Implementing MIS/EBT – Whatever It Takes (WIT)
Whatever It Takes (WIT)

Overview

- Dates
- Key Structure
- Major Events
- Keys to Success

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Whatever It Takes (WIT)

Dates

- April 2012 Legislation Passed
  - MIS – EBT Simultaneously
  - May – Joint Procurement for on-line SNAP/WIC
  - August - MIS with proven EBT processor

- Implementation July 1, 2013
  - Pilot July – Sept 2013
  - Food and Nutrition Service evaluation Oct 2013
  - Roll-Out 6 regions Nov 2013 – March 2014
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- Two functions that must work in tandem, without doing so neither can efficiently achieve its goals.

  - **Strategy** The *overall plan*, which involves complex operational patterns, activity, and decision-making that govern organizing and executing individual tactical actions.

  - **Tactics** The Ancient Greek *taktike* meaning "art of arrangement." It is a conceptual action focused on the *actual steps* used to achieve a goal. It focuses on the ordered arrangement and actions of organizational elements in relation to each other and in relation to external forces to achieve project objectives.
Whatever It Takes (WIT)

- Project Delivery

Strategy

JULY 2013

<table>
<thead>
<tr>
<th>Aug</th>
<th>Sept</th>
<th>Oct</th>
<th>Nov</th>
<th>Dec</th>
<th>Jan</th>
<th>Feb</th>
<th>Mar</th>
<th>Apr</th>
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<th>Jun</th>
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<th>Sept</th>
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<tr>
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<td></td>
<td></td>
<td></td>
<td>UAT</td>
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2012  

2013
**Whatever It Takes (WIT)**

**Tactics**

- Execution

---

<table>
<thead>
<tr>
<th>ID</th>
<th>Task Name</th>
<th>Delivered In</th>
<th>% Complete</th>
<th>Duration</th>
<th>Start</th>
<th>Finish</th>
<th>Resources Required</th>
<th>Pred Cost</th>
<th>Act Cost</th>
<th>Final Cost</th>
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<tbody>
<tr>
<td>1</td>
<td>WIC Data System - Design, Development, and Implementation Project</td>
<td>9%</td>
<td>616.5 days</td>
<td>Wed 9/30/11</td>
<td>Thu 1/10/14</td>
<td>2</td>
<td>0$ - 0$</td>
<td>0$</td>
<td>0$</td>
<td>0$</td>
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<tr>
<td>2</td>
<td>Design, Development, and Implementation Project authorized to start</td>
<td>0%</td>
<td>6 days</td>
<td>Wed 9/30/11</td>
<td>Wed 9/30/11</td>
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<td>0$ - 0$</td>
<td>0$</td>
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<tr>
<td>3</td>
<td>Planning &amp; Definition Phase authorized to start</td>
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<td>41 days</td>
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<td>Wed 1/10/11</td>
<td>2</td>
<td>0$ - 0$</td>
<td>0$</td>
<td>0$</td>
<td>0$</td>
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<tr>
<td>5</td>
<td>Floridawell Project Management Activities</td>
<td>7%</td>
<td>661 days</td>
<td>Mon 3/17/14</td>
<td>Mon 3/17/14</td>
<td>2</td>
<td>661$ - 711$</td>
<td>661$</td>
<td>661$</td>
<td>661$</td>
</tr>
<tr>
<td>7</td>
<td>Planning/Action/Status Meetings - PM</td>
<td>7%</td>
<td>661 days</td>
<td>Wed 9/30/11</td>
<td>Wed 9/30/11</td>
<td>2</td>
<td>661$ - 711$</td>
<td>661$</td>
<td>661$</td>
<td>661$</td>
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<tr>
<td>8</td>
<td>Planning/Action/Status Meetings - BA</td>
<td>7%</td>
<td>596 days</td>
<td>Fri 3/7/14</td>
<td>Fri 3/7/14</td>
<td>2</td>
<td>596$ - 620$</td>
<td>596$</td>
<td>596$</td>
<td>596$</td>
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<tr>
<td>9</td>
<td>Provide Status Reports to Stakeholders (ongoing)</td>
<td>7%</td>
<td>661 days</td>
<td>Mon 3/17/14</td>
<td>Mon 3/17/14</td>
<td>2</td>
<td>661$ - 711$</td>
<td>661$</td>
<td>661$</td>
<td>661$</td>
</tr>
<tr>
<td>11</td>
<td>Project Planning &amp; Definition Phase</td>
<td>64%</td>
<td>183 days</td>
<td>Wed 9/30/11</td>
<td>Fri 3/9/12</td>
<td>2</td>
<td>183$ - 200$</td>
<td>183$</td>
<td>183$</td>
<td>183$</td>
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<tr>
<td>13</td>
<td>Complete Project Initiation</td>
<td>100%</td>
<td>13 days</td>
<td>Wed 9/30/11</td>
<td>Fri 10/4/11</td>
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<td>13$ - 15$</td>
<td>13$</td>
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<td>14</td>
<td>Develop Project Management Documents</td>
<td>58%</td>
<td>34 days</td>
<td>Fri 10/14</td>
<td>Mon 10/11</td>
<td>2</td>
<td>34$ - 50$</td>
<td>34$</td>
<td>34$</td>
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*Exhibit 3: WIC Data System - Design, Development, & Implementation and Operations & Maintenance Project*
Whatever It Takes (WIT)

- Key Relationships
  - Influence
  - Trust
- Primary
  - D.Eibeck
  - J.Menges
  - B.Christy
  - P.Kidder
  - 3Sigma
  - FIS/CDP
Whatever It Takes (WIT)

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  - 3Sigma
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Whatever It Takes (WIT)
Vendor Advisory Committee
- November 2012 and March 2013
  - Limited grant – stand-beside to non-integrated facilities
  - All integrated facilities on upgrade schedule
  - Pilot stores a cross-section of all categories of vendors
- Collaborative coordination with grocers and EBT provider
- Exceptional grocery vendor commitment start – finish
  - Corporate’s superior leadership instrumental – all of them
  - Florida Retail Federation – adamant support
  - Multiple flawless certifications
  - Adapted release cycle
  - Holiday “Not-A-Problem”
Whatever It Takes (WIT)
Keys to Success

- Survey vendor sites early and update frequently – March 2012
  - Know the integrated systems
  - Rapid roll-out
- ★ Advocate integrated system solution
  - Engage vendor, connect to suppliers
  - Stand-beside not the best for WIC
- On site UPC verification-collection
  - Unique food items – enhance acceptance
  - Physical presence
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- UPC collection heart of activation
  - Microsoft ACCESS program and on-site collection

- Focused vendor cooperation & support
Whatever It Takes (WIT)

- EBT integrated MIS
  - 3Sigma
    - Executive involvement throughout – always available
    - Proactive and adaptive
    - Met every milestone
  - Transfer system – limited modification
    - Development and design and code
    - Site and central configuration
    - Testing
      - Acceptance Testing - Modifications
- July 2013 pilot – 22 stores, 3 clinics, 8,000 participants
- Implementation Nov 2013 – Mar 2014
Whatever It Takes (WIT)

- **User Training**
  - Train the Trainer – *Super Users*
    - Two week-long sessions 20-30/session
    - Concepts; practical hands-on experience
  - Critical user “buy in” and advocacy
  - Extensive work creating training documents and videos
    - Placed in training system
    - Required all users pass practical before access
Keys to Success

- Data Migration
- Transfer every record from the “old MIS” to the “new MIS”
  - Family and benefit record by record screening
    - Detailed schedules
    - Multiple dry runs
  - Must really know the data
    - What is anticipated
    - Compare to results – be very critical
## WIC EBT Roll Out Summary

<table>
<thead>
<tr>
<th>Count of Store Type</th>
<th>Type</th>
<th>POS</th>
<th>Grand Total</th>
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<tbody>
<tr>
<td>Rollout Region</td>
<td>Integrated</td>
<td></td>
<td></td>
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<tr>
<td>Region 1 – Implementation Date: November, 2013</td>
<td>176</td>
<td>35</td>
<td>211</td>
</tr>
<tr>
<td>Region 2 – Implementation Date: December, 2013</td>
<td>271</td>
<td>11</td>
<td>282</td>
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<tr>
<td>Region 3 – Implementation Date: January, 2014</td>
<td>341</td>
<td>28</td>
<td>369</td>
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<tr>
<td>Region 4 – Implementation Date: February, 2014</td>
<td>563</td>
<td>30</td>
<td>593</td>
</tr>
<tr>
<td>Region 5 – Implementation Date: March, 2014 (Week 1)</td>
<td>299</td>
<td>20</td>
<td>319</td>
</tr>
<tr>
<td>Region 6 – Implementation Date: March, 2014 (Week 3)</td>
<td>147</td>
<td>22</td>
<td>169</td>
</tr>
<tr>
<td>Grand Total</td>
<td>1797</td>
<td>146</td>
<td>1943</td>
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</tbody>
</table>
Keys to Success

- WIC MIS and EBT Clinic Implementation
  - User “buy-in” critical – State Office Creditability
  - The **Super User** critical
    - On-site support
    - Written WiSE Notes
  - Supervisory coordination
    - In-clinic
    - Grocery
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- State EBT Acquisition
  - Joint acquisition with SNAP
    - May – Dec 2012
    - Exceptional inter-departmental cooperation
  - Awarded FIS/CDP
    - FIS – Prime and CDP – WIC
    - Proactive and adaptive – met every milestone
    - Committed to and met June 2013
  - Arrived on-site November 2012
    - Key Executives – Intimately involved & there
    - Exceptionally well organized
    - Prepared grocers and TPP quickly
    - Excellent working relationship with 3Sigma
Whatever It Takes (WIT)

- FIS/CDP
  - Guided/led all integrated system upgrades
  - Daily contact with developers and managers
    - Multiple programming staffs
    - Third party processors & grocery vendors
  - Site survey for all locations
    - FIS/CDP met their timeline for certifications and installations; some third party processors and electronic cash register delays
    - Telephone and personal assistance
Keys to Success

- Professional Relationships
  - Trust – State Office & Clinics
    - Known entity
    - Knew “the system”
  - FIS/CDP – 3Sigma Exceptional
  - Grocers committed and active
    - Knew redemptions
    - Constant contact

- Cooperative
  - Environment
  - Attitude
  - Flexibility encouraged
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Keys to Success

-- WIT --

Strong Executive Leadership
Committed Contractor Teams
Determined WIC Staff
Dedicated Grocers

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Summary

-Just-Do-It-

- Improvement Can’t Stop - Ever
- Ownership & engagement
- Frequent tests and UAT scripts
  - UPC collection benefits
  - Integrated systems
  - Data Migration
Whatever It Takes (WIT)

Additional Information

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-We Will Answer The Phone-