EL PASO INDEPENDENT SCHOOL DISTRICT

Business Analysis Process
Needs Assessment

Form	Contract Initiator's Name and Location	Business Analysis Level	Needs Assessment ID			Analysis ID
			FY	Budget Code	Created on	
A	Raoul McKinney	2	25	214	05162022	2023214051620

PURPOSE: A needs assessment is the first step in a comprehensive business analysis process. It aims to (i) document and analyze a current department/District problem or opportunity, (ii) analyze current and future states, (iii) determine an optimal solution that will provide value and address the need, and (iv) assemble the results of the analysis to provide decision-makers with relevant information for determining whether an investment in the proposed good(s)/service(s) is viable.

INSTRUCTIONS: This assessment is to be: (1) completed and signed by the contract initiator (2) reviewed and signed by the contract sponsor (3) signed by the appropriate stakeholders in Section 8 and (4) routed to the Procurement and Budget departments. The contract initiator may find it helpful to refer to the "Business Analysis Start Guide" to get a high-level view of the process and meet the need in a timely manner.

SECTION 1: IDENTIFY THE NEED OR OPPORTUNITY

1.1 Specify what is prompting the need for the acquisition of the good(s)/service(s):
Keep the district in compliance with SB820 and HB3834. Provides Cybersecurity training to all employees to reduce phishing risk.

1.2 Describe the effects and/or impact the identified need (described in **Q1.1**) is having on district or department operations/goals?
With the increase of spyware, malware, and ransomware, there is a high probability of a security breach, compromising District, Employee, and Student data through phishing attacks.

1.3 Describe the good(s)/service(s) being proposed.
KnowBe4 provides security awareness training, phishing campaigns, and analyzation, which are ongoing forms of education, seeking to equip all members of EPISD with the information needed to protect ourselves and our assets from loss or harm.

SECTION 2: WHAT ARE THE CURRENT CONDITIONS

2.1 Describe the current business processes in place that addresses the need described in **Q1.1**.
N/A, this will be a renewal of the currently implemented product.

2.2 Describe the existing business services in place that address the identified need.
N/A, this will be a renewal of the currently implemented product.

2.3 Describe the existing infrastructure in place that supports the identified need.
N/A, this will be a renewal of the currently implemented product.

2.4 Describe the current state relative to best practice(s) or standard(s).
N/A, this will be a renewal of the currently implemented product.

2.5 What are the underlying root causes/reasons that are creating the identified need.
N/A, this will be a renewal of the currently implemented product.

SECTION 3: WHAT ARE THE EXPECTATIONS

3.1 What is the expected benefit (value) the good(s)/service(s) will have on District or department operations/goals?

KnowBe4 provides training to help employees understand the mechanisms of spam, phishing, spear phishing, malware, ransomware and social engineering and can apply this knowledge in their day-to-day job. By using KnowBe4 the district as a whole has and will continue to benefit in securing district assets and data and keep us compliant.

3.2 Describe how the good(s)/service(s) being proposed will satisfy the identified need .

Will Improve district security posture by reducing the phish-prone percentage and mitigating risks with security awareness training.

3.3 After stakeholder input, what features or capabilities were considered the most critical to satisfying the need identified?

Phishing campaigns, cybersecurity training, districts phish-prone percentage

3.4 What additional support is required to ensure this service/solution operates as intended in the first year of implementation? (For example, more funding, equipment, staff, training, etc.,).

N/A, this will be a renewal of the currently implemented product.

3.5 If approved, how many users and/or campuses will be affected by the good(s)/service(s) being proposed?

District wide

SECTION 4: WHAT ARE THE OPTIONS AND PROVIDE A RECOMMENDATION

4.1 What are all the options that are being considered?

This is a renewal; no other options are being considered.

4.2 After analysis (Form B), which options remain viable to meet the need?

This is a renewal; no other options are being considered.

4.3 If the good(s)/service(s) will **NOT** go out for bid, how well do the options in **Q4.2** address the need? Please rank them in order; based on how well each one meets the need identified.

This is a renewal; no other options are being considered.

4.4 Why is option 1 in **Q4.3** the recommended good/service being proposed?

N/A, this will be a renewal of currently implemented product.

4.5 After analysis and stakeholder input, why were the other good(s)/service(s) **NOT** the top recommendation?

This is a renewal; no other good(s)/service(s) are being considered.

SECTION 5: HOW WILL IT ALIGN TO DISTRICT/DEPT. STRATEGY, GOALS, AND OBJECTIVES

The section documents how the proposed good(s)/services will support District or department strategy, goals, and objectives over time. Please specify how the good(s)/services will align with any of the strategies, goals, and objectives using the index below.

Alignment Number Index			
1	Federal or State goal	6	Department Goal
2	Texas Education Agency Mandate	7	Mission Statement
3	Board Goal	8	Texas Cybersecurity Framework Goal
4	District Goal	9	
5	Strategic Goal	10	

Other(s): Click or tap here to enter text.

Reference	State the Full Description of the Strategy/Goal/Objective	Alignment Number
SB 820	Adopt a Cybersecurity Framework	2, 8
HB 3834	Compliance with the Department of Information Resources (DIR)	1
District Policy	Annual Cybersecurity Awareness Training	4

Comments: Click or tap here to enter text.

SECTION 6: PROJECT CHARTER (Form C)

The Project charter establishes the scope boundaries and creates a documented record of the initiation to proceed with implementing the good(s)/service(s). It is used to establish a partnership between the contract owner, contract initiator, and the stakeholders involved by establishing internal agreements within the department/team to ensure the proper delivery of the good(s)/service(s). Refer to the Business Analysis Guide if a Project Charter is required based on the dollar value, size, and complexity of the goods/services being proposed.

CONTRACT INITIATOR:	Yes	No	Date Completed
7.1 A Project Charter is required for this Business Analysis I certify there is an approved, signed, and current Project Charter (Form C):	☐	☒	

SECTION 7: STAKEHOLDERS IDENTIFICATION

Using the Role/Responsibility Index below, please assign each stakeholder the number that most identifies their role or responsibility. At a minimum, employees with role numbers 1, 2, 3, 5, 7, and 8 should be identified.

Index - Role or Responsibility Number - Index			
1	Contract Sponsor; provide financial support. Also known as the budget authority.	6	Job Role and/or job duty activities may change due to the good(s)/service(s).
2	Contract Initiator; responsible for the delivery of good(s)/service(s).	7	Will be consulted
3	Will directly benefit from the good(s)/service(s)	8	Will need to be involved during the entire delivery of the good(s)/service(s).
4	Will indirectly benefit from the good(s)/service(s)	9	Will regulate or constraint 9a – Overrides top recommendation (include his/her justification in the comments area and signature in Section 9).
5	Will implement the good(s)/service(s)	10	Will be informed

Comments: Click or tap here to enter text.

First Name	Last Name	Title and Department	Role or Responsibility Assigned
Glenn	Nathan	Interim CIO, IT	1
Jerremy	Cole	Information Security Systems Administrator, IT	3, 5, 6, 7, 8, 10
Andres	Dickens Ramos	Information Security Systems Administrator, IT	3, 5, 6, 7, 8, 10
Omar	Perales	Information Security Systems Administrator, IT	3, 5, 6, 7, 8, 10
Raoul	McKinney	Information Security Systems Administrator, IT	3, 5, 6, 7, 8, 10
Vacant		Information Assurance Administrator, IT	4, 10
Victor	Armendariz	Technology Support Manager, IT	10

SECTION 8: APPROVALS AND ACKNOWLEDGMENTS

The following employees acknowledge their roles and responsibilities by their signatures below. At a minimum, employees identified with role numbers 1, 2, 5, 7, and 8 should sign.

Role	Full Name	Title and Department	Signature	Date
1	Glenn Nathan	Interim CIO, IT		
3, 5, 6, 7, 8, 10	Jerremy Cole	Information Security Systems Administrator, IT		7/27/22
3, 5, 6, 7, 8, 10	Andres Dickens	Information Security Systems Administrator, IT		7/27/2022
3, 5, 6, 7, 8, 10	Omar Perales	Information Security Systems Administrator, IT		7/27/22
3, 5, 6, 7, 8, 10	Raoul McKinney	Information Security Network Administrator, IT		7/27/2022
4, 10	Vacant	Information Assurance Administrator, IT		
10	Victor Armendariz	Technology Support Manager, IT	Victor Armendariz	7/29/2022

For Contract Initiator Only

I certify below that all information in this needs assessment is an objective view of the best documentary and information available from stakeholders to provide a basis for drawing reasonable conclusions.

Employee Name	Title	Signature	Date
Raoul McKinney, Information Security Network Administrator			7/27/2022

For Procurement Staff Use Only

To meet Procurement Services Manual procedure 13.3, the following employee confirms the Contract sponsor (Role 1) and Contract initiator (Role 2) have signed this assessment as part of the business analysis process.

Employee Name	Title	Initials/Signature	Date

For Budget & External Financial Management (BEFM) Office Use Only

To meet BEFM Manual procedure 9.11, the following BEFM employee confirms the Contract sponsor (Role 1) and Contract initiator (Role 2) have presented a completed and signed needs assessment as part of the business analysis process.

Employee Name	Title	Initials/Signature	Date

EL PASO INDEPENDENT SCHOOL DISTRICT

Business Analysis Process
Analysis

Form 101B	Contract Initiator	Location	Analysis ID			Needs Assessment ID
			FY	Budget Code	Created on	
	Raoul McKinney	Information Technology	23	214	05162022	2021214051622 2

PURPOSE: The purpose of the analysis is beyond analyzing, modeling, and documenting good(s)/service(s) information. The analysis supports the needs assessment by ensuring that it is correct, conforms to standards, can be traced to goals, has inherent risks identified, and can be turned into a viable service or solution to a need.

INSTRUCTIONS: This analysis is to be: (1) completed and signed by the contract initiator (2) reviewed and signed by the contract sponsor (3) and kept by the contract initiator for internal/stakeholder review/reference as necessary

SECTION 1: SERVICE AND IMPACT ANALYSIS

1.1 If the contract initiator is IT (skip otherwise), what major IT service area(s) are being serviced by the proposed goods/services? *Check all that apply*:

Security ☒ Support ☐ Networks ☐ Operations ☐

1.2 Based on the options provided in Table 1A, what general impact is expected from the proposed goods/services? *Check all that apply*

Table 1A

1	☐ To replace a current District function/process/method	6	☐ To maintain District-wide mission critical system(s)
2	☒ To improve a current District function/process/method	7	☐ To meet specific IT department need
3	☐ Introduce a different method for an existing District function/process/method	8	☒ To meet specific non-IT department need
4	☐ To maintain current level of service (no competitive edge)	9	☒ To support District Initiative (PowerUp, etc.)
5	☐ To improve current level of service (improve competitive edge)	10	☐ [blank]

Comments: Click or tap here to enter text.

1.3 What is the impact to District operations if this particular good/service is NOT approved?

Low ☒ Medium ☐ High ☐ Critical ☐

Other: Click or tap here to enter text.

1.4 What are the reasons for the impact rating in Q1.3?
Does not affect day to day operations.

1.5 What data and/or metrics will be used to measure success and/or improvement?
District prone percentage based on industry standard.

1.6 What actually has to improve and by how much?
District prone percentage needs to improve by 20% according to industry standard.

1.7 Are the risks fully understood, reasonable and manageable?
Yes

SECTION 2: DUPLICATION OF RESOURCES ANALYSIS

2.1 What existing capabilities (such as infrastructure, business process, or efforts) are in place now to ensure the proposed good(s)/service(s) operate as intended?
N/A, this will be a renewal of the currently implemented product.

2.2 What other good(s)/service(s) are currently in place that are similar to the new good(s)/service(s) being proposed?
N/A, this will be a renewal of the currently implemented product.

2.3 Do the proposed good(s)/service(s) being analyzed overlap any of the current goods/services listed in Q2.2? If YES, what is being done to avoid excessive/redundancy of good(s)/service(s)?
No

SECTION 3: RESEARCH

3.1 Based on the options provided in Table 3A, what type of research, models, or analysis were conducted as part of the business analysis process?

List all that apply. If none apply, please explain in the comments section.

Table 3A

1	☐ SWOT Analysis	6	☒ Security Assessment	11	☐ Pilot
2	☐ Product Comparison Analysis	7	☐	12	☐ Sustainability Plan (focus is on long-term)
3	☐ Cost-Benefit Ratio Analysis	8	☐ Root Cause Analysis	13	☐ Implementation Plan
4	☒ Risk Analysis	9	☐ Duplication Analysis	14	☐ Usability Evaluation
		10	☐ Proof of Concept	15	☐ User Testing

Comments:HB3834

3.2 List all of the data gathered and analyzed to support the business analysis being performed.

Data Analyzed	Data Source	Date

3.3 Based on Q3.2, what information was analyzed with stakeholders holding Role 3 (directly benefits) and Role 6 (job duties may change). Note: All Roles are identified in "Section 8: Stakeholder Identification" in Form A – Needs Assessment.
Click or tap here to enter text.

3.4 Based on the options provided in Table 3B, how was data elicited and gathered to perform the analysis?
List all that apply

Table 3B

1	☐ Surveys	6	☐ Information provided by vendor	11	☐ [blank]
2	☐ Internet Search	7	☐ Information from vendor website	12	☐ [blank]
3	☐ Questionnaires	8	☐ Prototype	13	☐ [blank]
4	☐ Observation	9	☐ Internal reports (EPISD)	14	☐ [blank]
5	☐ Meetings and/or workshops	10	☐ External reports (not EPISD)	15	☐ [blank]

Comments:Click or tap here to enter text.

3.5 What conclusions were drawn from the research and analysis performed?
Click or tap here to enter text.

SECTION 4: APPROVALS AND ACKNOWLEDGEMENTS

For Contract Initiator Only

I certify the analysis examined key data and documented the process in sufficient detail to ensure that it reflects the stakeholders' needs and information available from stakeholders to provide a basis for drawing reasonable conclusions. Unless otherwise stated, the data used is creditable, complete, accurate, and reliable.

Employee Name	Title	Signature	Date
Raoul McKinney, Information Security Network Administrator			7/27/2022

For Contract Sponsors (Budget Authority AND Solution) Only

I certify the analysis performed by the contract initiator appears to be sufficient to provide a basis for drawing reasonable conclusions.

Employee Name	Title	Signature	Date
Raoul McKinney	Information Security Network Administrator		7/27/20
Glenn Nathan	Interim CIO		