

## 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:** \$

2.) **Requested Supplier:**

**3.) Description of Item/Service:**

Financial Consultant to The Citadel. The Citadel requires a financial consultant to advise and assist in financial planning. Rick Kelly recently worked closely with all Citadel Financial Services units. Rick Kelly has been a key player working with the internal team to streamline operations and identify areas to reduce expenses further and increase efficiencies. The savings and efficiencies attained through this project will allow The Citadel to reduce expenses in the short term and remain strong and viable in the long term. This sole source will be effective for one (1) year.

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

Rick Kelly previously worked as Interim CFO to The Citadel and on efficiency improvements in direct contact with Citadel departments for the last several years and is intricately involved with the culture and operating dynamics across campus. Rick's previous involvement with Citadel staff has created efficiencies other consultants are not familiar with. Hiring any other consultant would mean starting from square one as they would have to learn about the culture on campus, understand the depth of the project, and get up to speed on the current status of several project aspects. This would not only cause a major delay in timing but would also be a considerable increase in expenses since the extra time required would add considerably more billable hours. Rick Kelly allows The Citadel to leverage his previous experience and involvement on the campus and with this specific project. Rick has previous higher education experience and South Carolina state experience.

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

Rick Kelly has previous financial consulting experience on The Citadel Campus including other South Carolina higher education and South Carolina Budget and Control Board experience that no other consultant is able to provide.

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) vis 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.

*Preethi Saint*

SIGNATURE

6/13/2024

DATE

Preethi Saint

PRINT NAME OF DEPARTMENT HEAD

Finance

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.**