Memorandum



DATE October 21, 2025

Honorable Members of the Finance Committee: Chad West (Chair), Kathy Stewart ^{TO} (Vice Chair), Zarin Gracey, Maxie Johnson, Jesse Moreno, Jaime Resendez, Gay Donnell Willis

SUBJECT Overview of Services Provided by Gartner Inc. and Forrester Research, Inc.

The purpose of this memorandum is to provide background on the referral of Gartner Inc. and Forrester Research, Inc. annual membership fees to the Finance Committee for review and consideration.

On Wednesday, October 8, 2025, the City Council approved a resolution authorizing annual membership fees. During this process, Information & Technology Services (ITS) requested that the membership fees for Forrester Research, Inc. be removed from the City Council agenda item (No. 25-2707A) and referred to the Finance Committee for additional review.

ITS currently leverages IT Research and Advisory Services through both Forrester Research, Inc. and Gartner, Inc. These services provide access to industry-leading research, benchmarking, and advisory expertise that directly support the City's ongoing digital transformation, modernization, and customer experience initiatives.

IT Research and Advisory Services provide executive-level guidance, strategic frameworks, and technology market insights. While Gartner focuses primarily on IT leadership development, strategic sourcing, and operational optimization, Forrester emphasizes customer experience, workforce readiness, and measurable business outcomes through technology adoption.

Feedback from the Finance Committee will be incorporated into a future Council item seeking authorization to continue participation in Forrester's Research and Advisory Services agreement.

If you have questions or would like additional information, please contact me or Tanishia Dorsey, Chief Information Officer (I) and Director of Information & Technology Services Tanishia.Dorsey@Dallas.gov

Donzell Gipson

Assistant City Manager

October 21, 2025

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c: Kimberly Bizor Tolbert, City Manager Tammy Palomino, City Attorney Mark Swann, City Auditor Bilierae Johnson, City Secretary Preston Robinson, Administrative Judge Baron Eliason, Inspector General (I) Dominique Artis, Chief of Public Safety Dev Rastogi, Assistant City Manager
M. Elizabeth (Liz) Cedillo-Pereira, Assistant City Manager
Alina Ciocan, Assistant City Manager
Donzell Gipson, Assistant City Manager
Robin Bentley, Assistant City Manager
Jack Ireland, Chief Financial Officer
Ahmad Goree, Chief of Staff to the City Manager
Directors and Assistant Directors



Overview of Services Provided by Gartner Inc. and Forrester Research, Inc.

Finance Committee October 21, 2025

Tanishia Dorsey, CIO (I) Information & Technology Services

Purpose



- Background
- Overview of IT Research & Advisory and IT Sourcing model
- Current and proposed services with Forrester and Gartner
- Next Steps



Background





- •Forrester services were included in October 8, 2025 Council Agenda Item 25-2707A with the City's annual memberships fees.
- •ITS requested Forrester be removed from agenda item and referred to Finance Committee.





Overview of IT Research & Advisory Services and Sourcing Model



IT Research & Advisory Services



How The City Utilizes IT Research & Advisory Services (RAS):



Strategic Alignment with Policy & Mission

Helps organization to translate policies into actionable IT strategies and roadmaps focused on prioritizing mission-critical outcomes and value realization.



Emerging Technology Adoption

Accelerates technology change with insights to emerging tech and trends, comparative analysis of vendor solutions and early warnings on technical debt.



Governance & Risk Mitigation

Conducts Independent Verification & Validation (IV&V) services as independent thirdparty to ensure the right system is built correctly and complete procurement, project and operational risk assessment for high-impact or high-visibility projects.



Digital Transformation

Provides proven frameworks and strategies for modernization and maturity. Customer- and user-centered designs and roadmaps to accelerate digital transformation and adoption.



Cost Optimization & Efficiency

Benchmarks IT spending against peers. Optimizes vendor contracts and licensing. Identifies cost-saving opportunities (e.g., shared services, cloud migration).



Analyst Analysis & Consultancy

Scheduled or on-demand calls with experienced industry subject matter experts; Training courses, certifications, webinars, workshops and conference attendance. Peer connections and networking opportunities through client community.



Workforce & Skills Gap

Provides specialized expertise not available in current IT workforce due to difficulty attracting and retaining needed talent by providing expert consultants as staff augmentation for unique projects or tasks; delivering training, knowledge transfer, and toolkits or reference materials.



Cybersecurity & Resilience

Support the design and implementation of Zero Trust and other modern security architectures to strengthen resilience and recovery strategies to reduce risk amid increased cyber threats to public infrastructure.



IT Sourcing Model - 4 Bs





BUILD

What is it?

Developing employees through targeted skills, capability and competency development



BUY

What is it?

Recruiting talent from external sources into the permanent roles in the organization



BORROW

What is it?

Using freelancers, contractors, networks and contingent workforce (e.g. contract sales force)



BOT

What is it?

Leveraging technology such as automation and Al to deliver work





IT Research & Advisory Services with Forrester



IT Sourcing Model













Why We Use Forrester®:

- •Tech & Business Research: Leader in IT, Customer Experience (CX), and Transformation with research-backed guidance
- •Peer Benchmarking: Comparative data from private and public industry leaders.
- •Faster Execution: Proven tools to accelerate IT contracting and delivery progress: Forrester Wave™, Total Economic Impact™ (TEI) studies, and Future Fit Technology Strategy.
- •Broad Support: Cross-Departmental sharing of CX and technical knowledge using tools like Izola AI bot built into Forrester's research platform.
- •Trend Response: Support to navigate emerging shifts in AI and cybersecurity.



Forrester's Differentiated Value







Customer Obsession as a Core Philosophy

CX and Employee Experience (EX) are Forrester's superpower. As Dallas actively transforms into a resident-centered city, Forrester guides our teams to integrate CX/EX systematically into our technology, processes and governance. This is an enterprise-wide impact with access and engagements with Communications & Customer Experience/311, Dallas Police, Data Analytics & Business Intelligence, and Human Resources.



Global Reach with Local Relevance

Forrester's national and international footprint allows Dallas to benchmark against and learn from peer cities and commercial leaders, ensuring that strategies are informed by wide global best practices.



Actionable Insights in Volatility

Dallas needs decisive, research-backed guidance to make confident decisions. In multiple key domains, Forrester equips our team with insights that accelerate execution and reduce risk.



Forrester Engagements





Technology Architecture Clinics

Application Rationalization Strategy

Developed application rationalization strategy for software/hardware with similar capabilities and end-of-life/support first approach; Developed roadmap for future projects by creating break down of technical debt by application, infrastructure, and risk.

Customer Experience Workshops

CX Improvements & Delivery

Upcoming in-person workshop with cross-departmental leaders to train on key concepts of customer obsession, share CX trends and assist in maximizing their impact on constituent services through journey mapping sessions and next steps in leveraging customer satisfaction feedback

Artificial Intelligence Skills

Al Training & Skills Preparation

Using Forrester's Artificial Intelligence Quotient (AIQ) framework to survey city workforce for baseline AI skills assessment and development plan. This will help to accelerate AI tool training and rollout.

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Technology Certifications

Technology Strategic Planning

Built internal staff skills on Business Case Development with professional certification. Staff then led department technical needs assessments and documentation of future application needs/requests which impacts governance, project timelines, budgets and resources.

Managers Clinic

Application Rationalization Governance & Execution

Moved from strategy to execution where initial review identified 25% reduction in duplicate content management applications. Next phases target other enterprise and critical applications.

Cloud Strategy Assessment

Benchmark IT Optimization Capabilities

Using TEI studies to quantify true technology initiatives implementation and lifecycle costs and demonstrate return on investments and value realization.





IT Research Advisory Services with Gartner



IT Sourcing Model













Why We Use Gartner:

Executive Programs: One-on-One guidance tailored to specific business and career needs for executives and senior leaders, including one-on-one analyst sessions and peer networking.

Market Forecasts & Trends: Data-driven insights into IT spending, market shifts, and technology adoption across services. Magic Quadrants™ and Hype Cycles™ help visualize with solution and vendor comparisons which helps to make informed decisions and mitigate risk.

Strategic Frameworks & Toolkits: Access ready-made resources for RFPs, business cases, governance models, and maturity assessments available through Gartner's platform, including the Ask Gartner AI chatbot.

Workshops & Events: Customized, facilitated sessions to evaluate current capabilities and identify improvement areas.



Gartner Engagements



Contract Negotiation Clinic

Software as a Service (SaaS)

Analyst-led half-day workshop for contract and project managers on top trends impacting SaaS negotiations, and negotiation terms and strategies to enable successful outcomes.

Analyst Engagement

Navigating SaaS Contracts Development through Cooperatives

City of Dallas team gained insights into best practices for working with resellers, optimizing partnerships by leveraging reseller strengths and exploring direct contracts with preferred vendor partners.

SOW Success Workshop

Building Better Statements of Work

Through a hands-on workshop with 40 contract and project managers gained practical tools and proven frameworks for drafting effective Statement of Works. Participants learned how to clearly define deliverables, set measurable expectations and avoid common pitfalls that lead to project overruns and disputes.

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Managers Clinic

Radical Prioritization for Mission Critical Delivery

Executive Partner presented an 8-step guide to extreme IT Cost Prioritization for government and reviewed with department and project managers. Assessment now required component of IT contracts and renewals.

Benchmark Assessment

Benchmark IT Optimization Capabilities

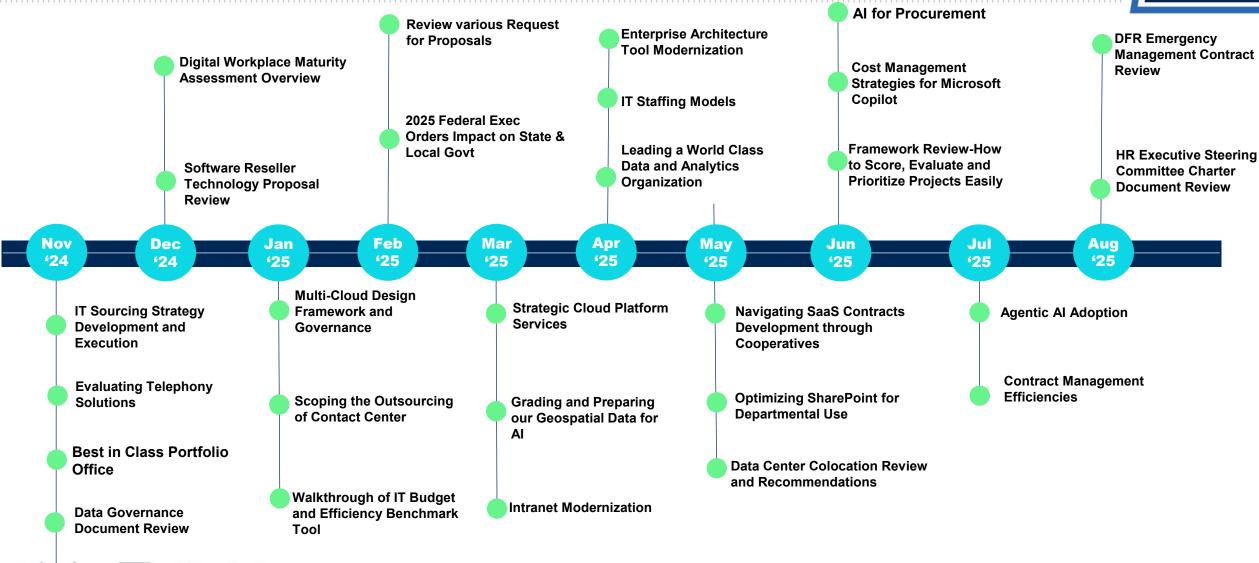
ITS has begun will utilize Gartner's IT Budget. & Efficiency Benchmark tool to manage IT costs and uncover cost optimization opportunities.



Gartner Engagements







Benchmarking Dallas' Spend





 Per Forrester, average annual client spend for research and advisory services is greater than \$900K for 25 comparable U.S. state and local agencies.

- FY 2025 1-Year Agreement \$645K
- Proposed 2-Year Agreement \$578K
 - FY 2026 \$289K
 - FY 2027 \$289K



Benchmarking Dallas' Spend



- or research
- Per Gartner, average annual client spend for research and advisory services is greater than \$1.8M for the Top 10 U.S. cities per population.
- FY 2023 3-Year Agreement \$4.9M
- Proposed 5-Year Agreement \$12.5M
 - FY 2026 \$2.3M
 - FY 2027 \$2.4M
 - FY 2028 \$2.5M
 - FY 2029 \$2.5M
 - FY 2030 \$2.6M



Next Steps



Receive feedback from Finance Committee

 Prepare an agenda item for upcoming City Council meeting to seek approval of proposed research and advisory services for Gartner and Forrester





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Tanishia Dorsey, CIO (I) Information & Technology Services