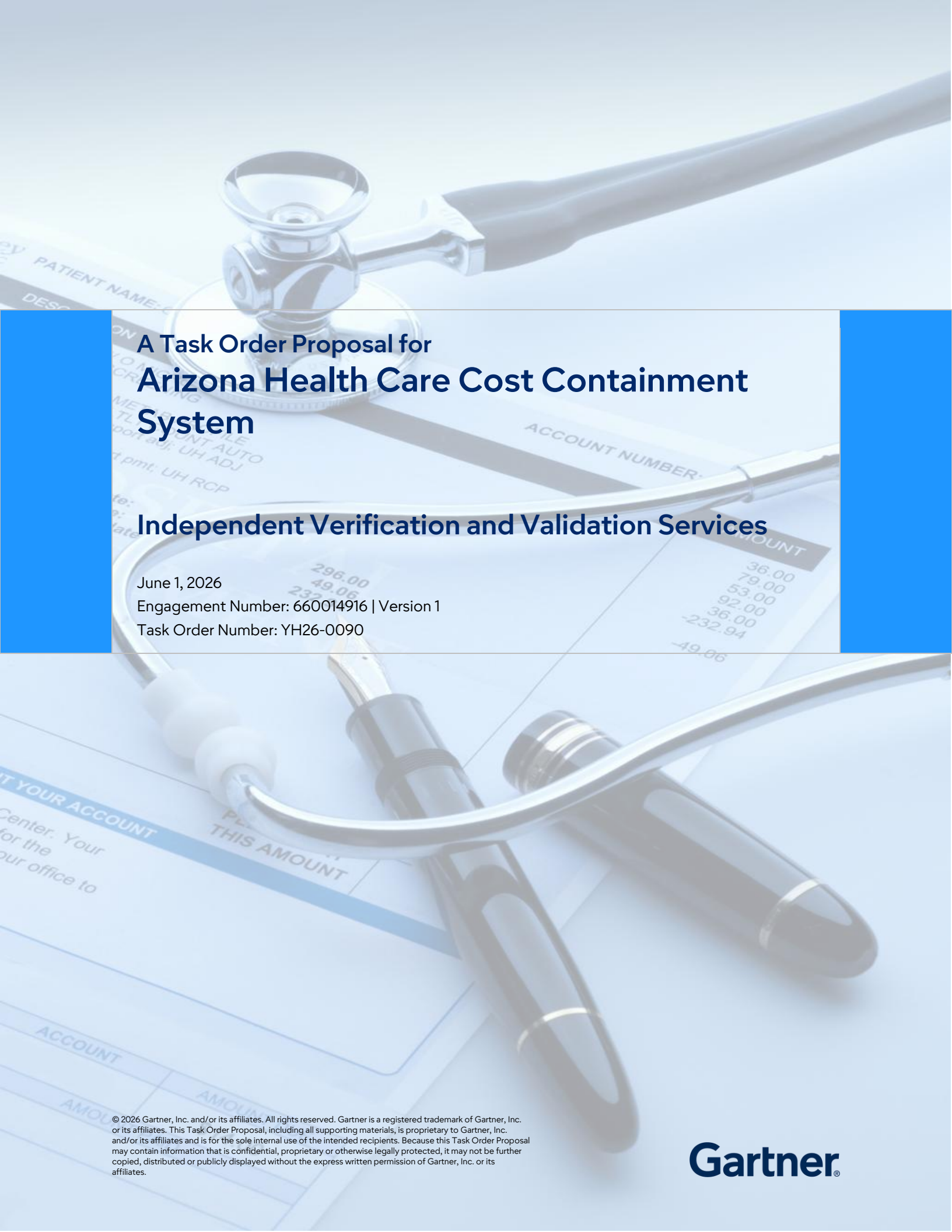




A Task Order Proposal for Arizona Health Care Cost Containment System

Independent Verification and Validation Services

June 1, 2026

Engagement Number: 660014916 | Version 1

Task Order Number: YH26-0090

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Cover Letter

June 1, 2026

Lisa Monreal
Senior Procurement Officer
Arizona Health Care Cost Containment System
Email: procurement@azahcccs.gov

Engagement Number: 660014916
Re: Task Order Proposal for Independent Verification and Validation (IV&V) Services
Task Order Number: YH26-0090

Dear Ms. Monreal:

Gartner, Inc. (Gartner) is pleased to provide the Arizona Health Care Cost Containment System (AHCCCS) with this Task Order Proposal in response to YH26-0090: Independent Verification and Validation (IV&V) Services under Master Consulting Services Agreement: IT Advisory, Assessment, Verification and Validation — Consulting Services, State Contract No. CRT053240, effective 01/01/2021.

Gartner understands that AHCCCS requires more than compliance oriented IV&V. The Agency is undertaking a complex, high-visibility transformation involving the implementation of a modern Medicaid Eligibility System alongside HR-1 Community Engagement (CE) requirements across both legacy (HEAplus) and future platforms. Success requires an IV&V partner capable of delivering independent, continuous oversight across multiple vendors and systems; validating testing completeness and readiness against CMS expectations; and, critically, enabling timely, informed decision-making at key milestones. AHCCCS must be able to see risks early, understand the impact, and act decisively.

Gartner is uniquely positioned to deliver this level of support. We combine strict independence with deep Medicaid and eligibility system experience, and a decision focused IV&V model that goes beyond reporting to actively support governance. Our approach provides AHCCCS with real-time visibility into project health, cross-project risk identification across ServiceNow and HEAplus, and clear escalation of material issues to executive leadership. Most importantly, we translate complex technical and program data into prioritized, actionable insights that enable confident go/no-go, readiness, and remediation decisions.

Gartner is the best partner to support AHCCCS's Eligibility System modernization and HR-1 CE implementation because we deliver IV&V that is not only independent but outcome-driven, transparent, and aligned to successful program delivery.

Specifically, Gartner brings:



- **Certification-first, outcome-driven IV&V expertise**, with proven experience supporting Medicaid eligibility and MES programs through testing, User Acceptance Testing (UAT) certification, and go-live readiness, ensuring artifacts and evidence withstand CMS scrutiny.
- **Proven independence and vendor-agnostic oversight**, fully compliant with Arizona IV&V requirements, providing AHCCCS with unbiased, objective assessments without delivery conflicts. Further, Gartner has and currently provides IV&V to some of the most complex implementation projects for Arizona.
- **A decision-focused IV&V approach** that delivers prioritized, actionable recommendations, structured risk escalation, and executive-ready reporting designed to drive timely leadership action. Our proprietary V-Assure Tool gives AHCCCS a dashboard and insight into all project risks.
- **Cross-project risk visibility** across complex, multi-system environments, ensuring risks are identified and managed holistically and not in silos.
- **Deep Health and Human Services (HHS) expertise** supporting **Medicaid** agencies across North America, including large-scale eligibility system modernization efforts. Our HHS Practice provides AHCCCS with firsthand experience with Medicaid engagements for some of the largest state and local agencies across North America.
- **Arizona-specific experience and local presence**, including successful IV&V for the [REDACTED]
[REDACTED] Further, Gartner has a Phoenix office from which the State and Local Government Market Lead for the Southwest and the proposed Managing Partner and some team members are based out of. We understand Arizona's unique needs.

**By 2027, 80%
of governments will
attempt to undertake
a new enterprise
application initiative,
but more than 50%
will fail**

Unlike traditional IV&V providers, Gartner does not operate as a passive reviewer generating retrospective reports. We provide forward-looking, decision-grade insight that strengthens governance, reduces delivery risk, and improves program outcomes. We do not perform implementation or remediation activities, ensuring complete independence; instead, we provide AHCCCS leadership with the clarity, transparency, and actionable recommendations required to govern this initiative successfully.

We have organized our response according to the submittal requirements of YH26-0090.



Table 1. Compliance Matrix

RFP Section	RFP Requirement	Gartner Response
10.2	Cover Letter	Cover Letter
10.3	Experience and Capacity of Firm and Key Personnel	Section 1.0
10.4	Methodology and Approach	Section 2.0
10.5	Project Cost (Attachment A)	Section 3.0

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

Please contact me at [REDACTED] or via email at [REDACTED] if you have any questions. We thank you for this opportunity and look forward to assisting AHCCCS with this key initiative.

Sincerely,

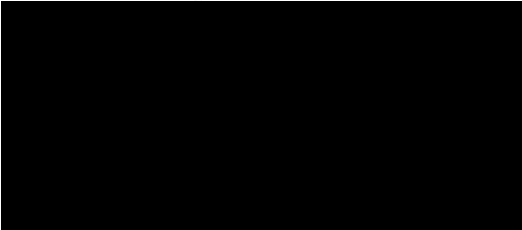


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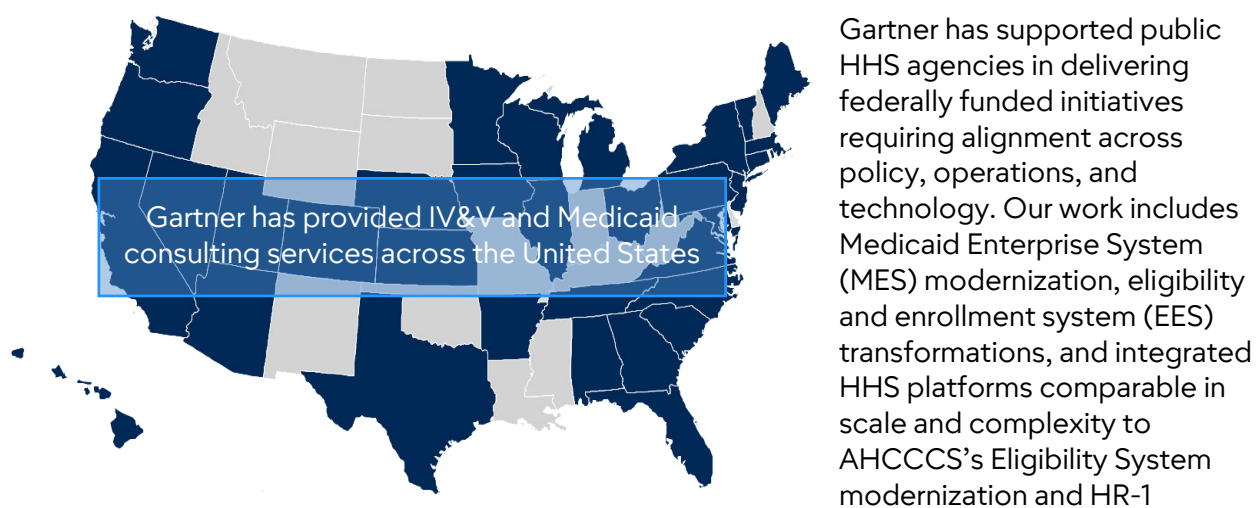
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1.0 Experience and Capacity of the Firm and Key Personnel

1.1 Gartner's IV&V and State Medicaid Technology Project Experience

For more than **25 years**, Gartner has been an industry leader in providing IV&V engagements, with a focus on Public Sector IT modernization projects, including Health and Human Services. Gartner has provided these services across North America with more than **210 Public Sector** engagements **over the last 5 years**, and more than **100,000 hours delivered** over the **past 2 years**. Gartner's IV&V experience includes aligning deliverables, testing evidence, and operational readiness with federal and state expectations to ensure documentation and outcomes support CMS review, certification, and audit requirements.

Figure 1. Gartner's IV&V Medicaid Services in the U.S.



Community Engagement (CE) implementation.

Gartner's experience is directly aligned with AHCCCS's dual-system and multi-vendor environment. We provide integrated oversight across concurrent initiatives, evaluating cross-project dependencies, integration risks, and systemic issues rather than assessing systems in isolation. This approach is critical in environments such as AHCCCS, where ServiceNow and HEAplus must operate in harmony and support evolving policy requirements.

Across public sector engagements, Gartner has applied structured, risk-based methodologies to assess governance, schedule and budget performance, scope management, vendor delivery, and technical solution quality. These engagements emphasize continuous risk identification, validation of testing completeness and traceability, and readiness assessments for UAT, go-live, and CMS review, which are key expectations of this Task Order.

Gartner brings deep experience supporting Medicaid eligibility systems in high-risk environments, independently validating requirements traceability, testing completeness, and readiness across data, interfaces, and operations, aligning with CMS expectations. A core strength of Gartner's approach is validating end-to-end traceability from requirements through testing and outcomes to ensure completeness, auditability, and alignment with CMS expectations.

Gartner also brings Arizona-specific experience and local presence in providing successful IV&V to some of the largest implementation projects [REDACTED]

[REDACTED] Table 2 highlights representative experience demonstrating Gartner’s experience supporting HHS initiatives similar to AHCCCS.

Table 2. Gartner’s Representative State Medicaid Experience

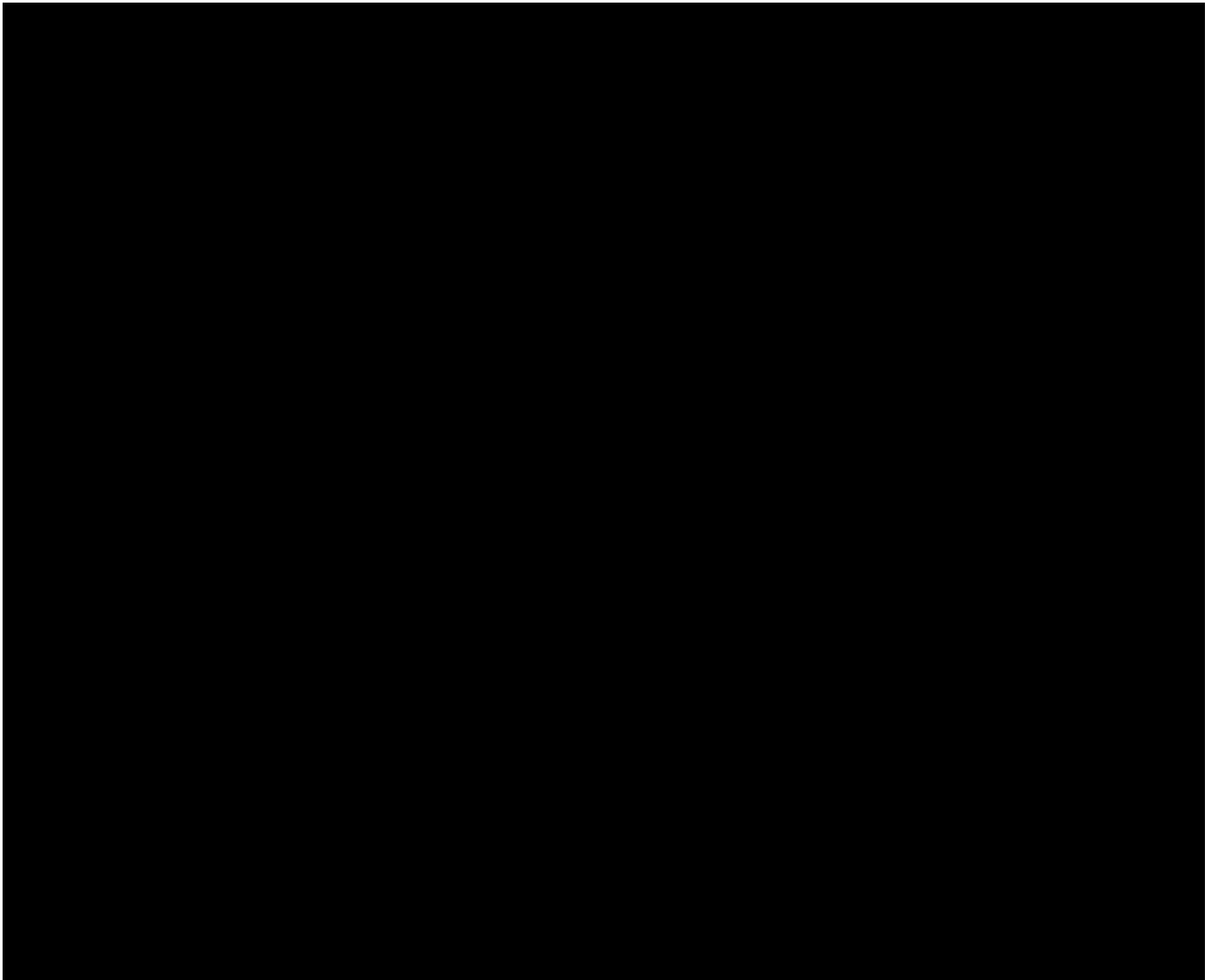
State	Project Description
[REDACTED]	

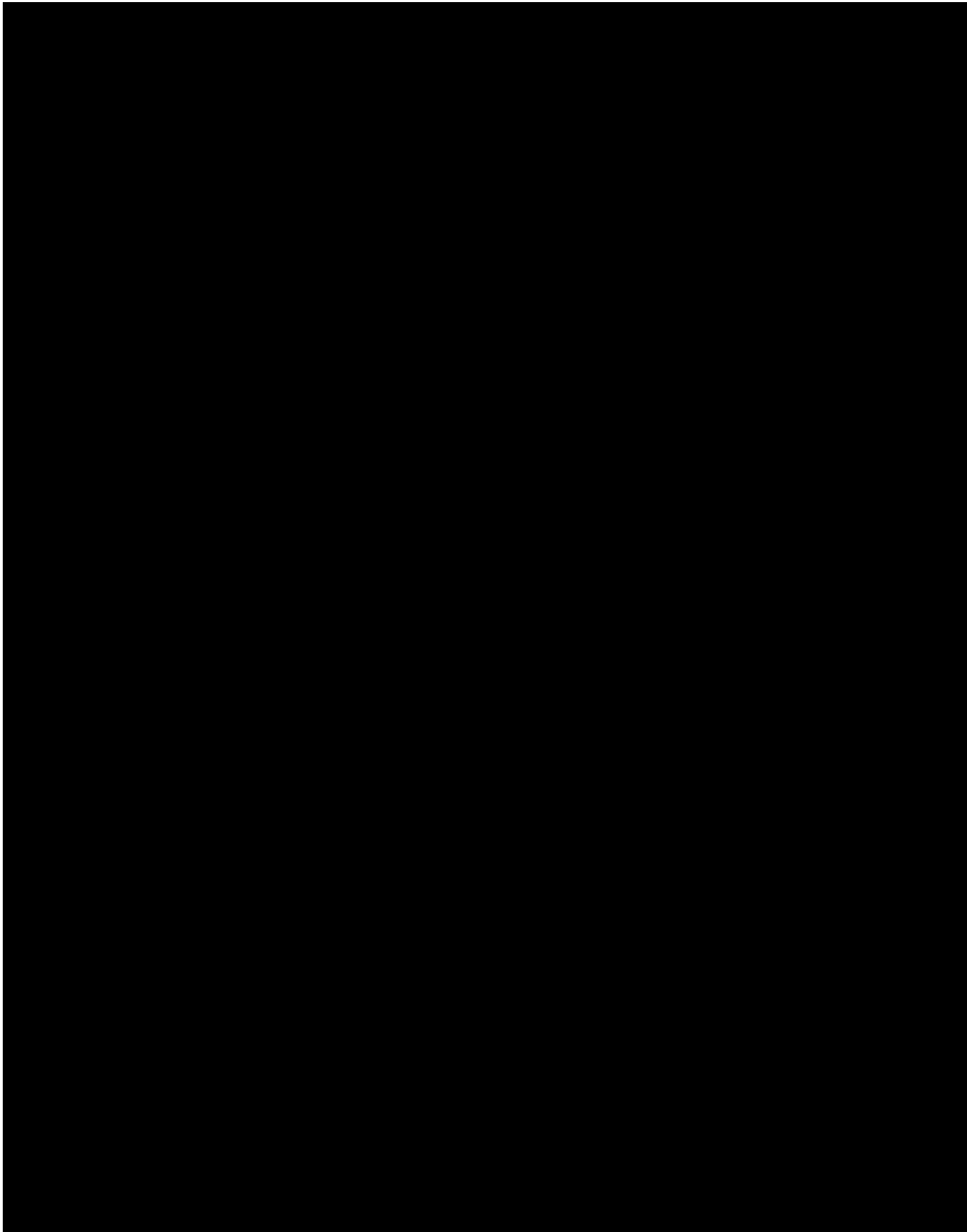
1.2 Key Staff Experience

Gartner proposes deploying a team of highly experienced senior experts, steeped in both strategic and technical depth, with a focus on Medicaid, to provide **Independent Verification and Validation (IV&V)** services for the AHCCCS Medicaid eligibility systems. This collaboration aims to deliver an **objective assessment** of technical performance and project management, ensuring that new implementations within ServiceNow and HEAplus remain on schedule and within budget, with a focus on **mitigating project risks** by evaluating everything from system architecture and security controls to user acceptance and federal compliance. Ultimately, the partnership is designed to ensure **operational readiness** through rigorous oversight of vendor performance and the validation of complex technical requirements.

We have created a team structure that provides **executive-level sponsorship, deep subject matter expertise with proven technical experience**, and key roles as requested by AHCCCS. Gartner is prepared to scale our team size and deploy additional team members and subject matter experts when necessary to ensure the best possible outcome for AHCCCS.

Key Staff Members

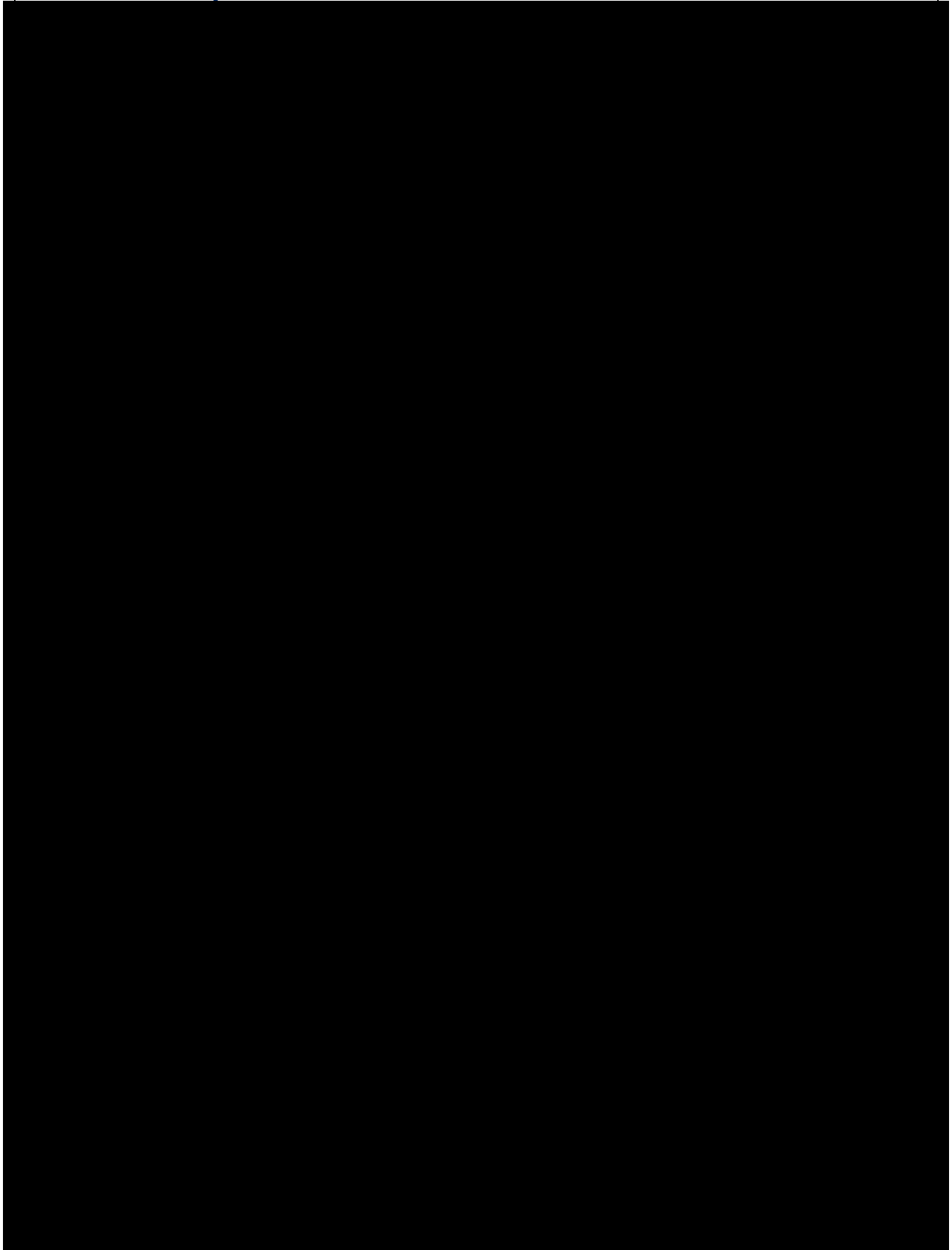


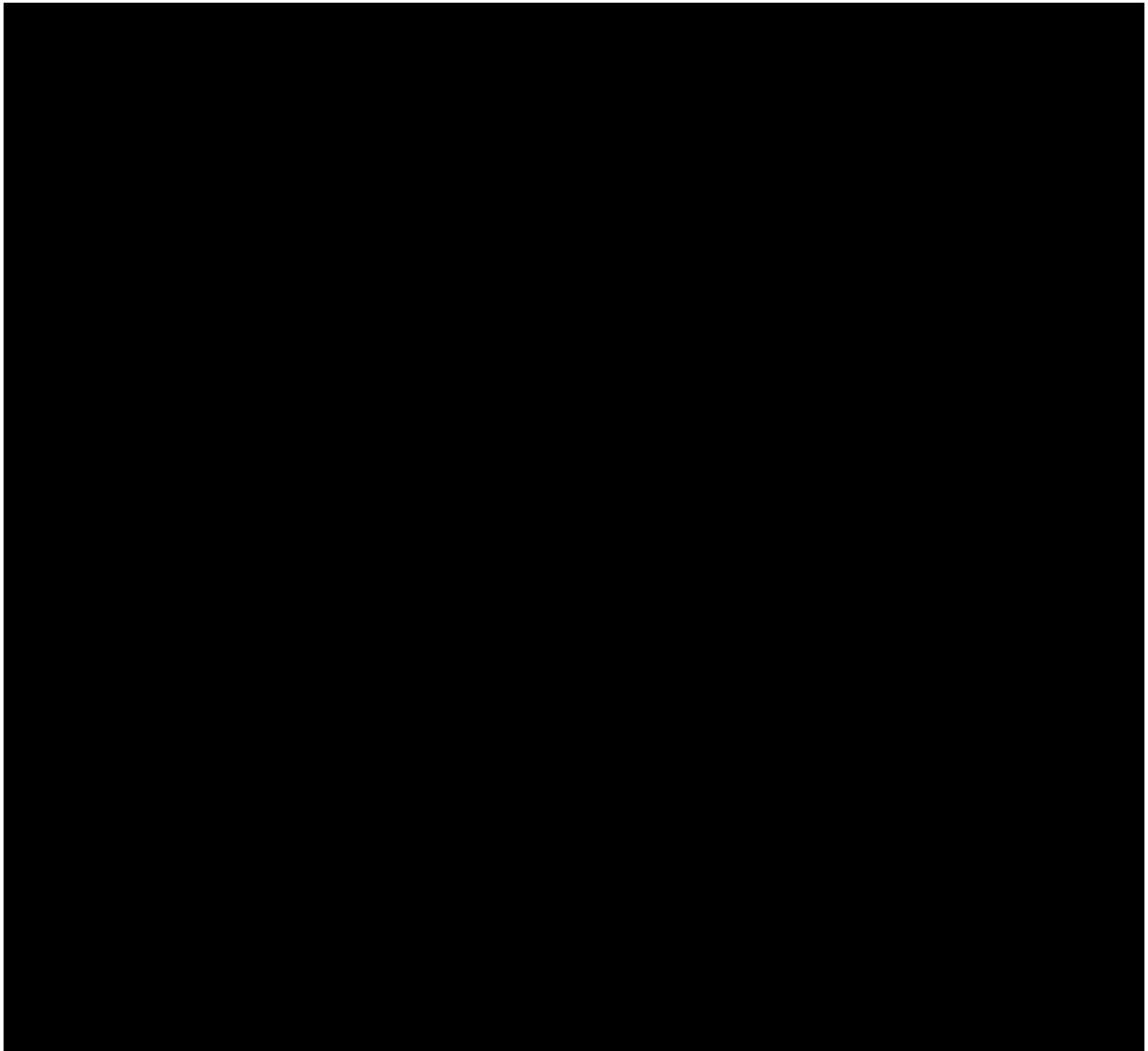


1.3 Key Staff Resumes

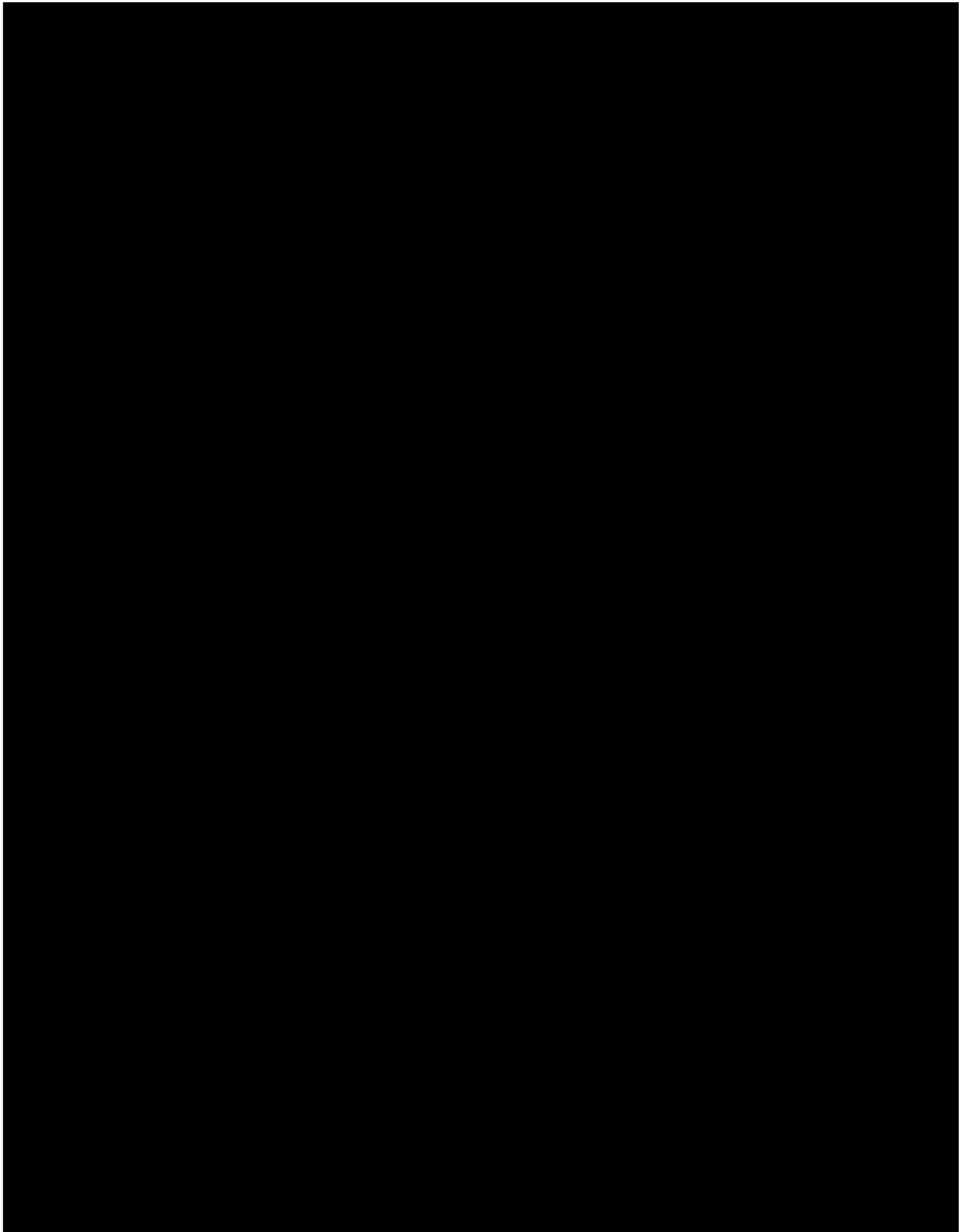
Key Staff Resume – [REDACTED]	
Background [REDACTED]	
Reference #1	Reference #2
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
Education • [REDACTED] • [REDACTED] – [REDACTED] – [REDACTED] – [REDACTED] – [REDACTED] – [REDACTED] • [REDACTED] – [REDACTED] – [REDACTED] – [REDACTED] – [REDACTED] – [REDACTED]	

Relevant Work History for Last 5 Years



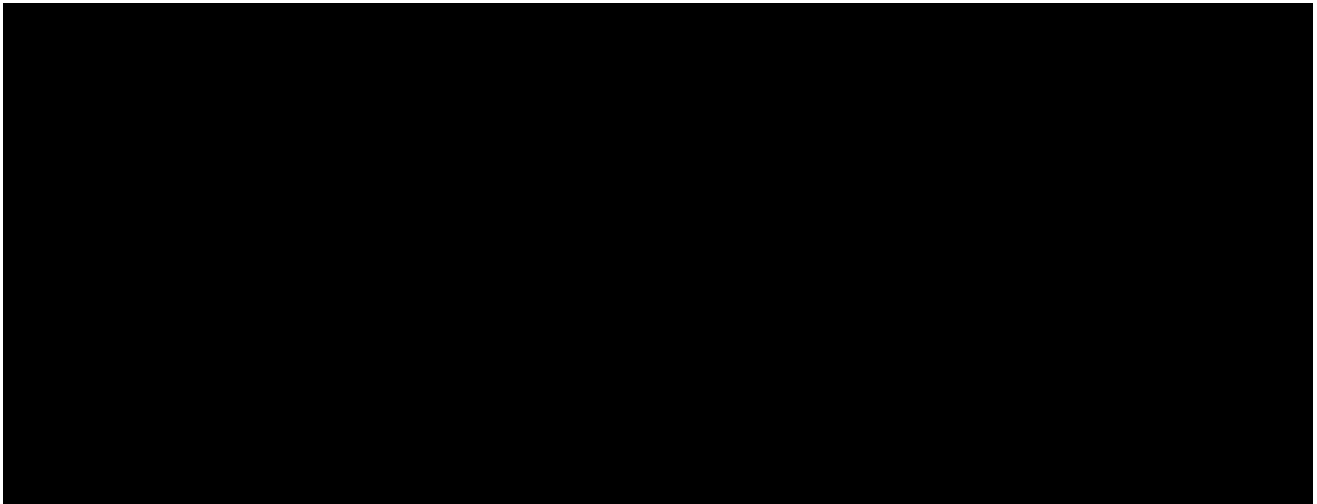


Key Staff Resume – [REDACTED]	
Background [REDACTED]	
Professional References	
Reference #1	Reference #2
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
Education	
• [REDACTED] • [REDACTED] • [REDACTED] • [REDACTED] • [REDACTED]	
Relevant Work History for Last 5 Years	
[REDACTED]	



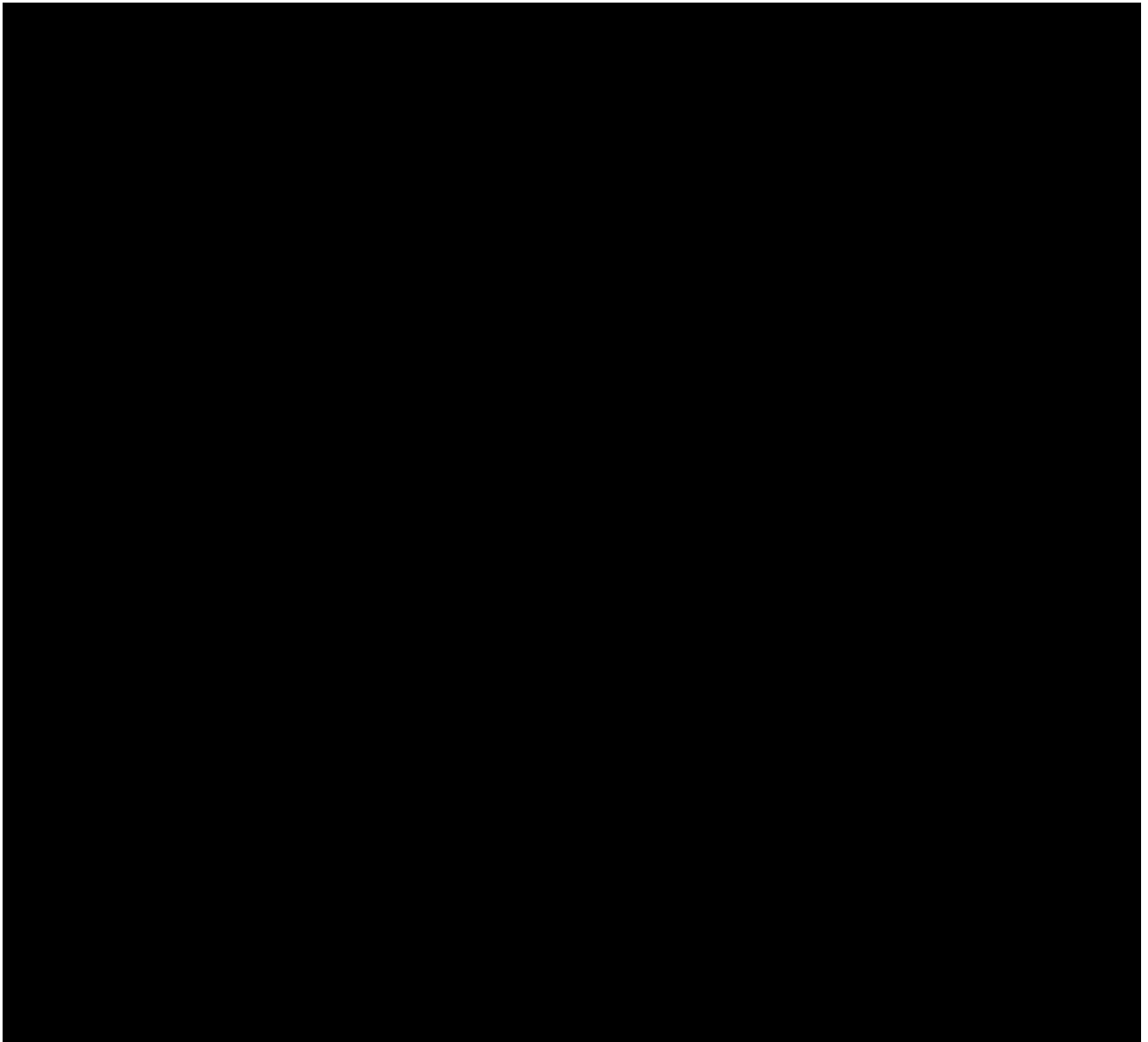
Key Staff Resume – [REDACTED]	
Background [REDACTED]	
Professional References	
Reference #1	Reference #2
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
Education • [REDACTED] • [REDACTED]	
Relevant Work History for Last 5 Years	

[REDACTED]



Key Staff Resume – [REDACTED]	
Background [REDACTED]	
Professional References	
Reference #1	Reference #2
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
Education	
• [REDACTED] • [REDACTED]	
Relevant Work History for Last 5 Years	

[REDACTED]



2.0 Methodology and Approach

2.1 Proposed Methodology and Approach to Fulfill Requirements

Gartner’s IV&V framework is both comprehensive and proven and is specifically designed to support Arizona’s IV&V requirements for independent, advisory oversight across complex IT initiatives. This framework enables Gartner to conduct independent, risk-based assessments across seven key dimensions, providing AHCCCS with objective insight into project performance, technical quality, and readiness for key decision points. Our approach to conducting both the baseline and subsequent project risk assessments for AHCCCS is a repeatable process that ensures thoroughness and transparency, enabling Gartner to engage effectively from Day 1. This structured approach ensures a holistic evaluation of the project, enabling early identification of risks and providing prioritized, actionable recommendations for AHCCCS leadership to address, aligned with project objectives.

Gartner continuously evolves our IV&V approach by incorporating leading practices, emerging technologies, and lessons learned from large-scale Medicaid programs to ensure AHCCCS benefits from the most current and effective oversight methods.

- **Real-time risk dashboards accessible to all stakeholders** provide continuous visibility into project health so AHCCCS leadership can identify risks early and take proactive action. These dashboards are enabled through Gartner’s V-Assure platform, which provides an interactive, centralized view of risks, issues, and performance metrics using dynamic visualizations such as heatmaps, trend lines, and KPI indicators to support informed decision-making.
- **Direct reporting to AHCCCS executive leadership** ensures critical risks are communicated without delay or filtering, enabling fast decision-making and strong governance.
- **Defined escalation protocols for high-risk situations** enable rapid response to critical issues, reducing the likelihood of schedule delays, cost impacts, or go-live failure. V-Assure supports escalation by providing real-time visibility into high-severity risks and overdue mitigation actions, clearly surfacing and communicating critical issues without delay.

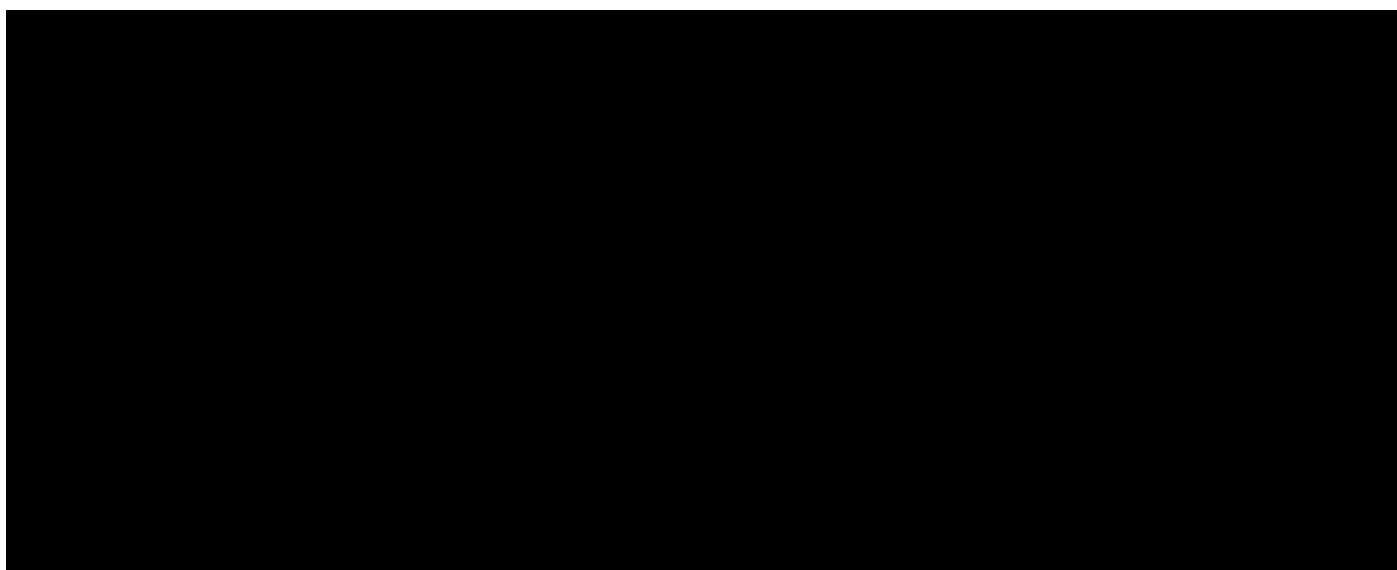
Table 3. Gartner Best-Practice IV&V Framework Dimensions and Descriptions

Dimension	Description

Dimension	Description

Each dimension has sub-categories that Gartner assesses based on the project phase. Gartner regularly reviews and refines this framework to ensure it continues to identify program risks accurately and provides value to clients and their business stakeholders.

Figure 2. Gartner’s Program Assurance/IV&V Framework



Using the above framework, each review focuses on:

- Evaluating current processes, procedures, practices, and technologies, highlighting **strengths, weaknesses, and areas for improvement**.
- Assessing **technical, financial, and managerial performance**, including adherence to standards, documentation accuracy, and **measurable progress**.
- Providing **actionable, measurable recommendations** that enable informed decision-making, tailored to the **unique needs of AHCCCS**. V-Assure further enhances this by tracking

recommendations, mitigation actions, and status updates through a dedicated recommendations summary view, including overdue indicators and progress tracking to ensure accountability and timely execution.

Our Guiding Principles for IV&V

While we work as part of the team and are committed to collaboration and communication, Gartner understands that our independence and objectivity are critical to our success as an IV&V vendor and, more importantly, essential for establishing and maintaining trust with all parties involved. We are successful in building trusted relationships with our clients and their vendors, because our IV&V work adheres to the following core principles:

- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]

At Gartner, we are not afraid to voice our opinion, even when it is unpopular, and always put the needs of the project first. However, we always do so in a collaborative manner, looking for solutions and active risk management techniques that provide value to the project. Gartner does not provide IV&V services that are viewed as box-checkers, fault finders, or finger pointers, nor will we provide evaluations of project status and propose recommendations from a removed “ivory tower” point of view.

While retaining our objectivity and independence, we believe strongly in being an active resource, providing technical, operational, and management advice and solutions based on proven methodology and a proven track record of experience and expertise in the field. In sum, our role as the IV&V vendor is to represent AHCCCS’s interests vigorously and zealously, and to collaborate with program stakeholders to ensure a successful implementation that is on time and on budget and delivers expected business value.

2.1.1 Approach Overview

AHCCCS is executing a complex dual-track transformation, combining the implementation of a new Medicaid Eligibility System on ServiceNow with HR-1 CE requirements across both the legacy HEAplus and future platforms. Gartner’s IV&V approach is purpose-built for this model, providing independent, integrated oversight across both initiatives while maintaining strict separation from project delivery activities. This ensures risks are identified, assessed, and communicated holistically, capturing cross-project and system dependencies rather than evaluating efforts in isolation.

Our approach emphasizes end-to-end validation of requirements, technical solutions, testing evidence, and operational readiness with a focus on alignment to business objectives, policy requirements, and expectations. Through continuous risk monitoring, strict traceability, and

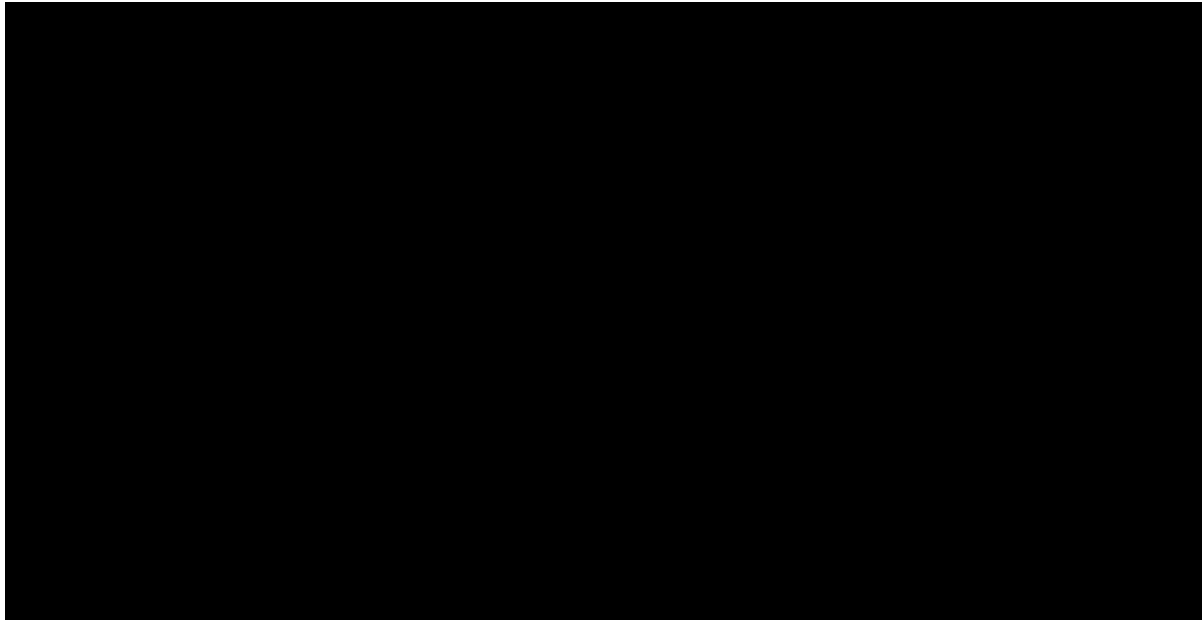
structured analysis, Gartner enables early issue detection, proactive mitigation, and clear, actionable reporting. V-Assure serves as the enabling platform for this approach by consolidating data across both projects into a single, user-friendly interface, ensuring holistic visibility across dependencies and eliminating siloed reporting. We place particular emphasis on high-risk areas, such as data migration, system interfaces, and eligibility rule implementation.

Aligned to Arizona’s IV&V statutory requirements, Gartner maintains strict independence while delivering decision-grade assurance for UAT, Operational Readiness Reviews (ORRs), Certification Reviews, and CMS Streamlined Modular Certification requirements. Our approach applies cross-project risk monitoring, trend-based insights, and rapid escalation of critical issues, so AHCCCS has timely visibility into risks that may impact schedule, cost, or program outcomes.

Gartner’s reporting is designed to support decision-making at all levels of governance. Through V-Assure, reporting is transformed from static deliverables into an interactive experience, allowing stakeholders to access real-time program status, drill into supporting data, and monitor progress against key performance indicators at any time. Each assessment includes prioritized findings, impact analysis, and clearly defined decision implications, enabling AHCCCS leadership to make informed go/no-go, acceptance, and remediation prioritization decisions with confidence.



Figure 3. The Gartner Deliverable Review Process



To determine the quality of any project deliverable or process, our approach considers:

- [Redacted]
- [Redacted]

Go-live requires a proactive IV&V approach that goes beyond checklist validation to focus on the most critical risk areas. Drawing on experience supporting similar modernization efforts, Gartner identifies common failure points and prioritizes actions to reduce risk and support a successful transition to production.



2.1.2 Proposed Project Timeline

Gartner will deliver continuous, scalable IV&V services throughout the full 36-month Task Order period (September 2026 — September 2029), aligning to AHCCCS phase-gate milestones and CMS certification expectations, ensuring that all readiness assessments and validations are completed in advance of key decision gates. The approach ensures that critical readiness assessments, UAT certifications, and go/no-go decision support are performed in advance of key deployment events. Each phase culminates in decision-support deliverables such as readiness assessments and residual risk evaluations.

- **Year 1 (Sept 2026 — Sept 2027):** Focus on program initiation, baseline assessments, governance establishment, and design reviews aligned with CMS Conditions for

Enhanced Funding (inclusive of the Seven Standards and Conditions), along with early validation of technical architecture and integration strategy.

- **Year 2 (Sept 2027 — Sept 2028):** Emphasis on intensive testing oversight, including validation of test strategy and execution, UAT certification, data migration readiness, and ORR to support go-live decision-making.
- **Year 3 (Sept 2028 — Sept 2029):** Post-implementation assurance, including validating system performance against business objectives, assessing operational stability and user adoption, and finalizing audit-ready documentation and CMS evidence packages.

2.1.3 Approach Detail

Table 4. Gartner Task Descriptions

AHCCCS IV&V Project	
1. [REDACTED]	
Objective	• [REDACTED]
	• [REDACTED]
Activities Performed by Gartner	• [REDACTED]
	• [REDACTED]
	• [REDACTED]
	• [REDACTED]
	• [REDACTED]
AHCCCS Responsibilities	• Ensure attendance at kickoff meetings by Project Sponsor, Project Manager, and other key stakeholders, as determined before kickoff. • Identify project manager, sponsor, business & technology stakeholders, and leadership participants. • Gain consensus on approach and participation from key organizational stakeholders. • Provide all relevant materials requested by Supplier. • Assist with scheduling interviews and workshops. • Attend meeting(s) as required. • Confirm governance structure, reporting expectations, and escalation protocols. • Validate IV&V plan alignment with AHCCCS priorities and CMS oversight expectations. • Identify and scope CE workflows and requirements for targeted IV&V oversight across both HEAplus and the new eligibility system. • Define approach for validation of CMS SMC artifacts, including metrics, evidence, and traceability to outcomes.

	Review and provide timely feedback on Supplier deliverables.
Deliverable(s)	[REDACTED] [REDACTED] [REDACTED]
Time Frame	[REDACTED]
2. [REDACTED]	
Objective	[REDACTED]
Activities Performed by Gartner	[REDACTED] [REDACTED] [REDACTED] [REDACTED] [REDACTED] [REDACTED] [REDACTED] [REDACTED]
AHCCCS Responsibilities	- Provide timely access to updated artifacts, reports, and stakeholders. - Participate in governance reviews and respond to IV&V findings. - Review and act on IV&V recommendations and escalations.
Deliverable(s)	[REDACTED] [REDACTED] [REDACTED] [REDACTED]
Time Frame	[REDACTED]
3. [REDACTED]	
Objective	[REDACTED]

Activities Performed by Gartner	• [REDACTED] • [REDACTED] • [REDACTED] • [REDACTED] • [REDACTED] • [REDACTED]
AHCCCS Responsibilities	• Provide access to test environments, test results, reports, and defect logs. • Ensure business participation in UAT and validation processes. • Review IV&V readiness findings and make final acceptance decisions.
Deliverable(s)	• [REDACTED] • [REDACTED] • [REDACTED] • [REDACTED]
Time Frame	• [REDACTED]
4. [REDACTED]	
Objective	• [REDACTED]
Activities Performed by Gartner	• [REDACTED] • [REDACTED] • [REDACTED] • [REDACTED] • [REDACTED] • [REDACTED]
Authorized User's Responsibilities	• Schedule/attend executive briefing meeting(s) and workshops as required. • Provide access to operational metrics, performance reports, and stakeholder feedback. • Review and provide timely feedback on deliverables.
Deliverable(s)	• [REDACTED] • [REDACTED] • [REDACTED] • [REDACTED]

	• [REDACTED] • [REDACTED]
Time Frame	• [REDACTED]

2.2 How Gartner Will Satisfy Each of the Minimum Criteria

Table 5 crosswalks how Gartner’s IV&V methodology and integrated QA processes directly fulfill the minimum requirements outlined in Section 4 of the AHCCCS Task Order.

Table 5. Mapping AHCCCS Section 4 Requirements to Gartner’s IV&V Approach

AHCCCS Requirement (Section 4)	Gartner Methodology & Integrated QA Process
4.1: Minimum IV&V Services: (Independent assessment of governance, schedule, budget, scope, and technical solution)	[REDACTED]
4.2: Core Assessment Areas: (Schedule, Resource, Scope, Financial, Data, QA/Testing, Security)	[REDACTED]
4.3: Actionable Recommendations: (Provided in Status Reports with priority and scoping methodology)	[REDACTED]
4.4 & 4.5: Technical Solution Assessments: (Eligibility System & CE implementation)	[REDACTED]
4.6 & 4.7: Governance & Risk Register: (Risk methodology, severity scoring, and maintenance of a risk register)	[REDACTED]
4.8: High-Severity Notification: (Immediate Agency notification of critical issues)	[REDACTED]
4.9: Operational Readiness Review: (Independent assessments before production deployment)	[REDACTED]
4.10: Ongoing Reporting & Metrics: (Review of operational reporting for CMS alignment)	[REDACTED]

Differentiating Gartner’s QA Process for AHCCCS

Gartner applies internal quality controls to ensure the accuracy, consistency, and objectivity of its IV&V assessments and deliverables. Specifically:

- **QA Specialists:** We leverage SMEs and QA resources (independent of the core project team) to peer-review all Gartner project plans and deliverables as needed.

- **Ombuds Office:** As an independent research organization, Gartner is equipped with an Office of the Ombuds to protect the independence and objectivity of our advice, ensuring no conflicts of interest influence our findings.
- **V-Assure Risk and Issue Tracking Tool:** Gartner’s proprietary tool, V-Assure, is a cloud-based tool offering a one-stop solution to execute IV&V, track progress, and de-risk the delivery, providing real-time reporting across all critical program dimensions. V-Assure is based on the Gartner IV&V framework and augmented with artificial intelligence capabilities to improve risk management and issue resolution. It can be easily customized to the needs of AHCCCS.

2.3 Deliverables

Table 6. Summary of Deliverables

Deliverable Name	Due Date	Description
IV&V Work Plan	Within 15 days after kickoff	Outlines the IV&V approach, schedule, stakeholder management, and risk framework.
IV&V Checklist(s)	Ongoing for each periodic review	Documents the project elements reviewed and monitored, aligned with industry standards such as PMBOK and IEEE.
Initial IV&V Report	Within 60 days after the project start	Documents the contractor's initial findings following the project kickoff for state and federal review.
Quarterly IV&V Status Report	By the 15th of the month following the end of each federal fiscal quarter	Highlights overall R/Y/G status, top risks, data conversion risks, testing progress, and defect trends.
Monthly Status Report	Monthly	Summarizes significant risks, governance observations, project schedule updates, compliance concerns, and recommendations.
Weekly Status Report	Weekly	Provides updates on results, findings, and observations documented during the reporting period.
Testing Evidence Review Memos	As needed (at least per major test phase)	Includes reviews of the Master Test Plan, Integration/System Testing, UAT readiness, and UAT results validation.
Independent UAT Certification Assessment Memorandum	Phase Gate Deliverable	Details UAT scope, script coverage, defect summaries, residual risk statements, and an independent go/no-go recommendation.
ORR / Go Live Readiness Assessment Report	Phase Gate Deliverable	Evaluates readiness domain scoring, cutover and contingency plans, operational support, and integration readiness; supports Certification readiness and evidence expectations.
Ad Hoc Briefings	Upon Request	Summarizes IV&V findings and the project's risk posture for Agency leadership or CMS.
Close Out Report	Within 30 days of Go Live	Serves as the final independent assessment of the project's overall quality, compliance, and performance.

3.0 Project Cost

Gartner has completed the Attachment A Pricing Schedule as a separate attachment with our proposal submission.

3.1 Investment Summary

3.1.1 Fees and Expenses

Gartner will conduct the engagement as outlined in this Task Order Proposal for a firm fixed-price of **US\$ 8,000,000** (plus applicable taxes) inclusive of travel and other reimbursable expenses. This will be billed as defined in Section 3.1.2.

3.1.2 Billing

Gartner will conduct the steps outlined in this Task Order Proposal for the firm fixed-price defined in Section 3.1.1.

Gartner will bill each month as outlined in Attachment A: “AHCCCS shall pay the awarded contractor based on the total annual amount but in 12 equal monthly increments.”

Gartner will invoice Client for Services based upon the agreed schedule, which are stated exclusive of all taxes. Payment is due 30 days from the invoice date. Where required, Gartner shall charge, and Client shall pay all applicable sales, use, value-added, or other tax(es) or charge(s) imposed or assessed by any governmental entity upon the sale, use, or receipt of Services, with the exception of any tax(es) imposed on the net income of Gartner. While we do not provide itemized billing for services, we agree and will comply with any reasonable requests for records substantiating our invoices.

Purchase Order

Unless the box is checked below: At the time of execution of this Task Order Proposal a Purchase Order (PO) document must be sent to your Gartner Primary Contact no later than 30 days from signature with the following reference: 660014916, **US\$ 8,000,000**. Any pre-printed or additional contract terms included on the PO shall be inapplicable and of no force or effect. If a separate PO is required for travel and/or project-related expense, Client will issue that PO within the same 30-day period. If a required PO is not received based on the 30-day term, Gartner will invoice without the PO.

☐ By checking this box, Client confirms that no PO is required and that the Billing Address and Invoice Recipient information are accurate.

Primary Contact

Lisa Monreal
Senior Procurement Officer
procurement@azahcccs.gov

3.1.3 Additional Terms & Conditions and Pricing Assumptions

Additional Terms & Conditions

- This Proposal includes (i.e., confidential, protected, restricted, trade secret and/or proprietary information). In the event this Proposal is required by law or requested via legal statute to be shared outside AHCCCS, the following information is to be redacted

or removed as confidential and proprietary: names and/or logos of Gartner clients, contact information of Gartner references, pricing breakdown and/or rates, sample deliverables, excerpts of Gartner Business and Technology Insight, or Gartner Intellectual Property.

- Client hereby consents to allow Gartner to reference the name of the client's organization in connection with the current Gartner solution/scope of work only in future Gartner Consulting proposals.

Pricing Assumptions

- **Firm Fixed-Price** — Gartner estimated the level of effort (hours) and expertise (labor categories) required for each deliverable using a blended rate approach. This allowed us to accurately reflect that the specific resources/Gartner labor categories are currently unknown, but will be filled by one of the labor categories included in the blended rate. Where required, Gartner has confirmed that this approach yielded blended rates at or below contractually stipulated rates.

The total cost outlined in the order shall be a fixed price for all the required services and work products. The Gartner team is fully committed to delivering the proposed scope of work described in the proposal using the fixed-priced deliverables-based model. The estimated hours provided in this proposal are for estimation purposes only to determine our proposed fixed price. As with all fixed-priced deliverable-based engagements, the actual number of hours required to perform the work will vary, and the estimated hours proposed may not reflect the actual hours required. Moreover, Gartner anticipates leveraging other labor categories as needed to deliver exceptional service most efficiently. Similarly, Gartner may need to move hours/level of effort across personnel and labor categories to enable efficient and high-value service delivery — provided the total firm fixed-price is not exceeded. Given that this is a fixed-price order, not a time-and-materials order, Gartner will not provide any further information regarding the actual hours expended and/or the labor rates of the resources utilized to complete the work.

3.1.4 Changes to Scope

The scope of this engagement is defined by this Task Order Proposal. All AHCCCS's requests for changes to the Task Order Proposal must be in writing and set forth the requested changes with specificity. As soon as practicable, Gartner shall advise AHCCCS 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 Task Order Proposal. By way of example and not limitation, changes may include the following:

- Any activities not specifically outlined in this Task Order Proposal.
- Any prolongation beyond the project duration outlined in this Task Order Proposal.
- Providing or developing any deliverables not specifically outlined in this Task Order Proposal.

- Any change in the respective responsibilities of Gartner and AHCCCS, 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 AHCCCS.
- Any additional work caused by a change in the assumptions outlined in this Task Order Proposal.
- Any delays in deliverables caused by the modification of the acceptance criteria in this Task Order Proposal.
- Any changes to Business and Technology Insight analysts' time or resources.

4.0 Appendix

4.1 Gartner's Experience with Similar Projects

Gartner brings deep experience in delivering independent IV&V and QA oversight for large-scale integrated eligibility modernization programs, and the two case studies described below demonstrate this capability in helping public sector HHS organizations mitigate risk, ensure compliance, and successfully execute complex, multi-program transformation initiatives.

Table 7. Case Studies

Gartner provided IV&V for a large-scale \$200M modernization program to implement a statewide integrated eligibility system. Using a structured, proven approach, Gartner assessed project performance, identified risks, and offered mitigation strategies throughout the lifecycle. This oversight provided an independent assessment of schedule, scope, and vendor performance, met federal requirements, and aligned with business objectives, resulting in a successful system implementation, federal approvals, and transition to ongoing operations.

Client Context

- [REDACTED]
 - To improve service delivery, the client launched a major \$200M modernization initiative to transform access, quality, and outcomes through technology enablement. The program aimed to implement a unified, integrated eligibility system to simplify and streamline eligibility determination across multiple benefit programs.
- Key objectives of the modernization included:
- Creating a more accessible and user-friendly eligibility process for both citizens and case workers.
 - Meeting federal compliance requirements (CMS and FNS) and securing enhanced federal funding.
 - Establishing a scalable, extensible platform to support future HHS programs.

Gartner Approach and Differentiation

- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]

- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]

Benefits Achieved

With Gartner’s IV&V support, the organization successfully delivered its modernization initiative and achieved its strategic objectives, including:

- Successful statewide implementation of an IE&E system.
- Seamless transition to a Maintenance and Operations (M&O) phase.
- Achievement of overall program vision, business goals, and improved service delivery outcomes.
- Compliance with federal requirements and successful approval of Implementation Advance Planning Documents (IAPDs) and updates.
- Improved confidence in project execution through consistent validation of schedule, budget, and requirements alignment.

Gartner’s independent oversight helped ensure the program stayed on track, minimized risk, and delivered a scalable, compliant platform capable of supporting future growth and evolving citizen needs.

Table 8. Case Studies

Gartner delivered independent QA and oversight for a multi-year IE&E modernization program aimed at improving access to public benefits and stabilizing fragmented legacy systems. Using its proprietary Program Assurance & Oversight Risk Assessment Framework, Gartner assessed program and project health, identified risks across key domains, and provided ongoing actionable insights through structured reporting and stakeholder engagement.

Client Context

- [REDACTED]
- [REDACTED]
To address these issues, an IE&E modernization program was launched with the core objective of improving the eligibility and enrollment process for benefits, streamlining client access, reducing administrative duplication, and enhancing the overall effectiveness of service delivery.

Gartner Approach and Differentiation

- [REDACTED]
- [REDACTED]
- [REDACTED]

- [REDACTED]

Benefits Achieved

- The IE&E Program’s vision was pursued by stabilizing outdated systems through mainframe transitions and establishing a foundational cloud platform. The program also delivered client-facing tools such as a client benefits status tracker, engaged in human-centered design to simplify benefit applications, and developed an overall modernization roadmap.
 - [REDACTED]
 - [REDACTED]
-

4.2 Project Team Overview

Gartner brings a team of senior experts to ensure the best possible outcome for AHCCCS. We create a team structure that provides high-level sponsorship and QA, strong day-to-day project management, a focused team of project consultants, deep subject matter expertise, and the key roles as requested by AHCCCS.

Gartner is prepared to provide AHCCCS with a team that is steeped in both strategic and technical depth, with a focus on Medicaid, enterprise applications implementation, and public sector IV&V.

4.2.1 Proposed Roles and Responsibilities

Table 9 describes the roles and responsibilities for this engagement.

Table 9. Project Team Roles and Responsibilities

Role	Responsibilities

[illegible]

Role	Responsibilities

Role	Responsibilities

Role	Responsibilities

4.2.2 Team Members' Experience with Similar Size and Complexity Projects

Gartner's proposed team for this engagement provides comprehensive coverage across IV&V, Medicaid eligibility systems, large-scale modernization, and regulated public sector environments, ensuring AHCCCS benefits from both deep subject matter expertise and experienced program oversight. Table 10 summarizes team members' experience with engagements of similar size and complexity.

Table 10. Team Members' Experience with Similar Size and Complexity Projects

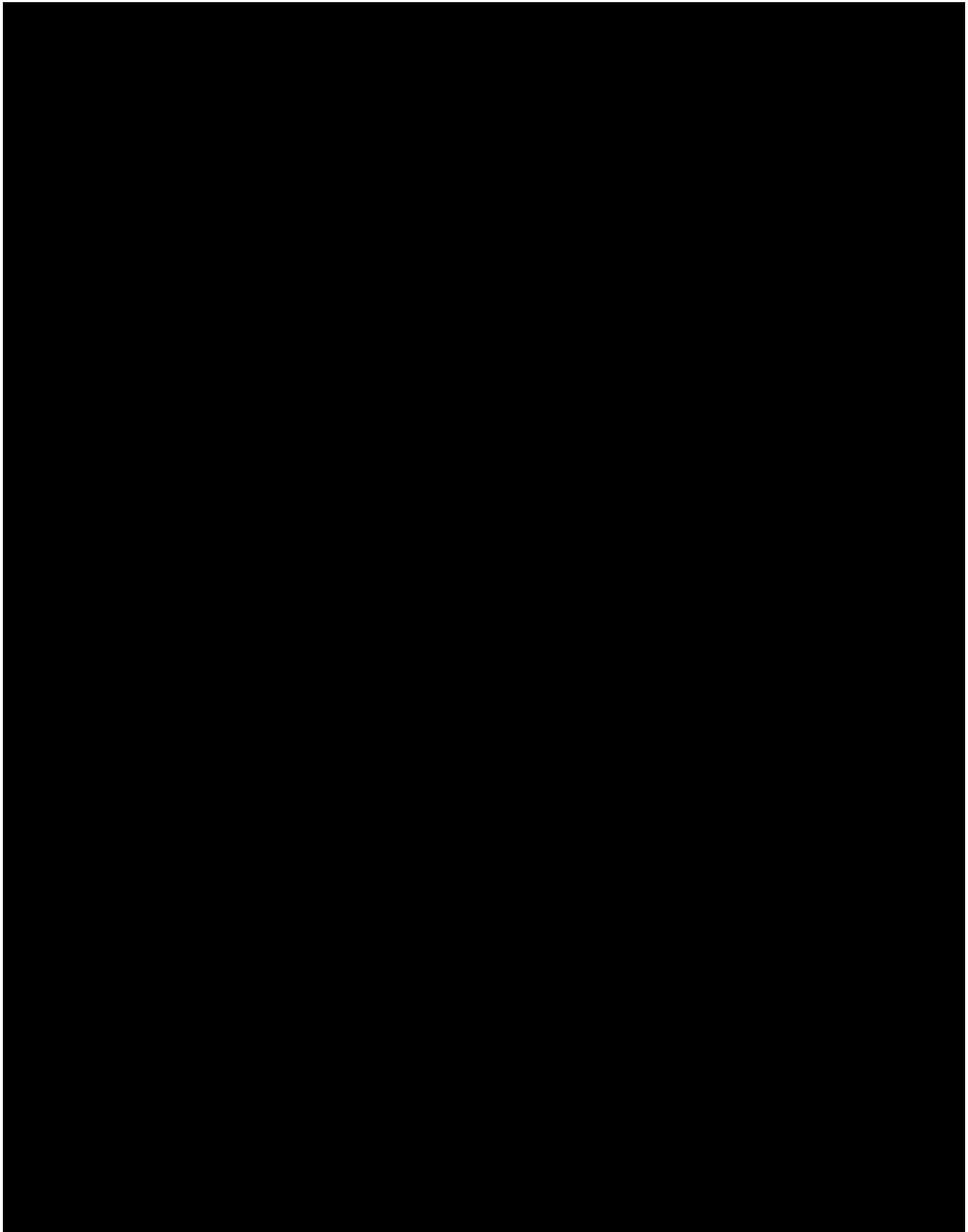
Proposed Team Member	Years of Relevant Experience	Sample Projects of Similar Size/Complexity	IV&V/ Program Assurance	Medicaid & Eligibility Systems	Large-Scale System Implementations / Modernization	Highly Regulated Public Sector Environment	Arizona Government Experience

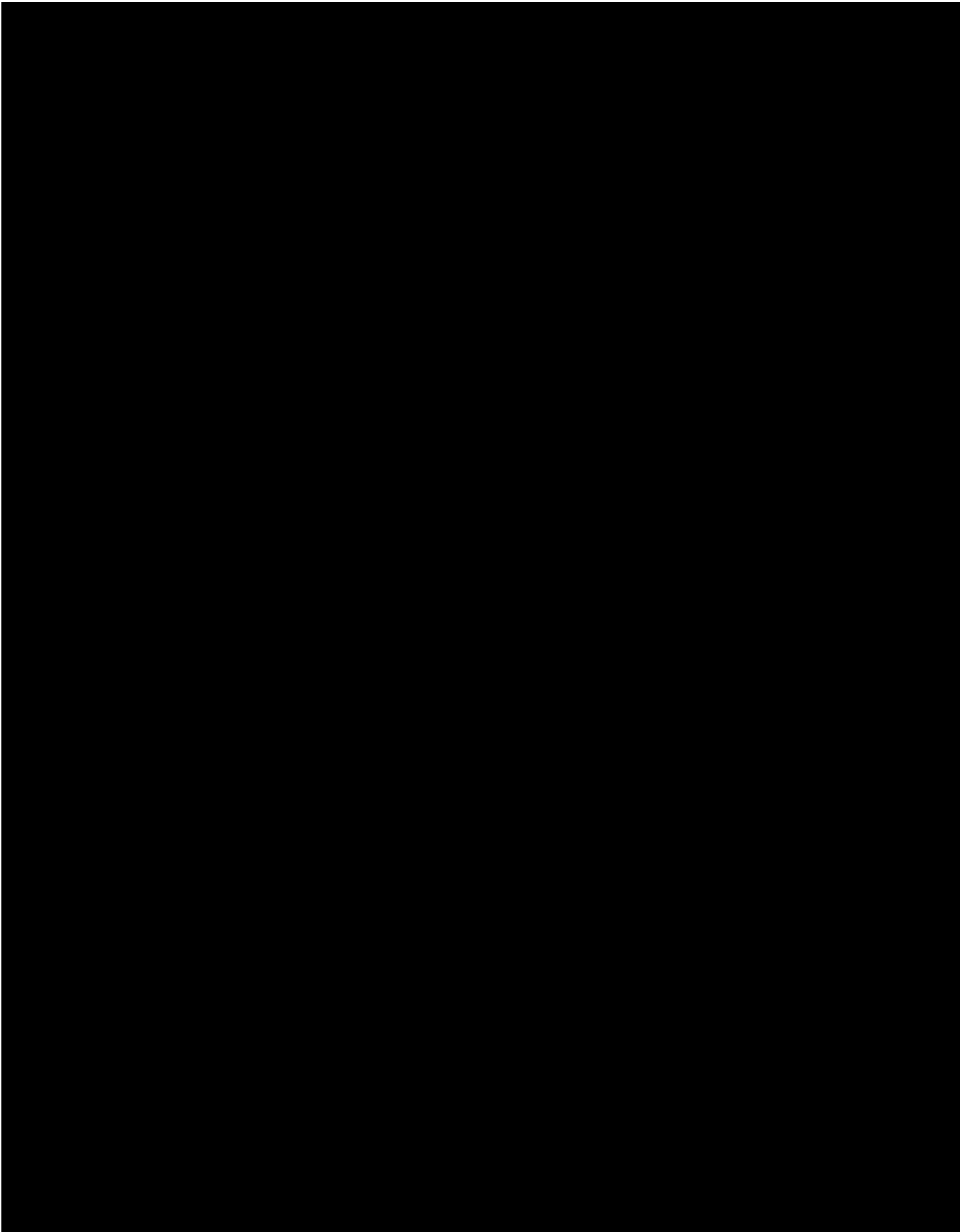
Proposed Team Member	Years of Relevant Experience	Sample Projects of Similar Size/Complexity	IV&V/ Program Assurance	Medicaid & Eligibility Systems	Large-Scale System Implementations / Modernization	Highly Regulated Public Sector Environment	Arizona Government Experience

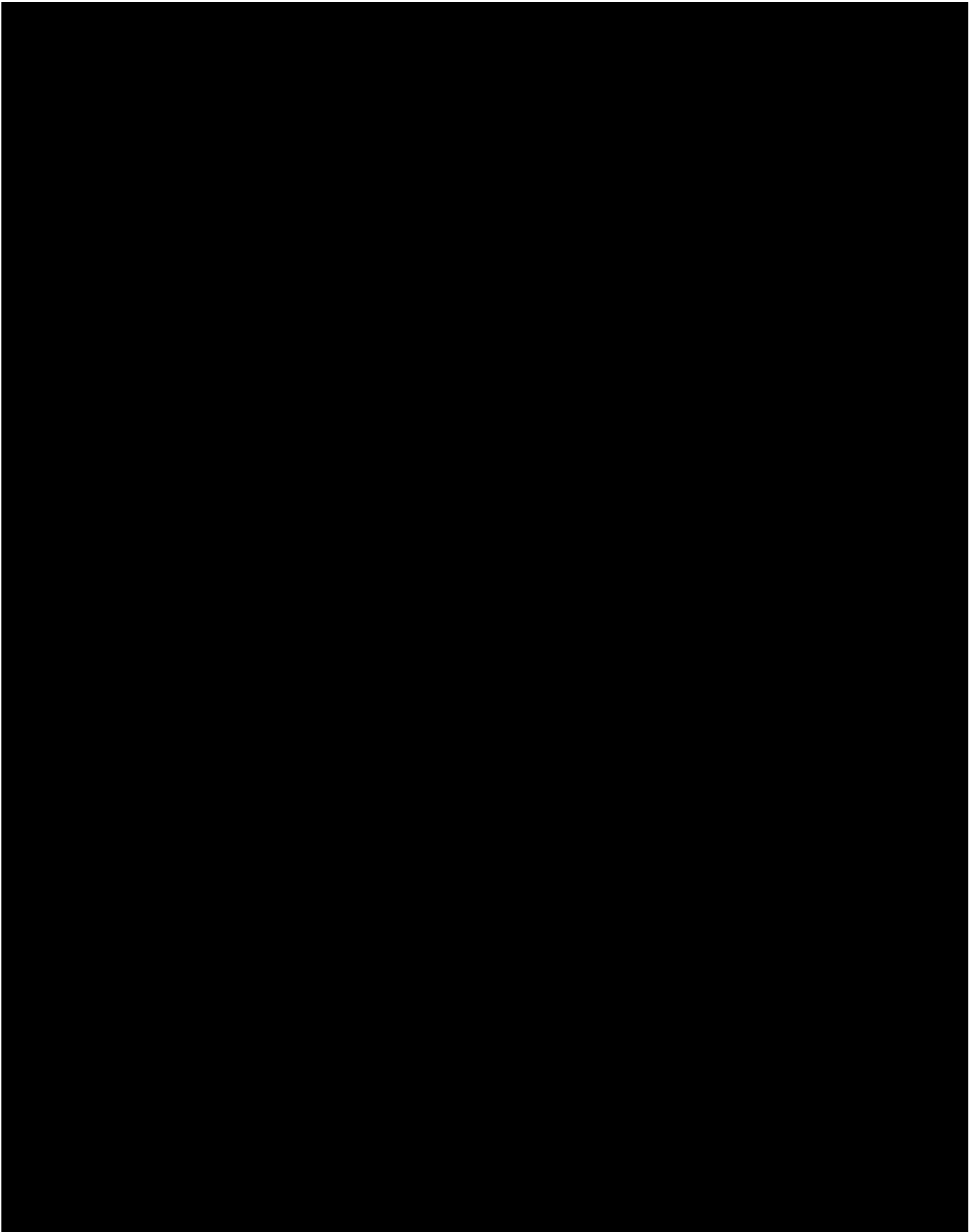
Proposed Team Member	Years of Relevant Experience	Sample Projects of Similar Size/Complexity	IV&V/ Program Assurance	Medicaid & Eligibility Systems	Large-Scale System Implementations / Modernization	Highly Regulated Public Sector Environment	Arizona Government Experience

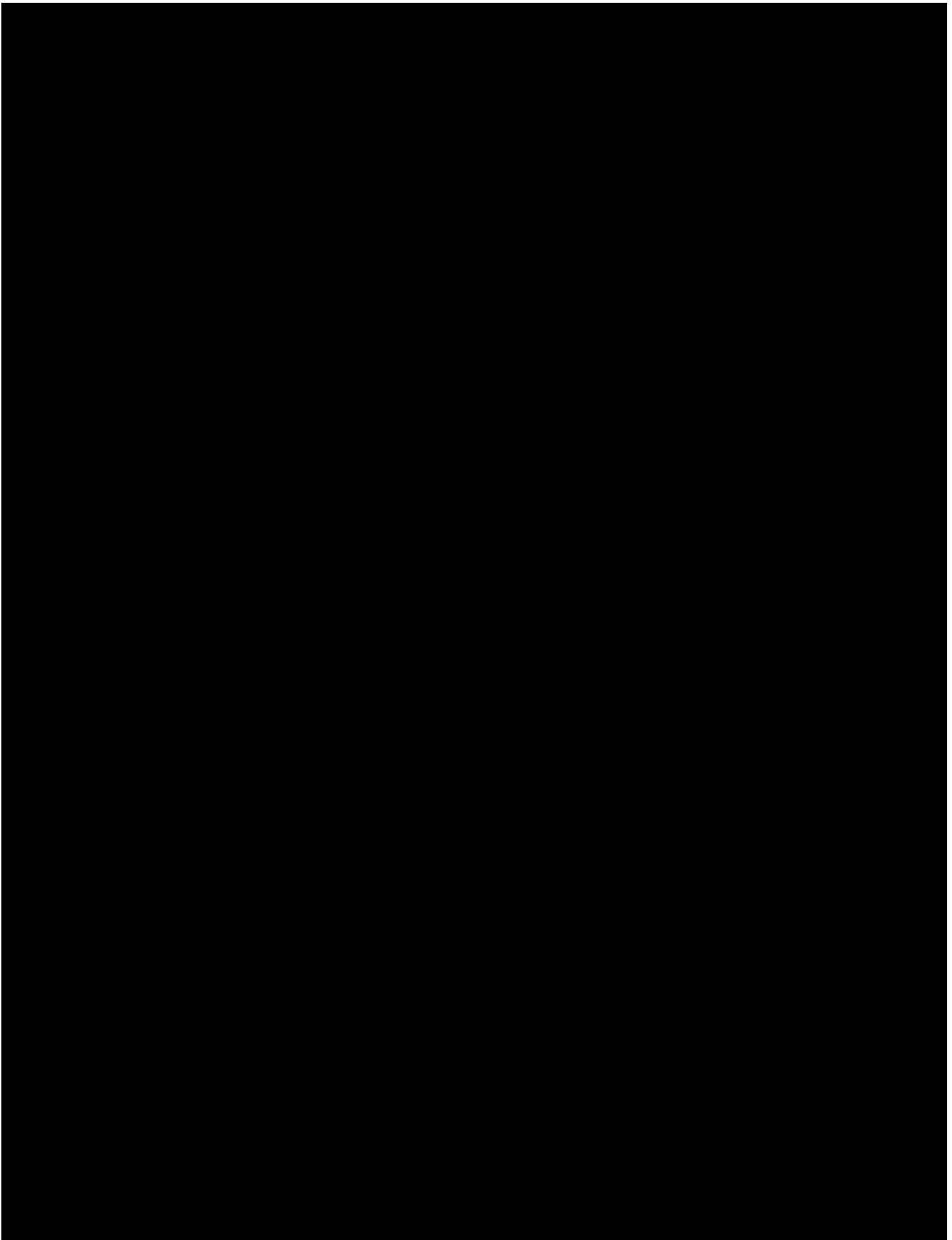
4.2.3 Non-Key Role Proposed Project Team Biographies

The following are sample biographies intended to indicate the nature of experience and skills possessed by Gartner Consulting associates. Please note that the individuals named herein are not yet committed to this project; however, any associate Gartner proposes will be appropriately qualified and will possess the skills, expertise, and credentials to perform the work described in this Proposal.

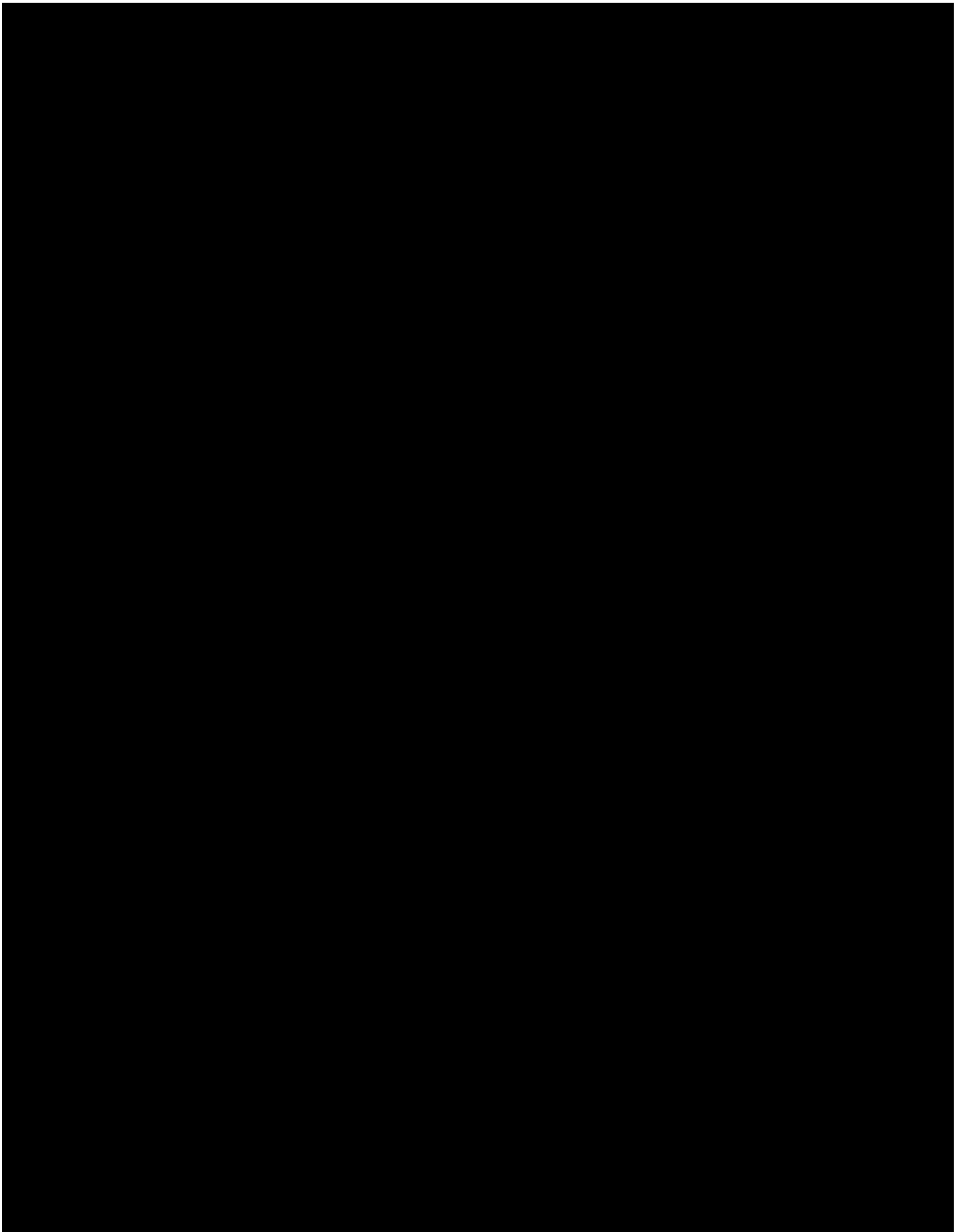


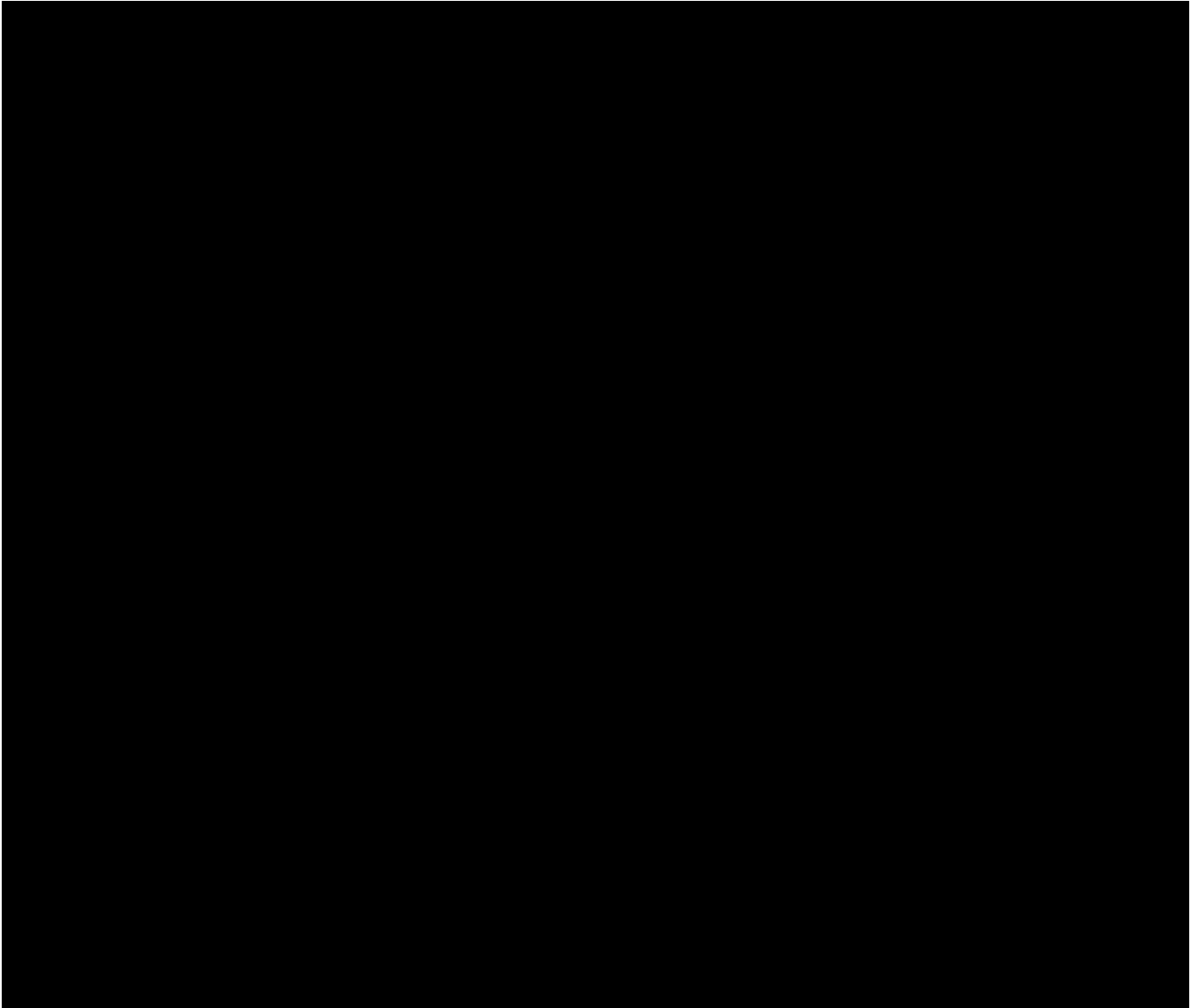


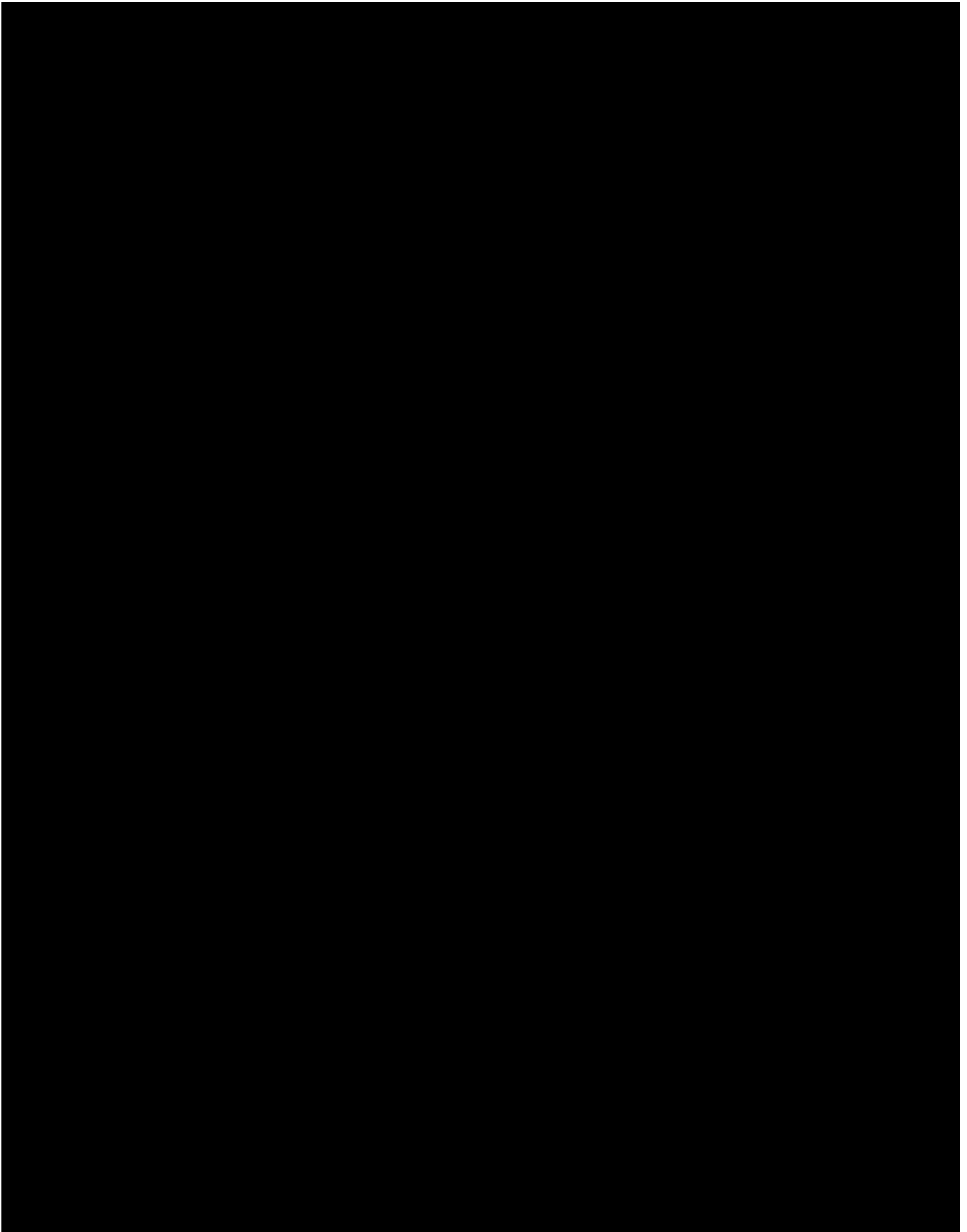


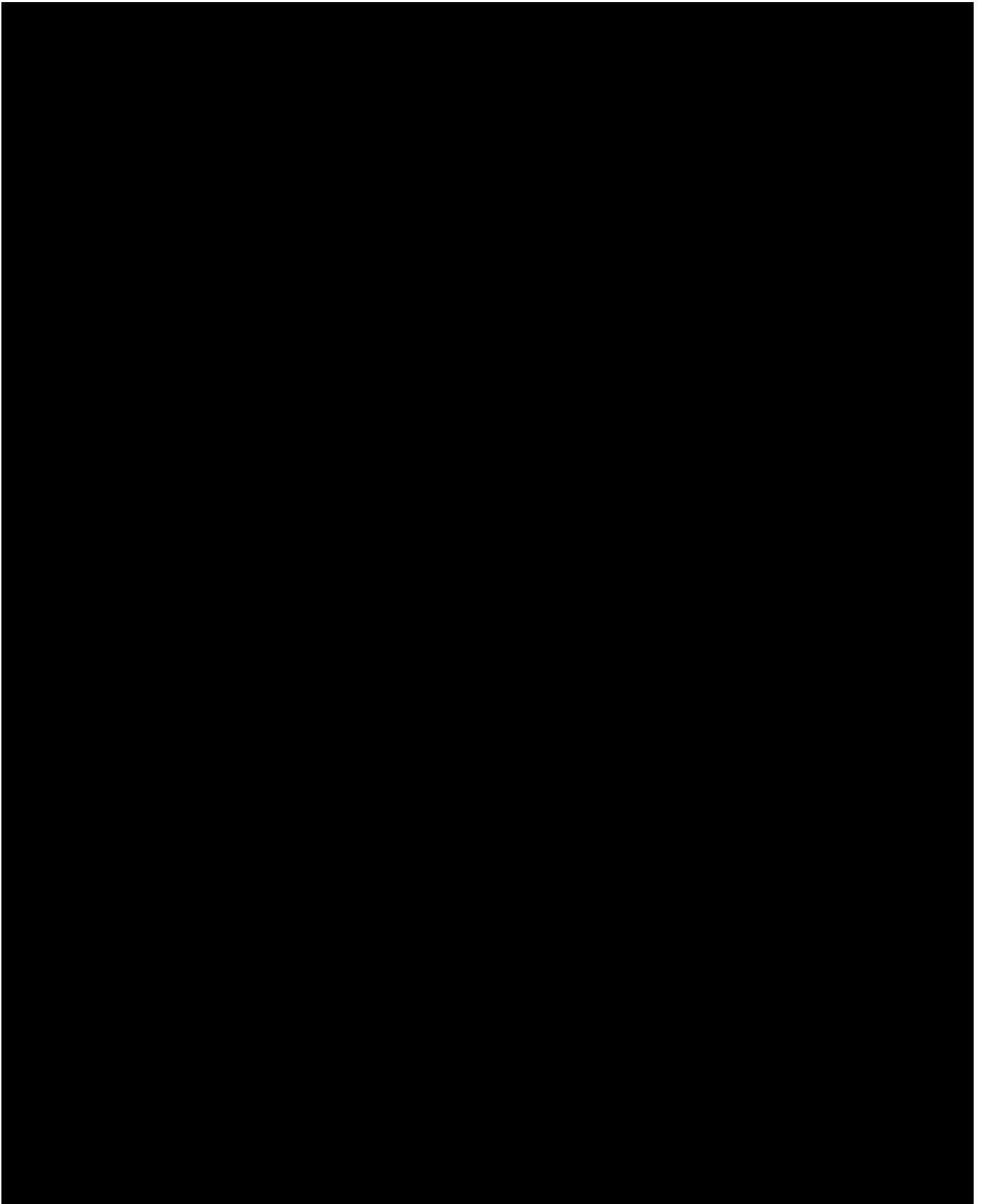


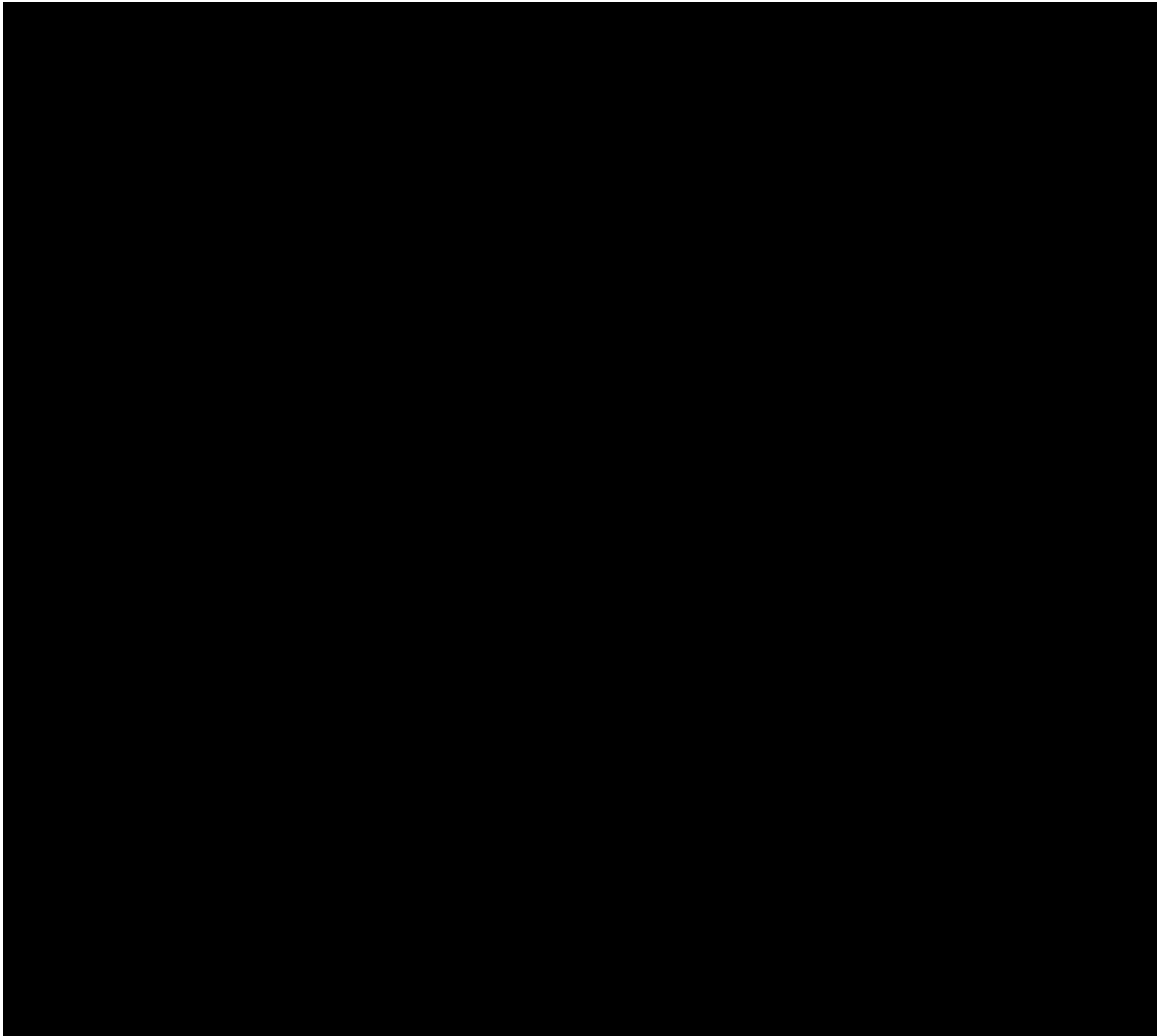




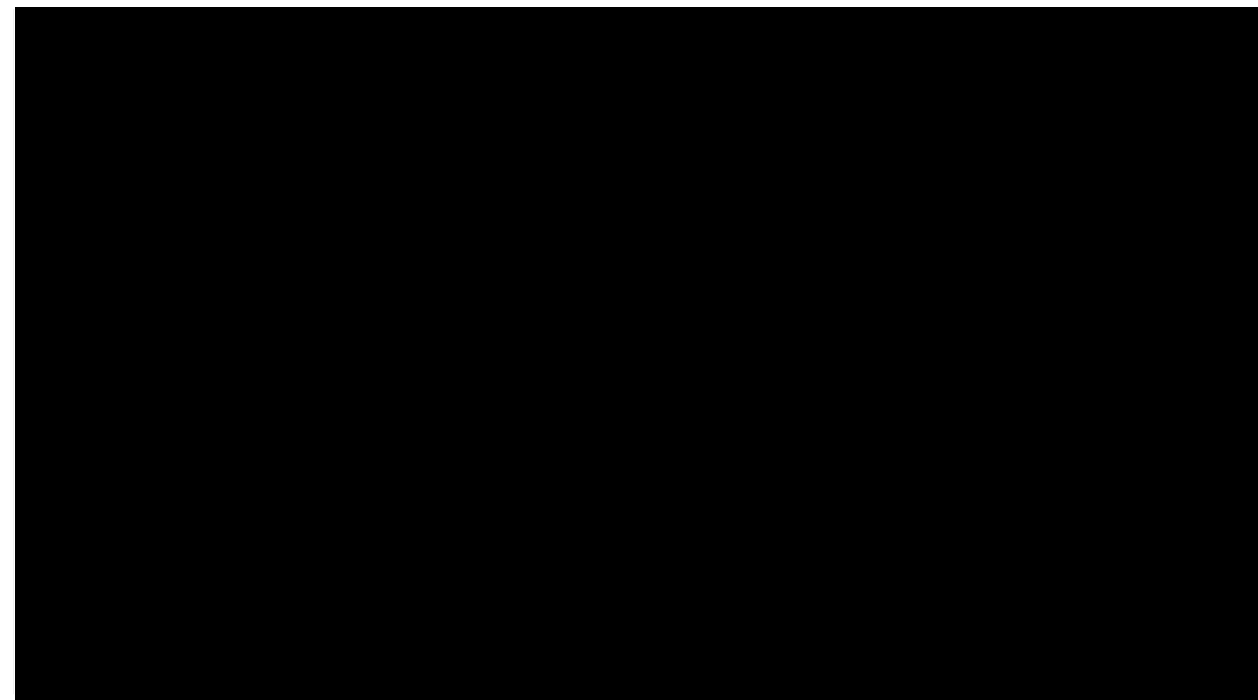
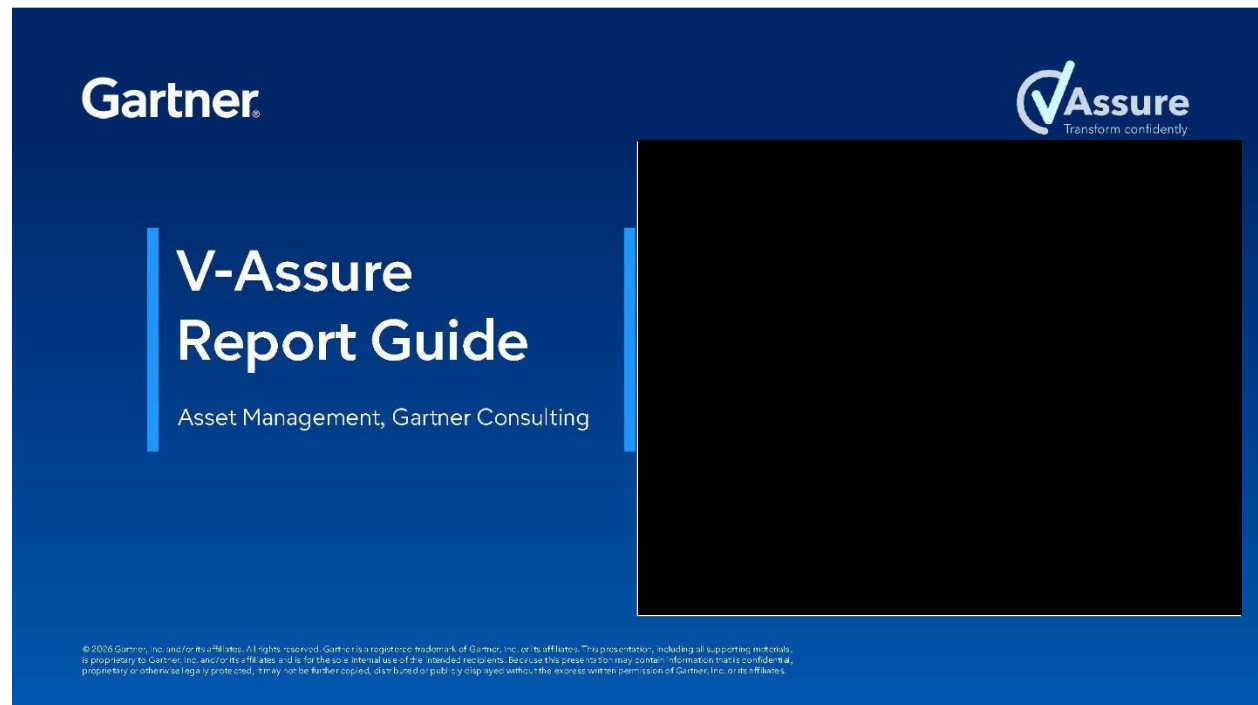


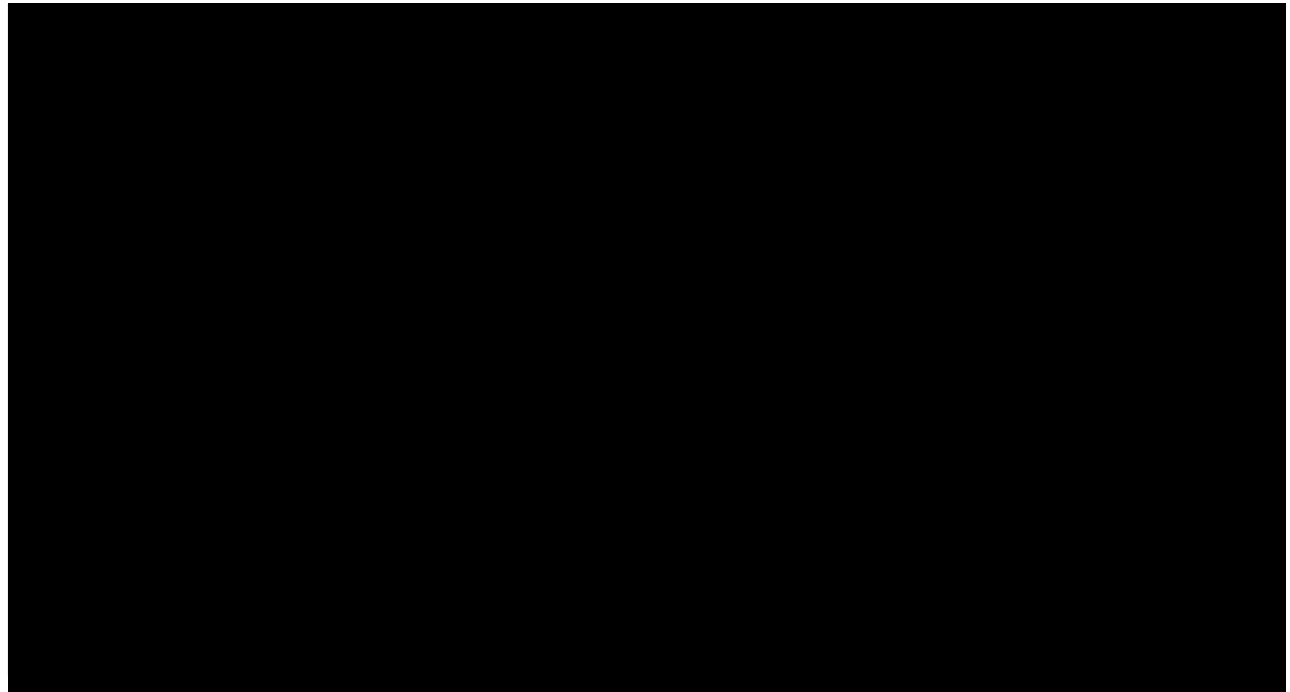
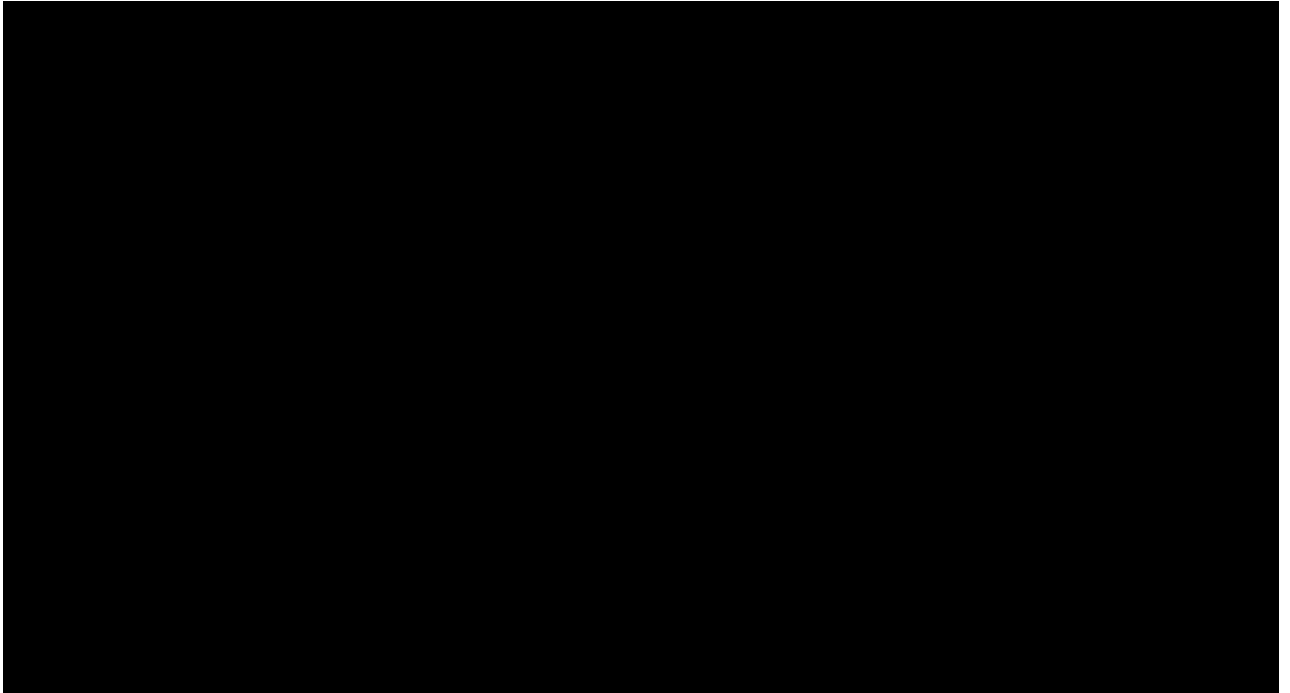


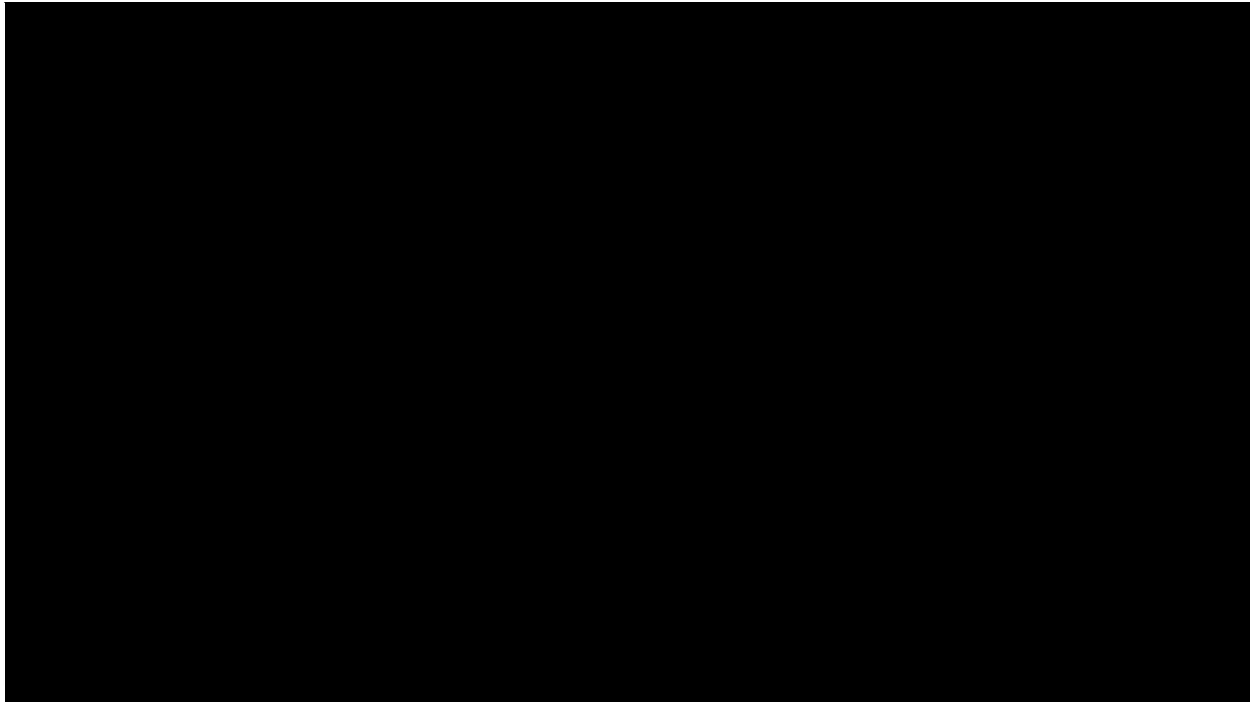
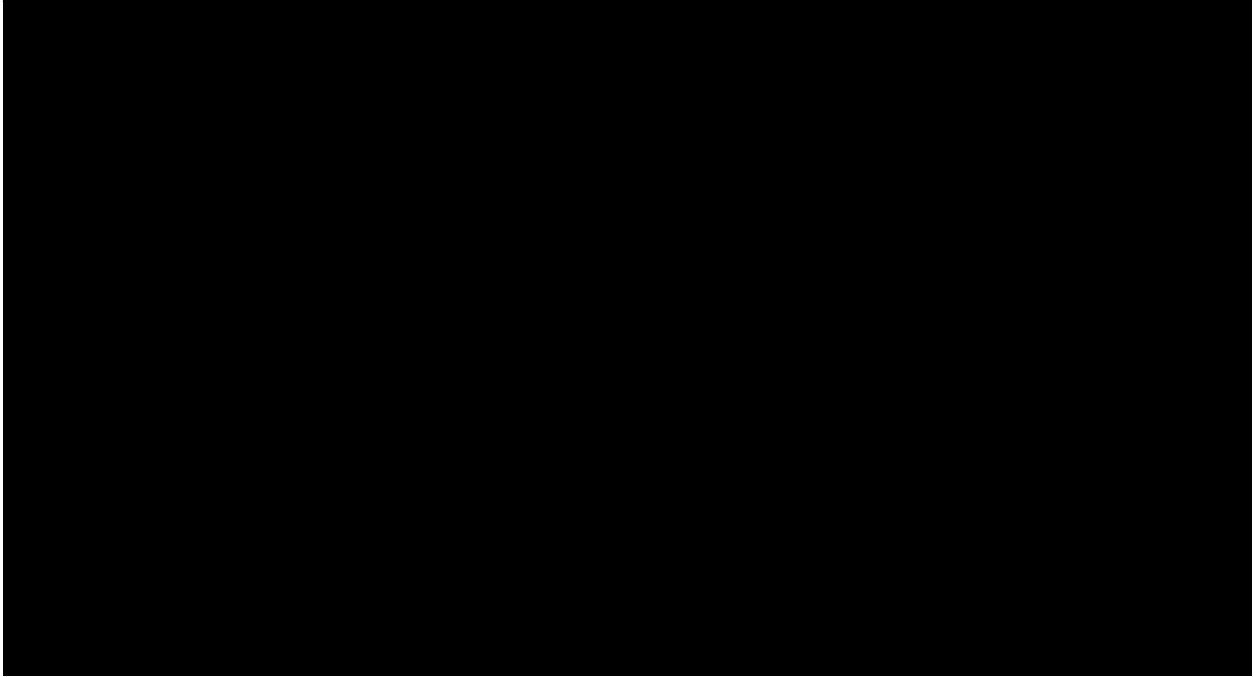


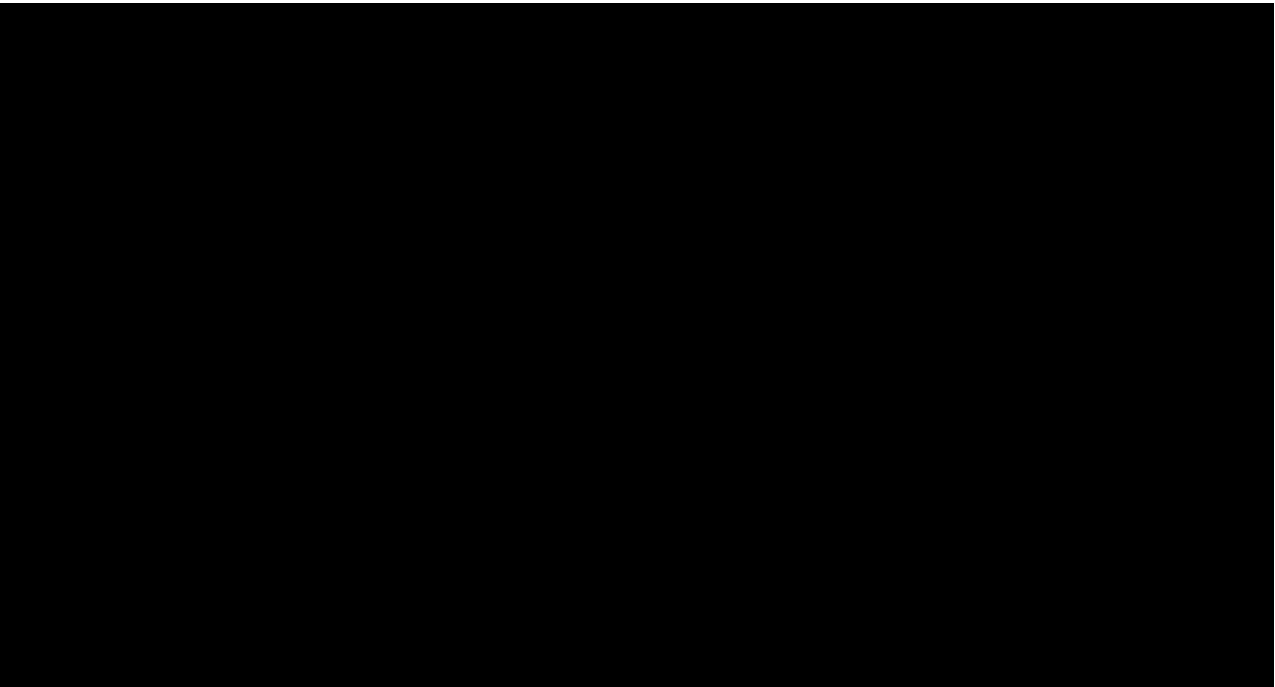
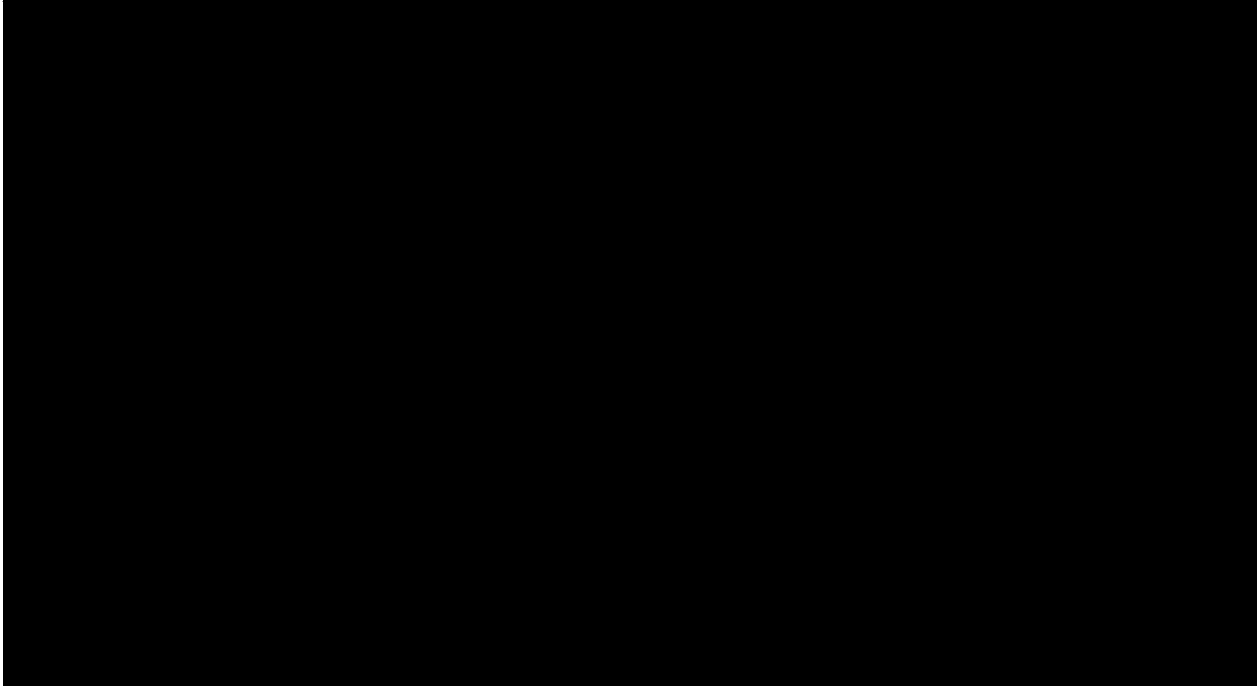


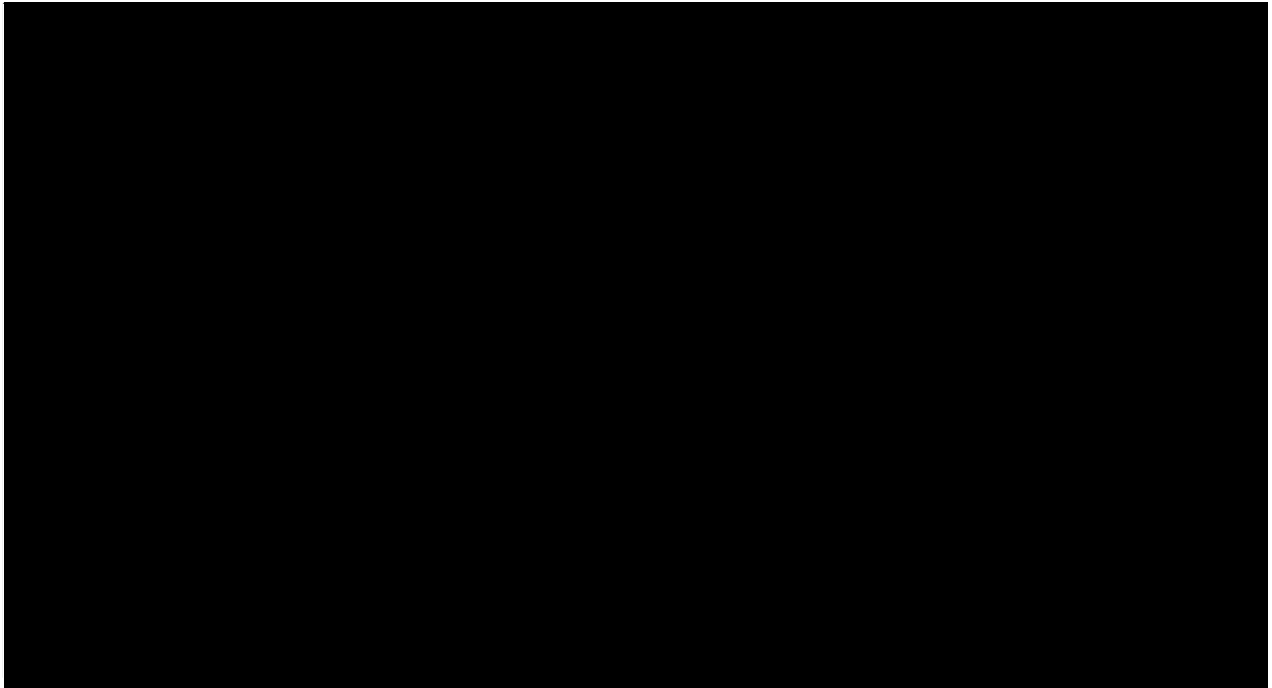
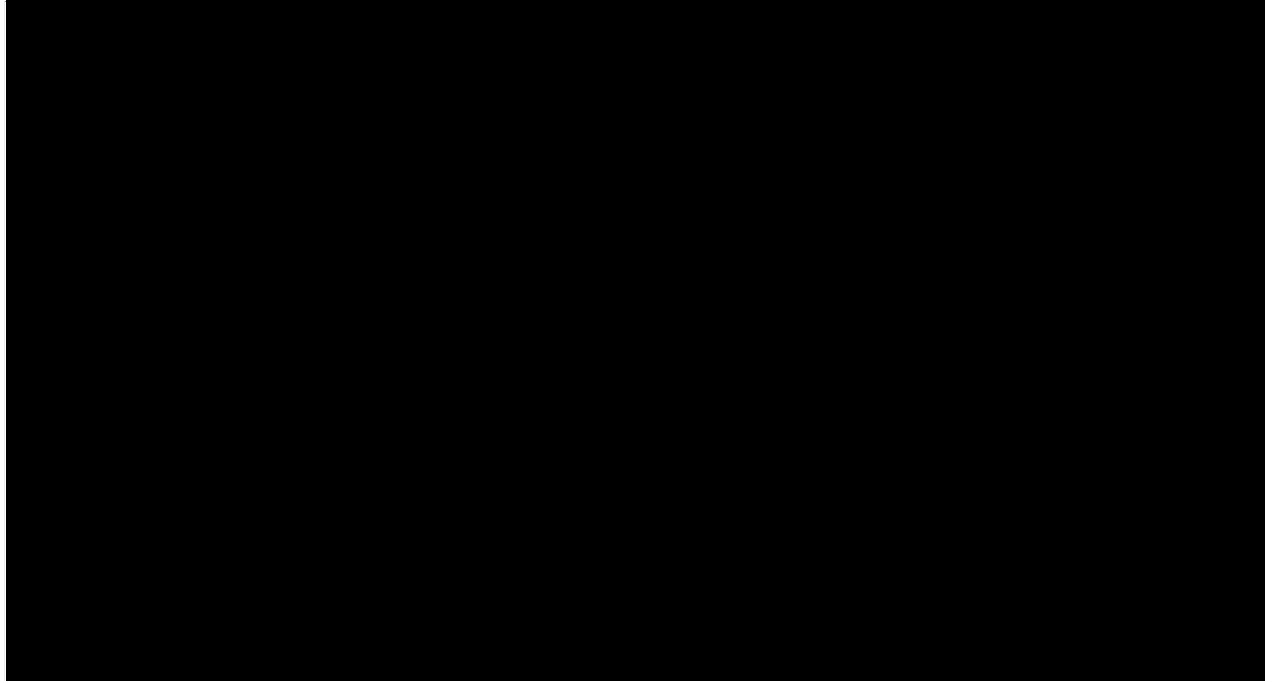
4.3 V-Assure Report Guide

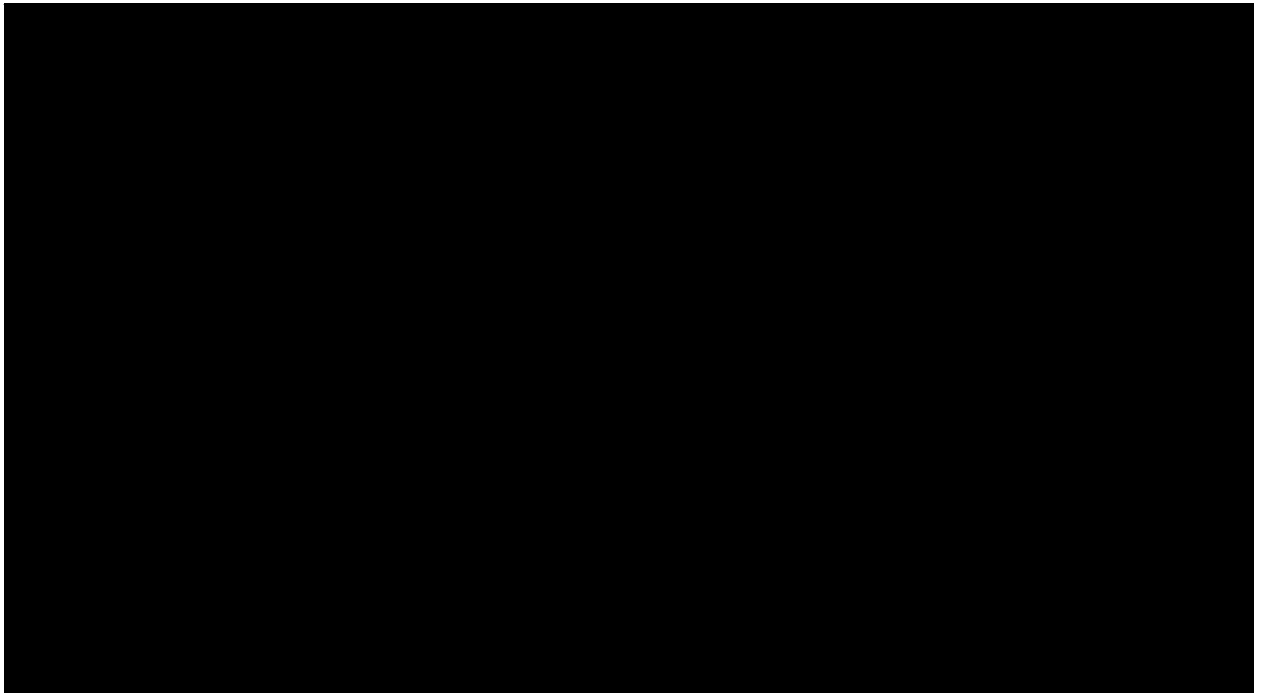












4.4 Assumptions

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

AHCCCS's Participation:

- AHCCCS will designate a project manager to act as the primary point of contact for this engagement. AHCCCS'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 Task Order Proposal assumes AHCCCS's personnel are available to assist in the manner defined in this Task Order Proposal. If AHCCCS's personnel are not available, a change of scope may be necessary.
- AHCCCS will review and approve all documents required to facilitate project execution (collectively "Project Documents") within five (5) business days. If no formal approval or rejection is received within this time frame, the Project Documents are considered accepted by AHCCCS to facilitate the drafting of each Deliverable.
- AHCCCS will schedule AHCCCS's resources for project activities and provide meeting facilities as necessary.
- AHCCCS'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 achieve a culture of continuous improvement in processes and best practices.

Data Collection:

- The due diligence (as-is) data are reasonably available via interviews and documentation review.
- AHCCCS will provide timely access to all appropriate personnel to be interviewed. These personnel will provide the data necessary to complete this engagement, answer questions, provide existing documentation and attend working sessions.
- Engagement pricing is based on the assumption that Gartner will conduct up to 135 interviews/workshops over a period of 36 months and that AHCCCS will arrange all sessions with AHCCCS's personnel.
- All data collection and interviews/surveys/workshops will take place via remote conferencing (e.g., telephone or video conference) or in person at an AHCCCS location as described in this Task Order Proposal and/or as agreed to at the project kickoff. Any surveys conducted as part of the work effort described in this Task Order Proposal will follow Gartner's confidentiality guidelines.

Key Personnel:

- Resumes/biographies of key personnel or any named associates provided in this Task Order Proposal are included solely for illustrative purposes and do not indicate the

commitment of a specific named associate. Upon signing a contract, we will identify the associates with the appropriate skills and background to deliver fully on the undertakings defined in the Task Order Proposal.

- If unforeseen circumstances require the replacement of an associate on an engagement, Gartner will inform AHCCCS 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 engagement pricing. Their guidance and support represent a significant value-add to the engagement.
- Where it is indicated in this Task Order Proposal, that a proposed team member is a subcontractor to Gartner, AHCCCS agrees to the inclusion of that individual as a member of the project team, so long as the sub-contractor is suitably qualified to provide the services. If such inclusion is not reasonably acceptable to AHCCCS, Gartner will be informed at the earliest opportunity and requested to find an alternative team member.

Place of Performance:

- Except as agreed between Gartner and AHCCCS, 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 AHCCCS's locations for on-site project time.

Deliverables:

- Any requests for additional information or resources (beyond the details described in the tasks above) that are made by AHCCCS will be considered a change in scope for this engagement and will be handled accordingly (see Changes to Scope section of this Task Order Proposal).
- All deliverables will be developed using Microsoft Office products (e.g., Word and PowerPoint).
- All Deliverables, provided by Gartner to AHCCCS shall be deemed to be accepted within 15 days of receipt by AHCCCS unless Gartner receives written notice of non-acceptance within 15 days after their delivery.
- Deliverables will not be made available to anyone outside of AHCCCS's organization.

Gartner Independence and Objectivity:

- Gartner Business and Technology Insight and Consulting recommendations are produced independently by the Company's analysts and consultants, respectively, without the influence, review, or approval of outside investors, shareholders, or directors.
- For further information on the independence and integrity of Gartner Business and Technology Insight, see "[Guiding Principles on Independence and Objectivity](#)" on our website, gartner.com, or contact the Office of the Ombuds at ombuds@gartner.com or +1 203 316 3334.

**Any questions regarding this Task Order Proposal
should be addressed to:**

[REDACTED]

Gartner, Inc.

Telephone: [REDACTED]

Email: [REDACTED]

**This Task Order Proposal was prepared for
Arizona Health Care Cost Containment System:**

Lisa Monreal

Senior Procurement Officer

Arizona Health Care Cost Containment System

Email: procurement@azahcccs.gov