



THE CITADEL

Procurement Services

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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: Office of Institutional Compliance/Title IX

Requestor Name and Title: Valerie Mercado

Date: 6/22/2026

Vendor Name: Student Ally

Goods-or-Services Description: Training/Case Management system

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

Estimated Total Cost: \$30,000 (split between 3 different offices: Compliance/HR/Krause C

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

Period-of-Performance (start-end dates): 8-15-2026-8-15-2027

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
- Compatibility or continuity with existing systems is required
- 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 requires a comprehensive platform capable of supporting student education, employee education, student safety, campus security, emergency communications, Title IX compliance, hazing compliance, student conduct administration, honor code management, reporting, case management, and campus engagement through a single integrated system.

2C. Consequences of Not Procuring

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

Separating these functions across multiple vendors would significantly reduce efficiency, increase costs, create fragmented data environments, complicate compliance efforts, and diminish the effectiveness of student engagement and safety initiatives.

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.)

We currently use Student Ally for Protection of Minors training and without the reporting aspect tied to it, we are at a disadvantage to keep our case management and honor court cases within compliance.

2E. Market Research Performed

(Describe what sources were reviewed or compared to determine whether other vendors could meet the requirement)

We previously used Maxient, but they only process case management. There is no other company that ties the two (training and report/case management) together other than Student Ally.

Other vendors I looked into:

- D. Stafford - just case management (no training tied to it)
- ATIXA - just training (no case management)
- Vector Solutions/Safe Colleges - just training (no case management)
- Third Millenium - just training (no case management)

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)

Software

2G. Explanation of Sole Source Justification

(Explain in plain language why other vendors cannot reasonably meet the requirement. Avoid vendor marketing language)

We have a specific need to connect/migrate our training and reporting efforts to create a more efficient student and employee process for required education and reporting efforts.

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: Valerie Mercado

Name: Valerie Mercado

Date: 6/22/2026

**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 requires a comprehensive platform capable of supporting student education, employee education, student safety, campus security, emergency communications, Title IX compliance, hazing compliance, student conduct administration, honor code management, reporting, case management, and campus engagement through a single integrated system.

Separating these functions across multiple vendors would significantly reduce efficiency, increase costs, create fragmented data environments, complicate compliance efforts, and diminish the effectiveness of student engagement and safety initiatives.

We currently use Student Ally for Protection of Minors training and without the reporting aspect tied to it, we are at a disadvantage to keep our case management and honor court cases within compliance.

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

We previously used Maxient, but they only process case management. There is no other company that ties the two (training and report/case management) together other than Student Ally.

Other vendors I looked into:

D. Stafford - just case management (no training tied to it)
ATIXA - just training (no case management)
Vector Solutions/Safe Colleges - just training (no case management)
Third Millenium - just training (no case management)

Sole Source Vendor Name: Student Ally

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.)*

Software

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)*

We have a specific need to connect/migrate our training and reporting efforts to create a more efficient student and employee process for required education and reporting efforts.

Note: Determination is not complete without required signatures and dates

Required Signatures:

Prepared by: Valerie Mercado

Date: 6/24/2026

Printed Name: Valerie Mercado

Title: Title IX Coordinator/Compliance Officer

Approved by: Preethi Saint

Approval Date: 6/24/2026

Printed Name: ~~David K. Hong~~
Preethi Saint

Title: ~~Director of Procurement~~
Chief Financial Officer

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