

Information Technology (IT) Vendor Interactions Policy

Policy Number:	ITD-2026-01
Effective Date:	06/01/2026
Supersedes:	N/A
Review Date:	05/01/2027
Issuing Office:	Information Technology Division (ITD)
Applicable To:	All NCDHHS staff, including State employees, Temporary Solutions, and contracted staff.
Legal Authority:	<i>G.S. 143B-10(a) and (j)(3)</i>
Approved By:	Vijay Ramanujam, Chief Information Officer Dr. ClarLynda Williams-DeVane, Chief Deputy Secretary
Contact:	Kwame Stringfield, IT Director of Vendor and Financial Section, NCDHHS

1. Purpose

The North Carolina Department of Health and Human Services (NCDHHS) regularly receives outreach or meeting requests from IT vendors, including lobbyists, non-profits, and for-profits, offering technology services, people, products, demonstrating capabilities, participating in proof-of-concept interactions, or proposing solutions. This policy provides a structured, consistent process to maintain visibility, reduce duplicate or premature interactions, efficiently use state resources, and ensure compliance with procurement and technical safeguards. While it is important to build and maintain sustainable relationships with the vendor community, this policy will help alleviate requests for similar IT conversations across multiple divisions within the agency and ensure the ITD team is aware of and/or part of these conversations.

Policy Objective

This policy establishes an agency-wide standard process for IT vendor-initiated and DHHS-initiated conversations with IT vendors, including lobbyists, non-profits, and for-profits offering technology services, people, products, demonstrating capabilities, proof-of-concept participation, and entities proposing solutions. The goal of this policy is to achieve the following objectives:

- Vendor interactions are **visible** across the agency leadership, including leadership and their delegates, to reduce, minimize, and avoid duplicate interactions with the same vendors for similar purposes.
- Assists divisions in determining **when** to involve ITD and how to coordinate efficiently.
- Provides divisions a process to **log** Interactions with IT Vendors, so the Agency maintains a shared understanding of such technology-focused interactions.

2. Scope

This policy applies to all NCDHHS employees, Temporary Solutions employees, and contractors having interactions with IT vendors, including non-profit organizations that provide technology products, staffing, and services.

2.1 This policy applies to interactions involving:

- Demonstrations or presentations of any technology product, people resource offerings, software, platform, or service.
- Any unsolicited request from a vendor resulting in discussions or explanations of technical capabilities or potential solutions.
- Exploration of technical needs for a business problem, requirement, or use case.
- Any vendor outreach proposing a technology demonstration.
- Any interaction initiated by vendors or by NCDHHS intended to understand any potential technical offering.
- Any innovation or proof of concept involving IT vendors.
- No interactions are allowed directly with the vendors under the CAI staffing contract about staffing services. However, interactions with CAI are allowed based on organizational needs.

2.2 This policy does NOT apply to:

- Vendor outreach via all channels – email, text, social media, phone calls, that is not accepted, not responded to, or does not result in a meeting.
- Non-technical interactions where no technology, product, staffing, or capability is discussed.
- Formal market research initiated by NCDHHS, procurement activities such as RFI, RFPs, RFQs, MOAs, SOWs, Evaluations, procurement-related demos, etc.
- Ongoing interactions with vendors on the program, projects, operations and maintenance through an executed contract with NCDHHS, such as Steering Committees, Governance committees, status calls, go-lives, rollouts, and escalations, etc.
- Interactions that happen at conferences do not have to be logged into the database, as long as they do not result in formal procurement, award, or handshake decisions at the conference, revealing non-public information, or a follow-up meeting requested by the vendor and attended by NCDHHS after the conference.

In other words, any conference interactions that may result in procurement should go through the formal procurement and legal process to work at NC DHHS.

3. Definitions

Term	Definition
IT Vendor	An external entity, including non-profits, presenting, demonstrating, proposing, or discussing technology products, staffing, platforms, or services.
Interaction	A virtual or in-person interaction with an IT Vendor where technical solutions or services are the main topic.
Demo	A vendor-led demonstration of a product or service. Demos are not a commitment to procure.
Technical Capability or Service	A vendor’s proposed functionality, service, or technical solution intended to meet a business or technical need.
Proof of Concept or Proof of Value	An idea or solution is being tested by NCDHHS and the vendor together within the NCDHHS ecosystem.

Term	Definition
Unsolicited Offer	Vendor outreach promoting products or services without the Agency's request. Staff should treat these cautiously to avoid premature influence.
Procurement Sensitive Information	<i>Nonpublic or confidential information related to requirements, specifications, costs, acquisition strategies, or vendor proprietary data obtained through market research or other formal procurement activities.</i>
IT Vendor Interaction Database	The Agency-wide repository of vendor interactions. Entries are for internal visibility only, not endorsement or procurement justification.
Market Research	The process of gathering, analyzing, and interpreting data to understand the market condition, supplier capabilities, and industry trends relevant to procurement activities. There can be market research and no solicitation

4. Policy Statement

1. ITD participation is required for vendor interactions involving technology as listed in section 2.1.
2. Staff shall not share non-public or procurement -sensitive information with vendors.
3. *Participation of each division's procurement office is required for any vendor interactions involving technology, as outlined in section 2.1*
4. Demonstrations conducted during vendor interactions that are not part of the market research process or formal procurement process do not mean NCDHHS will purchase those services or products.
5. Divisions shall follow the steps outlined in Section 5.0 Procedures.
6. Divisions coordinate and schedule their own meetings; ITD does not assume scheduling control.
7. If ITD is initiating the vendor interaction, then the ITD team will coordinate and schedule the meetings in collaboration with the respective divisions or offices.
8. The Vendor Interaction Database's purpose is for internal NCDHHS visibility only, to reduce duplication, and to improve efficiency. This database shall not be discussed or shared with any vendors at any point.
9. ITD will make the determination on participation and designation of appropriate technical staff.

5. Procedures

5.1 Vendor Interaction Steps

1. Make a professional judgment with NCDHHS and your respective program needs in mind to determine whether you really need to meet with the vendor.
2. You do not have to respond to every vendor request or have the obligation to meet with them. If you still feel like responding to the vendor but do not intend to meet, respond diplomatically to say that you are unable and not interested in meeting at this time.
3. Many times, you or your team might not be the best person to meet with the IT vendor, and you could send the request to your respective ITD portfolio director without copying the vendor. If you do not know who your IT portfolio director is, please use the link below to find out.
[Application Portfolio Management Office \(APMO\) & Project Management Office \(PMO\)](#)
4. Check if the meeting request from the vendor or the request initiated by NCDHHS involves technology, such as an IT product, IT staffing (under the CAI contract), platform, service, feature, solution, or capability.

5. Use the IT Vendor interaction database to evaluate:
 - Check if there were any past meetings between the vendor and your division or any other division.
 - Avoid duplicate demos
 - Understand who has already spoken with them
 - Review prior discussion summaries
6. If the interaction request meets one of the types listed in section 2.1 and you still intend to meet with the vendor, then inform and include the respective ITD’s portfolio director or their assigned delegate.
7. Do not share the vendor interactions or database with the vendor requesting the meeting or with other competitive vendors.
8. Make sure the interaction with the vendor has a specific agenda.
9. If the meeting meets the criteria in section 2.2, no notification or ITD involvement is required.
10. Make the entry into the IT Vendor Interaction Database within 2 business days after the interaction happens using this [Log DHHS Vendor Interaction](#).
11. Entries must contain factual information only and may not include opinions, commentary, assessments of the vendor, or subjective interpretation of meeting content.

5.2 Expected Behaviors During The Vendor Interaction

1. Respective Divisions facilitate scheduling and vendor coordination.
2. ITD attends, as appropriate, to listen in and learn.
3. No confidential, proprietary, or procurement-sensitive information shall be shared.
4. Demos or presentations must be explicitly framed for information purposes only.
5. No commitments or implied preferences should be communicated.
6. Staff must avoid any statements or representations that imply a promise of a future procurement opportunity, preferred vendor status, or that could be interpreted to provide a competitive advantage.

6. Roles and Responsibilities

Identify who is responsible for what under this policy. Use the table below.

Role / Position	Responsibilities
Business Divisions	<ul style="list-style-type: none"> ● Manage vendor interactions and meeting scheduling when the meeting is accepted by the business division. ● Ensure ITD participation when required. ● Complete post-meeting log entries. ● Do not share procurement-sensitive information.
ITD Division	<ul style="list-style-type: none"> ● Participate in vendor interactions involving technology. ● Lead or co-lead demos to reduce redundancy and maintain neutrality. ● Maintain and support the Vendor Interaction Log. ● Provide technical and compliance guidance.
Office of the Procurement, Contracts, and Grants (OPCG) and	Offer procurement-related guidance when vendor interactions approach procurement boundaries and attend all vendor interactions, if possible.

DHB Procurement Office	
Office of the General Counsel (OGC)	Provide advice on confidentiality, legal requirements, and lobbying considerations.

7. Compliance and Enforcement

- ITD or Operational Excellence leadership may request missing entries or notifications.
- Repeated noncompliance may require follow-up with division leadership.
- Improper disclosure of procurement-sensitive information may result in corrective action.
- Periodic reviews of the log will be conducted.
- Staff should exercise caution when responding to unsolicited vendor offers and obtain procurement and/or legal guidance when necessary.

8. Exceptions

No exceptions to this policy are permitted other than what is outlined in Section 2.

9. Related Policies and References


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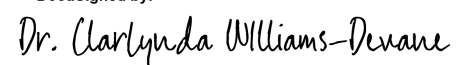
10. Revision History

Maintain a running log of policy changes below.

Version	Effective Date	Revised By	Summary of Changes
1.0	06/01/2026	Information Technology Division (ITD)	Initial issuance.

Approval and Signature

Signature	Date
Signed by:  734632E254284D3... Vijay Ramaniyam, Chief Information Officer	05/21/26 1:56 PM PDT

<p>DocuSigned by:  <small>33023E3C927E400...</small></p> <hr/> <p><i>Dr. ClarLynda Williams-DeVane, Chief Deputy Secretary</i></p>	<p>05/22/26 9:17 AM PDT</p> <hr/>
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