on the use of the tools and compliance with processes
- Assist with the planning of activities related to the EHR/ERP interface

Example Gartner Activities (con't)

- Mentor ARMC project staff to develop knowledge and process disciplines related to program operations and project planning and execution, such as:
 - Apply best practices for project lifecycle phases (Initiation, Planning, Executing, and Closing)
 - Apply best practices for IT Program operations (Issue Management, Problem Management, etc.)
 - Provide guidance to ARMC staff on the process of planning project activities from a conceptual level down to the planning and execution of tactical tasks and activities, including Communications, Planning, and Deliverable Management.

Time Frame

- Activities and timeframes will vary by Task Request, but typical timeframes are 4– 8 week per initiative depending on the nature of the work.

ARMC's Responsibilities and Participants

- Participants to be determined by ARMC

Workstream 3b: Knowledge Transfer and Capacity Building (KTCB)

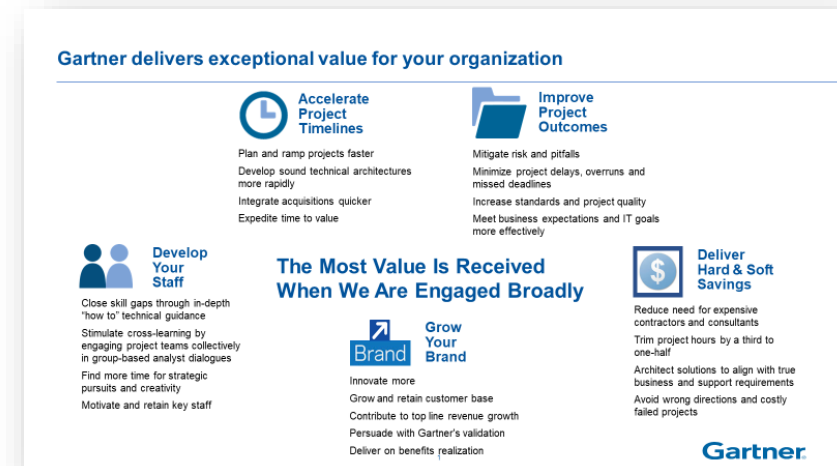
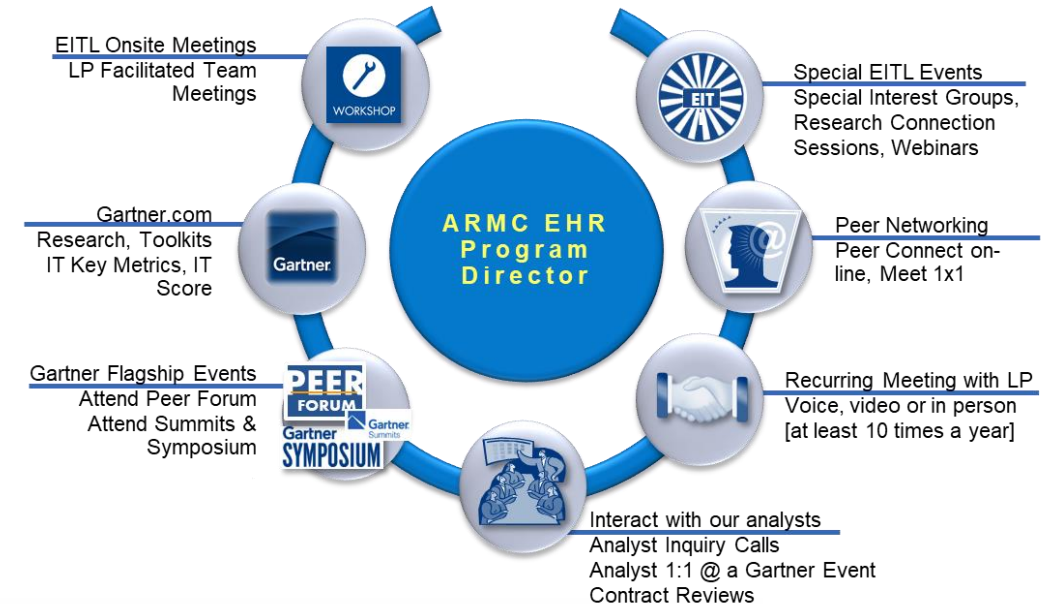
Enterprise IT Leadership (EITL) Team Solutions

Objective

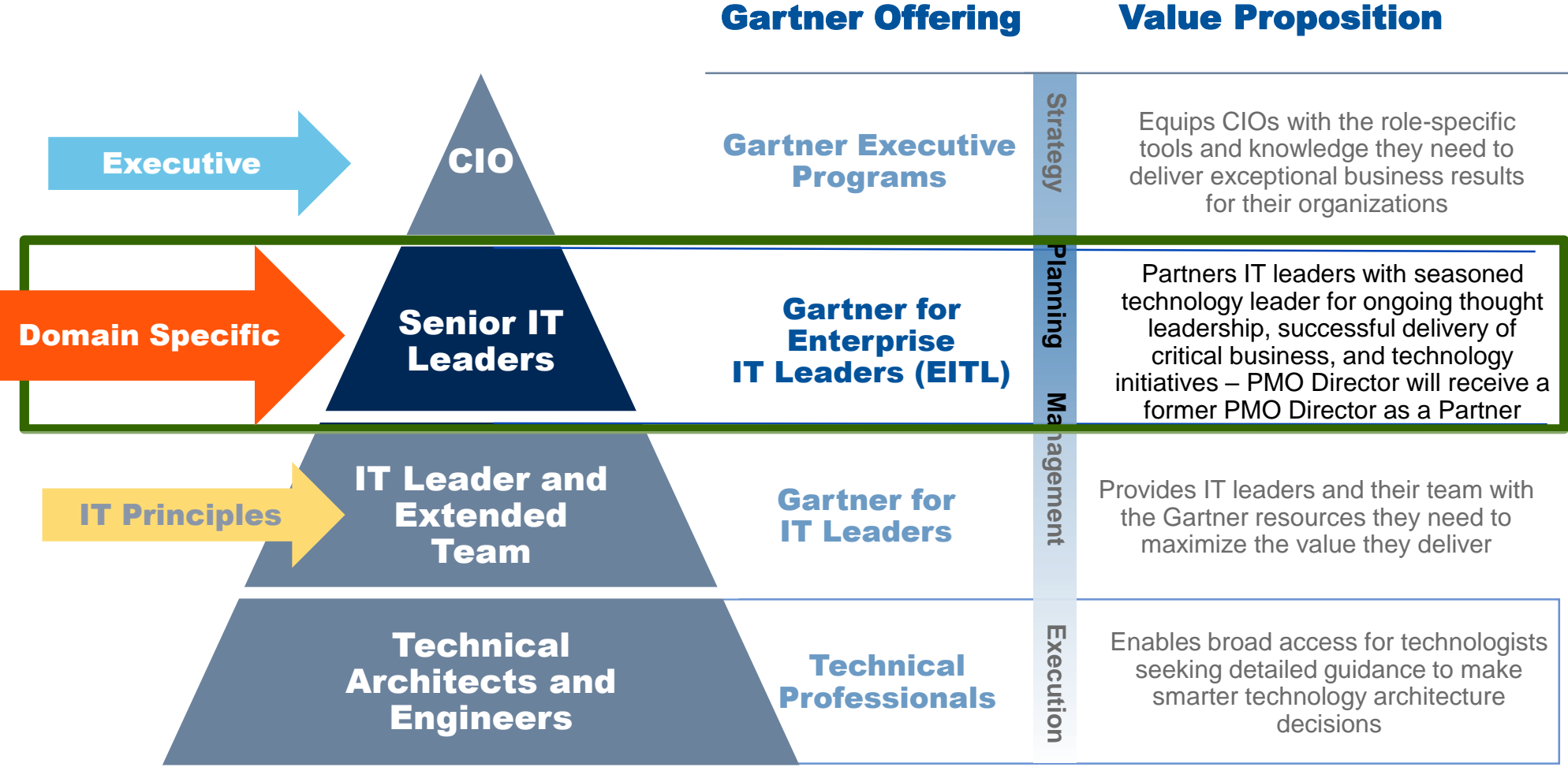
- **A stronger, more efficient team for better decision making**
 - Extend the Gartner relationship to your team, providing team members the insight they need to make more-informed, fact-based decisions.
 - Excel as an individual, and as a team leader, and create a cohesive, high-functioning unit. Engage in team analyst inquiries to ensure alignment and drive success.
- **End-to-end research and advice to keep you and the team focused**
 - From insightful research and analyst calls to data and trends, you get the access you need to the Gartner insights that support the key initiatives of you and your team.

Example Gartner Activities and Materials

- Access to Gartner research and tools, such as IT Maturity Assessment, IT Budget, IT Key Metrics Data, Magic Quadrant,
- Former Practitioner Partnership (e.g. Program & Portfolio Mgt)
- One Summit Event attendance / Two Peer Only Forum Event Invitation
- Gartner's exclusive online peer community: Peer Connect with both Public and Private Sector Clients



Gartner's EITL solution is tailored to support the unique needs of the EHR PMO Director

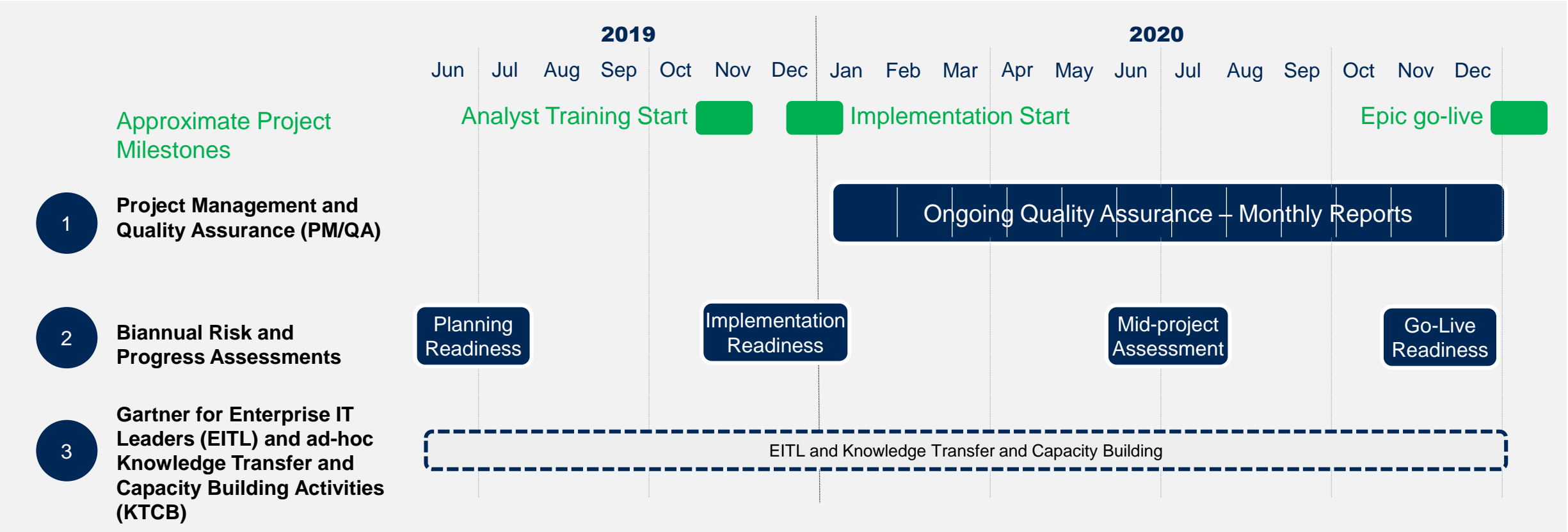


Summary of Deliverables

Step	Deliverables
Workstream 1: Program Management and Quality Assurance (PM/QA)	<ul style="list-style-type: none">▪ Twelve monthly reports
Workstream 2: Biannual Risk and Progress Assessments	<ul style="list-style-type: none">▪ Four Biannual assessment reports:<ol style="list-style-type: none">1. Planning readiness (June 2019)2. Implementation start readiness (December 2019)3. Mid-project assessment (June 2020)4. Go-live readiness (December 2020)
Workstream 3: Knowledge Transfer and Capacity Building (KTCB)	<ul style="list-style-type: none">▪ Workstream 3a: As defined in the Task Order▪ Workstream 3b: Gartner for Enterprise IT Leaders (EITL)

Deliverable Timeline

- Gartner proposes a 3-tiered approach to effectively support the EHR Program
- The work outlined in this Scope of Work will be completed between June 1, 2019 and January 15, 2021. The 12 periodic Quality Assurance reports will be delivered during Epic implementation each month of 2020.
 - The 4 in-depth assessments will be delivered every 6 months in June 2019, Dec 2019, June 2020 and December 2020.
 - Knowledge Transfer and Capacity Building tasks and mini-projects will be delivered between June 1, 2019 and January 15, 2021.
- *Scheduling is dependent on EHR Program events*



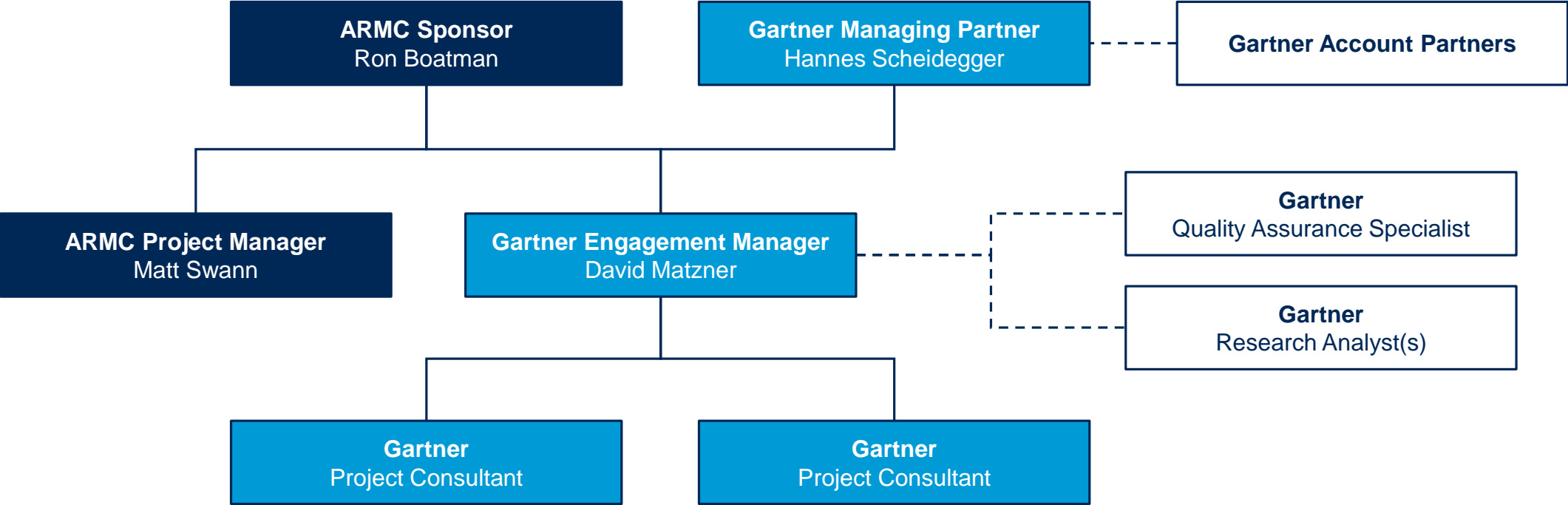
Project Team and Logistics

- **Project Team Overview**
- **Assumptions: ARMC Participation**
- **Logistics**

Project Team Overview

Organization Chart

Gartner has created an organization structure for this engagement that ensures 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
Managing Partner Hannes Scheidegger	<ul style="list-style-type: none"> ▪ Ensure that Gartner activities support ARMC goals. ▪ Build and maintain a long-standing relationship with ARMC. ▪ Provide high-level oversight to the engagement and become more heavily involved should any issue resolution be necessary.
Engagement Manager David Matzner	<ul style="list-style-type: none"> ▪ Be responsible for the day-to-day management of engagement initiatives. ▪ Ensure that deliverables are completed on time and meet the Gartner quality standards. ▪ Act as the primary point of contact for the Gartner team. ▪ Work closely with ARMC to ensure that Gartner is meeting its needs.
Project Consultant(s)	<ul style="list-style-type: none"> ▪ Provide day-to-day consulting support for project steps. ▪ Provide support for data collection, data analysis and recommendations for activities. ▪ Participate in deliverable creation, deliverable review and client presentations as needed. ▪ Present results to ARMC as needed.
Quality Assurance Specialist	<ul style="list-style-type: none"> ▪ Provide quality assurance review of Gartner project plan and Gartner deliverables throughout the engagement.
Research Analyst(s)	<ul style="list-style-type: none"> ▪ Support the core project team by providing a context-sensitive perspective to issues specific to ARMC based on Gartner industry-leading research. ▪ Participate in analysis and comparisons, and review deliverables as needed.

Project Team Overview

Gartner Account Partners

- Gartner Account Partners will work closely with the delivery team throughout the engagement:
 - Account Executives will ensure that the value delivered through this engagement is seamlessly integrated with all Gartner programs.
 - Service Partners will provide guidance so that this engagement advances the overall Mission-Critical Priorities of ARMC.
 - The body of Gartner Research and partnership with Analysts will ensure that recommendations and outcomes are aligned with Gartner Research frameworks.
 - Partnership across this team will ensure that the recommendations from this engagement are actionable through ongoing Gartner services.

Assumptions

ARMC's Participation

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

ARMC's Participation

- ARMC will designate a project manager to act as the primary point of contact for this engagement. ARMC'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 SOW assumes ARMC's personnel are available to assist in the manner defined in this SOW. In the event that ARMC's personnel are not available, a change of scope may be necessary.
- ARMC will review and approve documents within five business days. If no formal approval or rejection is received within that time, the deliverable is considered to be accepted by ARMC.
- ARMC will schedule ARMC's resources for engagement activities and provide meeting facilities as necessary.
- ARMC'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 to ensure 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.
- ARMC 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.
- All data collection and interviews/workshops will take place via telephone or in person at location as described in this SOW and/or as agreed to at the project kickoff.

Key Personnel

- Key personnel provided in this SOW 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 SOW.
- In the event that unforeseen circumstances require the replacement of an associate on an engagement, Gartner will inform ARMC 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 SOW, that a proposed team member is a sub-contractor to Gartner, ARMC 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. In the event that such inclusion is not reasonably acceptable to ARMC, Gartner will be informed at the earliest opportunity and requested to find an alternative team member.

Assumptions

Place of Performance, Deliverables and Changes to Scope

Place of Performance

- Except for meetings and workshops, 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 ARMC's locations for onsite time.

Deliverables and Changes to Scope

- Any requests for additional information or resource (beyond the details described in the steps above) that are made by ARMC will be considered a change in scope for this engagement and will be handled accordingly (see Changes to Scope section of this SOW).
- All deliverables will be developed using Microsoft products (e.g., Word and PowerPoint).

Gartner Research 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 Research, see "[Guiding Principles on Independence and Objectivity](#)" on our website, [gartner.com](https://www.gartner.com) or contact the Office of the Ombudsman at ombudsman@gartner.com or +1 203 316 3334.

Terms

- **Investment Summary**
- **Changes to Scope**
- **Additional Terms & Conditions**
- **Authorization**

Investment Summary: Fees and Expenses

Advisory Services

Gartner will conduct the consulting engagement outlined in this SOW for a firm-fixed price of \$905,022 inclusive of travel and other reimbursable expenses.

Description	Deliverables	Cost
Workstream 1: Project Management/Quality Assurance	<ul style="list-style-type: none">12 monthly reports/\$25,000 per report	\$300,000
Workstream 2: Biannual Progress/Risk Assessment	<ul style="list-style-type: none">4 reports/\$75,000 per report	\$300,000
Workstream 3: Knowledge Transfer and Capacity Building	<ul style="list-style-type: none">Ad hoc Consulting Services (task order based)EITL License 2019*EITL License 2020	<div>\$240,000</div> <div>\$29,782</div> <div>\$35,240</div>
	Total:	\$905,022

*Assuming a June 2019 contract start, the price will be prorated.

Investment Summary (2 of 2)

Pricing Assumptions

- Gartner's cost estimate is both reasonable and realistic. Our rates are reasonable for the following reasons:
 - Gartner's consulting staff rely heavily on Gartner's research. Our consultants utilize the research in a variety of ways, including leveraging the content directly and including it in Gartner deliverables. Consultants will also have the analysts participate directly by reviewing deliverables or taking part in the project directly. Each use of research provides significant value, and comes with a real opportunity cost. This resource is built into our hourly rates
 - Gartner comes to the table with a complete set of tools and templates developed through prior projects and applied subject matter expertise. This enables more-effective use of resources by both Gartner and ARMC, which results in fewer hours required to complete steps and deliverables and less risk of rework or wasted effort
 - Gartner does not charge for administrative or contracts management. Our administrative and secretarial personnel, our contracts management personnel, and our editors, graphics and production staff are all funded from overhead
- Gartner Consulting is a senior-leveraged Consulting practice. Our fees represent our years of experience performing similar work for analogous clients, our ability to apply lessons learned to mitigate risk, and experience working directly with senior stakeholders to achieve real results for our clients' key initiatives.

Investment Summary: Billing, Fees and Expenses and Invoicing

Billing

- Gartner will conduct the steps as outlined in this SOW for the firm-fixed prices defined on the previous slides.
- Gartner will bill for monthly/upon acceptance for PM/QA Reports and Services.
- Gartner will bill upon acceptance for Risk and Progress Assessments.
- Gartner will bill upon delivery/acceptance for Knowledge Transfer and Capacity Building tasks and projects.
- Note, if no response is received within 14 days, then acceptance of the deliverable is assumed.

Fees and Expenses

- Gartner will conduct the engagement as outlined in this SOW for a firm-fixed price of \$905,022. inclusive of travel and other reimbursable expenses. This will be billed as defined on the following slide.
- Gartner Research licenses will be invoiced in full on the agreed annual subscription timeframe, beginning upon contract acceptance.

Invoicing

- All invoices are payable net 30 days from the date of invoice. While we do not itemize billing for services, we agree and will comply with any reasonable requests for records substantiating our invoices.

Changes to Scope

- The scope of this engagement is defined by this SOW. All ARMC's requests for changes to the SOW must be in writing and must set forth with specificity the requested changes. As soon as practicable, Gartner shall advise ARMC 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 SOW. By way of example and not limitation, changes may include the following:
 - Any activities not specifically set forth in this SOW
 - Providing or developing any deliverables not specifically set forth in this SOW
 - Any change in the respective responsibilities of Gartner and ARMC, 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 ARMC
 - Any additional work caused by a change in the assumptions set forth in this SOW
 - Any delays in deliverable caused by modification of acceptance criteria in this SOW
 - Any changes to Research Analysts' time or resources

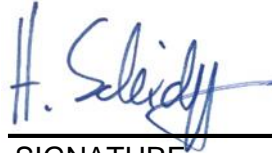
Authorization

- This Proposal/SOW is submitted under the terms and conditions of the Gartner Agreement #18-644 dated August 21, 2018 between Gartner and San Bernardino County.
- When signed by Gartner, Inc. and County, this Proposal/SOW is an attachment to and governed by Agreement #18-644. These two documents will set forth the relationship between the parties for this engagement. This SOW 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 Order provision.
- The Proposal, including the SOW, is valid for 60 days from May 1, 2019.

IF USING A DIGITAL SIGNATURE, PLEASE CONFIRM THE FOLLOWING AS A CONDITION OF CONTRACT EXECUTION:

[] By ticking this box, I agree that by affixing my digital signature hereunder I am attesting that: (i) this is my own personal legal signature; and (ii) I am a duly authorized signatory for my company. My signature verifies that the information provided to Gartner hereunder is subscribed by me, under penalty of false statement and material breach of contract.

SUBMITTED ON BEHALF OF Gartner, Inc.



SIGNATURE

Hannes Scheidegger, Managing Partner

PRINT NAME AND TITLE

May 1, 2019

DATE

AGREED ON BEHALF OF San Bernardino County Assessor

SIGNATURE

PRINT NAME AND TITLE

DATE

PO NUMBER (If applicable)

Contacts

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