

# **Attachment B**

**Service Agreement (Gartner, Inc.)**

## Gartner, Inc. Service Agreement for COUNTY OF SANTA BARBARA (“Client”)

This Service Agreement (“SA”) is between Gartner, Inc. of 56 Top Gallant Road, Stamford, CT 06902 (“Gartner”) on behalf of itself and all wholly-owned affiliates of Gartner, Inc. and Client of 105 East Anapamu Street, Santa Barbara, CA 93101-2000. (“Client”), and includes the Master Client Agreement (7914) between Gartner and Client or Client’s parent or affiliate dated MAR-2019 the terms of which are incorporated by reference, and all applicable Service Descriptions. This SA constitutes the complete agreement between Gartner and Client. Client agrees to subscribe to the following Services for the term and fees set forth below.

### 1. DEFINITIONS AND ORDER SCHEDULE:

**Services** are the subscription-based research and related services purchased by Client in the Order Schedule below and described in the Service Descriptions. 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 Client adds Services or upgrades the level of service or access, an additional Service Agreement will be required.

**Service Descriptions** describe each Service purchased, specify the deliverables for each Service, and set forth any additional terms unique to a specific Service. Service Descriptions for the Services purchased in this SA may be viewed and downloaded through the hyperlinks listed in Section 2 below or may be attached to this SA in hard copy, and are incorporated by reference into this SA.

<u>Service Name</u>	<u>Level of Access</u>	<u>Quantity</u>	<u>Name of User to be Licensed</u>	<u>Contract Term Start Date</u>	<u>Contract Term End Date</u>	<u>Annual Fee USD</u>	<u>Total Fee USD</u>
Core IT Research	Advisor	1	Virginia Butterfield	01-FEB-2022	30-JUN-2023	\$12,570.00	\$17,807.50
Executive Programs Leadership Team Plus	Delegate Member	1	Andre Monostori	01-FEB-2022	30-JUN-2023	\$54,400.00	\$77,066.67
Executive Programs Leadership Team Plus	Leader	1	Janette Pell	01-FEB-2022	30-JUN-2023	\$101,000.00	\$143,083.33
Executive Programs Leadership Team Plus	Advisor Member	1	Mark Garcia	01-FEB-2022	30-JUN-2023	\$39,300.00	\$55,675.00
				Term Total	(Excluding applicable taxes)		\$293,632.50
				Estimated Credit	(Excluding applicable taxes)		(\$25,020.83)
				TOTAL	(Excluding applicable taxes)		\$268,611.67
Core IT Research	Advisor	1	Virginia Butterfield	01-JUL-2023	30-JUN-2024	\$13,200.00	\$13,200.00
Executive Programs Leadership Team Plus	Delegate Member	1	Andre Monostori	01-JUL-2023	30-JUN-2024	\$57,120.00	\$57,120.00
Executive Programs Leadership Team Plus	Leader	1	Janette Pell	01-JUL-2023	30-JUN-2024	\$105,040.00	\$105,040.00
Executive Programs Leadership Team Plus	Advisor Member	1	Mark Garcia	01-JUL-2023	30-JUN-2024	\$40,700.00	\$40,700.00
				Term Total	(Excluding applicable taxes)		\$216,060.00
Core IT Research	Advisor	1	Virginia Butterfield	01-JUL-2024	30-JUN-2025	\$13,860.00	\$13,860.00

Offer valid until 31-JAN-2021

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Executive Programs Leadership Team Plus	Delegate Member	1	Andre Monostori	01-JUL-2024	30-JUN-2025	\$59,980.00	\$59,980.00
Executive Programs Leadership Team Plus	Leader	1	Janette Pell	01-JUL-2024	30-JUN-2025	\$109,250.00	\$109,250.00
Executive Programs Leadership Team Plus	Advisor Member	1	Mark Garcia	01-JUL-2024	30-JUN-2025	\$42,328.00	\$42,328.00
				<b>Term Total</b>	<b>(Excluding applicable taxes)</b>		<b>\$225,418.00</b>
				<b>Total Services:</b>	<b>(Excluding applicable taxes)</b>		<b>\$710,089.67</b>

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Due to the multi-year term of this Service Agreement, Client expressly waives its right of termination for convenience.

REPLACEMENT OF SERVICES. Upon execution by both parties, this SA shall cancel the previous Service Agreement or Letter of Agreement dated 01-APR-2019, between Client and Gartner or any wholly-owned affiliate of Gartner, Inc. (the "Contract"). Client will receive a credit, which represents the portion of the fee paid by Client applicable to the remaining, unfulfilled Term of the Contract. This credit will be applied to the invoice for this Service Agreement between Client and Gartner, and is subject to confirmation of the payment previously made to Gartner or any wholly-owned affiliate of Gartner, Inc.

## 2. SERVICE DESCRIPTIONS:

<u>Service Name/ Level of Access</u>	<u>Service Description URL</u>
Core IT Research Advisor	<a href="http://sd.gartner.com/sd_core_advisor.pdf">http://sd.gartner.com/sd_core_advisor.pdf</a>
Executive Programs Leadership Team Plus Leader	<a href="http://sd.gartner.com/sd_ep_team_plus_leader.pdf">http://sd.gartner.com/sd_ep_team_plus_leader.pdf</a>
Executive Programs Leadership Team Plus Advisor Member	<a href="http://sd.gartner.com/sd_ep_team_plus_advisor.pdf">http://sd.gartner.com/sd_ep_team_plus_advisor.pdf</a>
Executive Programs Leadership Team Plus Delegate Member	<a href="http://sd.gartner.com/sd_ep_team_plus_delegate.pdf">http://sd.gartner.com/sd_ep_team_plus_delegate.pdf</a>

## 3. PAYMENT TERMS

Gartner will invoice Client annually in advance for all Services. Payment is due 30 days from the invoice date. Client shall pay any sales, use, value-added, or other tax or charge imposed or assessed by any governmental entity upon the sale, use or receipt of Services, with the exception of any taxes imposed on the net income of Gartner.

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, Client 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. All PO's are to be sent to [purchaseorders@gartner.com](mailto:purchaseorders@gartner.com). This SA may be signed in counterparts.

## 4. CLIENT BILLING INFORMATION

\_\_\_\_\_  
Purchase Order Number

\_\_\_\_\_  
Billing Address

\_\_\_\_\_  
Invoice Recipient Tel. No.

\_\_\_\_\_  
Invoice Recipient Name

\_\_\_\_\_  
Invoice Recipient Email

Offer valid until 31-JAN-2021

**5. AUTHORIZATION**

**Client:**  
**COUNTY OF SANTA BARBARA**

\_\_\_\_\_  
*Signature*

\_\_\_\_\_  
*Date*

\_\_\_\_\_  
*Print Name*

\_\_\_\_\_  
*Title*

**Gartner, Inc.**

DocuSigned by:  
*Ashley Beluch*  
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\_\_\_\_\_  
*Signature*  
January 11, 2022

\_\_\_\_\_  
*Date*  
Ashley Beluch

\_\_\_\_\_  
*Print Name*  
Senior Contracts Specialist

\_\_\_\_\_  
*Title*

**SERVICE DESCRIPTION**  
**Attachment to the Service Agreement**  
**CORE IT RESEARCH ADVISOR**

Core IT Research Advisor (the “Service”) provides clients with research and advice about information technology and a base of knowledge to capitalize on IT technologies and markets.

**DELIVERABLES**

Each user designated by the Client (“Licensed User”) receives the following Deliverables:

- **Spotlights** — Reflect hot client issues, consider the issues from several different perspectives and tie together research from all the Core IT Research deliverables.
- **Special Reports** — Cover underlying research themes that cut across technology or industry-specific research, or provide in-depth strategic analysis of trends, industry developments, vendors, products and services.
- **Published Research** — Focus on companies, products, markets, decision frameworks, tactical guidelines, case studies and strategic planning assumptions.
- **Alerts** — Event-driven bulletins, addressing each of the IT and telecom markets.
- **NewsTakes** — Industry-focused newsletters providing up-to-the-minute analysis on the top stories in the hardware and semiconductor markets, capturing recent announcements and their potential impact on the market.
- **Individual Inquiry** — Provides Licensed Users with access to Gartner research advisors who are associated with this Service. Participation in inquiry sessions, as part of this Service, is subject to the following terms:
  1. Participation in inquiry calls is limited to the Licensed User(s) and the research advisor only (i.e., non-Users, either inside or outside of the Client company, may not attend or otherwise participate on the call).
  2. Licensed Users may engage with a research advisor: (i) to discuss a Gartner Research document published within the scope of their specific Service, and/or (ii) to apply a Gartner Research document to a related issue that their company is facing.
  3. Inquiry sessions may take up to 30 (thirty) minutes of a research advisor's time.
  4. Inquiry sessions may also be used to request basic technology reviews of business-related documents that are 20 (twenty) pages or less and take up to 60 (sixty) minutes of a research advisor's time. Examples of these documents include requests for proposals, marketing or business plans and procurement agreements.
- **Webinars** — Periodic Web conferences where Gartner research advisors speak on timely topics in information technology and then solicit questions from listeners.
- **Talking Technology Series** — Commentaries on the latest IT topics in a monthly audio program that can be listened to on gartner.com or downloaded to listened to in MP3 format.
- **Summit Ticket** — The Summit Event Ticket is a numbered identifier (e.g., 424562) that entitles the Licensed User to register for one (1) Gartner Summit Conference as specified in the Ticket Letter emailed to Client. A Summit Ticket may also be used to register for a Catalyst Event. Tickets are valid for 12 (twelve) months from the date of issue, per the expiration date on the Ticket Letter. Tickets provided as part of a Gartner Research offering are valid only for Gartner Events during the contract term of that Research offering. Tickets are transferable within the Client organization but may not be transferred to another company. A single Ticket may not be used by more than one (1) employee and may not be used for admission to any Gartner Event other than a Summit or Catalyst Event.

**ADDITIONAL USAGE INFORMATION**

Use of the Service is governed by the Gartner Usage Policy and the Gartner Copyright and Quote Policy, which are accessible on the Policies section of gartner.com.

**SERVICE DESCRIPTION**  
**Attachment to the Service Agreement**  
**EXECUTIVE PROGRAMS LEADERSHIP TEAM PLUS**  
**LEADER**

Executive Programs Leadership Team Plus: Leader (the “Service”) is designed for the most senior technology executive in the client company (“Client”), typically the CIO, and his or her leadership team. The Service provides Client with (i) an ongoing advisory relationship with Gartner, and (ii) a thinking partner to contextualize Gartner insights. This Service requires the separate purchase of an Executive Programs Leadership Team Plus Member Service.

## **DELIVERABLES**

The Executive Programs Leadership Team Plus is comprised of two sets of users: (i) the “Leader,” and (ii) “Team Members,” as set forth in the Service Agreement. Collectively, the Leader and his/her Team Members are “Licensed Users.”

1. The Deliverables for the Leader are set forth below.

- Assigned Service Delivery Team
- Value Reviews
- Virtual Team Workshop
- Access to Research Experts
- Research Briefing
- Gartner IT Symposium/Xpo™ with Executive Programs VIP Access
- Executive Programs Events
- Peer Networking
- Leadership Development Research and related content
- Gartner for IT Leaders Research and related content
- Strategic Business Content for IT Executives
- Peer & Practitioner Research
- IT Key Metrics Data
- Executive Programs Research and related content
- IT Podcast Series

2. Additional information on the Deliverables listed above include the following:

(a) **Assigned Service Delivery Team**

An Executive Partner with experience in senior technology executive roles and a client success manager will serve as the Leader’s primary points of contact for this Service. They will help define and develop individualized strategies based on their priorities and initiatives (“Leader Agenda”). The Leader may interact on a monthly basis with the Executive Partner and Gartner to ensure ongoing engagement and delivery of value. Interactions may include: Strategy Meetings, Research Expert (“expert”) interactions, local events, Symposium attendance, peer networking interactions, or Executive Partner teleconferences or meetings.

Strategy Meetings between the Leader and by invitation of the Leader, one or more of the Leader’s peers (typically the CEO, CFO, CXO, et al.), and the Executive Partner may be to review and apply Executive Programs Research, the annual Executive Programs CIO Agenda, or other relevant content, provide advice on issues of relevance to Leader, and/or to drive the Leader Agenda.

The client success manager, an experienced service professional who understands the Client’s context and priorities, helps the Client understand the entitlements of their Service, and provides personalized, proactive, concierge-level service as the single point of contact from Gartner, helps the team leverage the most relevant Gartner resources. The service professional facilitates a coordinated service approach for the team, as well as alignment between Team Members and the Leader.

- (b) **Value Reviews** – The Executive Partner will periodically conduct Value Reviews with the Leader against the Leader Agenda.
- (c) **Virtual Team Workshop** – A half-day annual strategy session (jointly determined by the Executive Partner and Leader), facilitated by the Executive Partner, which is focused on application of Executive Programs Research and action planning. Topic is selected by Leader and Executive Partner from a list of available Executive Programs workshops. The session may include non-Team Members up to a total of 25 (twenty-five) participants.
- (d) **Access to Research Experts** – Provides access to Research Experts (“experts”) who are associated with this Service. Participation is limited to the experts, the Leader, and Team Members. The Leader must be present on the inquiry call and lead the discussion and questions in order to advance the Leader Agenda. Leader may, on an occasional and infrequent basis (not to exceed 10 (ten) times per contract year, and not to exceed more than 25 (twenty-five) individuals per session), include in inquiry non-Team Members from within the Client’s organization.
  - Prioritized Scheduling** – The Leader is entitled to prioritized scheduling for inquiry and 1-on-1 sessions at Gartner IT Symposium/Xpo.
  - Research Briefing** – One (1) briefing session per contract period with an expert, delivered remotely, not to exceed four (4) hours. The session may include Team Members and others from the Client’s organization, up to a total of 25 (twenty-five) participants.
- (e) **Conference and Events**
  - Attendance at Gartner IT Symposium/Xpo™** – One (1) complimentary, nontransferable invitation to attend Gartner IT Symposium/Xpo, including standard Symposium entitlements and Executive Programs VIP access, as further referenced below.
  - Executive Programs Events** – Complimentary, nontransferable invitation to attend virtual Gartner Executive Programs Events, including regional CIO Leadership Forums, where available.
- (f) **Peer Networking**
  - Peer Directory** – Access to searchable directory of senior technology leaders and CEOs.
  - Online Forums** – Access to discussions of common issues among peers on gartner.com, including a private forum exclusive for Executive Programs Members and Leaders.
  - Offline Meetups** – Access to designated lounges at Gartner IT Symposium/Xpo.
  - Facilitated Networking** – Executive Partner will, upon request, arrange virtual meetings or conference calls with peers around a specific topic to discuss best practices or areas of expertise.
  - Peer Roundtables** – Access to facilitated discussions with peers; participation limited to executives with similar job roles.
- (g) **Leadership Development Research and related content** – Customized professional development content for the development of technology leaders, targeted to Team Members.
- (h) **Gartner for IT Leaders Research and related content**
  - Includes Core IT and role-specific Research; diagnostic tools, templates, and case studies; Weekly Picks and News Analysis; and webinars featuring Gartner experts.
- (i) **Strategic Business Content for IT Executives** – Access to content that aligns to the changing roles of IT Executives and provides guidance around how IT Executives can be better business partners to their peers.
- (j) **Peer & Practitioner Research** – Includes peer benchmarks, best practices, case studies, tools, and templates.

(k) **IT Key Metrics Data** – Provides performance metrics on trends in IT spending and staffing, unit costs, and performance measures across critical IT domains.

(l) **Executive Programs Research and related content**

**Research Reports** – Up to 12 (twelve) Reports per year, covering Gartner-selected topics on areas where business and IT intersect. (Schedules are approximations and are dependent on the publication schedule of relevant Research.) Includes associated tools and teleconferences hosted by Executive Programs authors to discuss their Research Reports.

**Business Research and related content** – Targeted to CIOs, CFOs, and other business executives.

**Note: For all Research Access (Letters (g) to (j) and (l), above)** – Leader may, on an occasional and infrequent basis, forward to other individuals in Client’s organization no more than 25 (twenty-five) individual Gartner Research documents per contract year. This may not be done on a routine basis, or via posting on Client’s intranet, or in any other manner that has the intent or effect of avoiding the purchase of additional Gartner User licenses.

(m) **IT Podcast Series** – A subscription-based podcast series featuring Gartner Research experts’ perspectives on business priorities and challenges on topics in information technology.

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## **ADDITIONAL USAGE INFORMATION**

The Conference invitation entitles the Licensed User to register for one (1) Conference and is valid for 12 (twelve) months from the date of issue. A conference invitation provided as part of a Gartner Research offering is valid only for a conference during the contract term of that Research offering. Invitations are not transferable. A single invitation may not be used by more than one (1) employee of the client company and may not be used for admission to any conference other than the Gartner IT Symposium/Xpo Conference.

Client companies around the world trust Gartner to be objective and independent in its research and advice, and Gartner takes that responsibility seriously. To preserve the objectivity of research, Gartner does not promise clients favorable coverage or leads from its research experts. Gartner does not provide access to confidential client information, offer aid to secure capital funding, or sell any product for use in litigation. There are no exceptions. If you have questions, please email [ombudsman@gartner.com](mailto:ombudsman@gartner.com).

Use of this Service is governed by the [Gartner Usage Policy](#) and the [Gartner Content Compliance Policy](#) which are accessible on the Policies section of [gartner.com](http://gartner.com).



**SERVICE DESCRIPTION**  
**Attachment to the Service Agreement**  
**EXECUTIVE PROGRAMS LEADERSHIP TEAM PLUS**  
**ADVISOR TEAM MEMBER**

Executive Programs Leadership Team Plus: Advisor Team Member (the “Service”) permits the client (“Client”) to identify an advisor team member, typically an individual reporting to the most senior IT executive, usually the CIO. The Service, which is part of Executive Programs Leadership Team Plus, requires the separate purchase of the Executive Programs Leadership Team Plus: Leader Service.

## **DELIVERABLES**

The Executive Programs Leadership Team Plus is comprised of two sets of users: (i) the “Leader,” and (ii) “Team Members,” as set forth in the Service Agreement. Collectively, the Leader and his/her Team Members are “Licensed Users.”

1. The Deliverables for the Advisor Team Member are set forth below.

- Assigned client success manager
- Virtual Team Workshop
- Access to Research Experts
- Gartner IT Symposium/Xpo™
- Peer Networking
- Gartner for IT Leaders Research and related content
- Strategic Business Content for IT Executives
- Peer & Practitioner Research
- IT Key Metrics Data
- Executive Programs Research and related content
- Leadership Development Research and related content
- IT Podcast Series

2. Additional information on the Deliverables listed above include the following:

(a) **Assigned client success manager**

A client success manager will serve as the Advisor Team Member's primary point of contact for this Service. The service professional understands the Client's context and priorities, helps the Client understand the entitlements of their Service, and provides personalized, proactive, concierge-level service as the single point of contact from Gartner. The service professional also helps the team leverage the most relevant Gartner resources, facilitates a coordinated service approach for the team, and provides alignment between Team Members and the Leader.

(b) **Virtual Team Workshop** – Participate in a half-day annual session (jointly determined by the Executive Partner and Leader) facilitated by the Executive Partner, which is focused on application of Executive Programs Research and action planning. Topic is selected by Leader and Executive Partner from a list of available Executive Programs workshops.

(c) **Access to Research Experts**

**Inquiry for the Advisor Team Member** – Participation is limited to the Research Expert (“expert”) and the Advisor Team Member. The inquiry topic may be any area of Gartner-covered Research.

(d) **Attendance at Gartner IT Symposium/Xpo™** – One (1) complimentary, nontransferable invitation for the Advisor Team Member to attend Gartner IT Symposium/Xpo, including standard Symposium entitlements, as further referenced below.

(e) **Peer Networking**

**Peer Directory** – Access to searchable directory of senior technology leaders.

**Online Forums** – Access to discussions of common issues among peers on gartner.com.

**Offline Meetups** – Access to designated lounges at Gartner IT Symposium/Xpo.

(f) **Gartner for IT Leaders Research and related content**

Includes Gartner Core IT and Role-specific Research; diagnostic tools, templates, and case studies; Weekly Picks and News Analysis; and webinars featuring Gartner experts.

(g) **Strategic Business Content for IT Executives** – Access to content that aligns to the changing roles of IT Executives and provides guidance around how IT Executives can be better business partners to their peers.

(h) **Peer & Practitioner Research** – Includes peer benchmarks, best practices, case studies, tools, and templates.

(i) **IT Key Metrics Data** – Provides performance metrics on trends in IT spending and staffing, unit costs, and performance measures across critical IT domains.

(j) **Executive Programs Research and related content**

**Research Reports** – Up to 12 (twelve) Reports per year, covering Gartner-selected topics on areas where business and IT intersect. (Schedules are approximations and are dependent on the publication schedule of relevant Research.) Includes associated tools and teleconferences hosted by Executive Programs authors to discuss their Research Reports.

**Business Research and related content** – Targeted to CIOs, CFOs, and other business executives.

(k) **Leadership Development**

**Leadership Development Research and related content** – Customized professional development content for technology leaders, targeted to Team Members.

(l) **IT Podcast Series** – A subscription-based podcast series featuring Gartner Research experts' perspectives on business priorities and challenges on topics in information technology.

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## ADDITIONAL USAGE INFORMATION

The Conference invitation entitles the Licensed User to register for one (1) Conference and is valid for 12 (twelve) months from the date of issue. A conference invitation provided as part of a Gartner Research offering is valid only for a conference during the contract term of that Research offering. Invitations are not transferable. A single invitation may not be used by more than one (1) employee of the client company and may not be used for admission to any conference other than the Gartner IT Symposium/Xpo Conference.

Client companies around the world trust Gartner to be objective and independent in its research and advice, and Gartner takes that responsibility seriously. To preserve the objectivity of research, Gartner does not promise clients favorable coverage or leads from its research experts. Gartner does not provide access to confidential client information, offer aid to secure capital funding, or sell any product for use in litigation. There are no exceptions. If you have questions, please email [ombudsman@gartner.com](mailto:ombudsman@gartner.com).

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**SERVICE DESCRIPTION**  
**Attachment to the Service Agreement**  
**EXECUTIVE PROGRAMS LEADERSHIP TEAM PLUS**  
**DELEGATE TEAM MEMBER**

Executive Programs Leadership Team Plus: Delegate Team Member (the “Service”) permits the client (“Client”) to identify an individual reporting to the most senior IT executive, typically the CIO, for professional development as a team member and to serve as proxy for the leader. The Service, which is part of Executive Programs Leadership Team Plus, requires the separate purchase of the Executive Programs Leadership Team Plus: Leader Service.

**DELIVERABLES**

The Executive Programs Leadership Team Plus is comprised of two sets of users: (i) the “Leader,” and (ii) “Team Members,” as set forth in the Service Agreement. Collectively, the Leader and his/her Team Members are “Licensed Users.”

1. The Deliverables for the Delegate Team Member are set forth below.

- Assigned Service Delivery Team
- Virtual Team Workshop
- Access to Research Experts
- Gartner IT Symposium/Xpo™
- Peer Networking
- Gartner for IT Leaders Research and related content
- Strategic Business Content for IT Executives
- Peer & Practitioner Research
- IT Key Metrics Data
- Executive Programs Research and related content
- Leadership Development
- IT Podcast Series

2. Additional information on the Deliverables listed above include the following:

(a) **Assigned Service Delivery Team**

An Executive Partner, who has experience in senior technology executive roles, and a client success manager will be assigned to the Delegate Team Member, who may serve as proxy for the Team Leader in working with the Executive Partner on the Leader Agenda. The client success manager is an experienced service professional who understand the Client’s context and priorities and helps the Client understand the entitlements of their Service. In his/her role as the single point of contact from Gartner, the service professional provides the following: (i) a personalized, proactive, concierge-level, coordinated service approach to help the team leverage the most relevant Gartner resources, and (ii) alignment among Team Members and the Team Leader.

(b) **Virtual Team Workshop** – A half-day annual strategy session (jointly determined by the Executive Partner and Leader), facilitated by the Executive Partner, which is focused on application of Executive Programs Research and action planning. Topic is selected by Leader and Executive Partner from a list of available Executive Programs workshops. The session may include non-Team Members up to a total of 25 (twenty-five) participants.

(c) **Access to Research Experts**

**Inquiry for the Delegate Team Member** – Participation is limited to the Research Expert (“expert”) and the Delegate Team Member. The inquiry topic may be any area of Gartner-covered Research.

(d) **Attendance at Gartner IT Symposium/Xpo™** – One (1) complimentary, nontransferable invitation to attend Gartner IT Symposium/Xpo, including standard Symposium entitlements, as further referenced below.

- (e) **Peer Networking**
  - Peer Directory** – Access to searchable directory of senior technology leaders.
  - Online Forums** – Access to discussions of common issues among peers on gartner.com.
  - Offline Meetups** – Access to designated lounges at Gartner IT Symposium/Xpo.
- (f) **Gartner for IT Leaders Research and related content** – Includes Core IT and role-specific Research; diagnostic tools, templates, and case studies; Weekly Picks and News Analysis; and webinars featuring Gartner experts.
- (g) **Strategic Business Content for IT Executives** – Access to content that aligns to the changing roles of IT Executives and provides guidance around how IT Executives can be better business partners to their peers.
- (h) **Peer & Practitioner Research** – Includes peer benchmarks, best practices, case studies, tools, and templates.
- (i) **IT Key Metrics Data** – Provides performance metrics on trends in IT spending and staffing, unit costs, and performance measures across critical IT domains.
- (j) **Executive Programs Research and related content**
  - Research Reports** – Up to 12 (twelve) Reports per year, covering Gartner-selected topics on areas where business and IT intersect. (Schedules are approximations and are dependent on the publication schedule of relevant Research.) Includes associated tools and teleconferences hosted by Executive Programs authors to discuss their Research Reports.
  - Business Research and related content** – Targeted to CIOs, CFOs, and other business executives.
- (k) **Leadership Development**
  - Leadership Development Research and related content** – Customized professional development content for the technology leaders, targeted to Team Members.
  - Leadership Development Coaching** – Executive Partner and Delegate Team Member create an Individual Development Plan to identify key areas of focus and priorities (the “Plan”). Progress against the Plan will be reviewed during the contract year as follows: Up to four (4) times per year, the Executive Partner will conduct Coaching Teleconferences with the Delegate Team Member to:
    - (i) review and apply Leadership Development Content, Executive Programs Research, or other relevant content;
    - (ii) advise the Delegate Team Member in the context of the Delegate Team Member’s professional and career goals; and
    - (iii) develop, discuss the progress of, or evaluate the Plan.
- (l) **IT Podcast Series** – A subscription-based podcast series featuring Gartner Research experts’ perspectives on business priorities and challenges on topics in information technology.

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## ADDITIONAL USAGE INFORMATION

The Conference invitation entitles the Licensed User to register for one (1) Conference and is valid for 12 (twelve) months from the date of issue. A conference invitation provided as part of a Gartner Research offering is valid only for a conference during the contract term of that Research offering. Invitations are not transferable. A single invitation may not be used by more than one (1) employee of the client company and may not be used for admission to any conference other than the Gartner IT Symposium/Xpo Conference.

Client companies around the world trust Gartner to be objective and independent in its research and advice, and Gartner takes that responsibility seriously. To preserve the objectivity of research, Gartner does not promise clients favorable coverage or leads from its research experts. Gartner does not provide access to confidential client information, offer aid to secure capital funding, or sell any product for use in litigation. There are no exceptions. If you have questions, please email [ombudsman@gartner.com](mailto:ombudsman@gartner.com).

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