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HEALTHIER WASHINGTON**

**Women, Infants, and Children Nutrition Program (WIC)
Lessons Learned EBT Planning
August 22, 2012**



Washington State WIC Nutrition Program

What We Learned and Advice To Other States



- Identify your team early on
- Don't reinvent the wheel
- Learn all you can about EBT as soon as possible
- Check in with your major “state agency” stakeholders
- Engage with your states SNAP EBT program
- Engage your retailer/vendor community

What We Learned continued...



- **Consider adding a Gap Analysis**
- **Clearly define the deliverables in the RFP/SOW**
- **Clearly define deliverable review cycles**
- **Identify document management & repository to use during the project**
- **Detail onsite requirements (during certain activities)**
- **EBT requirements review sessions with stakeholders**



Got Questions?

Contact Information

Callie Goldsby, WIC Information Technology Manager,
callie.goldsby@doh.wa.gov, 360-236-3626

Becky Waite, WIC Business Project Manager,
becky.waite@doh.wa.gov, 360-236-3640

Gary Schricker, WIC EBT IT Project Manager,
gary.schricker@doh.wa.gov, 360-236-3849

WIC EBT Planning RFP Lessons Learned Talking Points

Slide 1

- Title slide
- The following are some of the valuable lessons we have learned in Washington over the past year and a half.

Slide 2

- Identify all staff that need to be involved in the project ahead of releasing your RFP. Especially if you are a large program. This should include at least representatives from vendor management, clinic services, program integrity, data/reporting, and IT staff.
- Don't reinvent the wheel if at all possible. Look to other state's EBT planning documents as sources of information.
 - Join or form a Regional EBT User Group, the one in the western region has been incredibly helpful, we have a monthly conference call and have been working together for 2 years now.
 - In your statement of work ask the bidder/contractor to provide a list of known reports and documents they or other contractors created for other WIC EBT states, or Contact other states asking for this information directly.
 - In either case, gather lessons learned from key states that have implemented WIC EBT. You can also learn a lot by visiting states that match your own state's WIC profile and project goals. In general, we found face to face communication with colleagues from other states to be more fruitful than web searches alone.
- Learn all you can about EBT prior to bringing on a contractor; we recommend putting EBT 101 training for staff, and a more advanced EBT 201 requirement in the RFP. Don't wait to do this during the functional requirements identification process. Read up on The Online vs. Offline card technology choice the more informed you are the better.
- Check in with your contracts office, office of state treasurer or financial management, some states require an economic feasibility study for electronic payments, or some other state requirement, if this is the case put it into your RFP.

- Look to your states SNAP program to get info on their EBT contract, you may be able to tag WIC EBT onto that contract. If this is a possibility put it into the RFP to evaluate the potential of using the SNAP contract.
- Engage your retailer/vendor community, form a retailer task force committee in addition to any retailer advisory committees you already have. Our Retailer Task Force included the IT people from all the major wholesalers because most of the independents depend on their wholesaler for their Electronic Cash Register or Point of Sale system and support. Most independent retailers could not answer the survey questions on their own. We ended up getting information from the wholesalers who actually provide the ECR/POS systems and support. So this task force was a very helpful sounding board and mechanism for feedback.

Slide 3

- Add a Gap Analysis for identifying potential changes to MIS system for Online or Offline EBT. Don't underestimate the cost or the schedule of these changes depending on the MIS system. You may have to work with a user group to get the system EBT capable, not just ready.
- Clearly define the planning consultant's deliverables in their Statement of Work unambiguously and fully, and make sure the deliverables fit your organization's need.
 - If your planning project involves surveying stakeholders, pay close attention to the design of the survey.
 - Survey questions should be uniquely numbered.
 - If it's a retail vendor survey, a unique vendor id number should be assigned to each survey sent out for ease of compilation.
 - An official repository for the survey responses should be set up. It should reside at the agency, not the contractor, as it is a project resource or asset.
 - Require the contractor to validate the respondent's answers looking for erroneous replies and misstatements, and require follow up to correct the data.
 - Plan for more than one survey effort. Frequently, respondents do not complete the survey form properly or completely and a re-survey effort is needed. Also, plan on a strategy for dealing with those that don't respond at all.
 - Don't allow the contractor to design the survey content and post-survey reporting process in a way that meets their contractual obligation at

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expense of your project needs. For instance, stipulate a minimally acceptable response rate in the SOW. Again see if you can get copies of other states vendor surveys as a start. Be as clear as possible in the SOW.

- If your planning effort includes an assessment of impacts to clinic operations:
 - Make sure your SOW stipulates clinic visits to different size and types of clinics to obtain a more comprehensive perspective.
 - Your SOW could include second visits to the same clinics to confirm any project conclusions or information with clinic staff and to gather new information not identified in the first visit.
 - As with lessons learned from other states, face to face meetings with clinic staff are preferable keeping in mind that the most effective method of information gathering is in a one on one situation with line staff.

- Clearly define review cycles at least 2 per deliverable depending on the size of your team. Give yourself more than a week to turn around each review and be sure to include enough time for all possible review cycles in the RFP so the contractor can plan accordingly.
 - We needed more than 2 review cycles. The documents are big and since the technology is new we had many questions. We also found it helpful to walk through the changes and comments with the Contractor during each review cycle.

- Ask that the contractor to provide a secure site like SharePoint to track all documents, and deliverable versions, if the state doesn't have a tool available.

- Be clear up front what your onsite requirements are for the contractor
 - We found it helpful to have them onsite for project kickoff, functional requirements, EBT 101 sessions, and SOW development.

- If your planning contractor is performing EBT requirements review sessions with stakeholders set up face to face prep meetings with the stakeholders first explaining the purpose of the requirements review sessions and detail what and how they are expected to contribute to the sessions. Stakeholder preparation for these sessions is critical. Don't just setup the time for a contractor to visit with clinics and then expect to get good results.

Again, use other state's requirements as sample requirements where appropriate.

Slide 4

- Final Thoughts - If you are considering or planning MIS and EBT FS & IAPD on different tracks, rethink that up front. Looking back we would have saved money and effort to have done them together.
- Questions