



STATE OF NEW MEXICO 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 Chief Procurement Officer or, for Professional Services Agreements, the Secretary of the Department of Finance and Administration. 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: High Plains Regional Education Cooperative #3

Agency Chief Procurement Officer: Gary E. Gabriele

Telephone Number: 575-445-7090

II. Name of prospective Contractor:

NS4Ed, LLC.
Joseph Goins, CEO

Address of prospective Contractor:

382 Cypress Pointe Drive
Lenoir City, TN 37772

Amount of prospective contract:

\$575,000

Term of prospective contract:

10 Months

III. Please thoroughly list the services (scope of work), construction or items of tangible personal property of the prospective contract:

Proposed Source:

NS4Ed, LLC. is the sole source provider, sole publisher, sole ASP hosting source, and sole distributor of research protocols and ancillary programs attached in the SOW. NS4Ed, LLC conducts research utilizing the best available resources and will build a construct to the specs mentioned below:

Early College High Schools

1. Conduct a survey of Early College High School administrators, counselors and teachers to determine areas of needed support, success, and challenges related to instructional practice, adherence to administrative code and statutes, best and promising practices, and outcomes. The results of the survey shall be compiled in a report and will be used to inform a menu of supports that can be provided in regional or state-wide convening(s).
2. Host and facilitate a town hall meeting of Early College High School stakeholders to review the results of the aforementioned survey to prioritize actions and to identify supports for areas of challenge. This collective work shall inform an agenda and a support package to be addressed in item 3 below.
3. Work collaboratively with PED to develop an agenda for an ECHS Summit to occur in spring/summer of 2017 (before June 30, 2017). Such agenda shall address the collected body of work informed by items 1 and 2 above.
4. Work collectively with PED to determine individual ECHS or regional supports that can be provided to advance the ECHS mission and outcomes in New Mexico. Should supports be identified for ECHSs, such support shall be provided through a formal Request for Information or Application process.
5. Research national associations and practices that advance and improving access to postsecondary education through ECHSs. Such research and practices shall be made available in web based formats and disseminated to the registered ECHS in New Mexico, and professional associations that support such.
6. Provide appropriate REC III staffing for facilitation and implementation of the ECHS effort, secure meeting location, contract with content consultants, provide registration mechanism, facilitate surveys and provide lodging and mileage reimbursement to eligible workshop participants.

Workforce Readiness

1. Partner with New Mexico State University, Office of Outreach and Public Service, and the Southern Region Education Board (SREB) to facilitate and host town hall meetings in the four Workforce Investment Opportunity Act (WIOA) board regions of the state to share the results of the Building Career Pathways to Credential Attainment and Workforce Opportunities report, gather input and facilitate the development of action plans that participants can implement within their circle of influence to advance the career and technical education system.
2. Work collaboratively with PED, SREB and the New Mexico Association for Career and Technical Education to develop an agenda for a Workforce Readiness Summit to occur in spring/summer of 2017 (before June 30, 2017). Such agenda shall address the goals and recommendations of the Building Career Pathways to Credential Attainment and Workforce Opportunities report.
3. Conduct a funding landscape study to determine state and federal funding streams that currently exist with the same, or connected, mission or performance goals. Such study shall be disseminated to stakeholders in electronic format to inform such funding opportunities and alignment of resources to advance the career and workforce readiness system.

4. Adopt and incentivize the implementation of state approved programs of study at the local level by paying the facilitator/trainer and materials costs for teacher professional development. For example, work with New Mexico State University to secure national Project Lead The Way trainers or SREB's Advanced Career trainers to support high yield instruction in the approved pathway.
 5. Work collaboratively with the PED to review the existing career-technical education sections and courses in the states Student Teacher Accountability Reporting System (STARS) to determine course updates, additions and deletions. Such review will result with a report identifying courses to be deleted that are obsolete and not relevant to the PED career readiness system, course additions to support the PEDs course sequence development and guidebook, and relevant course modifications to update course names, numbers, descriptions, etc.
 6. Partner with the Tennessee Department of Education (<https://www.tn.gov/education/topic/work-based-learning>), or other state with a more advanced product, to obtain Work Based Learning standards, resources, tool kits, that can be customized for use by New Mexico educators, counselors, administrators and employers to strengthen and structure a students work based learning experience. Such materials, either acquired or developed, shall be made available in electronic format to the public on the PED's webpage. The branding of such materials shall occur in collaboration with Regional Education Cooperative No. 8 in Artesia, NM for consistency of look, color schemes, etc.
 7. Establish a state-wide advisory group to assist with the execution and vision of New Mexico's career readiness initiative.
 8. Provide appropriate REC III staffing for facilitation and implementation of the Workforce Readiness effort, secure meeting location, contract with content consultants, provide registration mechanism, facilitate surveys and provide lodging and mileage reimbursement to eligible workshop participants.
- IV. Provide an 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.)

The agency desires to conduct research related to Early College High Schools and to present the findings from that research in an ECHS summit in the summer of 2017. The research is to include a survey of ECHS teachers, counselors and administrators. Research into national associations and practices that improve access to postsecondary education through ECHS's will be made available to New Mexico's ECHS and the associations that support it.

The agency also desires to conduct research and to share the results of the Building Career Pathways to Credential Attainment and Workforce Opportunities Report in town hall meetings in each of the state's four WIOA regions, as well as in a Workforce Readiness Summit in the summer of 2017.

Separately, a study of federal funding streams that could advance the career and workforce readiness system in New Mexico will be conducted, and its results distributed to stakeholders.

Teacher professional development programs will be developed to support high-yield instruction in approved pathways.

A review of CTE programs will be conducted and will result in recommendations on course updates, additions and deletions.

A Work-Based-Learning toolkit will be deployed online for use by New Mexico educators, counselors, administrators and employers.

A statewide advisory group will be recruited and convened to assist with the state's career readiness initiative.

- 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.")

In order to properly conduct the research identified above and to disseminate and implement the findings, a contractor must have experience in both educational theory and administration, in addition to sophisticated capabilities in labor market and economic analysis. The relevance of the state's Career Technical Education and Work Based Learning strategies to the realities of regional career opportunities is a theme throughout the Workforce Readiness statement of work. Experience in state-level implementations of workforce readiness credentials is essential. Translating the needs of employers, who do not speak the language of educators and curriculum developers, into learning objectives and work-based learning standards requires a perspective borne of experience in private industry, educational administration, curriculum development, the federal workforce development system and regional career readiness initiatives. NS4Ed, LLC., as directed by Dr. Joseph Goins and the team he has assembled, possess this broad-based set of skills and experiences.

NS4Ed, LLC. has unique capabilities around the research being proposed by PED through its assembled staff with expertise in each area being proposed in Early College High School and Workforce Readiness. The staff at NS4Ed is comprised of several aspects that range from policy, practice, process, and technical. First, from the policy standpoint, Dr. Goins represents 25 years in public education. Dr. Goins has worked in various states to develop career infused programs, Dr. Goins has help establish statewide career systems in Alabama, West Virginia, Indiana, New York, Mississippi, Kentucky, Louisiana, Oregon, and Texas. His policy work has been directly related to workplace readiness and k12 policy around career readiness in high schools. He has his Ed.D from Vanderbilt University where he focused his research on Individual Career Programs and defining Career and College Readiness.

Additional staff includes Trevor Stokes, an economic and workplace specialist. Trevor Stokes directs workforce programs for the Arizona Commerce Authority. He also regularly serves as a subject matter expert in labor market analysis to support career-driven curriculum development, regional economic research and growth planning, industry sector partnerships,

educational product development and public policy recommendations. Personal experience in secondary education, adult technical training and workforce development have contributed to a practical and digestible approach to interpreting and applying labor market data. An in-demand public speaker, he has addressed a range of audiences both national and local, ranging from the federal Economic Development Administration Conference to the Arizona Association of School Boards. Before joining the ACA, Trevor provided leadership to some of the country's most innovative and successful career-driven education and workforce development initiatives, including GoBuild Alabama, Work Ready Austin, and the Kentucky Career and College Readiness Transformation. His writing and research have contributed to successful efforts to secure Race to the Top, AMJIAC, Workforce Innovation Fund and Ready to Work federal grants.

Dealing with practice, NS4Ed works with Dr. Gary Adcox. Dr. Adcox has also work closely with state and federal legislators collaborating with leaders of Tennessee Independent Colleges and Universities Association (TICUA), Tennessee Board of Regents (TBR), UT system institutions and the Executive Director and staff of the Tennessee Higher Education Commission in defining and addressing educational and workforce development issues across the state. As a board member of Tennessee Student Aid Commission (TSAC), Dr. Adcox is uniquely familiar with the financial policies and administration of educational lottery scholarship programs. Dr. Adcox has spoken nationally and internationally on a variety of topics including diversity and inclusion, change management, team development, leadership, character education, and best practices in retention. His expertise and dedication to educational and workforce development issues on a state and federal level has allowed him the opportunity to provide testimony before the Tennessee House and Senate Education Committees as well as before the Joint Government Operations Committee on matters effecting education and workforce development policies. Dr. Adcox has also been afforded the opportunity serve as a special advisor to the Governor's Veterans' Education Taskforce and Drive to 55 Taskforce, and most recently, as an advisor to the Tennessee Higher Education Authorization working group. Dr. Adcox is an innovative and transformational leader and holds a Bachelor of Science degree in Psychology from University of Maryland, a Masters of Education in Counseling Psychology from Boston University, a Doctorate of Management in Organizational Leadership from the University of Phoenix, and a Doctorate of Education in Higher Education Leadership and Policy from Vanderbilt University.

From a technical expertise, NS4Ed works with the staff at Metiri group. Metiri specializes in evaluation and research, curriculum development, professional development, readiness tools, district and state level visioning and planning, commercial product evaluation, and the development of policy, position, and white papers. Metiri's experience includes the evaluation of numerous National Science Foundation (NSF) projects, U.S. Department of Education, FIPSE grants, NCLB Title II D grants, as well as numerous state and district supported initiatives. In addition, Metiri Group has supported education technology initiatives for corporate and non-profit clients such as Intel, Cisco and Apple with 1:1 laptop evaluation, the development of online and face-to-face professional development courses, large scale visioning, assessment tools, leadership tools, and by authoring research-based white papers on technology integration. As a continual provider of professional development for K-20 education, Metiri works to bring research to practice through effective strategies and research-based materials.

NS4Ed also works with the Global Pathways Institute that was launched in June, 2014, and is based at Arizona State University. It is directed by William C. Symonds, who gained international recognition as the primary author of the Pathways to Prosperity report, which was issued by the Harvard Graduate School of Education in 2011. The Institute grew out of the vision for preparing all youth for success that was first expressed in this landmark report.

Symonds had primary responsibility for preparing the report while serving as director of the Pathways to Prosperity Project at Harvard from 2008-2013. Following its publication, he spoke about the report's findings in 40 states, as well as in Canada and New Zealand. Later, he helped organize the Creating Pathways to Prosperity conference, which was held at Harvard University in March, 2013. This event attracted more than 400 attendees from across the country and around the world, including educators, business representatives from Fortune 500 companies, and political leaders. The conference concluded with a call for creating a more effective pathways system that would improve career guidance, expand high-quality "multiple pathways" options for young people, and increase opportunities for work-based learning.

- 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.***

NS4Ed has the exclusive capacity to not only develop the research from the best personnel available but to also utilize the technical capability to accomplish the following:

- Establish accountability for development of programs leading to career opportunities in high-growth, high-wage occupations.
- Facilitate conversation between education, workforce and economic development.
- Ensure career counselors have access to relevant regional labor market information and career pathways supporting employment opportunities.
- Benchmark workforce literacies for demand occupations.
- Promote systems integration and transformation using common data analysis and information.
- Develop a state portal to disseminate information constructed through research and delivered around best practices.
- Facilitate a state wide conference on Early College High School and Workforce Readiness
- Utilize Resources from various states to inform best practices for the state of New Mexico.

The desires of the agency do not fit into the qualifications of an educational research professional, or a workforce development practitioner or a curriculum developer or labor market analyst; indeed, the package of skills, experience and connections required by the state to execute this concept are rare to the point of disqualifying all contractors except one, NS4Ed, LLC.

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

No other contractor in this space currently offers professional experience in public education, workforce development, curriculum development, employer engagement and private industry.

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; reviewing telephone books and other advertisements; contacting similar service providers; and reviewing the Chief Procurement Officer’s vendor list. 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.

HPREC did an extensive search on the internet, as well as the GSD Price Agreements, and found no contractor that can offer professional experience in public education, workforce development, curriculum development, employer engagement and private industry.

Certified by:

Date: _____

Agency Chief Procurement Officer

Agency Approval by:

Date: _____

Agency or Entity Head or Designee

If this sole source relates to a procurement of general services:

- 1) the signature of the Chief Procurement Officer on this form certifies the sole source has been posted for thirty (30) calendar days and has received no challenges;
- 2) the sole source is granted as of the date of signature by the Chief Procurement Officer; and
- 3) the signature of the Chief Procurement Officer on this form is the final signature required for this sole source procurement.

If this sole source relates to a procurement of professional services:

- 1) the signature of the Chief Procurement Officer on this form certifies the sole source has been posted for thirty (30) calendar days and has received no challenge(s).