



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: Southwest Innovation Alliance
Contact Name: Matthew Gallegos
Phone: 505-321-0806
Email: matthew.gallegos@nmt.edu

2. Name of Prospective Vendor: Chimney Trail Health
Contact Name: Matthew D. Brown
Phone: 720-930 5390
Email: matthew@chimneytrail.com
Estimated Cost: \$193,500
Duration (for Services or Professional Services – limited to four years): ~ 9 months (250 days) from award

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

The purpose of this procurement is to evaluate an industry-led Cognitive Behavioral training (CBt) assessment pilot program under the New Mexico Tech (NMT) Partnership Intermediary Agreement with the Air Force Research Laboratory (AFRL), in direct support of Air Education and Training Command (AETC). This workforce readiness and resilience initiative is designed to equip AETC personnel and families with proactive tools that improve morale, adaptability, and mission readiness.

This assessment pilot is limited to evaluation of a pre-existing curriculum and structured evaluation of workforce applicability.

Milestones include (per PSA, now referred to as assessment milestones):

- Six in-person 90-minute CBt seminars across AETC subordinate commands.
- Four serialized Waypoint Kits per participant, distributed over six months, reinforcing resilience training through structured activities.
- Program evaluation using validated measures (PHQ-9, GAD-7, adaptability, and readiness indicators).
- Midpoint and final reports, including feasibility, scalability, and recommendations for adoption.

4. Detailed explanation of criteria developed for this purchase:

The criteria for vendor selection included:

- Delivery of a non-clinical, cognitive-behavioral training assessment program tailored for proactive resilience and family readiness, distinct from crisis or clinical interventions.
- Ability to integrate proprietary take-home reinforcement tools (serialized kits) into the training model.
- Demonstrated capacity to provide training in military contexts and align with AETC Lines of Effort (Family Readiness and Warrior Mindset).
- Ability to conduct structured evaluation using standardized readiness metrics without requiring human subjects/clinical research approvals.
- Ability to deliver clearly defined assessment milestones and data collection using validated readiness indicators.

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:

Chimney Trail Co. is uniquely positioned to deliver this assessment pilot program because:

- They offer a proprietary CBt curriculum emphasizing proactive recognition and correction of cognitive distortions.
- Their Waypoint Kit system is a unique, serialized resilience toolset specifically designed to reinforce training beyond the seminar setting.
- They have the expertise to adapt resilience training to military personnel and family systems, aligning with AETC mission requirements.
- They have a built-in evaluation framework using validated readiness and resilience measures, ensuring program impact is captured in a way meaningful to AFRL/AETC.

No other known vendor provides this integrated combination of curriculum, reinforcement tools, and evaluation capacity.

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:

Chimney Trail Co.'s training program is unique in three critical ways:

- **Proprietary Curriculum and Materials:** Their CBT program emphasizes proactive resilience skill-building, supported by Waypoint Kits—serialized, tangible reinforcement tools that no other vendor provides. This combination of live training and serialized kits is exclusive to Chimney Trail and central to the assessment pilot design.
- **Alignment with Military Readiness Objectives:** The program is tailored to advance AETC Lines of Effort, including Family Readiness and Warrior Mindset. Alternative programs are typically designed for corporate or civilian audiences and lack the operational alignment with AETC goals.
- **Purpose of the Assessment Pilot:** This procurement is structured to evaluate the feasibility and scalability of Chimney Trail’s specific training program approach under the AFRL/NMT Partnership Intermediary Agreement. Using another provider would result in a different program approach and would not fulfill the grant’s intent to evaluate Chimney Trail’s program for potential adoption.

This approach is permitted under NMSA 1978, §13-1-126(A), which allows sole source procurement when “there is only one source for the required service.” The uniqueness of Chimney Trail’s program is inseparable from the purpose of this assessment pilot, satisfying the statutory requirement that the vendor’s unique features be substantially related to the intended purpose.

7. Please provide a narrative description of the 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:
- a. Method used to research and review other available sources
 The SWIA conducted a review of resilience and training providers by examining publicly available information, including industry websites, program descriptions, and open-source materials. The review focused on vendors offering resilience training, workforce readiness programs, or cognitive behavioral approaches in organizational or military settings. This analysis was designed to determine whether other vendors could provide a training program comparable in scope, methodology, and deliverables to Chimney Trail’s CBT curriculum and Waypoint Kit model, consistent with the assessment milestones outlined in the PSA.
 - b. List of vendors contacted
 No vendors were contacted directly. Because this procurement is for a proprietary assessment pilot program, outreach to alternative vendors would not serve the project’s purpose and would invalidate the assessment pilot scope.

c. Documentation explaining why alternatives cannot meet the purpose

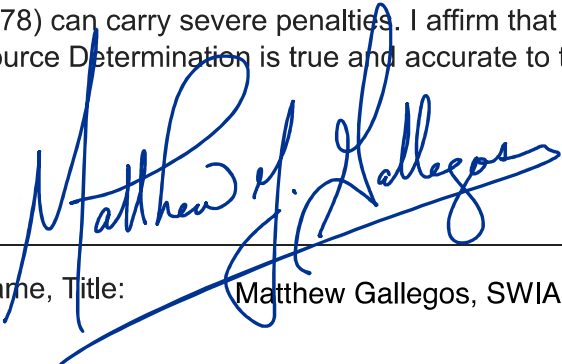
i. Vendors reviewed:

- Headspace Health (Headspace + Ginger): Provides digital meditation and coaching services but does not deliver in-person CBT seminars or serialized reinforcement kits.
Website: <https://www.headspace.com>
- The Mind Gym: Offers corporate behavior-change seminars but lacks CBT-based, non-clinical training for military families and does not provide reinforcement kits.
Website: <https://themindgym.com>
- PsychArmor Institute: Focuses on awareness and education for military-connected communities but does not provide structured CBT programs with longitudinal reinforcement tools.
Website: <https://psycharmor.org>
- NeuroLeadership Institute: Specializes in neuroscience-based leadership and performance programs for corporate clients, not military or family readiness-focused training with serialized kits.
Website: <https://neuroleadership.com>

ii. Why similar services cannot meet the intended purpose:


Each vendor above provides useful training or educational programs, but none combine non-clinical CBT-based training seminars, serialized reinforcement kits, and readiness-focused evaluation tools. These elements are essential because the assessment pilot's purpose is to assess the applicability and scalability of Chimney Trail's specific training program approach for AETC. Substituting another provider would result in a different program altogether, preventing the assessment pilot from meeting its stated objectives.

I certify I have performed thorough and diligent research and analysis to determine that **Chimney Trail** is the only source capable of providing the required goods and services. 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: Matthew Gallegos, SWIA Exec. Director

25 SEP 2025



Review: Purchasing Services: Lisa Majkowski, Director - Purchasing
Website Posting Date: 09/29/2025
Posting Expiration Date: 10/29/2025
Protested (Yes/No):

09.26.2025



Approval: Delilah A. Walsh
Vice President of Administration and Finance

29-Sep-2025

Version: July 2025


ChimeyTrailHealth_Sole Source Application_09.26.2025

Final Audit Report

2025-09-29

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