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WIC EBT Re-Procurement

Improving Results

Jerry Owens, Conduent

Overview

Reducing Uncertainty and Cost

Re-procurement is an excellent opportunity to optimize your requirements allowing bidders to showcase their proposed capabilities with understanding and clarity. The following activities not only result in proposals that more closely align with program needs, but also reduce uncertainty which results in lower costs.

- **Incorporate** changes from last procurement due to a result of the Q&A process or any amendments
- **Refine** requirements based on actual implementation or requirement validation efforts
- **Remove** unused/unneeded requirements or add clarity to reduce uncertainty
- **Clarify** intent of any new IT policy requirements that result in expensive solution-wide impacts to items such as hosting, security, or architecture

Incorporate...

...changes from last procurement

Programs tend to use previous procurement documents as the baseline for a re-procurement of the same services. This is not only an excellent time saver, but if done properly, also provides the largest improvements to the procurement documents.

- Use Q&A results of the earlier procurement to identify requirements that needed revision previously
 - These include requirements that may have been removed, added, or changed by answers
- Modify the new procurement requirements so that they align with the previous answers where appropriate
 - Not all answers will result in changes, but the question may provide insight on how to revise
- Take advantage of amendments and make updates as appropriate
 - Amendments often have updated requirement language making it easy to replace language in the new documents

Refine...

...requirements to align with functionality

Most programs have implemented but are on their original WIC EBT procurement and we all better understand now what we didn't understand then. Much has been learned from requirements validation, implementation, change requests, and other activities.

- Utilize existing documentation and lessons learned to refine requirements to better align with program needs
 - Revising vague or incorrect requirement language reduces questions and improves response
 - Be clear, but careful not to over-define so that bidders can explain how their solution meets the need
- Be sure to include any new requirements that are the result of a change request or defect remediation effort
 - Change requests after an initial procurement are often the result of an incorrect or missing requirement, so adding to the new procurement requirements where appropriate is essential
 - Some defects are the result of a misunderstood requirement and a revision of the requirement can provide clarity

Remove...

...unused or unneeded requirements

Similar to refining, removing requirements is based on experience and lessons learned from the previous procurement and implementation efforts. With this experience and additional understanding, many programs will find a few requirements that are obsolete or just not needed.

- Identify and remove requirements that were overcome by events
 - Requirements based on limited knowledge that were not needed in the solution
 - Requirements that are now understood to be met by other requirements or functionality
- Not all unused requirements will merit removal
 - Some requirements were based on an intended design that may still be desired at a later date
 - Provide additional details and clarify the intent of the requirement or the reason it remains
 - Consider making the remaining requirement optional so it can be priced separately

Clarify...

...new IT policy requirements

Policies and standards for government IT solutions evolve over time, so it is not uncommon to find such revisions in a re-procurement. Generally, such revisions are relatively minor and easily incorporated. However, major changes are occasionally encountered that significantly impact solution design and cost. If the intent, applicability, and requirements of such policy changes are not clear, bidders may have difficulty providing an accurate price and the solution may not align with program needs.

- Examples of major IT policy changes
 - National Institute of Standard and Technology (NIST) Security
 - Cloud hosting

Unlike the previously discussed revisions for re-procurement, major IT policy changes are more complicated and suggestions on how to incorporate are discussed on the following slides.

Clarify...

...new IT policy requirements continued

When new IT policies are added, the requirements generally refer to other publications from sources such as State or Commonwealth IT Departments or external standards organizations.

- Specifically indicate the appropriate policies in these other publications along with any exceptions that may apply. Some questions to consider when clarifying:
 - Must the standard apply to all aspects of the solution or are there exceptions such as call centers, test environments, or external participants such as TPPs and Vendors?
 - Do all policy changes apply to WIC EBT solutions or do existing industry standards prevail?
 - How is compliance measured? Is an audit required or is self-certification acceptable?
 - Why is this important to implement for WIC EBT?

It is typically best for individual programs to work through such questions with their internal IT departments taking into account, the magnitude of the changes required to meet the new policies, the need as it relates to the program, the associated cost, and the expected benefit.

Additional Considerations

Use your re-procurement as an opportunity to improve both the procurement process and the quality of proposals received.

- Exceptions – Be clear regarding the ability to take exceptions in the response
- Evaluation - Be certain to evaluate “apples to apples”
 - Such changes are comprehensive, so be certain that requirements are appropriately met by all bidders
 - Large differences in cost suggest something may be out of alignment, so be sure to understand why
- Implementation – Beware of implementation efforts required
 - Implementation of requirements that fundamentally change the solution often require significant effort from State or Commonwealth resources
 - Does this fundamentally change the nature of the solution and if so, should we seek a waiver?

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