

TIPS FOR WRITING YOUR EBT PLANNING RFP

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State of “Franksylvania”

Sample EBT Planning RFP:

- | | |
|--------------------------------|-------------|
| I. INTRO/BACKGROUND | (CA) |
| II. STATEMENT OF WORK | (ND) |
| III. EVALUATION/SCORING | (WA) |
| IV. STANDARD PROVISIONS | (WI) |

It might be



BORING

We are in charge!

- SECTION ONE

1. General Information

- 1.1. Introduction

The WIC EBT Project Director and Manager will oversee this project by setting project objectives, goals and requirements and will also approve the tasks, timelines and deliverables of the Contractor, under advisement of the EPPCS.

We are special!

- 1.2. Background
- The WIC Program's Integrated Statewide Information System (ISIS), was developed in the early 1990's as an online mainframe system using a DB2 relational database and was fully implemented statewide in 1996. ISIS handles 2.6 million online transactions daily. ISIS handles the food prescription portion of the certification process, resulting in approx. 5 million paper FIs monthly. Files containing FI serial numbers from ISIS are created and transferred nightly to the State Treasurer's Office (STO). The STO also receives electronic image replacement documents or batches of physical FIs from the vendor's presenting banks.



“Hasten Slowly”



1.4. Key Action Dates

	Event	Date
1.	Release of RFO	11/15/2011
2.	Deadline for Written Question	11/22/2011
3.	Response to Written Question	12/2/2011
4.	Due Date for Bidder Response	12/19/2011
6.	Contract Award	01/11/2012

It's a free country?

- 1.7. Cost
- The estimated amount allotted for the EBT Planning Project is \$150,000 - \$339,000. Offers received shall not be greater than \$339,000 for this project; any offers exceeding this amount will be rejected.

OMG EBT EPT?

- **1.14. Acronyms used throughout the RFP**

- **DPH** **Department of Public Health**
- **DGS** **Department of General Services**
- **EPPSC** **EBT Planning Project Steering Committee**
- **EPT** **EBT Project Team**

What's in a Name?

- **DELIVERABLES**
- **3.01.1 EBT Feasibility Study** – Shall include a written deliverable in draft, revision and final versions. In compliance with FNS Handbook 901, Section 4.2 (http://www.fns.usda.gov/apd/Handbook_901/V_1-4/Chapter_4-WIC.pdf) to determine the viability of implementing EBT within the State's operating environment.
- **3.01.1 A. WIC MIS EBT Readiness Assessment** – Assess the readiness and practicality of adapting WICnet to electronically issue and track benefits. Conduct a gap analysis comparing the FNS FReD/FReD-E to WICnet system documentation.

SNAP Decision

- **3.01.1 D Financial Considerations/Cost Benefit Analysis**
- **Assess EBT effects on financial transactions. Assess whether EBT on-going needs are best handled in-house by the state or outsourced to a third party.**
- **Identify paper costs at the State and local level, costs that would be eliminated as a result of EBT efficiencies gained, and new costs related to EBT operations.**
- **Explore possible partnership with SNAP- Examine the implications of partnering with SNAP on a food delivery card system, including technical, fiscal and administrative impacts.**

On again, Off again

- **3.01.1 E Technical Considerations**
- **Infrastructure Considerations – Assess WIC telecommunications capabilities and requirements, and the impact of any required improvement.**
- **Electronic Card Options – Examine the choices of cards for the development, testing, and evaluation of EBT solutions. This should include options for magnetic stripe cards for an online solution and smart-cards for an offline solution.**

SOW What?

- **Recommend a Technical Solution** - Detail the various implementation options available to WIC, include the benefits and challenges of each technical solution (online vs. offline), and risks of each approach, and provide a recommended solution. Provide a thoughtful, detailed analysis of deliverables A-E as the basis of the recommendation.
- **Recommend a Plan** – Based on pertinent data, recommend a 2-5 year plan for the State to pursue WIC EBT. As part of the recommended implementation plan the impact on stakeholders (Retailers, Local Agencies, Clinics, State Agencies, and Banking) should be detailed.

What's the Plan, Roseanne?

- **3.01.2 Project Plan** – The offeror will provide the following sections of the Project Plan regarding all services, tasks, and products delivered by the offeror:
 - A mutually agreed upon detailed baseline scope and schedule for the project
 - The management plans to control scope, schedule, cost and quality, including the variance
 - An integrated change control process
 - A process for accepting/approving deliverables including the signoff form to be used
 - A human resource management plan
 - A communication management plan
 - A risk management plan

The Year of Living Dangerously

- 3.05 Project Schedule
- Include a detailed schedule that includes task descriptions for completing each deliverable, a timeline for completion of each task, involved parties, and people responsible for completing each task. The schedule shall be submitted in sufficient detail to allow the evaluators full visibility into the planned activities, responsibilities, and dependencies. The schedule shall include project milestones and be developed utilizing MS Project. The submission shall include a description of any known risk areas and the contractor's approach to mitigating the risks.

Get it while you can!

- **3.01.6 Implementation Advanced Planning Document (IAPD)**
- **Follow state and federal IAPD guidelines**
LINK
- **3.01.7 Request for Proposal (RFP) for EBT Implementation Phase**
- **Follow state and federal RFP guidelines**
LINK

Sometimes, less is more?

FNS HANDBOOK 901

PROCUREMENT

The State agency should weigh the cost of each bidder's proposal...but should not base their decision solely on cost, unless their procurement laws direct them to use lowest bidder procurement. To ensure the best product and long-term value for the project, it is important that the State agency not weight the cost proposal too highly and choose the lowest bidder, regardless of other factors.

FNS recommends the cost proposal be weighted as 20 percent to 40 percent of the total proposal, to provide balance between technical and cost factors.

Evaluation and Scoring of Proposal Response

6.3 An evaluation committee of representatives from program areas will judge the merits of proposals received in accordance with the evaluation factors defined in the RFP. The evaluation process will include a structured review of each section of the response by DOH. The distribution of points for each proposal section is provided in the table below.

<i>Preliminary Score</i>	<i>Maximum Score</i>
<i>Requirements/Criteria</i>	
Technical Proposal Specification	400
Management Proposal Specifications	400
Cost	200

Experience in WIC Preferred

- *6.6.2.1 Previous Program Experience*
- States should not put previous program experience in their selection criteria as a pass/fail element. Instead an RFP may require and assign evaluation points for relevant experience in large-scale eligibility or benefit management programs and may award more points for program-specific experience. Therefore, the RFP should not contain language, such as "must have WIC experience" but should assign points on the basis of experience. States should assess the quality of the experience as well as the existence of the experience.

Score!!!!

D - TECHNICAL PROPOSAL SPECIFICATIONS

**Organizational Knowledge/Experience re:
Consulting Services for WIC EBT (400 Points):**

1. Prior Experience with WIC and EBT (225 points)

Bidder must describe any prior experience in assessing a state's current WIC program and its vendors, and then identifying a variety of EBT solutions or recommendations that met other State WIC program needs.

Show us the money

E - MANAGEMENT PROPOSAL SPECIFICATIONS

QUALIFICATIONS (400 points Maximum)

Describe your organization's relevant staffing levels and business relations and to provide references.

- 1. Staffing (250 points).** Provide a staffing and organizational plan to carry out the proposed work.
- 2. Fiscal Controls (50 points).** Describe your organization's fiscal controls and accounting practices that assure against fraud or abuse of funds.
- 3. Fiscal Capacity (100 points).** Describe your fiscal capacity to pay costs "up front" and be reimbursed on a deliverable basis.

We Are The World

- *6.6.2.2 Geographic Preference Prohibition*
- The USDA rule at 7 CFR 3016.36(c)(2) states that grantees and sub-grantees will conduct procurements in a manner that prohibits the use of statutorily or administratively imposed in-State or local geographical preferences in the evaluation of bids or proposals, Nothing in this section preempts State licensing laws; therefore, a State can require that a vendor be licensed in the State.

All Federal Requirements are not the same!

Attachment 8 FNS Required Federal Provisions

1. **Executive Order 11246, entitled —Equal Employment Opportunity**, federal contractors and federally-assisted construction contractors and subcontractors from discriminating in employment decisions on the basis of race, color, religion, sex, or national origin.
2. **The Clean Air Act, Section 306:** No Federal agency may enter into any contract with any person who is convicted of any offense under section 113(c) for the procurement of goods, materials, and services to perform such contract at any facility at which the violation which gave rise to such conviction occurred if such facility is owned, leased, or supervised by such person.

It remains a free country.

FEDERAL COMPLIANCE AND FEDERAL ASSURANCES

CITIZENSHIP/ALIEN VERIFICATION/DETERMINATION -

The Personal Responsibility and Work Opportunity Reconciliation Act (PRWORA) of 1996 (PL 104-193) states that federal public benefits should be made available only to U.S. citizens and qualified aliens. Non-US citizens and unqualified aliens are not eligible to receive the services. PL 104-193 also includes specific reporting requirements.

EBT Friending, unFriending ☹️

14.0 RIGHT TO APPROVE CHANGES IN STAFF:

The State shall have the absolute right to approve or disapprove a proposed change in the assigned staff. The State, in each instance, will be provided with a resume of the proposed substitute and an opportunity to interview that person prior to giving its approval or disapproval. The State shall not unreasonably withhold its approval.



You'll Pay For This!



PERFORMANCE STANDARD If the contractor fails to perform as represented in the contract terms and conditions, the contractor may be assessed a penalty for the non-performance until such time as the products are delivered or services performed. The penalty would be an assessment of \$500.00 per day for each calendar day of delay. Material and repeated failure of the contractor to comply may be cause for termination.

The Sub-way diet

22.0 PRIME CONTRACTOR AND

SUBCONTRACTORS: Subcontractors must abide by all terms and conditions of the contract. When subcontractors are used, this should be clearly explained in the proposal. However, the prime contractor will be responsible for contract performance whether or not subcontractors are used.

Blah blah blah

Approval The contract shall be subject to approval by the USDA-FNS for expenditure Of Federal funds under the contract, as required by applicable regulations.

Order of Precedence In the event of any conflict between the provision of the contract, the incorporated provisions of the RFP, or the incorporated provisions of the proposal, the provisions of the contract shall prevail over the conflicting provisions of the RFP and of the proposal, and the provisions of the RFP shall prevail over conflicting provisions of the proposal.