

# EBT 101: GETTING STARTED

## WIC EBT PLANNING

**WIC EBT User Group Meeting**

**August 22, 2012**

Ellen Thompson

MAXIMUS

# Get Educated

- States should know the basics of EBT before beginning the planning process
- Knowledge of EBT technologies, implementation approaches, and project activities will help State Agencies to:
  - ▣ Understand your technology and implementation options
  - ▣ Understand the tasks ahead of you
  - ▣ Consider your timeline and resources
  - ▣ Determine what tasks you may want to outsource

# Educational Resources

- Conferences and User Group Meetings
- FNS public website
- FNS PartnerWeb – WIC EBT Technical Documents Community
- Visit or talk to State Agencies with operational EBT systems and/or have completed the planning process
- FNS Documents:
  - Handbook 901 –WIC EBT Chapter (4.2)
  - FReD EBT-Ready Functions and Appendix E
  - FNS approved cost analysis models
  - WIC EBT Operating Rules and Technical Guidance Document
  - WIC Universal EBT-MIS Interface
  - WIC EBT Policy Memoranda
  - UPC Category/Subcategory Table
  - Status of EBT pilot projects

# Determine how planning activities will be completed

- Do other agencies and/or departments need to be involved?
- Are resources and expertise available in-house?
- If not, what are the procurement options for a planning contractor:
  - ▣ Request for Proposals
  - ▣ Use of an existing Master Services Agreement
- If outsourced, what resources will be available to support State Agency responsibilities?
- Who will manage the project for the State Agency?

# Identify a project manager

- May not be full time during the planning phase, but will likely be full time during implementation
- Must have the time to commit to the project
- Will oversee planning activities including the planning contractor (if planning tasks are outsourced)
- Some State Agencies have used a contracted project manager

# Engage Stakeholders

- Retailer Support
  - ▣ Critical to involve retailers early
  - ▣ Established a vendor advisory group for EBT that includes a mix of retailer types, wholesalers, value added resellers, and retailer associations
- State Support
  - ▣ Obtain support from necessary State officials
  - ▣ Is there a separate IT department that requires involvement?
  - ▣ Identify any State legislative requirements that impact EBT
  - ▣ Identify any other programs that require coordination
  - ▣ Form an executive steering committee
- Local Agency Support
  - ▣ Determine how local staff will be involved and informed during the project

# Consider Criteria for Decision Making

- Start considering what factors will be most important in determining technology and implementation approach decision:
  - Cost
  - Resources
  - Impact on participants
  - Impact on vendors
  - Impact on staff

# Identify Data Needed for Planning Activities

- Start collecting or identifying sources of data such as:
  - ▣ Program Data
    - Number of WIC Households (not all states maintain household counts)
    - WIC Participant Churn Numbers
    - Estimate of Participation Growth
    - WIC FI Data (i.e., issued, paid, returned, etc.)
  - ▣ Financial Data
    - WIC Banking Contract Costs
    - Printer, Supplies, and Maintenance Cost
    - Labor Rates for Employees in Roles Related to Benefit Issuance, Redemption and Reconciliation
    - Indirect Rate for State Employees
    - Staff Annual Cost of Living Adjustment Rate

# Other Considerations

- Be realistic about timeframes
  - ▣ Consider state and FNS review periods for documents
  - ▣ If planning contractor is used, consider the timing of deliverable submissions so that State Agency is not reviewing multiple documents at the same time
- Look to other states for sample documents
  - ▣ FNS is working on a sample PADP and Planning RFP
- Talk to other states about lessons learned
- Obtain information about the SNAP EBT contract and talk to SNAP EBT staff about lessons learned

# Types of Activities a Planning Contractor can Support

- EBT orientation / training
- Stakeholder support activities
- Baseline cost analysis
- Alternatives analysis
- Cost benefit analysis
- Identification of policy / procedure changes
- Assessment of work flow changes
- Gather information and documentation from other State Agencies
- Feasibility study
- IAPD
- Procurement documents
- Procurement support
- Contract negotiation

# Contact Information

---

Ellen Thompson

MAXIMUS, Director

[ellenthompson@maximus.com](mailto:ellenthompson@maximus.com)

(240) 401-8676