

**AMENDMENT #2 TO VENTURA COUNTY**  
**CONTRACT # HCA-ECG-AC2023**

The County of Ventura (County) and Executive Consulting Group, LLC dba ECG Management Consultants ("Contractor" or "ECG") hereby agree that the agreement identified as Ventura County Contract No. HCA-ECG-AC2023 previously entered into by the parties is amended, effective March 12, 2024 as follows:

- 1. The contract not-to-exceed amount is increased by \$155,000, from \$718,000 to \$873,000 for calendar year 2023, and by \$1,575,000 from \$500,000 to \$2,075,000 for calendar year 2024.
- 2. Attachment A – January 1, 2024 is replaced in its entirety with the attached Attachment A – March 2024.

All other terms and conditions remain the same.

**COUNTY OF VENTURA**

**CONTRACTOR**

DocuSigned by:  
*Barry L. Zimmerman*  
BC8C753G2D604A5...  
Signature

DocuSigned by:  
*John N. Fink*  
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Authorized Signature

Barry L. Zimmerman  
Printed Name

John N. Fink  
Printed Name

Director  
Title

Partner  
Title

3/12/2024  
Date

3/12/2024  
Date

Attachment A – March 2024

**Understanding the Situation/Overview**

ECG appreciates the opportunity to continue to partner with and support Ventura County Health Care Agency (VCHCA) to enhance Ambulatory Care performance, patient experience, and provider satisfaction. ECG looks forward to continuing to support VCHCA with the adoption of the new Oracle Cerner Practice Management (CPM) and Experian products. ECG is prepared to present subject matter expertise and advisory services to support VCHCA’s Information Technology Services, Project Management, and Ambulatory Care teams with Oracle Health–related initiatives. In order to drive VCHCA’s success, ECG will continue to:

- Provide comprehensive operational knowledge and technical expertise on Oracle Health patient access and Experian infrastructure.
- Support a cross-functional team collaboration with stakeholders to execute on the vision, objectives, and strategy driven by executive leadership.
- Partner with Information Technology Services and translate Ambulatory Care operational processes to address key workflows and technology implications and ensure best practices for education, training, and adoption.

**Project Approach**

The ECG team of subject matter experts with specific experience working with and optimizing Oracle Health configuration and workflows will partner with the VCHCA Project Management Office, Information Technology Services, Ambulatory Care, and Oracle Health teams to evaluate workflows, endorse suggested changes, and plan the implementation solutions. ECG will continue to ensure technical alignment with operational needs from the future-state workflow validation, maintenance training, integration testing phases, superuser training, end-user training, cutover, and go-live.

**Component A: CPM/Experian Adoption and Optimization**

Time Frame	ECG Key Deliverables
January–December	<ul style="list-style-type: none"><li>• Subject matter expertise on and advisory support for best practices for the training and conversion stages, including the Oracle Health Millennium code upgrade and Common Financial Clearance (CFC) enablement in October 2024</li><li>• Confirmation of the remaining Oracle Health and Experian configuration, design, timeline, and deployment plan</li><li>• Oversight of CPM and Experian workflow alignment strategy, change management, and integration</li><li>• Optimization of the radiology and diagnostic order workflows, scheduling, and departmental work queues</li></ul>

Time Frame	ECG Key Deliverables
	<ul style="list-style-type: none"> <li>• Oversight of historical encounter charges cleanup via the Ambulatory Encounters and Charges task force</li> <li>• Development of key training materials for end-user adoption, workflow alignment, and supplemental training support</li> </ul>

### Component B: Scheduling Database Optimization

Time Frame	ECG Key Deliverables
January–June	<ul style="list-style-type: none"> <li>• Assessment of scheduling build components (appointment type, location, resource list, resources, and slot type associations)</li> <li>• Oversight of appointment textual descriptions, comments, durations, schedules, mnemonics, resources, slots, slot groups, slot types, time blocks, and user options</li> <li>• Facilitation of the on-site, rapid process improvement event</li> <li>• Confirmation of the scheduling database configuration, design, timeline, and deployment plan</li> <li>• Development of the training plan, key training materials, and change control</li> <li>• Transition to ongoing internal support</li> </ul>

### Component C: Reporting and Data Analytics

Time Frame	ECG Key Deliverables
January –September	<ul style="list-style-type: none"> <li>• Subject matter expertise on and advisory support for best practice Oracle Health KPI reporting outcomes for scheduling, registration, and referral management</li> <li>• Confirmation of the Oracle Health reporting system configuration and potential needed customization</li> <li>• Oversight of the education and training delivery of Oracle Health revenue cycle applications</li> <li>• Recommendation of ambulatory billing report optimization and potential customization needed for charges clean-up via the Ambulatory Encounters and Charges task force</li> </ul>

### Component D: Clinical Services Support

Time Frame	ECG Key Deliverables
April–December	<ul style="list-style-type: none"> <li>• Optimization of the radiology and diagnostic order workflows</li> <li>• Alignment of the workflows and documentation for multispecialty ambulatory visits to meet quality measures</li> </ul>

Time Frame	ECG Key Deliverables
	<ul style="list-style-type: none"> <li>• Creation of Oracle Cerner Dynamic worklists to align with clinic operations</li> <li>• Enhancement of the medical assistant workflows, handoffs to providers, and intake and documentation processes</li> <li>• Recommendation of the standard workflows for the providers (i.e., submitting orders, charges, templates for documentation)</li> <li>• Continuation of TOSS team support with provider and staff training, including at-the-elbow support</li> <li>• Optimization of the Employee Health workflows within Oracle Health</li> <li>• Development of the workflows for nursing support, case management, ancillary services, CPSP (a California-specific program), pulling live reports, charges/billing, and appropriate follow-up</li> </ul>

Over the course of the engagement, coordinating these activities will be paramount to success. To facilitate timely communication and track results, ECG will formally report progress weekly to Theresa Cho, MD. In addition, ECG anticipates frequent communication with providers, practice managers, and operational leaders through weekly and ad hoc meetings to ensure that any operational challenges are addressed in a timely fashion.

### **Support Roles and Assumptions**

The roles and assumptions outlined below will help clearly define roles and responsibilities throughout the engagement. Revisions will be discussed and agreed upon by VCHCA leaders as appropriate.

- Jen Wing will be responsible for overseeing all project activities related to work supported by ECG resources. Jen will participate in Executive Steering Committee meetings to provide progress updates or discuss and address barriers.
- Andrew Vu will provide subject matter expertise and advisory services to assist Information Technology Services, Project Management, and Ambulatory Care in making education, training, and adoption decisions related to CPM, the scheduling database, and reporting and data analytics in a timely manner. Andrew will partner with the Director of Clinical Informatics to support project planning, oversight, and execution of the Oracle Health and Ambulatory Care initiatives.
- Ben Kelsh will provide clinical subject matter expertise to support provider and staff workflows and processes. Ben will partner with the Chief Medical Information Officer, informatics team, and clinic leadership to support Oracle Health clinical optimization and training initiatives.

- Jacob Eisler will provide subject matter expertise to support the Experian and CFC enablement integration work with Oracle Health and provide updates, risks, or issues to Information Technology Services and Project Management.
- McKenna Teltscher will provide subject matter expertise to support the redesign of Ambulatory Care appointment types, resources, locations, and slot types. McKenna will also provide administrative and project support to the ECG team in the completion of key deliverables.
- Additional ECG team members may be assigned to support the work as appropriate.
- Changes to roles and responsibilities within the scope of the engagement will be reviewed and discussed with Dr. Cho.
- Support of the system or reporting tool configuration may be outsourced to independent contractors or similar resources as needed and not considered a part of this budget. ECG will support VCHCA in identifying these support resources.

**Schedule and Budget**

Jen Wing, Andrew Vu, Ben Kelsh, and Jacob Eisler will be assigned to this initiative in 2024. ECG expects the time and specific resources needed to change on a month-to-month basis and we will align our project team’s support with the needs of the project and expectations of VCHCA leadership. While we anticipate most work to be conducted remotely, we will be available for in-person/on-site meetings as needed. Additional ECG team members may be assigned to support the work under Jen’s direction.

	Average Hours per Month	Average Monthly Budget
Average Monthly Budget (Calendar Year 2024)	300-350	\$100,000–\$150,000

**Compensation Schedule**

The professional fees charged will be determined by the actual hours worked on the engagement at the hourly rates listed in Table 1.

TABLE 1: ECG Rate Schedule Effective through September 30, 2024

Title	Hourly Rate
Partner	\$680 - \$800
Principal	\$600
Associate Principal	\$580
Senior Manager	\$560

Title	Hourly Rate
Manager	\$450
Senior Consultant	\$370
Consultant	\$325
Senior Analyst	\$240
Analyst	\$160

ECG's hourly rates are subject to adjustment annually on October 1 and upon a particular consultant's promotion in rank.

ECG charges for our services based on the professional fees and project-related expenses incurred. ECG professional fees will be determined by the actual hours worked on the engagement at our standard hourly rates. We will require 30 days' notice from VCHCA to terminate this engagement and will bill a minimum of \$32,500 per month to VCHCA to retain the time of our project team and ECG resources. Project-related expenses will include travel, phone, document production, administrative expenses, and other out-of-pocket expenses and are estimated to be between 12% and 15% of professional fees. All travel will adhere to the County expense reimbursement policy.

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John N. Fink

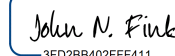
JFink@ecgmc.com

Partner

ECG Management Consultants

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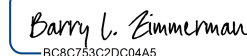
Barry L. Zimmerman

Barry.Zimmerman@ventura.org

Director

Security Level: Email, Account Authentication  
(None)

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Carbon Copy Events	Status	Timestamp
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Theresa Cho, MD Theresa.Cho@ventura.org CEO Ambulatory Care County of Ventura Health Care Agency Security Level: Email, Account Authentication (None) <b>Electronic Record and Signature Disclosure:</b> Accepted: 3/11/2024 10:09:26 PM ID: 373991c1-b376-4083-b6da-e8cd5b59017c	COPIED	Sent: 3/12/2024 2:33:49 PM
VCMC AP VCMC.AccountsPayable@ventura.org Security Level: Email, Account Authentication (None) <b>Electronic Record and Signature Disclosure:</b> Not Offered via DocuSign	COPIED	Sent: 3/12/2024 2:33:49 PM
Witness Events	Signature	Timestamp
Notary Events	Signature	Timestamp
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Certified Delivered	Security Checked	3/12/2024 2:33:40 PM
Signing Complete	Security Checked	3/12/2024 2:33:47 PM
Completed	Security Checked	3/12/2024 2:33:49 PM
Payment Events	Status	Timestamps
Electronic Record and Signature Disclosure		



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If you decide to receive notices and disclosures from us electronically, you may at any time change your mind and tell us that thereafter you want to receive required notices and disclosures only in paper format. How you must inform us of your decision to receive future notices and disclosure in paper format and withdraw your consent to receive notices and disclosures electronically is described below.

### **Consequences of changing your mind**

If you elect to receive required notices and disclosures only in paper format, it will slow the speed at which we can complete certain steps in transactions with you and delivering services to you because we will need first to send the required notices or disclosures to you in paper format, and then wait until we receive back from you your acknowledgment of your receipt of such paper notices or disclosures. Further, you will no longer be able to use the DocuSign system to receive required notices and consents electronically from us or to sign electronically documents from us.

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Unless you tell us otherwise in accordance with the procedures described herein, we will provide electronically to you through the DocuSign system all required notices, disclosures, authorizations, acknowledgements, and other documents that are required to be provided or made available to you during the course of our relationship with you. To reduce the chance of you inadvertently not receiving any notice or disclosure, we prefer to provide all of the required notices and disclosures to you by the same method and to the same address that you have given us. Thus, you can receive all the disclosures and notices electronically or in paper format through the paper mail delivery system. If you do not agree with this process, please let us know as described below. Please also see the paragraph immediately above that describes the consequences of your electing not to receive delivery of the notices and disclosures electronically from us.

#### **How to contact Carahsoft OBO County of Ventura:**

You may contact us to let us know of your changes as to how we may contact you electronically, to request paper copies of certain information from us, and to withdraw your prior consent to receive notices and disclosures electronically as follows:

To contact us by email send messages to: Catherine.Bek@ventura.org

#### **To advise Carahsoft OBO County of Ventura of your new email address**

To let us know of a change in your email address where we should send notices and disclosures electronically to you, you must send an email message to us at Catherine.Bek@ventura.org and in the body of such request you must state: your previous email address, your new email address. We do not require any other information from you to change your email address.

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#### **To request paper copies from Carahsoft OBO County of Ventura**

To request delivery from us of paper copies of the notices and disclosures previously provided by us to you electronically, you must send us an email to Catherine.Bek@ventura.org and in the body of such request you must state your email address, full name, mailing address, and telephone number. We will bill you for any fees at that time, if any.

#### **To withdraw your consent with Carahsoft OBO County of Ventura**

To inform us that you no longer wish to receive future notices and disclosures in electronic format you may:

- i. decline to sign a document from within your signing session, and on the subsequent page, select the check-box indicating you wish to withdraw your consent, or you may;
- ii. send us an email to Catherine.Bek@ventura.org and in the body of such request you must state your email, full name, mailing address, and telephone number. We do not need any other information from you to withdraw consent.. The consequences of your withdrawing consent for online documents will be that transactions may take a longer time to process..

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- Until or unless you notify Carahsoft OBO County of Ventura as described above, you consent to receive exclusively through electronic means all notices, disclosures, authorizations, acknowledgements, and other documents that are required to be provided or made available to you by Carahsoft OBO County of Ventura during the course of your relationship with Carahsoft OBO County of Ventura.