SAMPLE WIC EBT IMPLEMENTATION
REQUEST FOR PROPOSAL (RFP)
STATEMENT OF WORK (SOW)

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BACKGROUND

• Sample Documents Workgroup formed.
• Comprised of both FNS headquarters and regional staff responsible for reviewing and approving WIC State agency’s EBT Planning and Implementation documents.
PURPOSE

• Provide WIC State agencies with sample language to assist with the development of a WIC EBT SOW.

• The State agency must edit the sample language to meet their needs.
PURPOSE

• Specifies the required technical and functional requirements to support the ongoing operations of a WIC EBT system.

• Conforms with Federal regulations, national standards and State agency performance standards.
PURPOSE

• Designed for a fully outsourced procurement.
• Designed to allow State agency to add to boilerplate RFP language as a Statement of Requirements or a Statement of Needs.
SECTIONS OF THE STATEMENT OF WORK

1. Project Management
2. Project Requirements
3. Vendor Readiness
4. Training
5. Staff and Participant Support
6. Reporting
7. System Testing
PROJECT MANAGEMENT

• Provides a description of WIC EBT provider’s qualifications, project roles and responsibilities.

• WIC EBT provider should demonstrate the capability to meet or exceed the requirements of the RFP and assure:
  - Accurate and timely delivery of services
  - Project requirements are achieved
PROJECT MANAGEMENT

- State procurement and technology standards are met
- Project issues or problems are handled appropriately
PROJECT REQUIREMENTS

• Outlines the SA requirements for the project.
• Provides a description of:
  - System Design
  - System Functionality
• Must comply with all FNS Standards (WIC Operating Rules and Technical Implementation Guide)
VENDOR READINESS

• Provides a description of requirements for management of WIC vendors.
• Describes WIC EBT provider’s roles and responsibilities to ensure:
  - Vendor Participation
  - Equipment
  - Help desk services
TRAINING

• Provides requirements for stakeholder training.
• Outlines the WIC EBT provider’s roles and responsibilities to assure:
  Stakeholders involved in and impacted by EBT are knowledgeable about policies and procedures.
STAFF & PARTICIPANT SUPPORT

• Provides requirements for State, Clinic and Participant Support.

• Describes the WIC EBT provider’s role in delivering:
  - Assistance to State and clinic staff via a toll-free number
  - Assistance to cardholders via automated response unit and live customer service support
• Outlines reports the SA requires to meet its informational needs.
• WIC EBT provider shall describe reports the SA anticipates as well as additional proposed alternatives or additional reports.
• Include methodology for maintaining the reporting.
SYSTEM TESTING

• Provides required system testing services.
• Describes the WIC EBT provider’s roles and responsibilities to assure:
  - System life cycle testing is performed for the duration of the contract
  - System testing is performed on all components and functional areas of the WIC EBT provider’s EBT systems and interfaces.
SOW CONTENTS

- TIPS are added throughout the document
  - To provide guidance and
  - To highlight important items for State agencies to consider.
SOW CONTENTS

Within the sample SOW, reference is made to various standard documents such as the:

- WIC EBT Operating Rules
- WIC EBT Technical Implementation Guide (TIG)
- X9.93 2008
- WIC Universal MIS-EBT Interface document
Use the most current version when possible.

Recognize that some stakeholders may be programmed to a prior version (e.g., X9.98).

Require support for prior versions until upgrades can be initiated.
CONCLUSION

• The Sample Implementation RFP SOW is in the final draft stages.

• Final document will be available in October.
QUESTIONS