



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 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:
MetaMetrics, Inc.

SHARE Vendor Number (must be active): **0000172837**

Address of prospective Contractor:
800 Taylor St., Suite 102
Durham, NC 27701

Contact Name, Telephone Number and Email Address:
Mandie Bechard
518-645-0776
mbechard@lexile.com

Amount of prospective contract before tax: **\$400,000.00.00**
Estimated tax amount (tax is subject to change): **\$0.00**

Term of prospective contract: **12 months; July 1, 2026 - June 30, 2027**

- 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):

It is New Mexico Public Education Department's (NMPED) intent to acquire services from Metametrics that:

Project 1:

Will provide Lexile reading and Quantile mathematics measures for students in grades 3-8 and High School (1 English Language Arts and 1 Math) to the NMPED for school years 2025/2026 & 2026/2027 associated with the NM-MSSA summative assessments. NMPED will require the services to be based on over 30 years of research.

Project 2:

Will provide a comparability Research Study that leverages the direct links between the Lexile® Framework for Reading and the Quantile® Framework for Mathematics, for school years 2025/2026, with statewide summative assessments to execute rigorous statistical analyses, accounting for both the complex demographic composition of New Mexico as well as the psychometric challenges posed by working across assessment programs and linking studies. The results of this study will provide descriptions and comparisons of the complexity of text that may be accessed or the mathematical skills and concepts for which students are ready for students in New Mexico versus those at similar age and grade levels in other states, based on Lexile and Quantile measures at key scale scores and performance levels.

- 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.)

Project 1:

NMPED has made the decision to utilize the Lexile Framework for Reading and the Quantile Framework for Mathematics for the purposes of, but not limited to:

- 1. Program evaluation by using a common metric over time.**
- 2. Providing educators, students, and parents with actionable data to interpret test scores on both math and reading.**
- 3. Acting as a thought partner to engage K-12 educators in professional learning on the Lexile Framework for Reading and the Quantile Framework for Mathematics.**

Project 2:

- 1. To establish a research agenda that will reevaluate New Mexico's student outcomes in relation to different variables of interest and in comparison to other states that use the same Lexile and Quantile metrics and Frameworks**

2. **To enable a comparison of reading comprehension and mathematical skill demands represented by the New Mexico Measures of Student Success and Achievement (NM-MSSA) with summative assessment results from surrounding states.**
- 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.”)

NMPED’s current early literacy assessments for students in kindergarten through grade 2 provides Lexile and Quantile measures to New Mexico schools, and the current college and career readiness math pathways assessments utilized by New Mexico high school CTE students provides Quantile measures. Given the broad use of both measures across other state assessment programs, the NMPED will require the consistent use of these measures for its statewide 3-8 NM-MSSA assessments. Since these measures are exclusive to MetaMetrics, without their utilization, it would be impossible for NMPED to determine comparability from one large-scale assessment to another large-scale assessment in the absence of a technical linking study. The measures allow for continuity and comparability of students' reading and math abilities across multiple assessments, regardless of their independent scales and independent of the changes to state assessment and standards.

- 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*.

Project 1: MetaMetrics is the only company in the world that created and exclusively licenses the Lexile Framework for Reading and the Quantile Framework for Mathematics. MetaMetrics holds the proprietary rights for Lexile and Quantile measures. No other company holds the proprietary rights to link assessments or curriculum to the scale, particularly in large scale assessments.

Once the state licenses the use of the Lexile and Quantile Frameworks, it can use the measures to support its state priorities in a variety of ways. The state decides how to implement the measures utilizing no-cost services. These services are not charged individually and there is not a “change order” charge like other companies. There is one price for the intellectual property based on the state’s student population. Based on the student population, the state of New Mexico would be charged \$190,000 for the use of the measures. No other company can offer licensing of the Lexile Framework for Reading and the Quantile Framework for Mathematics. The no charge services are below. Working with the state, the state gets access to the no cost services.

MetaMetrics No Cost Implementation Supports for State Education Agencies

School Years 2025/2026 and 2026/2027

As part of your state's annual licensing agreement to use Lexile® reading measures and Quantile® mathematics measures, the following implementation supports are available upon request at no cost and offered throughout the contracted school year.

Implementation Toolkit

These implementation supports also are meant to complement and serve as an extension of the Lexile & Quantile State Implementation Toolkit. To access the toolkit, please visit: metametricsinc.com/state-toolkit.

Communications and Outreach Support

Suggested Language for Outreach Messaging

MetaMetrics® provides a variety of draft messaging for email/newsletter campaigns and social media to help you communicate with educators and families about the value and utility of Lexile reading measures and Quantile mathematics measures.

Lexile and Quantile Information for State Score Reports

MetaMetrics® collaborates with states and their contractors to provide language and/ or individualized, student instructional information on state score reports.

Language for State Specific Lexile & Quantile Web Content

MetaMetrics® provides a draft of text content for your SEA website to explain Lexile reading measures and Quantile mathematics measures, free tools and resources, and their use both in the classroom and at home. Once the content is finalized and approved, MetaMetrics also works with the webmaster or designee to post the content to the SEA's website.

Language for State Assessment RFPs

MetaMetrics® is a sole source to states that choose to use and report Lexile reading measures and Quantile mathematics measures from their state assessment systems. To ensure continuity in use and reporting, MetaMetrics makes available state RFPs that have mandated Lexile reading measures and Quantile mathematics measures through this procurement process.

Language for Outreach to Publishers of Textbooks and Instructional Materials

MetaMetrics® offers example language that states and/or local districts can use to request that publisher materials be encouraged or required to submit Lexile reading measures and Quantile mathematics measures for books and materials being considered for adoption.

Implementation Support

MetaMetrics® offers a variety of support including professional learning and informational videos for educators and other stakeholders. These offerings help to expand knowledge of Lexile reading measures and Quantile mathematics measures and the understanding of how these measures can be utilized to facilitate student learning and growth both in the classroom and at home.

FORMAT	DESCRIPTION
--------	-------------

SEA Asynchronous Learning	Overview 1 - The Lexile® Framework for Reading Overview 2 - The Quantile® Framework for Mathematics Overview 3 - Access and Utilizing Lexile® & Quantile® Hub Overview 4 - Managing Multiple Measures Follow-up Q & A sessions provided, additional topics may be covered upon request.
Face-to-Face Meeting	Annual onsite or virtual kickoff planning meeting for new state partners. Annual review meeting for existing state partners.
Support for Educators	Digital Library - Containing professional learning and informational videos providing instruction on the Lexile® and Quantile® Frameworks and the tools in the Lexile® & Quantile® Hub.
State Conference/Event	MetaMetrics® is available to support your annual state sponsored conference or event as availability permits.

Please note: Webinar or In-person, district level professional learning is not included in the services listed above, but may be available upon request.

Lexile & Quantile Tools and Resources

MetaMetrics® provides access to the following tools and resources so that educators, families and students can utilize Lexile reading measures and Quantile mathematics measures.

A Variety of Lexile & Quantile Tools Available

Many online tools for Lexile reading measures and Quantile mathematics measures are available through the Lexile® & Quantile® Hub. As part of the licensing agreement to use Lexile reading measures and Quantile mathematics measures, educators in the partner state receive Premium access to the Hub and the full functionality of each of its tools at no cost. Visit the Hub at Hub.Lexile.com.

Lexile and Quantile Support Team

The MetaMetrics team will provide ongoing communication with the State as thought partners for strategic planning and implementation purposes. This support is intended to inform state policy decisions as well as promote the use of the Lexile and Quantile measures among various stakeholders for improved student achievement. We look forward to working with you to build these implementation supports into your state system of support for educators and families.

Project 2: This Comparability Research Study describes a research study that leverages the direct links between the Lexile® Framework for Reading and the Quantile® Framework for Mathematics with statewide summative assessments to execute rigorous statistical analyses, accounting for both the complex demographic composition of New Mexico as well as the psychometric challenges posed by working across assessment programs and linking studies. The results of this study will provide descriptions and comparisons of the complexity of text that may be accessed or the mathematical skills and concepts for which students are ready for students in New Mexico versus those at similar age and grade levels

in other states, based on Lexile and Quantile measures at key scale scores and performance levels.

Evaluating how state assessments, third-party benchmarks, or educational products compare to Lexile and Quantile measures requires a level of psychometric access that only MetaMetrics possesses. Specifically, MetaMetrics is the sole source provider for this study due to the following exclusive capabilities:

- **Access to linking studies across the nation:** Only MetaMetrics has the official linking studies used for other state summative assessments outside of New Mexico. Therefore, if New Mexico wants to compare their own students' outcomes against literacy and math outcomes in other states, only MetaMetrics can provide those data from the other states in the comparison group.
- **Proprietary Psychometric Alignment:** Conducting a scientifically valid comparability study requires deep knowledge and access to linking procedures, scaling algorithms, and normative data of the Lexile and Quantile frameworks. Because this methodology is proprietary, no third-party vendor has the legal access or technical capability to replicate the linking equations necessary to establish accurate comparability.
- **Scale Integrity and Validity:** MetaMetrics maintains the scientific scales for both frameworks. Any attempt by an outside entity to map or compare data to these scales would lack the foundational psychometric validation, resulting in unverified alignments that could compromise data integrity.
- **Exclusive Authority:** As the sole proprietor of these frameworks, MetaMetrics is the only entity authorized to issue certified comparability and alignment determinations. Independent third-party crosswalks or comparisons are not recognized as valid or authorized representations of the Lexile or Quantile metrics.

Consequently, to ensure scientific precision, legal compliance with intellectual property standards, and absolute data integrity for a state's educational comparisons, MetaMetrics is the sole source provider capable of conducting this comparability study and any future research study using the Lexile and Quantile frameworks and scales.

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

Other companies are not the creators of the Lexile Framework for Reading and the Quantile Framework for Mathematics, and therefore can not offer licensing or the no cost services.

NMPED Researched the Center for Assessment and they are unable to meet the

established criteria.

NMPED Researched Cognia and they are unable to meet the established criteria.

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.

NMPED conducted an extensive search of industry and other state assessment agencies and concluded that Lexiles and Quantiles as common measures across assessments can only be provided by MetaMetrics. These states include:

- 1. The State of Indiana**
- 2. The State of North Dakota**
- 3. The State of West Virginia**

- See attached documentation (Addendum A): MetaMetrics Letter

Knowing the Lexile reading measure of a reader and the Lexile measure of a text helps to predict how the text matches the reader's ability—whether the text may be too easy, too difficult, or just right. The Quantile Framework for Mathematics uses a common, developmental scale to describe a student's mathematical achievement and the difficulty of specific mathematical skills and concepts. Describing student performance and instructional material using the same scale in order to pair students with the appropriate materials for their Lexile or Quantile measure is a unique feature of the Lexile and Quantile Measures. No other reading and mathematics leveling systems do this work in this way. The computer algorithms that produce Lexile Measures and Quantile measures are proprietary to MetaMetrics, Inc., and are available only from MetaMetrics, Inc.

Certified by:

Date: 08/11/2026

Veronica Wadley
[Veronica Wadley \(Aug 11, 2026 08:48:48 MDT\)](#)

Agency Chief Procurement Officer

Agency Approval by:

Date: 08/11/2026

Bryan Dooley
[Bryan Dooley \(Aug 11, 2026 10:11:52 MDT\)](#)

Cabinet Secretary/Agency or Entity Head or Designee

Addendum A



July 24 2026

Lynn Vasquez
Sr. Manager of Assessment, Research, Evaluation, and Accountability
New Mexico Public Education Department (NMPED)
300 Don Gaspar Ave.
Santa Fe, NM 87501

Dear Lynn Vasquez,

MetaMetrics, Inc. is the sole creator, developer, and proprietor of the Lexile® Framework for Reading and the Quantile® Framework for Mathematics. Because these proprietary psychometric frameworks are already established as sole-source assets & services for New Mexico PED, MetaMetrics is uniquely and exclusively qualified to conduct any Lexile and Quantile-based research, comparative analysis, or efficacy studies tied to these metrics.

Evaluating how state assessments, third-party benchmarks, or educational products compare to Lexile and Quantile measures requires a level of psychometric access that only MetaMetrics possesses. Specifically, MetaMetrics is the sole source provider for this study due to the following exclusive capabilities:

- **Access to linking studies across the nation:** Only MetaMetrics has the official linking studies used for other state summative assessments outside of New Mexico. Therefore, if New Mexico wants to compare their own students' outcomes against literacy and math outcomes in other states, only MetaMetrics can provide those data from the other states in the comparison group.
- **Proprietary Psychometric Alignment:** Conducting a scientifically valid comparability study requires deep knowledge and access to linking procedures, scaling algorithms, and normative data of the Lexile and Quantile frameworks. Because this methodology is proprietary, no third-party vendor has the legal access or technical capability to replicate the linking equations necessary to establish accurate comparability.
- **Scale Integrity and Validity:** MetaMetrics maintains the scientific scales for both frameworks. Any attempt by an outside entity to map or compare data to these scales would lack the foundational psychometric validation, resulting in unverified alignments that could compromise data integrity.
- **Exclusive Authority:** As the sole proprietor of these frameworks, MetaMetrics is the only entity authorized to issue certified comparability and alignment determinations. Independent third-party crosswalks or comparisons are not recognized as valid or authorized representations of the Lexile or Quantile metrics.

Consequently, to ensure scientific precision, legal compliance with intellectual property standards, and absolute data integrity for a state's educational comparisons, MetaMetrics is the **sole source provider** capable of conducting this comparability study and any future research study using the Lexile and Quantile frameworks and scales.

Please let me know if you need additional information or have any further questions.

Best regards,

Mike Crepeau
Mike Crepeau
Chief Revenue Officer

Measures That Inspire

MetaMetrics.com
hello@metametrics.com
919-547-3400

MetaMetrics
800 Taylor Street, Suite 102A
Durham, North Carolina 27701

R9_MetaMetrics_Assessments_Sole Source

#27003

Final Audit Report

2026-08-11

Created:	2026-08-11
By:	Region IX Ed Coop (contracts.procurement@regionix.org)
Status:	Signed
Transaction ID:	CBJCHBCAABAAJ9xgBSxMGVgfm8JJrh7MMLzzYdU5mBfe

"R9_MetaMetrics_Assessments_Sole Source #27003" History

-  Document created by Region IX Ed Coop (contracts.procurement@regionix.org)
2026-08-11 - 2:48:02 PM GMT
-  Document emailed to Veronica Wadley (veronica.wadley@regionix.org) for signature
2026-08-11 - 2:48:07 PM GMT
-  Email viewed by Veronica Wadley (veronica.wadley@regionix.org)
2026-08-11 - 2:48:35 PM GMT
-  Document e-signed by Veronica Wadley (veronica.wadley@regionix.org)
Signature Date: 2026-08-11 - 2:48:48 PM GMT - Time Source: server - Signature Appearance Selected: DRAW
-  Document emailed to Bryan Dooley (bryan.dooley@regionix.org) for signature
2026-08-11 - 2:48:50 PM GMT
-  Email viewed by Bryan Dooley (bryan.dooley@regionix.org)
2026-08-11 - 4:11:26 PM GMT
-  Document e-signed by Bryan Dooley (bryan.dooley@regionix.org)
Signature Date: 2026-08-11 - 4:11:52 PM GMT - Time Source: server - Signature Appearance Selected: MOBILE_TYPE
-  Agreement completed.
2026-08-11 - 4:11:52 PM GMT