



## REGION 9 EDUCATION COOPERATIVE SOLE SOURCE REQUEST AND DETERMINATION FORM

A sole source *determination* is not effective until the *sole source request for determination* has been posted for thirty (30) calendar days without challenge, and subsequently approved in writing by the State Purchasing Agent or, for Professional Services Agreements, the Secretary of the General Services Department. The foregoing requirement is regardless of whether the *sole source request for determination* has been signed by the Agency and/or the Contractor.

I. Name of Agency: **Region 9 Education Cooperative**

Agency Chief Procurement Officer: **Veronica Wadley**

Telephone Number: **469-726-8349**

Agency Contact for this request: **Veronica Wadley**

Telephone Number & Email Address: **469-726-8349; veronica.wadley@regionix.org**

II. Name of prospective Contractor: **WestEd**

SHARE Vendor Number (must be active): **0000055894**

Address of prospective Contractor:

**730 Harrison Street  
San Francisco, CA 94107**

Contact Name, Telephone Number and Email Address:

**Diane Lee  
415-615-3436  
dlee2@wested.org  
contracts@wested.org**

Amount of prospective contract before tax: **\$600,000.00**

Estimated tax amount (tax is subject to change): **\$0.00**

Term of prospective contract: **8 months; November 1, 2025 to June 30, 2026**

Note: This Sole Source is a Notice of Intent to Award and is subject to execution of a written contract and, as a result, this Sole Source does NOT constitute the formation of a contract between Region 9 and the prospective Contractor.

III. Agency is required to state purpose/need of purchase and thoroughly list the services (scope of work), construction or items of tangible personal property of the prospective contract (if this is an amendment request to an existing contract, include current contract number issued by SPD):

**Critical components included in the New Mexico Statewide Literacy Framework are leadership, instruction and intervention, assessment, professional learning, and family engagement. WestEd’s Reading Apprenticeship Framework includes each component and is backed by 25 years of research. Studies show that Reading Apprenticeship produces:**

- improvement on standardized tests,
- significant impact on students’ reading comprehension scores, and
- substantial improvement in students’ grade point average in core academic classes.

**Focused on supporting secondary teachers and administrators, evidence-based Reading Apprenticeship routines provide a rigorous approach to disciplinary literacy instruction for all students and can serve as a foundation for strategic, aligned planning and sustained professional learning and coaching.**

**Described in the statewide plan (page 24), the stages of reading directly connected to the Reading Apprenticeship Framework include:**

- Stage 3: Students read to learn new ideas, gain new knowledge, experience new feelings and attitudes, and consider multiple points of view.
- Stage 4: Students read a wide range of complex materials, both expository and narrative, and are asked to consider the varying viewpoints expressed.
- Stage 5: Students focus on an individual’s own purposes for reading whether personal or professional.

**Teachers using the Reading Apprenticeship approach “learn to model discipline-specific literacy skills and establish routines for discussion and collaboration that tap into students’ own experiences. The framework consists of four interacting dimensions (social, personal, knowledge-building, cognitive) to support academic and social-emotional learning. These four dimensions are integrated into subject-area teaching and developed through metacognitive conversation that explores students’ thinking processes. Students think and talk about how they learn as well as what they learn. This collaborative work takes place within the context of extensive reading — increased in-class opportunities for students to practice reading in more skillful ways” (WestEd, 1995-2023).**

## **DESCRIPTIONS OF SERVICES:**

<b>Reading Apprenticeship Essentials I</b>	
In-person Track	<ul style="list-style-type: none"> <li>● Comprised of 3-day live institutes</li> <li>● Full day (6-hour) sessions of immersive learning</li> <li>● Builds community and models classroom strategy and implementation</li> <li>● Teachers experience extended inquiry, collaboration, and reflection with colleagues</li> <li>● Includes team of 2 Reading Apprenticeship facilitators + all of their travel expenses, plus one training binder and one copy of “Reading for Understanding” for 40 teachers.</li> <li>● DISTRICT will host these sessions in their own venue</li> </ul>

<b>Reading Apprenticeship Essentials II</b>	
In-person Track	<ul style="list-style-type: none"> <li>● Comprised of 2-day live institutes</li> <li>● Full day (6 hour) sessions of immersive learning</li> <li>● Builds community and models classroom strategy and implementation</li> <li>● Teachers experience extended inquiry, collaboration, and reflection with colleagues</li> <li>● Includes team of 2 Reading Apprenticeship facilitators + all of their travel expenses, plus one training binder for up to 40 participants</li> <li>● DISTRICT will host these sessions in their own venue</li> </ul>

<b>Coaching</b>	
In-person	<ul style="list-style-type: none"> <li>● To be eligible to participate in coaching, a teacher must have attended at least 2 days of face-to-face PD</li> <li>● <u>Small group coaching</u> is scheduled in half-day sessions, with teachers choosing to attend an AM or PM session, together with colleagues from their same content area or in school teams <ul style="list-style-type: none"> <li>○ Teachers are asked to bring student work and will engage in formative assessment of student metacognition and their Reading Apprenticeship instructional practices</li> <li>○ Teachers are asked to bring a text they will be using in their classroom for planning next instructional steps</li> <li>○ Can include Reading Apprenticeship expert-facilitated learning walks with teacher teams</li> </ul> </li> <li>● <u>One-on-One coaching</u> for teachers can include having our Reading Apprenticeship expert model lessons in their classroom and meet for intensive lesson-planning support</li> <li>● School will host these sessions in their own venue</li> </ul>

<b>Leading for Literacy</b>	
In-person	<ul style="list-style-type: none"> <li>● Comprised of 2-day live institutes</li> <li>● Full day (6-hour) sessions of immersive learning</li> <li>● Guides teams and coaches in the effective implementation of Reading Apprenticeship at the district and/or school level. This workshop focuses on deepening of classroom practice, support for planning and evaluation, and literacy leadership development</li> </ul>

	<ul style="list-style-type: none"> <li>• Includes team of 2 Reading Apprenticeship facilitators + all of their travel expenses, plus one training binder and one copy of “Leading for Literacy: A Reading Apprenticeship Approach” for 40 participants</li> <li>• Client/District will host these sessions in their own venue</li> </ul>
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IV. Provide a detailed explanation of the criteria developed and specified by the agency as necessary to perform and/or fulfill the contract and upon which the state agency reviewed available sources. (Do not use “technical jargon;” use plain English. Do not tailor the criteria simply to exclude other contractors if it is not rationally related to the purpose of the contract.)

**New Mexico’s Public Education Department has invested in several state-level initiatives around curriculum and instruction as a route to improving instructional outcomes for students, including development and release of the New Mexico Statewide Literacy Framework and Instructional Scope. With the release of these documents, educators will need sustained professional learning to understand the relationship between/among disciplinary literacy, standards, and curriculum materials in virtual and/or in-person settings.**

The [Statewide Literacy Framework](#) states that “The ultimate responsibility of all educators is to prepare ALL students for meaningful post-secondary opportunities, including further education, meaningful employment, lifelong learning, and roles as contributing members of communities. Reading, while not the only skill necessary to access these opportunities, is the foundation for academic and long-term success. Literacy is one of the great equalizers that can assure a person can pursue a happy, engaged life for themselves and others. The ability to read affects society on the individual level and lays the foundation for a collective just society” (p. 2).

The New Mexico [Instructional Scope](#) is an “educator-influenced tool designed to provide guidance and support to assure that all students in New Mexico have access to content at their grade level combined with the use of impactful instructional strategies. The tool is a strategy for assuring a guaranteed, viable, and equitable curriculum across the state, while at the same time capitalizing on the leadership and expertise of educators at the local level” (n.p.). The Instructional Scope is designed to:

- meet districts where they are, with tools to support district-wide horizontal and vertical curricular alignment, as well as provide guidance on the sequencing of standards at the local level;
- foster programmatic planning at the district and school level and provide a rich foundation for aligned collaborative conversations about teaching and learning; and
- support teachers in their individual as well as their collaborative instructional planning and in utilizing strategies, including the use of formative classroom assessment, to guide all students in attaining grade level proficiency, or above.

**New Mexico’s Public Education Department conducted two pilot cohorts where participants learned about and implemented Reading Apprenticeship routines. This included three days of learning for administrators and educators. Providing opportunities for these pilots was a result of not requiring or expecting school districts across the state to**

**adopt one curriculum program. Rather, learning about and implementing Reading Apprenticeship routines provided educators and administrators with a framework, inclusive of evidence-based disciplinary instructional practices, that can be used in grade 6-12 and within any subject area.**

**New Mexico Public Education Department also included ongoing instructional coaching opportunities for continued learning and application of routines. These additional supports, both virtual and in-person, included support for educators and administrators. This helped to establish a focus on working together to create a coherent implementation plan to support literacy in all subject areas including (but not limited to) data-based decision-making, how to support implementation, and how to incorporate routines within professional learning communities at the campus- and district-level.**

V. Provide a detailed, sufficient explanation of the reasons, qualifications, proprietary rights or unique capabilities of the prospective contractor that makes the prospective contractor *the one source* capable of providing the required professional service, service, construction or item(s) of tangible personal property. (Please do not state the source is the “best” source or the “least costly” source. Those factors do not justify a “sole source.”)

**WestEd is the sole source developer, distributor, and facilitator of the Reading Apprenticeship professional learning courses. These courses are facilitated by consultants that are certified in Reading Apprenticeship. Reading Apprenticeship has been a project of WestEd for over 25 years.**

**The Reading Apprenticeship approach is based on a unique framework of four interacting dimensions of learning that support both academic and social-emotional learning: social, personal, cognitive, and knowledge-building. These four dimensions are integrated into subject-area teaching and developed through metacognitive conversation that explores students’ thinking processes. Students think and talk about how they learn as well as what they learn. This collaborative work takes place within the context of extensive reading and increased in-class opportunities for students to practice reading in more skillful ways.**

**Professional learning services from Reading Apprenticeship are proven to support teaching and learning across a range of demographics and educational settings. Several decades of research demonstrates that the Reading Apprenticeship approach results in more engaging and effective teacher assignments with significant impact on student literacy and overall test scores.**

VI. Provide a detailed, sufficient explanation of how the professional service, service, construction or item(s) of tangible personal property is/are *unique and how this uniqueness is substantially related to the intended purpose of the contract*.

**WestEd is the sole source developer, distributor, and facilitator of the Reading Apprenticeship professional learning courses. These courses are facilitated by consultants who are certified in Reading Apprenticeship. Reading Apprenticeship has been a project of WestEd for over 25 years.**

**WestEd has demonstrated success in providing evidence-based sustained professional**

learning and instructional coaching nationally, including New Mexico. WestEd's commitment to provide diverse and culturally responsive materials and services that can be used with any curricular materials are necessary and critical to increasing literacy performance across the state. Additionally, WestEd's deep understanding of New Mexico Public Education Department systems, frameworks, and priorities; knowledge of Statewide Literacy Framework and Instructional Scope; and ability to develop partnerships that are responsive to varying cultures positions them to effectively support educators and administrators across the state in addressing literacy needs.

WestEd's collective knowledge base, deep understanding, and experience in supporting disciplinary literacy will help educators and administrators develop a:

- deep understanding of current research on evidence-based literacy practices required for students in all subject areas,
- cohesive vision for increasing student engagement and the overall student experience in any secondary classroom,
- comprehensive implementation support plan with instructional coaching, and
- sustained professional learning to show how evidence-based, disciplinary literacy routines support the Statewide Literacy Framework and Instructional Scope.

VII. Explain why other similar professional services, services, construction or item(s) of tangible personal property *cannot* meet the intended purpose of the contract.

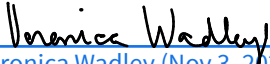
**WestEd is the sole source developer, distributor, and facilitator of the Reading Apprenticeship professional learning and coaching support. Consultants for WestEd participate in sustained professional learning and become certified in Reading Apprenticeship after successfully completing required coursework and practicums. Reading Apprenticeship has been a project of WestEd for over 25 years.**

VIII. Provide a narrative description of the agency's due diligence in determining the basis for the procurement, including procedures used by the agency to conduct a review of available sources such as researching trade publications, industry newsletters and the internet;; contacting similar service providers; and reviewing the State Purchasing Divisions' Statewide Price Agreements. Include a list of businesses contacted (*do not state that no other businesses were contacted*), date of contact, method of contact (telephone, mail, e-mail, other), and documentation demonstrating an explanation of why those businesses could not or would not, under any circumstances, perform the contract; or an explanation of why the agency has determined that no businesses other than the prospective contractor can perform the contract.

**The agency has reviewed the available resources noted in this document and has reviewed WestEd's past history in providing the services required to meet the goals of this work within New Mexico and in other similar agencies. This framework has been used and proven effective in other states. As NM follows this same trajectory, implementing this evidence-based framework will lead to an increased understanding of disciplinary literacy in New Mexico.**


Certified by:

Date: 11/03/2025

  
Veronica Wadley (Nov 3, 2025 12:58:32 MST)  
Agency Chief Procurement Officer

Agency Approval by:

Date: 11/03/2025

  
Bryan Dooley (Nov 3, 2025 15:29:44 MST)  
Region 9 Education Cooperative Executive Director









# R9\_WestEd\_LHB\_ NMIS\_Sole Source #26008

Final Audit Report

2025-11-03

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