



Sole Source Application and Determination Form

A sole source determination is not effective until the sole source application for determination has been posted on the Purchasing website for thirty (30) calendar days without protest and is subsequently approved in writing by the Vice President of Administration and Finance.

1. Name of Department: ICASA

Contact Name: Rachel Dotson
Phone: 575-835-5934
Email: rdotson@icasa.nmt.edu

2. Name of Prospective Vendor: Smartsheet Inc.

Contact Name: Dan Thomas or Crystal Lewis
Phone: Unavailable
Email: dan.thomas@smartsheet.com or crystal.lewis@smartsheet.com
Estimated Cost: \$22,500.00 USD (\$25,000.00 tax included)
Duration (for Services or Professional Services – limited to four years): 1 Year

3. Purpose/need for purchase and detailed list of items of tangible property, services, or professional services:

Smartsheet Gov is a collaborative program management software platform that the ICASA program management (PM) team has utilized for the past 3 years. It assists our team in planning, tasking, scheduling, and budgeting infrastructure and software projects. Additionally, it is FedRAMP and DODIL-4 authorized meaning it meets the Department of Defense's strict security requirements for a cloud service.

4. Detailed explanation of criteria developed for this purchase:

When ICASA was first looking at program management software 3 years ago, it was looking for a program that could assist the team with project planning, specifically Gantt Charts and critical paths, and was capable of storing Controlled Unclassified Information (CUI). Smartsheet Inc. met our criteria (and then some) and we have been very satisfied with the software and what it provides to the PM team.

5. Provide a detailed, sufficient explanation of the reasons, qualifications or unique capabilities of the prospective vendor that make that prospective vendor the one source for providing the items of tangible property, services, or professional services:

Smartsheet Gov is a secure and reliable platform, made specifically for government agencies, that leverages Amazon Web Services (AWS) GovCloud (US) and is FedRAMP authorized. Smartsheet Gov's Defense Information Systems Agency (DISA) Impact Level (IL) 4 authorization verifies the platform has demonstrated compliance with the Federal Risk and Authorization Management Program (FedRAMP) and authorizes cloud service offerings that meet certain Department of Defense (DoD) security requirements mandated by the level of the information the offering will support. Designed to host sensitive data and regulated workloads in the cloud, AWS GovCloud (US) Regions are AWS regions operated by employees who are US citizens on US soil.

6. Provide a detailed, sufficient explanation of how the items of tangible property, services, or professional services is/are unique and how this uniqueness is substantially related to the intended purpose of the department/grant:

The PM team uses Smartsheet Gov to manage individual projects by building Gantt charts and tracking budgets which are displayed as a 'dashboard' that is available for our government customer to view at any time. We also maintain a Risk Register and Project Ideation Database using an easily accessible form and the entered information is stored in an Excel-like grid. We utilize the dashboard function to display capability status to customers in real-time. We have utilized Smartsheet Gov to initiate research collaborations between ICASA and NMT faculty and plan to extend that to other institutions via this platform. We have ongoing statewide research that leverages Smartsheet Gov for surveys and interview records. The Research Compliance Department within the Office for Research utilizes Smartsheets Gov to track security trainings and briefings for all NMT employees that have security clearances.

7. Please provide a narrative description department's due diligence in determining a basis for the procurement. Include:
 - a. method used to research and review other available sources (i.e. list of potential vendors from Purchasing, internet, state pricing agreements, purchasing cooperatives)
 - b. list of vendors contacted, the date and method of contact (i.e. email, phone call)
 - c. documentation explaining why:
 - i. those vendors cannot provide the required items of tangible property, services, or professional services
 - ii. other similar items of tangible property, services, or professional services cannot meet the intended purpose of department/grant:

After the purchase of the original license, the ICASA PM team spent time with a Smartsheet representative to help build and learn the platform for the needs that were unique to each of our projects. We have invested our time in establishing Smartsheet Gov as a critical step in our PM project development process. It would take extensive time to learn a new platform and port the current information we have to that new platform. We have not done any research into any alternatives due to

the fact that we have been reliant on this specific software for 3 years now and have invested a lot of time into its use and are very satisfied with its capabilities as a product.

I certify I have performed thorough and diligent research and analysis to determine that Smartsheet Inc. is the only source capable of providing the required FedRAMP Program Management Software. I understand that violations of the New Mexico Procurement Code (Chapter 13, Article 1 NMSA 1978) can carry severe penalties. I affirm that the information provided in this Sole Source Determination is true and accurate to the best of my knowledge and belief.

Name, Title: Rachel Dotson, Program Manager

Rachel Dotson

Review: Purchasing Services: Lisa Majkowski, Director

Lisa Majkowski 01.06.2026

Website Posting Date: 01/06/2026

Posting Expiration Date: 02/06/2026

Protested (Yes/No):

Approval: Delilah A. Walsh

Vice President of Administration and Finance

Delilah Walsh (Jan 6, 2026 14:12:31 MST)

06-Jan-2026

Requisition for Smartsheets

Final Audit Report

2026-01-05

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