

## SUMMARY OF DEPARTMENT OPERATIONAL SUPPORT

### CONTRACT REQUEST TO THE HEALTH COMMISSION

*A DOS Contract is a Contract for the provision of goods or services that directly supports DPH's operations.*

|             |                                 |                        |                |
|-------------|---------------------------------|------------------------|----------------|
| Contractor: | Persimmony International Inc.   | Division/Section:      | DPH            |
|             |                                 | Deputy Director:       | Aman Lail      |
| Address:    | 5830 Granite Pkwy, Ste. 100-217 | DPH Administrator:     | Priti Rane     |
|             | Plano, Texas 75024              | Program Administrator: | Jeanne Lee     |
| Contact:    | James Greaves                   | Phone:                 | (949) 770-5550 |
|             |                                 | Contract Analyst:      | Joanna Li      |
|             |                                 | Phone:                 | 628-271-6154   |

Request for approval of a new Software and Support Services Agreement with Persimmony International Inc. for case management and time study in support of Maternal Child and Adolescent Health Program. The total proposed contract amount is \$295,079.68 which includes a 12% contingency for the term of July 1, 2026 through June 30, 2028 (2 years).

Mark only one for each question below:

1. Vendor Type ☒ For Profit ☐ Non-Profit ☐ Government Entity
2. Is the Vendor a CMD Certified LBE? ☐ Yes ☒ No
3. Purchasing Authority: ☐ RFP ☒ Sole Source ☐ GPO  
OCAWVR0013652
4. Does DPH have other existing contracts with this Vendor? ☐ Yes ☒ No  
If yes, approximately how many years has DPH been doing business with this Vendor? Provide explanation, as needed. N/A

#### CONTRACT INFORMATION

#### Proposed Transaction

July 1, 2026 to June 30, 2028

#### FUNDING SOURCES:

|                                   |                     |
|-----------------------------------|---------------------|
| General Fund                      | \$263,464.00        |
| <b><u>TOTAL DPH REVENUES:</u></b> | <b>\$263,464.00</b> |

|                                                       |                     |
|-------------------------------------------------------|---------------------|
| Contingency Amount                                    | \$31,615.68         |
| <b><u>TOTAL CONTRACT AMOUNT WITH CONTINGENCY:</u></b> | <b>\$295,079.68</b> |

|                                       |     |
|---------------------------------------|-----|
| <b><u>ONE-TIME UPFRONT COSTS:</u></b> | N/A |
|---------------------------------------|-----|

|                                                         |              |
|---------------------------------------------------------|--------------|
| <b><u>ANNUAL AMOUNT OF CONTRACT*:</u></b>               | \$128,091.84 |
| <i>*Excludes one-time upfront/implementation costs.</i> |              |

#### [FOR PROGRAM ADMINISTRATION CONTRACTS ONLY]

|                                        |  |
|----------------------------------------|--|
| Program Administrator Indirect Percent |  |
| <b><u>TOTAL INDIRECT EXPENSES:</u></b> |  |
| <b><u>TOTAL DIRECT EXPENSES:</u></b>   |  |

## **SUMMARY OF DEPARTMENT OPERATIONAL SUPPORT**

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#### **PROPOSED BREAKDOWN OF ITEMS/SERVICES**

| <b>Item or Service</b>                                                                                                                                                                                      | <b>Quantity</b>                                   | <b>Amount</b> |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------|---------------|
| Case Management<br>Includes configurable assessments, calendar, caseload management, and reporting. Granular user permissions.<br>Unlimited programs.<br>\$3600 First Year per User<br>4% increase annually | First Year - 31 Users<br>Second Year - 31 Users   | \$227,664.00  |
| Time Study Included                                                                                                                                                                                         | First Year - 150 Users<br>Second Year - 150 Users | Included      |
| Data Import Setup (One Time Configuration)                                                                                                                                                                  | 4 @ \$2500 each                                   | \$10,000.00   |
| Cyber Liability & Tech E&O Gap Coverage<br>(to meet DPH requirement)                                                                                                                                        |                                                   | \$25,800.00   |
| Inbound Referral Users                                                                                                                                                                                      | 50                                                | \$0.00        |
| Total Base Amount                                                                                                                                                                                           |                                                   | \$263,464.00  |
| 12% Contingency                                                                                                                                                                                             |                                                   | \$31,615.68   |
| Total Contract Not To Exceed Amount                                                                                                                                                                         |                                                   | \$295,079.68  |

#### **Purpose of Contract:**

Persimmony International Inc. will provide case management application support with data import implementation, to replace the existing software application used by the Child and Adolescent Health program. The software centralizes assessments, visit notes, referrals, and other case information, allowing staff to maintain consistent documentation across teams. The system also includes time-study tools that track how staff hours are allocated across activities for reporting and planning.

Persimmony International Inc. is a case management software provider established in 2002 that supports public health and community-based programs by organizing client records, service documentation, and required reporting. The software is operated in a secure, cloud-based environment and is used by healthcare organizations to manage large volumes of program and client data.

#### **Performance Monitoring:**

The contract will be monitored in accordance with Hospital and network monitoring procedures by the Program Manager assigned to these services.

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**Listing of CEO, Board of Directors, and Owners of 10% or More of the Firm:**

|                                           |                                                                                                                                                                                                                          |
|-------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>CEO:</b>                               | James Greaves, President and CEO                                                                                                                                                                                         |
| <b>Board of Directors:</b>                | Michael Kogus, Chairman and Founder                                                                                                                                                                                      |
|                                           | James Greaves, President and CEO                                                                                                                                                                                         |
|                                           | Brian Scott, CFO, Secretary and Treasurer                                                                                                                                                                                |
|                                           | There are no current vacancies on the Board of Directors of Persimmony International, Inc. The Board is fully constituted with three (3) members as confirmed at the most recent Board Meeting held on January 15, 2026. |
| <b>Owners of 10% or more of the Firm:</b> | Michael Kogus, Chairman and Founder                                                                                                                                                                                      |
|                                           | James Greaves, President and CEO                                                                                                                                                                                         |
|                                           |                                                                                                                                                                                                                          |