

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

Karen Burns-Hill, FNS SERO

Bob Logan, FNS MARO



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 MANAGMENT

- 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

REPORTING

- **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**



SOW CONTENTS

- **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

