

SOLE SOURCE JUSTIFICATION

A waiver from the competitive solicitation process may be granted when based upon operational compatibility with existing equipment, strong technological grounds, a unique and cost-effective feature requirement, or when it is clearly in the State's best interest.

1.) Contract Amount: \$ 97,800.00

2.) Requested Supplier: Pohlig Consulting

3.) Description of Item/Service:

The Citadel requires a consultant to partner with the Cadet and Graduate Admissions offices to implement Slate CRM so that Admissions is fully off of Recruit CRM no later than the end of 2024.

- 1) The consultant must have a minimum of 10 years' experience working in Admissions and at least 6 years' experience as Director of Admissions or above. The consultant must also be a Principal Consultant, or above, and have at least 7 years' experience implementing and supporting Slate CRM.
- 2) The consultant must work directly with The Citadel's team over the course of the project through weekly Zoom or phone calls. Any questions or support issues must go directly to the consultant for efficiency and not routed through any other departments or people.
- 3) The consultant must assist in configuring Slate to meet The Citadel's needs and work with the project team in all Slate customizations.
- 4) The consultant must evaluate Admissions business processes and provide industry best practice solutions that leverage the capabilities of Slate.
- 5) The consulting firm must solely specialize in implementing and supporting the Slate CRM tool and no other CRM tools.
- 6) The consultant must be able to work fully remote and configure Slate alongside The Citadel's project team.
- 7) The consultant must adapt under the existing contract if The Citadel's priorities or goals change during project.

4.) Establish the reasons The Citadel absolutely requires this specific Item/Service and the unique benefits that will be realized:

Reasons

- 1) Holly Pohlig is the Principal Consultant at Pohlig Consulting. She will work directly with The Citadel's Slate project team to customize and configure Slate CRM to replace Recruit CRM and implement essential functionality. Holly will leverage her 6+ years experience as Director of Admissions at Rollins University, 10+ years experience in Admissions, and her 7+ years experience implementing Slate to ensure Admissions adheres to industry best practices and has a successful Slate implementation.
- 2) The philosophy of Pohlig Consulting is that colleges and universities should be able to manage their Slate instances without requiring a consultant indefinitely. Holly teaches her clients how to customize their system for their unique needs and then how to effectively utilize it and maintain it independently – without outside support. She personally joins and actively participates in phone and Zoom meetings with real conversations, not through a service desk ticketing system. She focuses on developing her clients' Slate modules with little to no custom coding so that their staff can manage the product simply and independently. Her goal is to make sure the initial implementation is completed in a solid, functional way utilizing industry best practices with practical real-world usability.

Benefits

- 1) By replacing the poorly performing processes with Slate CRM, The Citadel can expect a significant improvement in its admissions operations. Slate CRM, when configured and customized under Holly Pohlig's guidance, will provide a robust and efficient solution to meet the core business requirements of Admissions. This means streamlined workflows, better data management, and more effective communication with prospective students.
- 2) As a part of the engagement, The Citadel's Slate system administrator (the "Slate Captain") will receive comprehensive training in system customizations and maintenance. This ensures that The Citadel will have in-house expertise to handle first-level system support, reducing the need for external support and contributing to long-term cost savings.

5.) Explanation as to why no other supplier can offer a comparable Item/Service:

Holly Pohlig is unique in that she is the industry's first full-time Slate consultant. She has over ten years experience working in Admissions and over six years experience as Director of Admissions at Rollins University. Holly is the Principal Consultant at Pohlig Consulting and her sole focus is on Slate implementation and support.

Some other consultants have a background in admission, but none at the Director level or above. Holly's unique background allows her to help her clients anticipate not just the operational needs, but also the higher-level strategic needs. As the nation's first Slate consultant, she has worked with a large variety of schools (by size and selectivity) and in a wide variety of programs (undergraduate, graduate, professional schools, etc.).

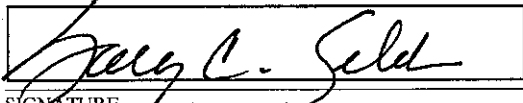
Pohlig Consulting clients work directly with Holly (and her colleague, Erin Calhoun). In other firms, it's exceptionally rare to work with the Principal Consultant. In fact, Slate consulting is most commonly just one arm of a large firm offering a wider variety of other services. Slate is the only system that Pohlig Consulting works on. It is their sole focus. They don't create graphics, write copy, or try to sell their clients other packaged services. They focus exclusively on Slate functionality for high-performance day-to-day utility.

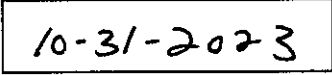
Another entirely unique aspect of Pohlig Consulting's approach is that their scope of work covers anything and everything in Slate. If the client wants or needs to revise their priorities or goals during their contract, she changes with them. This gives her colleges and universities the most flexibility and control in the usage of their contract hours.

Right to Protest: If you are aggrieved in connection with the intended award of this project you may be entitled to protest, but only as provided in Section 11-35-420 (1) South Carolina Code of Laws. Any intent to protest or actual protest must be submitted in writing to the Chief Procurement Officer, Materials Management Office
(a) via email to protest-mmo@mmo.sc.gov or
(b) via USPS or any other carrier to 1201 Main St., Suite 600, Columbia, SC 29201

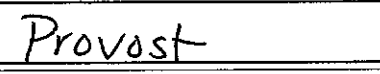
I hereby certify that the above information is accurate and request that a waiver from the State mandated bidding process be approved for the procurement of the above stated equipment, commodity, or service.

Based on the determination above, the proposed procurement action described is being procured pursuant to the authority of Section 11-35-1560 of the South Carolina Procurement Code and 19-445.2105 of the Rules and Regulations, 1976 South Carolina Code of Laws.


SIGNATURE


DATE


PRINT NAME OF DEPARTMENT HEAD


DEPARTMENT

FOR PROCUREMENT SERVICES USE ONLY	
APPROVED BY: _____ Director of Procurement Services	DATE: _____
APPROVED BY: _____ VP Finance & Business	DATE: _____
*VPFB signature only required for requests over \$100,000	

GUIDANCE:

Section 3; Provide a description of the item or service being requested with sufficient detail so that it is clear to the reviewer of this form what is being sought and the purpose it serves.

Section 4; Detail the specifics about the item or service and explain how it is uniquely positioned to meet the need at The Citadel. This section should address the role that will be played by the item/service and how it is positioned to be the only option that will work in this scenario. Factual evidence must be presented to substantiate why this is the sole item/service that will work.

Section 5; Cite the reasons why alternatives would not be acceptable and how comparable products or services from other suppliers could not meet the need. Also, include details about the market research that was performed to substantiate the sole source request. Detail the specific, quantifiable facts as to why this type of item/service cannot be purchased from any other supplier.

The Drug-free Work Place certification must be obtained for sole source procurements greater than \$50,000.