

## 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:** \$ 300,000.00

**2.) Requested Supplier:** Gregory Atkins, Independent Consultant - Higher Education

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

The Citadel requires the services of a consultant with extensive experience as a Bursar and experience working as a consultant in a Bursar's office. The consultant will review the existing processes within the Bursar's office, identify areas for improvement for efficiencies, identify areas for better use of technology, present these findings from observations, formulate a plan to remediate any findings, implement these efficiencies and create processes in areas that are not being performed at this time. The consultant needs to have hands on experience working with the existing team members within Finance & Business, Student Business, Services and the academic team. In addition, the consultant needs to have hands on experience with using Ellucian-Banner platform as that is the ERP system in place at The Citadel. One year with two options to renew.

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

The Citadel is seeking for a consultant with over 15 years of experience as a Bursar and experience as a consultant working in a college or university Bursar's office to:

- Analyze and provide recommendations of the current organizational structure of the Bursar's office
- Develop strategies to bridge collaboration between Financial Aid/Academic/Student Affairs
- Analyze and provide recommendations for Tuition and Fees Table Set Up within Ellucian-Banner platform
- Analyze, review and revise IRS Tax 1098-T processes
- Develop and implement procedural recommendations for Student A/R-Cashiering
- Develop strategies and implement the reconciliation process for any Federal Loan programs
- Experience working with the Ellucian-Banner platform
- Implement convenience fee transaction processing with the existing payment processor

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

The Citadel requires the services of Gregory Atkins, Independent Consultant, as he has 34+ years of unique higher education industry and student software experience. Mr. Atkin's recent endeavor was as an independent consultant at UNC Pembroke's Bursar's Office analyzing and providing recommendations on the organizational structure of their Bursar's office, developing strategies to bridge collaboration between Financial Aid/Academic/Student Affairs, analyzing and providing specific software recommendations for Tuition and Fees Table Set Up as well as overall configuration within the Ellucian Banner Student Platform, analyzing, reviewing and revising IRS Tax 1098-T processes, developing and implementing procedural recommendations for Student A/R-Cashiering, and developing strategies and implementing the reconciliation process for Federal Loan programs. He will be providing these services at a rate of \$60 per hour. Given the specific Banner Ellucian Bursar software related experience and the industry specific performance of Bursar management advisory services, and Citadel specific experience there is no other solution currently available.

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.

DocuSigned by:  
*Abigail Hatch*  
DB69DBEFF4964C3  
SIGNATURE

11/30/23  
DATE

ABIGAIL HATCH  
PRINT NAME OF DEPARTMENT HEAD

FINANCE & BUSINESS  
DEPARTMENT

**FOR PROCUREMENT SERVICES USE ONLY**

APPROVED BY: \_\_\_\_\_ DATE: \_\_\_\_\_  
Director of Procurement Services

DocuSigned by:  
*Preethi Saint*  
APPROVED BY: \_\_\_\_\_ DATE: 12/1/2023  
378D05A085FB435...  
VP Finance & Business - Preethi Saint

\*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.**