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| **SUBJECT\*** | Money Management Services |

**GENERAL INFORMATION**

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| **CONTRACTING OFFICE’S ZIP CODE\*** | 06516 |
| **SOLICITATION NUMBER\*** | 36C24125Q0292 |
| **RESPONSE DATE/TIME/ZONE** | 03-07-2025 09:00 EASTERN TIME, NEW YORK, USA |
| **ARCHIVE** | 30 DAYS AFTER THE RESPONSE DATE |
| **RECOVERY ACT FUNDS** | N |
| **PRODUCT SERVICE CODE\*** | R610 |
| **NAICS CODE\*** | 523991 |
| **CONTRACTING OFFICE ADDRESS** | West Haven VA Medical Center  Network Contracting Office (NCO) 1  Contracting Office (90C)  950 Campbell Avenue  West Haven CT 06516 |
| **POINT OF CONTACT\*** | Contract Specialist  Ophelia Wilson  ophelia.wilson@va.gov  203-932-5711 |

**ADDITIONAL INFORMATION**

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| **AGENCY’S URL** | https://www.va.gov/OAL/index.asp |
| **URL DESCRIPTION** | Department of Veteran Affairs Website |
| **AGENCY CONTACT’S EMAIL ADDRESS** | ophelia.wilson@va.gov |
| **EMAIL DESCRIPTION** | Contract Specialist's Email |

**DESCRIPTION**

**Pre-solicitation Notice of Intent to Sole Source**

Pre-Solicitation Notice for notice of intent to award a sole source contract. This is not a solicitation. The Department of Veterans Affairs intends to negotiate a sole source contract for 5 years with Columbus House Inc., 586 Ella T Grasso Blvd, to continue money management services for veterans who are enrolled at the VA Connecticut Healthcare System. They are currently in session with these classes and service and to prevent disruption this will be a follow-on contract to maintain services. Since the intent is to procure these services on a sole source basis, no solicitation will be posted to Contract Opportunities. The applicable NAICS code is 523991 with a size standard of 41.5 million. The PSC is R610 The authority for this action is FAR 6.302-1 Only One Responsible source and no other supplies or services will satisfy agency requirements. Interested persons may contact the Contract Specialist via email at ophelia.wilson@va.gov regarding this procurement. The determination to conduct a competitive procurement based on responses to this notice is solely within the discretion of the Contracting Officer. Response must be received by 03/07/2025.

**Section 1: General Information**

1.1 General: This is a non-personal services contract to provide money management services to Veterans enrolled at VA Connecticut Healthcare System. The Government shall not exercise any supervision or control over the contract service providers performing the services herein. Such contract service providers shall be accountable solely to the Contractor who, in turn is responsible to the Government.

1.2 Period of Performance:

1.3 Place of Performance:

1.4 Hours of Operation: All aspects of contractor enrollments fiduciary responsibilities shall be conducted during normal business hours 8:30 am – 4:30 pm except federal holidays:

NATIONAL HOLIDAY: The 11 holidays observed by the Federal Government are:

New Year's Day -1 January

Martin Luther King Jr. Day -Third Monday in January

President's Day -Third Monday in February

Memorial Day -Last Monday in May

Juneteenth -19th day of June

Independence Day -4 July

Labor Day -First Monday in September

Columbus Day -Second Monday in October

Veterans Day -11 November

Thanksgiving Day -Fourth Thursday in November

Christmas Day -25 December

or any other day specifically declared by the president of the United States to be a national holiday. If a holiday falls on Sunday, the following Monday will be observed as a legal holiday. When a holiday falls on a Saturday, the preceding Friday is observed as a legal holiday by U.S. Government agencies.

1.7 Type of Contract: The government will award a Firm Fixed Price per each Veteran served up to 20 Veterans per month.

The contract shall be effective for a one-year Base period, with the Government having the option to renew for four (4) additional one (1) year periods. Fees for services shall be based on Fixed Firm Price for each Veteran enrolled in the program per month with services, and RP and fiduciary reporting responsibilities included for each Veteran enrolled.

1.8 Contract Changes: Additional money management services required by changes in mission assignments must be documented by a written contract modification. If the contractor receives a request from VA personnel directing or requesting work that the contractor believes is not within the terms of the PWS or the contract, then the contractor must notify the Contracting Officer Representative (COR) and the Contracting Officer of the request. The only person that has the authority to modify the terms of the contract or request work for which compensation will be provided is a Contracting Officer.

1.9 Invoicing: All invoices from the contractor shall be submitted electronically in accordance with VAAR Clause 852.232-72 Electronic Submission of Payment Requests.

VA’s Electronic Invoice Presentment and Payment System – The FSC uses a third-party contractor, Tungsten, to transition vendors from paper to electronic invoice submission. Please go to this website: <http://www.tungsten-network.com/US/en/veterans-affairs/> to begin submitting electronic invoices, free of charge.

More information on the VA Financial Services Center is available at <http://www.fsc.va.gov/einvoice.asp>.

**Section 2: Definitions & Acronyms**

2.1 Definitions:

***Representative Payee****.* A representative payee is a person, or an organization designated by Social Security for anyone who can’t manage or direct the management of his or her Social Security benefits. A payee’s main duties are to use the benefits to pay for the current and future needs of the beneficiary, and properly save any benefits not needed to meet current needs. A payee must also keep records of expenses.

***Fiduciary****.* A fiduciary is a person or entity appointed by VA to receive benefits on behalf of a beneficiary. The benefits must be used to support the beneficiary or their dependents.

***Recovery Oriented Money Management Program (ROMM****)*. The name of the money management program at VACT.

***Contractor*.** A supplier or vendor awarded a contract to provide specific supplies or service to the government. The term used in this contract refers to the prime.

***Contracting Officer (CO****).* A person with the authority to enter into, administers, and/or terminates contracts and makes related findings. The Contracting Officer is the only individual who has the authority to contractually bind the Government. The Contracting Officer may designate a government employee to act as his authorized technical representative.

***Contracting Officer Representative (COR).*** The person has been designated as the authorized representative of the Contracting Officer acting within the limits of his/her authority. This individual shall not be authorized to award, agree to, or sign any contract or modification thereto, or in any way to obligate the payment of money by the Government. The COR advises the Contracting Officer on matters relating to this contract, verifies completion of the work, certifies invoices related to completed work, and ensures compliance with all provisions of the contract.

*Corrective Action.* Action taken by the Contractor to correct a deficiency and identify the cause(s) of the deficiency.

*Joint Commission (JC).* A national organization dedicated to improving the care, safety, and treatment of patients in health care facilities, and publishers of the Joint Commission on Accreditation Manuals.

2.2 Acronyms:

ECCC Errera Community Care Center

ROMM Recovery Oriented Money Management

CO Contracting Officer

COR Contracting Officer Representative

JC Joint Commission

RP Representative Payee  
ID Identification  
IT Information Technology  
PWS Performance Work Statement  
QASP Quality Assurance Surveillance Plan  
DVA Department of Veterans Affairs

SSA Social Security Administration

VA Veterans Affairs

ROI Release of Information

**Section 3: Government Furnished Property, Equipment, and Services**

The government will not furnish or provide property, equipment or services.

**Section 4: Contractor Furnished Items and Services**

The contractor agency shall furnish computer equipment, software, photocopy machines, office supplies, client educational material and other equipment and supplies as may be needed to complete the tasks specified in this contract.

The Contractor shall provide all equipment, supplies, management, supervision, personnel, and transportation to assure that all services are in accordance with the contract and all applicable laws and regulations. The contractor shall ensure all work meets performance standards specified in this Performance Work Statement (PWS) and referenced documents.

**Section 5: Specific Tasks**

Task 1: The contractor agency will conduct recovery-oriented intake and enrollment visits with each referred Veteran and case managers at the Community Resource and Referral Center (CRRC) located at 114 Boston Post Road, West Haven, CT 06516 for the purpose of program enrollment. A VA release of information (ROI) will be signed by each Veteran prior to a referral being made to the contracting agency. This ROI will also allow shared communication for as long as the Veteran is enrolled in the program. If the Veteran chooses to rescind the ROI, he/she will be removed from this contractual program as shared communication is critical to the overall program outcome(s).

Task 2: A review of contractor program policies and procedures will be conducted and verified with signatures (Veteran participant, VA case manager, and contractor agency).

Task 3: Involves building formal linkages with Social Security Administration (SSA) and Department of Veteran Affairs (DVA). Each participant who agrees to enroll shall meet with the RP to begin formal request for a RP. The RP shall work closely with the New Haven office of the SSA and/or the VA Fiduciary in this process. Payee and participant shall complete form SSA 11, request to be selected as Payee, SSA 795 Statement of Claimant and and/or the fiduciary agreement, VA Form #27-4703 and other appropriate documents including SSA-4164 and VA form #20-572 are completed when appropriate.

Task 4: The Contractor shall provide in person and electronic RP and fiduciary services to Veterans enrolled in the ROMM program at the VA Connecticut Healthcare System in accordance with the specifications incorporated herein. Cost shall be all inclusive to include all necessary and appropriate labor, supervision, administrative functions, and all other services associated in providing RP and fiduciary services as indicated herein.

Task 5: The contractor agency along with each Veteran will develop a personal budget for each participant and will send it to the responsible VA clinician for review. This budget shall be crafted to ensure that all needs for shelter, food and clothing are met. Remaining funds shall be available for participants’ personal and recreational needs. The mandate that Social Security Administration benefits be spent to meet basic needs and not on things that are harmful (i.e. drugs, alcohol, gambling) shall be respected. The contractor agency will allow for changes to the Veteran’s Budget by having the Veteran complete a Funds Request Worksheet. A signed copy will be given to the contractor agency. The contractor agency will also send these to the responsible VA clinician.

Task 6: The ongoing duties of a Representative payee (RP) include: The payee must ensure that the recipient’s current and reasonably foreseeable needs are met. First, day-to-day needs for food, shelter, and clothing must be met. The benefits may be used for personal needs, such as recreation and other expenses. Benefits also can be used to pay for medical needs. Any money left must be saved and maintained in the beneficiary’s behalf.

Task 7: Includes financial reporting responsibilities. The RP must keep records showing how much was received in benefits and how the money was used. The payee is required to account for the funds received by completing a RP Report, Form SSA-623 as well as any additional forms requested by the Department of Veterans Affairs (DVA) Fiduciary. Case manager/payees and payees shall also collect, compile, and organize all data necessary to conduct an evaluation of the effectiveness of the project.

Task 8: Includes other reporting responsibilities. The RP must inform SSA and/or VA about any changes that may affect the checks received. The payee must inform SSA and/or VA if the recipient died moves, starts or stops working, gets married or is imprisoned. A payee for an SSI recipient must inform SSA and/or VA of any changes in the recipients living arrangements, marital status, and income or resources. They payee is liable for repayment of money received on behalf of the recipient if any of the above noted events occur and are not reported.

Task 9: Includes collecting data pertinent to this project. The VA is predominantly interested in cost/benefit information. This data will be collected by the contractor under the supervision of VA program managers. The contractor will be required to collect individual data on such elements as changes in budget needs, hospitalizations, urine toxicology results, income and expenses, and frequency of reporting events.

**Section 6: Technical Requirements**

6.1 Contractor agency must be in current standing with the Social Security Administration (SSA) and Veterans Benefits Administration (VBA) to provide organizational RP and fiduciary services. Evidenced by yearly written documentation from SSA & VBA.

6.2 Contractor agency must establish a no fee bank account for each Veteran enrolled in the program.

6.3 Contractor agency must secure a True Link Visa prepaid card (or card with similar capabilities for being monitored, blocking expenditures, and expenditure reporting) for each Veteran enrolled in the program.

6.4 The Contractor’s facility must be located within 15-minute driving distance so ROMM staff can easily provide financial oversight and conduct site visits.

6.5 All services under this contract must be performed by qualified staff including but not limited to: Project Director, Quality Assurance Manager, Representive Payees and Administrative Support.

6.6 Recovery oriented financial services will be provided daily based on individualized budget and/or spending plan.

**Section 7: Recovery Oriented Care Requirements**

7.1 Provide comprehensive recovery-oriented care focusing on strengths of the Veteran and complementing him/her on their successes.

7.2 Believing in the potential for growth and improvement of the Veteran.

7.3 Using a language of hope and possibility, being hopeful even when the Veteran cannot be.

7.4 Understanding that recovery is an individualized process and is a possibility for everyone.

7.5 A discussion of strengths is a central focus of every session, budget or spending plan and case summary.

**Section 8: Physical Plant/Environment**

Key Elements of the physical environment of the Contractor agency shall include:

* Secure password protected computers and financial accounting software.
* Veteran records are stored in locked and secured file cabinets.
* Secure fax for transmitting/receiving Veteran financial records.

**Section 9: Contractor Personnel**

Direct contractor staff shall consist of the following: Project Director, Quality Assurance Manager and RP

9.1 The Project Director shall be responsible for the program oversight and shall work closely with the DVA to ensure project effectiveness. The Project Director shall facilitate program development, including the development of an educational module for participants addressing money management skills. In conjunction with the DVA staff, the project Director shall coordinate data collection and review and provide training to all staff and directly supervise the RP.

9.2 The Project Director shall directly supervise project staff and shall closely monitor all payee activities. The Project Director shall work closely with VA staff to ensure a seamless delivery of service to all participants. The Project Director shall also participate in the compilation of data necessary to evaluate the effectiveness of the project.

9.3 The RP will provide both case management and payee services to participants. The RP shall work with participants to set goals and monitor progress toward those goals. The RP shall also assist in the development of participants’ budgets and receive and deposit all funds and shall disburse funds. The RP shall maintain all participant ledgers and reconcile participant accounts with bank document. The RP shall liaison with the local SSA office and the DVA Fiduciary. The RP shall assist the compilation and data necessary to evaluate the effectiveness of the project.

9.4 The Case Manager/RP shall work, in conjunction with participants, in the development of participants budgets, receive and deposit all funds and shall disburse funds. They shall maintain all participant account ledgers and reconcile participant accounts with bank documents. Payee shall liaison with the local SSA office and the DVA Fiduciary. They shall assist in the compilation of data of data necessary to evaluate the effectiveness of the project.

9.5 Contractor shall provide managerial oversight to the project.

9.6 Contractor shall oversee all fiscal procedures.

9.7 Contractor shall provide administrative support including fiscal operations, insurance and payroll.

9.8 The contractor agency will, in accordance with Veterans Benefits Administration and Social Security Administration standards, set up Veteran accounts, pay monthly bills, maintain up-to-date debit cardholder information, and reload Visa prepaid cards.

9.9 The contractor agency will conduct at minimum at least monthly and by appointment as needed. Contractor will provide community-based visits to Veterans. Contractor may choose to have office/drop-in hours at the ECCC at regular times with VA Liaison if both parties agree to the need. This will allow Veterans to drop off receipts, ask questions and have face to face interaction with their RP or Fiduciary.

9.10 The contractor agency will keep records showing how much was received in benefits and how the money was used. Annually, contractor agency shall file RP Report, form SSA-623-OCR-SM, an accounting of fund receipt and disbursement, as well as any additional forms as may be requested by the Department of Veterans Affairs (DVA) Fiduciary.

9.11 Under the direction of the Program Manager, the contractor agency will collect, compile, and organize data necessary to conduct an evaluation of the effectiveness of the project.

9.12 The contractor agency will meet with Veterans and VA clinicians as required to update personal budgets and spending plans.

9.13 The contractor agency will meet monthly with VA money management program staff to review policies and procedures and ongoing management of the program tasks.

9.14 The contractor agency will submit invoices monthly in arrears to the ROMM Coordinator to VA liaison, Jason Mastropaolo, for review and she will forward to the Core Manager of the Contract, Darla French. Invoices will not include patient identifiers.

9.15 The contractor agency will maintain program policies and procedures consistent with Social Security Administration and Veterans Benefits Administration guidelines and cooperate with any reporting and/or audit requirements of these agencies.

9.16 The contractor agency will ensure that all staff is trained annually regarding HIPPAA and the VA Privacy Act requirements. All correspondence will be maintained in a secure area to ensure the confidentiality of the Veterans patient information.

Section 10. RECORDS MANAGEMENT

1. Citations to pertinent laws, codes, and regulations such as 44 U.S.C chapters 21, 29, 31 and 33; Freedom of Information Act (5 U.S.C. 552); Privacy Act (5 U.S.C. 552a); 36 CFR Part 1222 and Part 1228.
2. Contractor shall treat all deliverables under the contract as the property of the U.S. Government for which the Government Agency shall have unlimited rights to use, dispose of, or disclose such data contained therein as it determines to be in the public interest.
3. Contractor shall not create or maintain any records that are not specifically tied to or authorized by the contract using Government IT equipment and/or Government records.
4. Contractor shall not retain, use, sell, or disseminate copies of any deliverable that contains information covered by the Privacy Act of 1974 or that which is generally protected by the Freedom of Information Act.
5. Contractor shall not create or maintain any records containing any Government Agency records that are not specifically tied to or authorized by the contract.
6. The Government Agency owns the rights to all data/records produced as part of this contract.
7. The Government Agency owns the rights to all electronic information (electronic data, electronic information systems, electronic databases, etc.) and all supporting documentation created as part of this contract. Contractor must deliver sufficient technical documentation with all data deliverables to permit the agency to use the data.
8. Contractor agrees to comply with Federal and Agency records management policies, including those policies associated with the safeguarding of records covered by the Privacy Act of 1974. These policies include the preservation of all records created or received regardless of format [paper, electronic, etc.] or mode of transmission [e-mail, fax, etc.] or state of completion [draft, final, etc.].
9. No disposition of documents will be allowed without the prior written consent of the Contracting Officer. The Agency and its contractors are responsible for preventing the alienation or unauthorized destruction of records, including all forms of mutilation. Willful and unlawful destruction, damage or alienation of Federal records is subject to the fines and penalties imposed by 18 U.S.C. 2701. Records may not be removed from the legal custody of the Agency or destroyed without regard to the provisions of the agency records schedules.
10. Contractor is required to obtain the Contracting Officer's approval prior to engaging in any contractual relationship (sub-contractor) in support of this contract requiring the disclosure of information, documentary material and/or records generated under, or relating to, this contract. The Contractor (and any sub-contractor) is required to abide by Government and Agency guidance for protecting sensitive and proprietary information.