



## 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: Joanna Cosbey**

SHARE Vendor Number (must be active):

Address of prospective Contractor:

**9101 Hagerman Ave. NE**

**Albuquerque, NM 87109**

Contractor Telephone Number and Email Address:

**505-967-6202**

**[joannacosbey@gmail.com](mailto:joannacosbey@gmail.com)**

Amount of prospective contract before tax: **\$80,000.00**

Estimated tax amount (tax is subject to change):

Term of prospective contract: **January 2026 - June 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):

**This scope of work requires the completion of the New Mexico Technical Evaluation Manual (NM TEAM). A revision that originated in 2021. Final edits and review shall occur for final vetting to the Public Education Department. This requires an individual with prior involvement and project knowledge, expertise in best practices of evaluation, and knowledge of Federal and State regulations.**

**Additionally, an individual with specific expertise and knowledge with the previously developed IEP templates (2021) (including content; format; automated functionality; and rationale for content, format, and automated functionality). The individual will review the templates with the Office of Special Education to identify any remaining updates or changes.**

**The individual(s) will provide consultation and technical assistance to the software company to support the transition of the current Word template into the software system and explain the critical functionality elements of such forms to be compliant with IDEA and NMAC. This individual is knowledgeable of the stakeholder feedback gathered in 2021 in order to support compliance by LEAs and stakeholders (e.g., parents).**

**The individual will develop other resources, materials, or tools that are identified as required to support implementation of the software.**

**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.)

**Criteria required for completion of this project includes the individual having historical knowledge of the updates to manual, and the status of the latest revision of the NM TEAM. It is also imperative that this individual developed and created the current IEP template and has proprietary knowledge of the back-end technical aspects of the forms.**

**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.”)

**This individual is the only individual with historical knowledge having been the only contributor to the NM TEAM project that was part of the core group, and served on every revision committee since (2011) and (2017). This individual was part of a larger work-group for the Developing Quality IEP Manual and IEP template, but was the sole**

**creator of the template and development of all functionality components. It is necessary that an individual who understands the technical functionality work closely with the software company that will house the IEP template in order to maintain the integrity of the forms.**

**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*.

**The purpose of the contract is to finalize two projects (NM TEAM) and Developing Quality IEP Manual and template. While these projects are close to completion, it requires a person with the historical background and content knowledge to finalize the information. These final projects will be utilized on the NM PEDs website of technical manuals and resources and finish the plan toward the statewide unified IEP template for NM schools.**

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

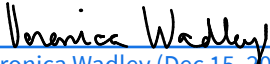
**There is not another individual with the historical knowledge and understanding of the technical aspects of the template functionality. This is a time sensitive matter. It would take an inordinate amount of time for another individual to learn the inner workings of the template to be able to accurately convey not only the functionality, but also have expertise in the content. Both factors are equally important. Content knowledge and technical knowledge and expertise.**

**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.

**This individual is the only individual with historical knowledge having been the only contributor to the NM TEAM project that was part of the core group, and served on every revision committee since (2011) and (2017). This individual was part of a larger work-group for the Developing Quality IEP Manual and IEP template, but was the sole creator of the template and development of all functionality components. It is necessary that an individual who understands the technical functionality work closely with the software company that will house the IEP template in order to maintain the integrity of the forms.**

Certified by:

Date: 12/15/2025

  
Veronica Wadley (Dec 15, 2025 09:18:18 MST)  
Agency Chief Procurement Officer

Agency Approval by:

Date: 12/15/2025

  
Bryan Dooley (Dec 15, 2025 09:57:19 MST)  
Region 9 Education Cooperative Executive Director





# R9\_Joanna Cosbey\_Sole Source 26013

Final Audit Report

2025-12-15

Created:	2025-12-15
By:	Region IX Ed Coop (contracts.procurement@regionix.org)
Status:	Signed
Transaction ID:	CBJCHBCAABAA1fnh7c-tFibzAxBq4thbO035IPodLs0t

## "R9\_Joanna Cosbey\_Sole Source 26013" History

-  Document created by Region IX Ed Coop (contracts.procurement@regionix.org)  
2025-12-15 - 4:13:36 PM GMT
-  Document emailed to Veronica Wadley (veronica.wadley@regionix.org) for signature  
2025-12-15 - 4:13:41 PM GMT
-  Email viewed by Veronica Wadley (veronica.wadley@regionix.org)  
2025-12-15 - 4:18:08 PM GMT
-  Document e-signed by Veronica Wadley (veronica.wadley@regionix.org)  
Signature Date: 2025-12-15 - 4:18:18 PM GMT - Time Source: server
-  Document emailed to Bryan Dooley (bryan.dooley@regionix.org) for signature  
2025-12-15 - 4:18:20 PM GMT
-  Email viewed by Bryan Dooley (bryan.dooley@regionix.org)  
2025-12-15 - 4:57:07 PM GMT
-  Document e-signed by Bryan Dooley (bryan.dooley@regionix.org)  
Signature Date: 2025-12-15 - 4:57:19 PM GMT - Time Source: server
-  Agreement completed.  
2025-12-15 - 4:57:19 PM GMT