THE CITADEL

Procurement Services

Bond Hall, Room 244
171 Moultrie Street, Charleston, SC 29409
Procurement@citadel.edu

Requirements Packet

Sole-Source Procurement

Under the South Carolina Consolidated Procurement Code, Section 11-35-1560, a sole source procurement may be used only when there is a legitimate need that only a specific supply or service can meet, when competition is not practicable, and only one vendor can reasonably provide that specific supply or service.

This packet documents and supports a non-competitive procurement under the South Carolina Consolidated Procurement Code (SCCPC) § 11-35-1560 and South Carolina Regulation 19-445. This packet must be fully completed and approved under Memo 2-001 before any purchase, contract, renewal, or obligation of funds occurs.

Each Department must complete section 1 and 2 for each soul-source procurement. Once completed, email this form to: procurement@citadel.edu

1. INFORMATION (DEPARTMENT)

Department: Admissions and Recruiting

Requestor Name and Title: Andrea J. Gross

Date: 10/22/2026

Vendor Name: Pohlig Consulting, LLC

Goods-or-Services Description: Consulting Services

Contract-or-Agreement Title (if applicable): _____

Estimated Total Cost: $43,840

Funding Source / FOAP (include grant title and period, if applicable):
140025

Period-of-Performance (start-end dates): January 1, 2027 - December 31, 2027

2. SOLE-SOURCE CRITERIA & JUSTIFICATION (DEPARTMENT)

2A. Sole Source Basis

(Check all that apply and provide explanation where indicated)

- [ ] Only one vendor can provide the required goods or services
- [ ] Vendor possesses unique or proprietary capability
- [x] Compatibility or continuity with existing systems is required
- [x] Competing would result in substantial duplication of cost or unacceptable delay
- [ ] Other allowable basis (explain below)

2B. Programmatic or Operational Need

(Explain why this requirement is necessary for instructional, operational, research-based, safety-based, compliance-based, or mission-based needs)

The Citadel implemented Technolutions Slate in 2024 and continues to expand and optimize its use as the institution's primary enrollment management and admissions platform. Ongoing consulting services are required to support system configuration, process improvement, automation, reporting, communications, portal development, event management, and staff training. These services are necessary to ensure the efficient operation of recruitment and admissions functions and to support The Citadel's enrollment management objectives.

2C. Consequences of Not Procuring

(Describe what will occur if this requirement is not fulfilled, including disruption, risk, or non-compliance)

Without these services, The Citadel would be unable to efficiently implement planned enhancements, optimize existing Slate functionality, and continue developing recruitment and admissions processes within the platform. Delays in system improvements could negatively affect recruitment operations, application processing, communications, reporting, and staff productivity. In addition, opportunities to leverage automation and best practices within Slate could be lost, reducing the institution's ability to maximize its investment in the platform.

2D. Prior Use, Historical Context, and Program Reliance (if applicable)

(Describe any prior use of the goods or services, historical reliance on the vendor or solution, incumbent status, continuity considerations, or programmatic dependency. Include relevant contract history or duration of use, if applicable.)

The Citadel engaged Pohlig Consulting during the initial implementation of Technolutions Slate in 2024. Since that time, Pohlig Consulting has provided consulting, implementation assistance, training, and strategic guidance related to The Citadel's Slate environment. The vendor has assisted in developing and customizing workflows, communications, portals, forms, event structures, reporting, and other critical system components.As a result of this ongoing engagement, Pohlig Consulting has developed extensive knowledge of The Citadel's business processes, admissions operations, implementation history, and customized Slate configuration. The institution continues to rely on this expertise to support ongoing development and optimization of its Slate environment.

2E. Market Research Performed
(Describe what sources were reviewed or compared to determine whether other vendors could meet the requirement)

The Citadel researched the market for Slate consulting and implementation services during the initial implementation of Technolutions Slate and identified multiple firms that offer general Slate consulting support. During that process, Pohlig Consulting was selected to assist with implementation, configuration, training, and strategic guidance.Since the initial implementation, Pohlig Consulting has worked directly with The Citadel to develop and customize its Slate environment and has acquired significant institutional knowledge regarding business processes, recruitment and admissions operations, and system configuration. The Citadel assessed whether transitioning support to another vendor would be practical and determined that a new vendor would require substantial time and

2F. Description of the Requirement
(Describe clearly what is being purchased. Focus on what the goods or services do - not the brand or the vendor)

The procurement is for specialized consulting, implementation support, technical assistance, troubleshooting, configuration, optimization, and training services related to The Citadel's instance of Technolutions Slate. Services will be provided remotely and will support the continued development, enhancement, and effective utilization of Slate for recruitment and admissions operations.

2G. Explanation of Sole Source Justification
(Explain in plain language why other vendors cannot reasonably meet the requirement. Avoid vendor marketing language)

Pohlig Consulting has provided implementation and consulting services for The Citadel's Slate environment since the initial deployment of the system. Through this work, the vendor has acquired extensive knowledge of The Citadel's recruitment and admissions processes, customized workflows, data structures, implementation history, and strategic enrollment objectives.The requested services represent a continuation of previously performed work involving the enhancement, optimization, training, and support of a highly customized Slate environment that Pohlig Consulting helped design and implement.While other firms may provide general Slate consulting services, no other vendor possesses the same level of familiarity with The Citadel's existing Slate configuration and

2H. Supporting Evidence Attached (check all that apply)

- ☐ Vendor exclusivity attestation (vendor letter or signed email)
- ☐ Vendor technical or proprietary documentation
- ☐ Comparison of alternative products or vendors
- ☐ Email confirmations or correspondence
- ☐ Prior solicitations or procurement history
- ☐ Other documentation (describe): _____

Department Head Acknowledgement (Department Submission):

Signature: Andrea J. Gross Digitally signed by Andrea J. Gross Date: 2026.11.10 15:23:00 -05'00'

Name: Andrea J. Gross

Date: 10/22/2026

Sole Source
Written Determination

Agency Identification: The Citadel, Military College of South Carolina (H090)

Description of the agency need that this procurement fulfills: *(See instructions on last page for guidance)*

The Citadel implemented Technolutions Slate in 2024 and continues to expand and optimize its use as the institution's primary enrollment management and admissions platform. Ongoing consulting services are required to support system configuration, process improvement, automation, reporting, communications, portal development, event management, and staff training. These services are necessary to ensure the efficient operation of recruitment and admissions functions and to support The Citadel's enrollment management objectives.

Without these services, The Citadel would be unable to efficiently implement planned enhancements, optimize existing Slate functionality, and continue developing recruitment and admissions processes within the platform. Delays in system improvements could negatively affect recruitment operations, application processing, communications, reporting, and staff productivity. In addition, opportunities to leverage automation and best practices within Slate could be lost, reducing the institution's ability to maximize its investment in the platform.

The Citadel engaged Pohlig Consulting during the initial implementation of Technolutions Slate in 2024. Since that time, Pohlig Consulting has provided consulting, implementation assistance, training, and strategic guidance related to The Citadel's Slate environment. The vendor has assisted in developing and customizing workflows, communications, portals, forms, event structures, reporting, and other critical system components.As a result of this ongoing engagement, Pohlig Consulting has developed extensive knowledge of The Citadel's business processes, admissions operations, implementation history, and customized Slate configuration. The institution continues to rely on this expertise to support ongoing development and optimization of its Slate environment.

Describe the Market Based on Research Performed: *(See instructions on last page for guidance)*

The Citadel researched the market for Slate consulting and implementation services during the initial implementation of Technolutions Slate and identified multiple firms that offer general Slate consulting support. During that process, Pohlig Consulting was selected to assist with implementation, configuration, training, and strategic guidance.Since the initial implementation, Pohlig Consulting has worked directly with The Citadel to develop and customize its Slate environment and has acquired significant institutional knowledge regarding business processes, recruitment and admissions operations, and system configuration. The Citadel assessed whether transitioning support to another vendor would be practical and determined that a new vendor would require substantial time and

Sole Source Vendor Name: Pohlig Consulting, LLC

Based upon the following determination, Agency proposes to acquire the supplies, construction, information technology, and/or services described herein from the vendor named above per SC Code Ann § 11-35-1560 and SC Regulation 19-445.2105, Sole Source Procurement.

Description of supplies, construction, information technology, and/or services vendor will provide under the contract: *(See instructions on last page for guidance.)*

The procurement is for specialized consulting, implementation support, technical assistance, troubleshooting, configuration, optimization, and training services related to The Citadel's instance of Technolutions Slate. Services will be provided remotely and will support the continued development, enhancement, and effective utilization of Slate for recruitment and admissions operations.

Explain why the described solution is the only solution that meets the agency's need and how no other identified solutions were sufficient. *(See instructions on last page for guidance)*

Pohlig Consulting has provided implementation and consulting services for The Citadel's Slate environment since the initial deployment of the system. Through this work, the vendor has acquired extensive knowledge of The Citadel's recruitment and admissions processes, customized workflows, data structures, implementation history, and strategic enrollment objectives.The requested services represent a continuation of previously performed work involving the enhancement, optimization, training, and support of a highly customized Slate environment that Pohlig Consulting helped design and implement.While other firms may provide general Slate consulting services, no other vendor possesses the same level of familiarity with The Citadel's existing Slate configuration and

Note: *Determination is not complete without required signatures and dates*

Required Signatures:

Prepared by: Laura McElwaine Digitally signed by Laura McElwaine Date: 2026.11.04 09:36:03 -05'00' **Date:** 11/04/2026

Printed Name: _____ **Title:** Assoc Dir Admissions Operations

Approved by: Caroline Connolly Digitally signed by Caroline Connolly Date: 2026.11.10 15:59:42 -05'00' **Approval Date:** 11/10/2026

Printed Name: _____ **Title:** _____

The last page contains instructions and is not required to be retained.

Sole Source
Written Determination - Instructions

Agency Identification: *(Provide Agency and Number)*

Description of the agency need that this procurement fulfills:
(Do not describe the vendor solution that meets the agency's need. This is often accomplished best by describing the problem the agency is trying to solve.)

Describe the Market Based on Research Performed: *(Enter a description of the market based on research you performed for this procurement including such things as commercially available off the shelf products, vendors providing solutions in the market space, barriers to entry to the market space, benefits and types of customized solutions and how and by whom those solutions are provided.*

- *How were the specifications or scope of work developed?*
- *Will the product be obtained from a third-party vendor or reseller, or the manufacturer?*
- *Will the reseller assist or consult in the implementation?*
- *Length of time and place of delivery?*
- *What types of warranties or other performance guarantees are available in the market?*
- *How and by whom will training be provided?*

Document and retain market research in the procurement workpaper file.)

Sole Source Vendor Name: *(Provide Vendor Legal and dba Name)*

Based upon the following determination, Agency proposes to acquire the supplies, construction, information technology, and/or services described herein from the vendor named above per SC Code Ann § 11-35-1560 and SC Regulation 19-445.2105, Sole Source Procurement.

Description of supplies, construction, information technology, and/or services vendor will provide under the contract: *(Provide a description of the product(s) and/or service(s) identified that will meet the agency's need.)*

Explain why the described solution is the only solution that meets the agency's need and how no other identified solutions were sufficient. *(Provide an informed, objective explanation for the sole source procurement method, including the agency's factual grounds and reasoning as supported by the agency's market research. The agency's explanation should be based on its own conclusions supported by its description of the market space.*

- *Vendor assertions of product differentiation or availability may be obtained as part of market research and are valuable information in the agency's assessment of available solutions, but are not, by themselves, sufficient justification for a sole source determination.*
- *Please do not cut and paste vendor claims, content, or literature in this space.*

Recommend this section be pasted into the required public notice of intent to award without competition.)

Notes:

Authorized Approver signature is the agency head unless the agency head has delegated that authority in writing to someone above the level of procurement officer and provided written notification the MMO.

Approval Date: Sole Source Determinations are required to be approved **prior to contract execution**. The approver should hand write the date at the time of approval.

Drug Free Workplace Act: The agency must obtain a DFWA certification from the vendor if the sole source procurement is $50,000 or greater.

Cost or Pricing Data must be addressed and documented in the file for any sole source procurement exceeding $500,000