

Request for Information (RFI)

The Department of Veterans Affairs (VA) is issuing this RFI in accordance with FAR 15.201(e). This RFI is issued for the purpose of conducting capabilities and market research. Accordingly, this RFI constitutes neither a Request for Proposal (RFP) nor a guarantee that one will be issued by the Government in the future; furthermore, it does not commit the Government to contract for any services described herein. Do not submit a Proposal. The Department of Veterans Affairs is not at this time, seeking proposals or quotes and therefore will not accept, review, or evaluate unsolicited proposals or quotes received in response hereto. This notice is not to be construed as a commitment on the part of the Government to award a contract, nor does the Government intend to pay for any information submitted as a result of this request. The Government does not reimburse respondents for costs associated with submission of the information being requested or reimburse expenses incurred for responses to this RFI. The information provided may be used by VA in developing an acquisition strategy and Product Description (PD)/Performance Work Statement (PWS). Any information submitted by respondents to this RFI is strictly voluntary; however, any information received shall become the property of the Government and will not be returned to the respondent. Interested parties are responsible for adequately marking proprietary, restricted or sensitive information contained in their response. This is a request for information only and does not obligate the Government in any way, nor does it commit the Government to a specific course of action. The Government is seeking as much information as possible and a complete response from industry to this RFI during this market research activity may assist the Government in developing an acquisition strategy and finalizing any PD/PWS.

Background

On May 5, 2010, the Caregivers and Veterans Omnibus Health Services Act of 2010, Public Law 111-163, was signed into law. This law enabled VA to provide unprecedented benefits to caregivers of eligible Veterans. The law required VA to establish a Program of Comprehensive Assistance for Family Caregivers for eligible Veterans with a serious injury incurred or aggravated in the line of duty in the active military, naval, or air service on or after September 11, 2001 (among other eligibility criteria) and a Program of General Caregiver Support Services for eligible Veterans of all service eras. These programs fall under the purview of VA's national Caregiver Support Program as outlined in VHA Directive 1152(1), Caregiver Support Program.

On June 6, 2018, the John S. McCain III, Daniel K. Akaka, and Samuel R. Johnson VA Maintaining Internal Systems and Strengthening Integrated Outside Networks Act of 2018 or the VA MISSION Act of 2018, Public Law 115-182, was signed into law. Section 161 of this law, among other things, expands eligibility for VA's Program of Comprehensive Assistance for Family Caregivers to eligible Veterans with a serious injury incurred or aggravated in the line of duty in the active military, naval, or air service before September 11, 2001 in two phases, the first of which will begin upon VA certifying to Congress that VA has fully implemented a required information technology system. This law also establishes new benefits for designated primary family caregivers of eligible Veterans under the Program of Comprehensive Assistance for Family Caregivers. VA is currently working on regulations to define the scope of financial

planning services and legal services under 38 U.S.C. 1720G(a)(3)(A)(ii)(IV), as amended by section 161(a)(3) of the VA MISSION Act of 2018, under which VA is required to provide designated primary family caregivers:

(1) financial planning services relating to the needs of injured Veterans and their caregivers; and

(2) legal services, including legal advice and consultation, relating to the needs of injured Veterans and their caregivers.

Under the law, these services must be provided through the use of contracts with, or the provision of grants to, public or private entities.

The Caregiver Support Program is seeking information on and from public or private entities that could provide financial planning and legal services on a national level, to primary family caregivers of eligible Veterans (with a current population of 20,000 and anticipated significant growth) participating in the Program of Comprehensive Assistance for Family Caregivers.

Objective

Financial Planning Services:

The phrase “financial planning services relating to the needs of injured Veterans and their caregivers” will need to be defined through notice and comment rulemaking, but it is possible that VA’s regulations could define it to include such things as:

- Increasing primary family caregivers’ financial literacy;
- Assisting designated primary family caregivers in developing a plan to manage their own personal finances to include:
 - Household budget planning (such as making a budget, learning to balance a checking account, and learning to pay bills);
 - Debt management (such as assistance establishing payment plans and credit counseling);
 - Retirement planning (such as consulting on personal retirement plans, pension planning, and investment options);
 - Insurance review and counseling (such as reviewing current insurance policies; and counseling on alternative insurance options to include health, automobile, life, or house insurance); and
 - Referrals to community resources for representation in matters not included.

Legal Services:

Similarly, the phrase “legal services, including legal advice and consultation, relating to the needs of injured Veterans and their caregivers” will need to be defined through notice and comment rulemaking, but it is possible that VA’s regulations could define it to include such things as:

- Estate planning;
- Advanced care planning;

- Wills;
- Trusts;
- Designating a power of attorney;
- Appointing a guardian for the eligible Veteran; and
- Referrals to community resources for representation in matters not included.

It is also possible that VA's definition could specifically exclude certain matters, such as:

- Representation in legal action against the United States Government or against the eligible Veteran; and
- Representation in criminal or civil legal matters (including matters of family law such as divorce, child custody, and related matters).

These services will be provided by public or private entities as required by governing statute.

It is possible that VA's regulations could limit the number of issues or sessions relating to this benefit for which a designated primary family caregiver is eligible, but as with the scope of these benefits, this has not been determined and would be subject to notice and comment rulemaking. The amounts of financial planning and legal services needed will vary depending on the complexity of the issues being addressed and the needs of the primary family caregiver.

THERE IS NO SOLICITATION AT THIS TIME.

If your organization has the potential capacity to perform these services through a contract with VA, please provide the following information:

Cover Sheet – 1 page

Please provide the following information:

1. Organization name, address, web site, DUNS number, and CAGE code.
2. Point of contact to include e-mail address and telephone number.
3. Company's current business size (large or small). If small, please provide type of small business.
4. North American Industry Classification System (NAICS) that best fits these task areas.
5. GSA contract number, schedule, and SIN category.

Index – 1 page

Please provide an index to assist the Government in identifying where you have addressed each question below in your Capabilities Statement and Market Information. Please provide question number and corresponding page and section heading and/or paragraph number.

Capabilities Statement and Market Information –

Please respond to the following questions by providing a capabilities statement and market information.

The Department is seeking responses from industry regarding their respective experiences and capabilities applicable to the following key questions:

1. Please describe your organization's breadth of expertise/competency to provide financial planning and legal services for designated primary family caregivers of eligible Veterans under the Program of Comprehensive Assistance for Family Caregivers.
2. Can you provide both financial planning and legal services to designated primary family caregivers of eligible Veterans? If not, which can you provide?
3. Describe how you currently provide these services, to include in what format you provide them (e.g., by phone, in person, online, etc.).
4. Describe your intake process for new clients to include methods for determining the planned number of sessions, any limits placed on the scope or duration of sessions, etc.
5. Describe and provide common pricing structures for these services. Duration per beneficiary (e.g., days, months), by call volumes, in person contacts, or other?
6. Would the work require the use of subcontractors? If so, what percentage of work would be completed by the prime versus subcontractors?
7. To what volume of participants can you provide services?
8. Can you provide these services on a national level, to primary family caregivers of eligible Veterans with a current population of 20,000 and anticipated significant growth?
9. Have you provided these services for a Federal department or agency previously, or are you doing so currently? If so, provide contract and task order numbers, total award amount, agency name, and procurement method and vehicle (e.g., open market single award, GSA Federal Supply Schedule, internal agency ordering contract, etc.).
10. Are financial planning and legal services for Veterans, active duty servicemembers, or family members of Veterans or active duty servicemembers covered under your GSA schedule contract, and if so what Schedule(s) and SIN(s) are most appropriate for this type of service?
11. Describe a typical staffing strategy and structure (including applicable labor categories) for similar type projects.

12. Describe the specific scope of services that should be included or excluded in the provision of financial planning and legal services, and why.
13. Provide the typical benefits structures for beneficiaries.
14. Please suggest if there should be a limit as to how many times a primary family caregiver has access to these services, and if so, whether it should be an annual limit or lifetime limit, or a limit based on some other measure.
15. Please provide any other feedback or suggestions that you deem appropriate.

STRUCTURE AND SUBMISSION OF RESPONSES

Contractors should respond to this RFI by Wednesday, April 17, 2019 by 10:00 AM EDT via e-mail to Brian.Kadel@va.gov and Lindi.Sylvester@va.gov. Limit all responses to 10 pages.