

Sample Documentation for Writing an EBT Planning Advance Planning Document (PAPD)



FNS EBT Users
Group Meeting
August 2012

Sample Documents Workgroup



- Workgroup formed in the March, 2011.
- Comprised of both FNS headquarters and regional staff responsible for reviewing and approving WIC State agency's EBT Planning and Implementation documents.

Purpose of Workgroup

- Provide sample documents for the major EBT planning and implementation documents required by FNS.
- Facilitate and streamline the WIC EBT approval process

Sample Documents Currently Being Developed

- Planning Advance Planning Document (PAPD)
- Alternatives Analysis Document(AA)
- Cost Analysis Document (CA)
- Planning Request for Proposals (RFP)
- Implementation Advance Planning Document (IAPD)



PAPD Document

The PAPD is the first step in the planning phase and gives the State agency an opportunity to:

- ❖ evaluate current operations
- ❖ define future needs
- ❖ define project scope including:
 - resources
 - schedule
 - budget

Sample PAPD

The sample PAPD is designed for WIC State agencies that have no prior EBT planning experience and outlines the required information needed by FNS for PAPD approval.

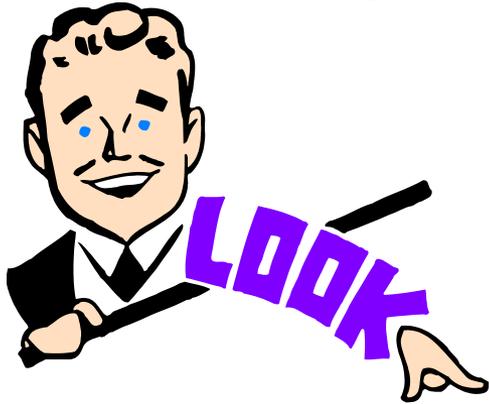


Sample PAPER

Each section includes:

- 1) Description of what to include
- 2) Sample language
- 3) Helpful “Tips”

Outline of Sample PAPD



- ✓ Transmittal Letter

- ✓ Table of Contents

The sample PAPD is divided into four main sections:

- ✓ Executive Summary;

- ✓ Project Description;

- ✓ Cost Allocation Plan; and

- ✓ State Agency/Contractor Assurances.

Executive Summary

Executive Summary – High level description of planning activities

Includes:

State agency's Procurement plan

Funding source to support project (e.g., OA, NSA, Technology)

Should focus on overall planning goals and objectives, including project scope and duration.

Project Description

Project Description is divided into 6 sub-sections:



- 1) Narrative Statement;
- 2) Procurement Plan,
- 3) Project Manager,
- 4) Staffing and Project Management;
- 5) Schedule/Timeline of Activities,
Milestones, Deliverables; and
- 6) Proposed Budget.

Project Description

Narrative Statement

- Approximately 2 to 3 pages long.
- Describes:
 - planning activities
 - activities conducted to date and outcome.

Must Include:

- timeline
- transition activities
- other entities involved in the project

Project Description

Procurement Plan

Describe:

- procurement method
- contractor resources

If conducted in-house, identify resources

Project Description

Project Manager (PM)

- Must identify PM or discuss plans to hire a PM.

- PM
 - ✓ Certified
 - ✓ Have knowledge and experience working with IT projects
 - ✓ Hold a degree in project management or have adequate project management experience.

Project Description

Staffing and Project Management

- ❖ Resources and experience
- ❖ Percentage of time devoted to the planning project.
- ❖ Contractor assistance (if required)
- ❖ Staffing plan and organizational chart.

Project Description

Schedule/Timeline of Activities, Milestones, Deliverables

- Table/chart outlining:
 - Key planning tasks,
 - Events,
 - Dates, and
 - Deliverables for the project.

- Ensure sufficient time for completing each task – factor in FNS review and approval time.

Project Description

Proposed Budget

- Identify:
 - State and contractor costs
 - transition activities
- Include:
 - budget narrative
 - estimated costs (show how they were derived),
 - salary information for State and local staff
 - State travel, if applicable.
- Budgets broken out by federal fiscal year and fiscal year quarter
- Identify sources.

Cost Allocation Plan

Describe the cost allocation methodology for any shared planning costs.

WIC funds can only be used for the portion of the system that supports WIC operations. All other program functionality must be funded by the appropriate program.

State Agency/ Contractor Assurances

If Information System modifications are identified as an activity in the EBT PAPD, the State agency must provide assurances the system modifications will be planned in accordance with existing standards.

Conclusion

The Sample PAPD and Handbook 901 (EBT Section 4.2) are the best resource tools to use when developing a PAPD.

Question Time