Gartner

SERVICE DESCRIPTION
Attachment to the Service Agreement
GARTNER FOR IT EXECUTIVES CIO

Gartner for IT Executives CIO (the "Service") is for the most senior-level IT executives of complex organizations or enterprises whose business models rely heavily on IT. This Service provides the Client with an ongoing advisory relationship with Gartner and assistance in responding to questions where standard industry practices have not yet been defined.

DELIVERABLES
Client may designate one (1) Licensed User, referred to herein as "Member," who may access the Deliverables described below. The sections following this list provide additional guidance:

- Assigned Service Delivery Team
- Strategy Meetings
- Executive Programs Research and Related Content
- Gartner for IT Leaders Research and Related Content

- Analyst Inquiry
- Symposium/ITxpo® with Executive Programs VIP access
- Executive Programs Events
- Networking

1. Assigned Service Delivery Team
An Executive Partner and an Executive Client Manager will serve as Member's primary points of contact for this Service. The Delivery Team will work with Member to develop a plan (the "Member Value Plan"), to highlight value sought; identify key issues on which Service delivery will focus; and define how the Service will deliver that value. The Delivery Team will, as necessary, select and synthesize Gartner Research in accordance with the Member Value Plan.

2. Strategy Meetings
Up to four (4) times per year, the Executive Partner will meet face to face with Member (the "Strategy Meeting") to (i) review and apply Executive Programs Research, the annual Executive Programs CIO Agenda, or other relevant content; (ii) provide advice on issues of relevance to Member; and/or (iii) develop, discuss progress of, and where necessary, modify the Member Value Plan.

Substitutions for Strategy Meetings — The Delivery Team and the Member will jointly determine whether any of the following services should be included in the Member Value Plan. Member must be present at these sessions, participation is limited to Member and Member's Team (as required for Member's business purposes), and session is limited to 25 (twenty-five participants. Each session used by Member counts as one (1) of the four (4) Strategy meetings to which they are entitled annually and may be used only once per contract year:
- **Onsite Analyst Briefing** — Half-day session with a Gartner Analyst providing advisory assistance, based on Gartner content.
- **Executive Programs Workshop** — Half-day session on Client premises facilitated by a Gartner Executive Programs expert and focused on application of Gartner Executive Programs Research and action planning. Topic is selected by Member and the Delivery Team from a list of available Executive Programs workshops.

3. Executive Programs Research and Related Content
- **Research Reports** — Up to 12 (twelve) Reports* per year, covering Gartner-selected topics, such as IT Governance, Business Value of IT, Architecture, and other areas where business and

IT intersect. Includes associated tools and teleconferences hosted by Executive Programs Research Report authors to discuss topics of their Research Reports.
- **Business Research and Related Content** targeted to CIOs, CFOs and other business executives. May include podcasts, Road Notes, toolkits and top research picks.

*Schedules above are approximations and are dependent on the publication schedule of relevant Research.

4. **Gartner for IT Leaders Research and Related Content** which may be updated from time to time.

5. Analyst Inquiry
Inquiry provides access to Gartner Analysts who are associated with the Service purchased by Client. Participation is limited to the Gartner Analyst, the Member, and the Member's team (as reasonably required for the Member's business purposes). In all instances, the Member must be present on the Inquiry call and must manage and lead the Inquiry discussion and questions. The Inquiry topic may be any area of Gartner-covered Research so long as the purpose is to advance the Member's agenda.

6. Events
- **Symposium/ITxpo®** — One (1) complimentary, nontransferable invitation to attend Gartner Symposium/ITxpo, including standard Symposium entitlements plus Executive Programs VIP access.
- **Executive Programs Events** — Complimentary, nontransferable invitation, for the Member only, to attend local content-based Gartner Executive Programs Events, including regional CIO Leadership Forums, where available.

7. Networking
- **Facilitated Networking** — Member may request meetings or conference calls with peers around a specific topic to exchange information about best practices or areas of expertise.
- **Online Networking** — Access to Peer Connect, including Peer Connect Forums.

ADDITIONAL TERMS & CONDITIONS
Member may, on an occasional and infrequent basis, forward to specific individuals within Client organization copies of individual research documents, not to exceed 25 (twenty-five) separate documents per contract year. This may not be done on a routine basis, or by means of posting on Client's corporate intranet, or in any other manner that has the intent or effect of avoiding the purchase of additional User licenses from Gartner.

Unless otherwise provided above, use of this Service is governed by the Usage Guidelines for Gartner Services, which are accessible on the Policies section of gartner.com.

APPENDIX D to DIR Contract No. DIR-TSO-2531

Gartner, Inc. Services Agreement for Fort Bend County ("Customer")

This Service Agreement ("SA") and DIR Contract No. DIR-TSO-2531 constitutes the complete agreement between Gartner, Inc. of 56 Top Gallant Road, Stamford, CT 06904 ("Gartner") and Customer for the Services (as defined below). The SA is based upon and governed by the Contract for Services with the State of Texas Department of Information Services ("DIR") Contract No. DIR-TSO-2531, between Gartner and DIR, the terms of which are incorporated by reference for use by the Customer. The General Terms contained herein and all applicable Vendor Services Descriptions shall apply to this SA and shall be effective when signed by both parties. Customer agrees to subscribe to the following Services for the term and fees set forth below. All fees shall be as set forth in Appendix C of DIR Contract No. DIR-TSO-2531.

1. DEFINITIONS AND ORDER SCHEDULE

a. Services are the subscription-based research and related services purchased by Customer in the Order Schedule below and described in the Service Descriptions.

b. Service Descriptions, the terms of which are incorporated by reference, are attached to this SA and describe each Service purchased, specify the deliverables for each Service, and set forth any additional terms unique to a specific Service.

Service Names and Levels of Access are defined in the Service Descriptions. Gartner may periodically update the names and the deliverables for each Service. If Customer adds Services or upgrades the level of service or access, an additional Service Agreement will be required.

Service Name	Level of Access	Number of Users	Name of User to be Licensed	Contract Term Start Date	Contract Term End Date	Annual Fee $	Total Fee $
IT Executive	CIO	1	Ray Webb	7/01/2014	6/30/2015	$77,900	$77,900
				Total Services:	(Excluding applicable sales tax)		$77,900

2. SERVICE DESCRIPTIONS:

Service Name/ Level of Access	Service Description URL
Gartner for IT Executives CIO	http://www.gartner.com/it/sd/sd_ite_cio.pdf

3. PAYMENT TERMS

Gartner will invoice Customer $38,950 at time of signature and $38,950 in October 2014 for all Services. Payment shall be in accordance with Section 7.K. of Appendix A of the DIR Contract DIR-TSO-2531.

Please attach any required Purchase Order ("PO") to this SA and enter the PO number below. If an annual PO is required for multi-year contracts, Customer will issue the new PO at least 30 days prior to the beginning of each subsequent contract year. Any pre-printed or additional contract terms included on the PO shall be inapplicable and of no force or effect.

3. CUSTOMER BILLING INFORMATION

_____

Purchase Order Number

_____

Invoice Recipient Name

_____

Billing Address

_____

Invoice Recipient Email

_____

Invoice Recipient Tel. No.

4. AUTHORIZATION

State of Texas Customer:

~~Robert Hebert~~

Signature/Date

Robert E. Hebert, County Judge

Print Name and Title

Approved by Commissioners Court
on June 10, 2014

Gartner, Inc.

May 13, 2014 - Christine Payne

Signature/Date

Christine Payne - Sr. Account Executive

Print Name and Title

General Terms and Guidelines for Vendor's Services

1. This SA for subscription-based research and related services (the "**Services**") is subject to Section 8.B. of Appendix A of the DIR Contract No. **DIR-TSO-2531**.

2. *Services* are the subscription-based research and related services described herein. Service Descriptions, Names and Levels of Access are as detailed for each product offering. Vendor may periodically update the names and the deliverables for each Service.

3. *Modification of Services by Vendor.* In order to remain current and timely in its Service offerings, Vendor may make minor modifications from time to time in the content of any Service. If Vendor discontinues any Service in its entirety, Customer may, at its option, receive a substitute Service, or obtain a pro rata refund of the fees paid for the discontinued Service.

4. *Licensed User* is the individual named in the Customer Purchase Order who is licensed to use the Services. Customer will limit access to the Services to the agreed upon number of Licensed Users.

3. *Ownership and Use of the Services.* Vendor owns and retains all rights to the Services not expressly granted to Customer. Only the individuals named in the Customer Purchase Order (each a "**Licensed User**") may access the Services. Each Licensed User will be issued a unique password, which may not be shared. Customer agrees to review and comply with the *Usage Guidelines for Gartner Services* ("**Guidelines**"), which are accessible to all Licensed Users via the "Policies" section of www.gartner.com. Among other things, these Guidelines describe how Customer may substitute Licensed Users, excerpt from and/or share Vendor research documents within the Customer organization, and quote or excerpt from the Services externally. Customer may not redistribute copies of individual research documents, by electronic means or otherwise, to non-Users without Vendor's prior written permission. Licensed Users may not reproduce or distribute the Services externally without Vendor's prior written permission, except for external distribution, in their entirety only, of reprints of individual documents purchased by Customer.

   Customer may excerpt from the Services for external use only if Customer obtains the prior written approval of Gartner Quote Requests, at quote.requests@gartner.com. Any approved external use of the Services must comply with Vendor's *Copyright and Quote Policy* which may be viewed on the Gartner Vendor Relations section of www.gartner.com. Services may not be stored by Customer on any information storage and retrieval system.

4. *Access to the Services.* ID's for access to Vendor Core Research and Analyst Inquiry may not be shared. Access to the Services is restricted to the number of named individuals (each a "Licensed User") as identified in the Customer Purchase Order.

5. *Monitoring of Usage.* Customer acknowledges and agrees to inform all Licensed Users that Vendor may monitor activity on Vendor's web site, including access to, and use of, the Services by individuals. Upon request, Customer agrees to provide Vendor with assurance from a responsible party (or other relevant evidence) of compliance with these usage terms.

6. *DISCLAIMER OF WARRANTIES.* THE SERVICES ARE PROVIDED ON AN "AS IS" BASIS, AND VENDOR EXPRESSLY DISCLAIMS ALL WARRANTIES, EXPRESS OR IMPLIED, STATUTORY OR OTHERWISE, INCLUDING, WITHOUT LIMITATION, ANY IMPLIED WARRANTIES OF FITNESS FOR A PARTICULAR PURPOSE OR AS TO ACCURACY, COMPLETENESS OR ADEQUACY OF INFORMATION. CUSTOMER RECOGNIZES THE UNCERTAINTIES INHERENT IN ANY ANALYSIS OR INFORMATION THAT MAY BE PROVIDED AS PART OF THE SERVICES, AND ACKNOWLEDGES THAT THE SERVICES ARE NOT A SUBSTITUTE FOR ITS OWN INDEPENDENT EVALUATION AND ANALYSIS AND SHOULD NOT BE CONSIDERED A RECOMMENDATION TO PURSUE ANY COURSE OF ACTION. VENDOR SHALL NOT BE LIABLE FOR ANY ACTIONS OR DECISIONS THAT CUSTOMER MAY TAKE BASED ON THE SERVICES OR ANY INFORMATION OR DATA CONTAINED THEREIN. CUSTOMER UNDERSTANDS THAT IT ASSUMES THE ENTIRE RISK WITH RESPECT TO THE USE OF THE SERVICES.

7. *Applicable Law.* This SA shall be governed by and construed in accordance with the procedural and substantive laws of the State of Texas, without reference to its conflict of law principles, venue for disputes shall be Travis County, Texas.

8. *Customer Confidential Information.* To the extent allowable under the Texas Public Information Act, Vendor agrees to keep confidential any Customer-specific information communicated by Customer to Vendor that is (i) clearly marked confidential if provided in written form, or (ii) preceded by a statement that such information is confidential, if provided in oral form, and such statement is confirmed in writing within 15 days of its initial disclosure. This obligation of confidence shall not apply to any information that: (1) is in the public domain at the time of its communication; (2) is independently developed by Vendor; (3) entered the public domain through no fault of Vendor subsequent to Customer's communication to Vendor; (4) is in Vendor's possession free of any obligation of confidence at the time of Customer's communication to Vendor; or (5) is communicated by the Customer to a third party free of any obligation of confidence. Additionally, Vendor may disclose such information to the extent required by legal process. Customer acknowledges that Vendor is in the business of researching and analyzing information technology and this obligation of confidence shall not apply to information obtained by Vendor's research, analysis or consulting organization(s) from other sources.

FORT BEND COUNTY- TEXAS

Gartner Impact Assessment

Christine Payne

April 2014

Gartner

Executive Summary

Gartner's support of Fort Bend County's key initiatives:

IT continues to be critical to Fort Bend County's growth and will continue to reshape its standards in IT leadership, strategic planning, process governance, and expertise in deploying modern information technologies to improve efficiency. Gartner has aligned its proposed services with the key goals & initiatives that you shared during our discussion. Gartner is a cost-effective method for providing both unrivaled expertise and timely insight against all of your key initiatives that will help you successfully deliver against these initiatives:

Key Initiatives:
- Enterprise Content Management
- ?
- ?

Fort Bend County has captured **strategic value** within all levels of the IT organization through its interactions with Gartner. The team accessed 392 research documents and 83 Toolkits (475 total). Conducted 4 analyst inquiries. Conducted 1 contract review and 2 document reviews.. In addition, the City of Fort Worth attended 3 Gartner events

How Gartner will continue to deliver value:
Saved time
Cost Savings
Risk Avoidance

1

Gartner

Executive Summary

Fort Bend County - Texas currently has 1 seat for a total investment of $75,000. It comprises the following:

- Ray Webb — Gartner for IT Executives CIO

From July 2013 through April 2014, Fort Bend County - Texas user has:

Accessed 82 research documents. Conducted 3 analyst inquiries. Had 5 executive interactions. In addition, Fort Bend County - Texas had 2 event attendances.

Through these interactions Gartner provided advice and insight on initiatives including:

IT Management (ExP use), Enterprise Applications Suites and ERP, Mobile Enterprise Strategy, IT Strategic Planning, Information Security Technology and Services.

Gartner has aligned its proposed services to Fort Bend County's key initiatives including:

Enterprise Content Management

Gartner

Fort Bend County's Key Initiatives/Gartner Support – Next Steps

Initiative	Description and Objective	SAMPLE GARTNER RESOURCES	ORGANIZATIONAL IMPACT	Aligned to FBC's Goal
Enterprise Content Management	Content, collaboration and social capabilities enable people to find and manage the right content and to work together effectively SCOPE: • User interaction technologies • Enterprise content management strategy • Collaboration software deployments	• *Investment Strategies for the Four Worlds of ECM* • *Failure Mode: Collaboration and Social Initiatives Without Clear Success Criteria* • *EXP: Quarterly strategic session to review progress/analyst workshop* • *Case Study: New York Saved Millions by Using E-Forms to Process Complex Tax Filings* • *Boost Collaboration With 'Social Everywhere' Application Architectures* • *First 100 Days: Enterprise Content Management Initiatives* • *Top 10 Signals That Your Management Doesn't 'Get' Social Media and What to Do About It*	• Gartner helps clients coordinate more effectively what are typically disparate deployments of workplace software to increase business impact. We also help clients choose the right vendors and deployment models for their particular needs. • A government agency saved $228 million over nine years by implementing an e-learning and collaboration environment, according to a process outlined in Gartner research. • A global engineering firm consolidated three Web content management systems to increase sales leads. It achieved an ROI in 13 months, and download page views grew by 68%. • We have analysts with expertise in every aspect of planning, evaluating, deploying and managing content, collaboration and social technologies.	This initiative aligns to the following Strategic Objectives: •Deploying Modern Information Technologies •Cost savings

SAVE TIME * SAVE MONEY * MITIGATE RISK

Gartner for Technical Professionals Research Adds Depth to the Content, Collaboration and Social Initiatives Key Initiative

How Gartner for Technical Professionals Research Delivers Value

Gartner for Technical Professionals research provides strategy guidance to IT architects and engineers who are beginning projects that enable business users to collaborate productively and to create, organize, search for and deliver relevant content. As communication, content and collaboration (3C) and social solutions become more crucial to information workers' productivity, this guidance can help you evaluate 3C and social tools in the context of ongoing business trends, changes in delivery models and evolving user expectations. Understanding these changes and how available tools will address them is critical to remaining competitive.

Hurdles Companies Typically Face

How can we plan a coordinated strategy for content, collaboration and communication?

How can we assess which delivery model will best meet our organization's needs?

How can we implement content management and social technologies?

How can we match system capabilities with real business user needs and avoid duplication of services?

Examples of Recent Research

- *Planning Guide: Collaboration and Content*

- *Communication, Collaboration, Content and Social Model*

- *Solution Path: Creating an Effective Enterprise Content Management Environment*

- *Solution Path: Improving Organizational Effectiveness With Social Software*

- *The Online Workplace Framework: Defining the Enterprise Work Layer*

Gartner

Proposed Services

Clients	Service	Initiatives	Investment
R. Webb	Gartner for IT Executives CIO	Enterprise Content Management	

Total Investment $ $77,900

Gartner

Next Steps

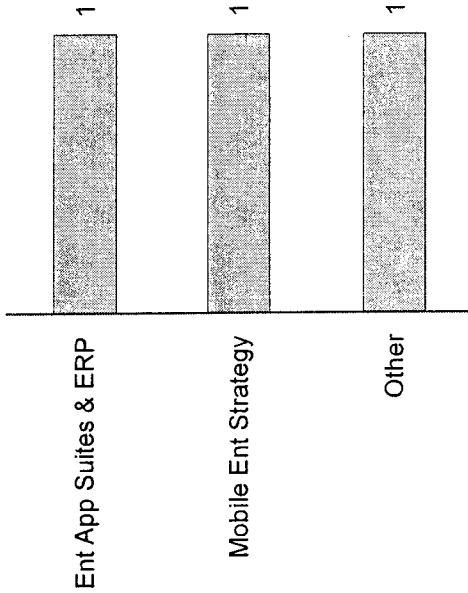| Description	Owner	Date
Update this document based on today's discussion	Christine Payne	April 16th
Provide service agreement reflecting services discussed today	Christine payne	April 22nd
Complete sign off process with target date of	Ray Webb	May 24th
Kick-off services • Onboard new seat holders • Ensure value delivery plans are up to date for all seat holders • Conduct kick-off meeting with Ray Webb to review his plan on using Gartner for top priorities	Christine Payne Phil Baughn Sara Matias	Week of July 1

Gartner

Appendix

Gartner

FORT BEND COUNTY-TEXAS's
Engagement Dashboard from Jul 13 to Apr 14

82 Documents and Toolkits Accessed[1]

Top Key Initiatives

- Ent App Suites & ERP — 11
- Info Sec Tech & Svcs — 10
- Mobile Ent Strategy — 7
- Comms Infra Moderniz — 5
- IT Strat Planning — 4
- App Development — 3
- BCM — 3
- DataCtr Mod & Consol — 3
- Smart Government — 3
- Application Rationaliza — 2

Top Users

- R. Webb — 82

3 Inquiries Conducted

- Ent App Suites & ERP — 1
- Mobile Ent Strategy — 1
- Other — 1

Top Users

- R. Webb — 3
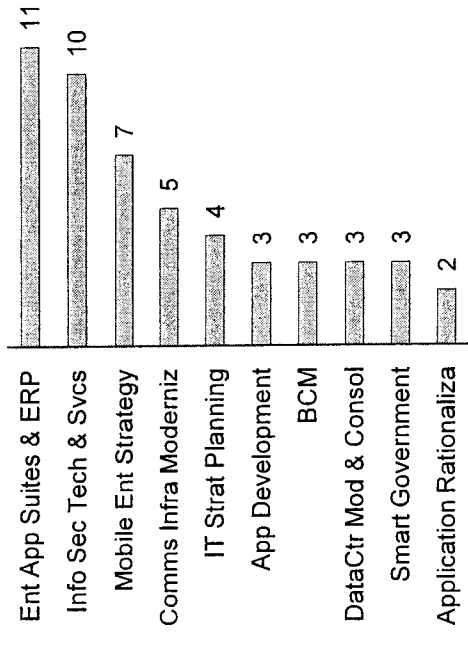
Executive Interactions
- 2 Workshops
- 1 Strategy/Review Meeting
- 2 Member to Member Networking

Conferences
- 2 Event Attendances

Gartner

[1] 31 additional documents and toolkits from other Key Initiatives not shown in the chart

8

FORT BEND COUNTY- TEXAS's
Value Review from Jul 13 to Apr 14 (page 1 of 2)

Key Initiative	Engagement Snapshot
IT Management (ExP use)	**Workshops including:** • On site re business value of IT, P. Baughn, 16-Jan-2014 (R. Webb) • Executive management review and plkanning, P. Baughn, 19-Jul-2013 (R. Webb) **Member to Member Networking Sessions including:** • Peer discussions w/RC and HHAS, P. Baughn, 11-Oct-2013 (R. Webb) • Peer lunch with HOU HAS CIO, P. Baughn, 25-Sep-2013 (R. Webb)
Enterprise Applications Suites and ERP	**Inquiry including:** • EXP: Contract Lifecycle Management (CLM) Solutions with D. Wilson , 27-Jan-2014 (R. Webb) **11 Research Documents including:** • Business, Technology and IT Evolution Shape the Future of the ERP Competency Center (R. Webb) • Enterprise Contract Management Solutions Vendor Guide, 2010 (R. Webb) • Hype Cycle for Human Capital Management Software, 2012 (R. Webb)
Mobile Enterprise Strategy	**Inquiry including:** • EXP: AirWatch Acquisition with T. Cosgrove , 24-Jan-2014 (R. Webb) **7 Research Documents including:** • Magic Quadrant for Mobile Device Management Software (R. Webb) • Critical Capabilities for Mobile Device Management Software (R. Webb) • Hype Cycle for Wireless Devices, Software and Services, 2013 (R. Webb)
Other	**Strategy/Review Meeting including:** • Strategic discussions around current issues, P. Baughn, 01-Apr-2014 (R. Webb)

Gartner

1 5 is extremely valuable; 1 is not valuable , [2] Average Value Rating for rated inquiries, documents and strategic analyst meetings

© 2013 Gartner, Inc. and/or its affiliates. All rights reserved.
Gartner is a registered trademark of Gartner, Inc. or its affiliates.

FORT BEND COUNTY- TEXAS's
Value Review from Jul 13 to Apr 14 (page 2 of 2)

Key Initiative   **Engagement Snapshot**

Other (Continued)   **Inquiry including:**

- ExP: 2013 US Mercer/ Gartner IT Workforce Practices Survey Results with L. Mok , 06-Nov-2013 (R. Webb)

2 Event attendances including:

- R. Webb - CIO Leadership Forum, 25-Feb-2014
- R. Webb - US Fall Symposium/ITxpo, 10-Oct-2013

64 Research Documents including:

- Magic Quadrant for Mobile Data Protection (R. Webb)
- Magic Quadrant for Security Information and Event Management (R. Webb)
- The North American Local Government IT Solution Vendor Landscape, 2012 (R. Webb)

Gartner