

STATE OF NORTH CAROLINA CENTRAL PIEDMONT COMMUNITY COLLEGE	REQUEST FOR INFORMATION NO. 88-260021-PH	
	Issue Date: April 24, 2026	
Refer <u>ALL</u> Inquiries to: Robin Harper E-Mail: Robin.Harper@cpcc.edu Telephone No. 704-330-2722, x3909	Due Date: May 21, 2026, by 2pm EST	
	Commodity: 811620 – Software as a Service Description: Health Science CRM Platform	
	Using Agency Name: Central Piedmont Community College	

This Request for Information (“RFI”) is available electronically on the North Carolina electronic Vendor Portal (“NC eVP”) at <https://evp.nc.gov/>

The purpose of this RFI is to survey the market for information requested herein and not to award a contract. Submission of a response does not create an offer, and no award will result by submitting a response.

The State recognizes that considerable effort may be required in preparing a response to this RFI. However, the Respondent shall bear all costs for preparing and submitting a response. Information obtained through this RFI process may be used to develop a future solicitation. Responses to this RFI will be received until 2:00 p.m. EST, on May 21, 2026.

EXECUTION

VENDOR NAME:	E-MAIL:	
STREET ADDRESS:	P.O. BOX:	ZIP:
CITY & STATE:	TELEPHONE NUMBER:	TOLL FREE TEL. NO:
TYPE OR PRINT NAME & TITLE OF PERSON SIGNING:	FAX NUMBER:	
AUTHORIZED SIGNATURE:	DATE:	

SECTION I. RESPONDENT QUESTIONS, RESPONSE INSTRUCTIONS, AND CONFIDENTIALITY

A. Schedule

Respondents will have three weeks to prepare their submissions to this RFI. Responses must be received by the date, time, and location specified on the cover sheet of this RFI. There is no guarantee that all RFI submissions will be invited to present. If selected, respondents will be notified of the specific date and time approximately two weeks in advance of their presentation.

Intended Schedule of Events:

Event	Date and Time
RFI Issued	April 24, 2026
Written Questions Due	May 4, 2026, by 2pm EST
Response to Written Questions	May 7, 2026
Submission of Information Due	May 21, 2026, by 2pm EST

B. RFI Related Questions / Clarification Questions

Any questions regarding the RFI should be emailed on or before May 7, 2026, at 2:00pm EST to the attention of: Robin.Harper@cpcc.edu. All questions must be submitted in writing. Please enter “**Questions RFI 88-260021-PH**” as the subject for the email. An addendum containing any general clarification questions and their answers will be issued as an addendum to this RFI within the electronic vendor portal (eVP).

Vendors responding to the RFI shall designate a single person of contact within that company as receipt of all subsequent information regarding this RFI.

C. Instructions for Developing Responses

When developing Responses to this RFI, the Respondent should consider the following:

Central Piedmont recognizes that considerable effort will be required in preparing a response to this RFI. **However, please note that this is a request for information only, and not a request for services.** The Vendor shall bear all costs for preparing this RFI.

Multiple responses will be accepted from a single vendor provided that each response is comprehensive, meets all the college’s requirements, and is truly unique. Please place separate submissions through eVP and clearly mark responses as “Response #1, Response #2, etc.

Central Piedmont expects concise, detailed, point-by-point responses to each of the RFI response items identified in Section IV of this RFI. Central Piedmont is not interested in brochures or “boilerplate” responses. Instead, responses should clearly define how the vendor’s proposed solution(s) would meet Central Piedmont’s business requirements and objectives. Any issues or exceptions to Central Piedmont’s requirements should also be identified and explained.

The following outline is offered to assist in the development of your response.

- ____ 1. A cover letter -- the cover letter should include a summary of your response, such as indicating which areas you are responding to and an indication of supporting documentation included.
- ____ 2. The response should cover any or all areas of information requested by this RFI and be submitted in a .pdf format.

____ 3. Although the College does not limit the size of responses, you are asked to consider that the College will rely upon staff with limited time availability to review these responses. To ensure that your response receives the attention it deserves, you are asked to consider limiting the size of your response (not counting any supporting documentation) to approximately 20 pages. If you consider supporting documentation to be necessary, please indicate which portions of the supporting documentation are relevant to this RFI.

A comprehensive, detailed equipment list including software required for the proposed solution should be provided. All software identified in the response must be commercially available and in general distribution on or before the date of award. While Central Piedmont will require a pilot installation of any final solution adopted, the college is not interested in participating in any field trials of new software.

The response should define all services that would be required by the proposed solution. The response should also include:

- The vendor's understanding of the project and services by addressing Central Piedmont's business requirements and objectives;
- An estimated total cost of ownership for the solution, including continued compliance with emerging industry standards.

Responses to the Request for Information (RFI) will help the college:

- Decide whether to issue a solicitation,
- Determine the scope of work, and implementation timelines

D. Instructions for Submitting Responses

1. Responses to this Request for Information (RFI) shall be submitted via the electronic vendor portal (eVP) by the due date and time specified herein. Additional information can be found at the eVP updates for Vendors link: <https://eprocurement.nc.gov/news-events/evp-updates-vendors>
2. Respondents must submit their response to this RFI via the Electronic Vendor Portal (eVP) by the specified time and date provided in the Schedule.
3. When submitting a response, include all pages of the RFI, a completed and signed EXECUTION Section on page 1, and responses to the requested information contained in Section IV.
4. One (1) redacted response in accordance with Chapter 132 of the North Carolina General Statutes, the Public Records Act, identified as RFI #88-260021-PH - Respondent's Name - Redacted. For the purposes of this RFI, redaction means to edit a document by obscuring or removing information that is considered confidential and/or proprietary by the Respondent, and that meets the definition of Confidential Information set forth in G.S. 132-1.2. Any information removed by the Respondent should be replaced with the word, "Redacted."
5. Per NCGS 132-1, et seq., information or documents provided to the College in response to this RFI are Public Record and subject to inspection, copy and release to the public unless properly marked pertaining to, but not limited to, NCGS § 132-1.2.

If the Vendor does not provide a redacted version of the proposal with its proposal submission, Central Piedmont Community College will assume no exemptions apply and will release an unredacted version if a records request is received. If the vendor has confidential information, as defined in N.C. Gen. Stat. § 66-152 and other information exempted from the Public Records Act pursuant to N.C. Gen. Stat. §132- 1.2, a redacted copy of response was provided through eVP, at the time of bid submission.

Vendor Acknowledgment: Redacted Copy submitted _____ Yes _____ No

If “No” is checked, or if no response was provided, this copy of your response, in its entirety, WILL BE provided, to third-party firms, as the result of any public records request.

SECTION II. RIGHTS AND OBLIGATIONS

A. RIGHTS TO SUBMITTED MATERIAL

All responses, inquiries or correspondence relating to or in reference to this RFI, and all documentation submitted by the various Respondents shall become the property of the College when received. Ideas, approaches, and options presented by Respondents may be used in whole or in part by the State in developing a future solicitation should the College decide to proceed with a solicitation. Further, combinations of ideas from various Respondents may also become part of a solicitation, based on consideration of various RFI submissions and the needs of the College which may differ from any single Respondent’s experience in other places.

B. OBLIGATIONS OF THE STATE

The College may choose to issue a solicitation for the procurement of a solution. However, this RFI is not a guarantee that a solicitation will be issued for any or all the services or systems referenced herein, about which ideas and approaches are being sought. Information submitted by Respondents for this RFI will remain confidential until after the award of any solicitation or until the State decides not to issue a solicitation.

SECTION III. OBJECTIVE AND PURPOSE

A. EXECUTIVE SUMMARY & INTRODUCTION

Central Piedmont Community College (Central Piedmont) is a large, urban, multi-campus, non-residential college that enrolls more than 52,000 students annually in curriculum, adult high school and basic skills, and continuing education programs, and employs more than 3,000 full- and part-time faculty and staff, making Central Piedmont one of the largest colleges in the Carolinas. Central Piedmont offers more than 300-degrees, diploma and certification programs, customized and corporate training, market-focused continuing education, and special interest classes. Central Piedmont is academically, financially, and geographically accessible to all citizens of Mecklenburg County. Central Piedmont responds to the workforce and technology needs of local employers and job seekers through innovative educational and training strategies. Established in 1963, Central Piedmont has provided over 60 years of service to Mecklenburg County residents, businesses and industry, engaging approximately 250,000 people each year through various programs, services, events, and performances.

Central Piedmont is conducting industry research to learn more about available Customer Relationship Management (CRM) systems and explore potential solutions that will assist with operational functions for the Health Professions and Human Services Program area of Central Piedmont.

The new system is intended to be used as a multi-functional tool that will track clinical contracts; functional / fillable applications for up to two programs on each application; database for employees including a calendar; maintain equipment inventory for check-in / out; Appointment Calendar inclusive of name, appointment, follow-up and billing; and Electronic Medical Record (EMR) Training forms.

SECTION IV. DESIRED, FUNCTIONALITY, OUTCOMES AND REQUIREMENTS

A. FUNCTIONALITY

Please describe how your solution delivers the following functionality.

1. Clinical Contracts and approval workflows
 - a. Track from beginning to end
2. Equipment requests and inventory tracking
3. Leave requests with calendar views that is integrated with M365 calendars and Ellucian Colleague Employee Self Service (ESS) Leave
4. New employee onboarding forms
5. Admission application processing for at least 23 Health Sciences programs
6. Security Assertion Markup Language (SAML)-based Single Sign-On (SSO) with enterprise identity providers. Authentication and access must be centrally managed.

B. DESIRED OUTCOMES

The new Health Sciences software platform is expected to deliver the following outcomes. Please describe how your solution delivers the desired outcomes.

1. Ability to share, view, edit, version, and archive large attachments, including transcripts, certifications, Test of Essential Academic Skills (TEAS) scores and admission letters.
2. Support for separate applications for students and structured sections for advisors, faculty, Department Chairs, and Associate Deans.
3. Intuitive navigation, hierarchical organization, and clear separation of admissions and clinical agreements processes.
4. Security and Access Control, compliant with CIS standards
5. Cloud and mobile access, with student submissions separated from internal workflows
6. Automated applicant notifications and letters, by on screen confirmation and follow up email.
7. Maintain common lists for consistent data across applications
8. Flexible reporting and data analysis for advisors, faculty, and Department Chairs.
9. Multiple document attachments per record import/export capabilities, Microsoft 365 product integration and historical data tracking.
10. Support PDF, DOCX, XLSX, and image files (JPG/PNG) for uploading and viewing documents.
11. Support for larger file size documents (provide size limitations)
12. Personalized dashboards, formula-based calculations, administrative audit logs, and note entry capabilities, including record updates and permission-based actions. Field-level access control must be supported where necessary.
13. workflow automation
14. Tracking and routing of approvals, attachments, comments and private notes
15. Calendar Management integration with Microsoft 365

16. Schedule and track equipment maintenance
17. Provide a solution to request and track personnel leave requests
18. Automated review and approval with timestamped updates
19. Training and Documentation by role
20. Comprehensive documentation of applications, workflows, data structures, and reporting criteria.
21. Provide optional technical and help desk support
22. Optional access to dedicated support resources
23. Ability to export and backup the data
24. Ability to create, host, and manage custom internal and external forms

C. REPORTING AND DATABASE FUNCTION

The new Health Sciences software platform is expected to deliver the following reports. Please describe how your solution delivers these reports.

1. Student application volume and outcomes
2. Program-level admissions tracking
3. Clinical contract status and expirations
4. Externship placement tracking
5. Equipment and time-off request status
6. Accreditation and equity-related reporting

D. APPLICATION FUNCTIONS

Please describe how your solution delivers these functions.

1. INTEGRATION:

Data export to Microsoft Excel is required. Real-time integration with Microsoft Teams, Outlook calendar, or SharePoint is not required, though optional connectors may be considered.

2. FORMULAS & CALCULATION LOGIC:

The system must support configurable formulas and business logic, including:

- Program-specific admissions scoring
- Eligibility checks and conditional logic
- Standardized evaluation rules to support equity and consistency

3. WORKFLOW FUNCTION / DOCUMENTATION:

Workflow logic must be documented within the system and supported by internal user guides. Formal external flowcharts are not required.

4. WORKFLOW COMPLEXITY:

Typical workflows involve 8–20 steps with multiple decision points. Examples include:

- Student admissions review and decision routing

- Clinical contract approval and renewal
- Equipment request approvals
- Time-off request approvals

5. NOTIFICATION CHANNELS:

Preferred notification channels are email and in-application alerts. Short Message Service (SMS) notifications are not required.

6. TEMPLATES:

Existing Word and PDF templates must be supported for attachment or automated generation within workflows.

7. ELECTRONIC CALENDAR

Calendar Integration:

The system is not intended to replace an enterprise calendar system and does not require integration with Outlook Calendar.

8. PERSONNEL SCHEDULING RULES:

The system must track date-based information (e.g., deadlines, contract expirations, requested time-off dates) but does not replace Human Resources (HR) scheduling or Enterprise Resource Planning (ERP) leave management systems.

9. Application ROLES:

Provide roles associated with application functionality: e.g. Users include administrative staff, supervisors, program personnel, advisors, and application administrators.

E. TRAINING AND DOCUMENTATION

Please describe the training associated with your solution, including format, duration, delivery method, etc.

1. TRAINING DELIVERY:

Training will be delivered internally by Health Sciences personnel. Describe what training materials you provide. Do you offer train the trainer?

2. DOCUMENTATION FORMATS:

Process-specific user guides; for example:

- Admissions applications
- Contract management
- Supervisors and administrative staff
- Application builders and system administrators

3. TECHNICAL SUPPORT

- Provide Support Hours
- Provide Service Level Agreement (SLA)

SECTION IV. Technology Standards

Below are the college's technology standards. Please explain any deficiencies or gaps for the standards you are not able to meet.

Software Standards

- a) Endpoint installed
 - i) Supports Windows 11, or macOS/iPadOS within one major version of the latest vendor release.
 - ii) Compatible with ITS application management platforms: Jamf, Intune
 - iii) Solution must support deployment via Citrix or Azure VDI (if virtualization is required)
 - iv) Does not require the end-user to have local administrator role

- b) College hosted
 - i) Compatible with Microsoft Azure virtualization standards (e.g., Hyper-V, Azure-hosted VMs)
 - ii) Supports current standard MS Windows Server or Redhat Enterprise Linux version
 - iii) Must support Azure SQL Managed Instance (if database required)

- c) SaaS
 - i) Vendor-guided implementation and ITS project request required
 - ii) Support enterprise licensing model (no single-payer credit card subscriptions)

- d) Compatibility and standards
 - i) Meets or exceeds accessibility standard WCAG2.1 AA
 - ii) Supports latest version of Microsoft Edge and other Chromium-based browsers
 - iii) Supports delivery of software updates via ITS application management platforms (e.g., Intune).

- e) Identity and Access
 - i) Supports SAML2 and/or Microsoft Entra ID SSO
 - ii) Includes role-based access permissions
 - iii) Supports group-based role provisioning via SCIM, Entra ID, or API integration
 - iv) Administrator access requires SSO if supported; local admin logins require MFA

- e) Data and integration
 - i) Integration methods: Ellucian Ethos, WebAPI, or structured data file transfer
 - ii) College data must be stored in USA
 - iii) Vendor must comply with all applicable regulations (e.g. FERPA)
 - iv) Solution supports data export in non-proprietary forms (e.g. JSON, CSV)

Hardware Standards

- a) Endpoint devices
 - i) Compatible with ITS hardware management platforms: Dell TechDirect, Intune, Extron

Other Standards

- a) Networking
 - i) Wi-Fi connectivity must support 802.1x or WPA2-PSK for Wi-Fi authentication and be compatible with 802.11ac / Wi-Fi 5
 - ii) Wired connectivity must support 100/1000Mbps RJ45 Ethernet
 - iii) Power Over Ethernet requirements must not exceed 30W (PoE+)
 - iv) Must support enterprise networking capabilities (e.g., routable across VLANs, compatible with DHCP and DNS)
 - v) Must support encrypted protocols such as HTTPS, SMBv3, and SSH

- b) Support
 - i) Vendor provided technical support with defined escalation paths and SLA

- ii) Vendor provided end-user and technical documentation
- iii) Vendor provided implementation and configuration assistance
- iv) Solution must support automated delivery of firmware and software updates via enterprise app management platforms (e.g., Intune, Jamf, SCCM) or native OTA (over-the-air) update mechanisms.

Security Standards

- a) Data Encryption
 - i) How does your solution protect sensitive data at rest and in transit, and what encryption standards are used?
- b) Cyber Resilience:
 - i) How does your solution securely integrate with third-party applications or services, including authentication, authorization, and data protection controls?
 - ii) What independent security assessments (e.g., penetration testing, third-party reviews) are conducted, and how frequently?
- c) Incident Response
 - i) Describe your incident response program, including how security incidents are detected, managed, and resolved.
 - ii) Provide a summary of any material security incidents or data breaches in the past five years and the corrective actions taken. Promptly notify us of any security issues, updates, or reports concerning the solution and our data within it, ensuring transparent communication.
- d) Compliance Requirements
 - i) How does your solution support FERPA and HIPAA requirements for protecting student data, and can you provide a current SOC 2 Type II report?
 - ii) Establish clear data retention and secure deletion/anonymization policies for unnecessary sensitive data, with written proof of data deletion within 24 hours.
- e) Access Control
 - i) Implement robust authentication mechanisms, including single sign-on (SSO) and multi-factor authentication (MFA), alongside role-based access control (RBAC), to restrict access based on roles.
 - ii) Adhere to the principle of least privilege and segregation of duties.
- f) Continuous Monitoring
 - i) What logging and monitoring capabilities are provided, including visibility into user and administrative activity? How does your solution support integration with enterprise monitoring or SIEM platforms such as Splunk Enterprise Security?
- g) Third-Party Security
 - i) What third-party services or subprocessors are used, and what role do they play in delivering the solution?