PowerSchool

Guide to Improving District and Budget Efficiency with a Connected K-12 ERP System

The right finance and HR system integrates with other education products, improves employee satisfaction, lowers costs, and increases efficiency

Contents

DISTRICT LEADERS

A holistic enterprise resource planning (ERP) system can transform your business and HR operations while giving you access to data that drives better decisions about budgeting and resource management.

ERP: An Essential Nerve Center Gets its Due

In today's K-12 districts, managing tight budgets and finances is a daily struggle for many HR and finance leaders. For some, the stress even keeps them up at night.

That's why many districts are making a sound investment in unified K-12 administrative education technology solutions from a single vendor. Enterprise resource planning (ERP) products give districts the ability to deliver an integrated suite of business applications, including finance, HR, and talent management.

Today's leading unified K-12 business software suites go even further, combining ERP with online registration, student information systems, and other edtech products. The result is streamlined district operations with a clear view into student, staff, and district-wide data for budgeting and forecasting.

An ERP system can merge data from across your district into a single dashboard.
Business and HR functions can become part of an expanded, holistic ecosystem with other district data hubs.

What's in this eBook

In this guide, we'll look at how ERP platforms can be a unifying tool within K-12 ecosystems.

Here's what we'll cover:

- A brief overview of ERP basics

- How ERP systems can help your staff streamline basic front-office functions and work together more effectively

- Ways to reconsider your district's business and HR processes

- Importance of interoperability between ERP and other edtech products you use

ERP Systems:
An Overview

In K-12 school districts, ERP systems typically merge payroll into a larger HR data management system, including benefits, employee performance, hiring, and other HR functions. Districts also use ERP systems for the purchasing process, document management, budgeting, accounting, strategic planning, equipment and supply storage, distribution and tracking, and more.

ERP systems were initially developed mostly for large manufacturers to manage their supply chains. Today, organizations deploy these platforms in organizations across many industries, government organizations, higher education institutions, and K-12 schools and districts.

Some ERP systems are designed as general platforms that can be configured for multiple industries. Others are targeted to particular sectors, including some specifically for K-12 education.

> **ERP** generally describes a modular software solution that incorporates the financial side of the business and then adds closely integrated app modules that address other areas of the business... In essence, ERP is a systemic approach to managing the entire enterprise, not just its finances. By integrating all of these modules into a single, cohesive whole, customers can gain new insights and create new processes that weren't possible using separate tools.

SOURCE: *PC Magazine*, September 2019

> We were using 1980's software 30 years later. But now, our ERP solution has given us the ability to use 21st-century software in the 21st century. With PowerSchool Unified Administration™ eFinancePlus, we started seeing the benefits in reduced costs and increased efficiencies from the all-in-one software.

DAVID BOLLHEIMER | Fiscal Support, Northwestern Local Schools, OH

An ERP System Upgrade: Time to Move It Up from the Back Burner

Today's finance and business managers, superintendents, and HR directors deal with a long list of challenges. **At the top of the list is dealing with tighter budgets and dwindling resources, along with complex processes across multiple products.** Purchasing decisions are often made in silos.

When educational leaders use outdated finance and HR products, these challenges are heightened. Fragmented, disparate edtech systems don't talk to each other, and schools and districts are forced to manage processes split between a hodgepodge of programs, each with its own unique interface, login, and data sets.

Because ERP systems involve so many functions that aren't directly involved in teaching, district administrators and boards can easily put off this type of upgrade far longer than they probably should. Add to that a sometimes complicated, lengthy implementation process that can stress staff— especially if the process isn't handled well— and it's easy to see why administrators and boards are reluctant to upgrade.

When your district upgrades, the platform you choose needs to be built for optimal usability and flexibility so it will last for the long haul.

> **(Our ERP products) are a powerfully interactive system that keeps track of everything—our finances, students, and personnel— all in a one-stop shop. The software keeps everyone more informed and gives us the tools to make better decisions.**

MACK JOHNSON
Management Systems Administrator, Rose Tree Media School District, PA

The **Center** of Your K-12 Finance & HR Ecosystem

ACCOUNTING

ACCESS CONTROL

TECHNOLOGY

HR

PAYROLL

PURCHASING

ERP

BUDGETING

PROJECT MANAGEMENT

EQUIPMENT & SUPPLY STORAGE

DISTRIBUTION & TRACKING

DOCUMENT MANAGEMENT

STRATEGIC PLANNING

PLANNING

Learn More

For a more detailed explanation of what ERP systems are and how they work, read our ERP "Buyer's Guide: How to Find the Best Finance and HR System for Your K-12 District."

READ BUYER'S GUIDE

Give Staff Members a More Cohesive, Responsive Set of Controls

Often, the hardware, software, and/or manual solution used for each of your business and HR functions is cobbled together from fragmented systems. Many K-12 school districts are trying to operate mostly with business and HR software and hardware systems that are either mismatched, outdated, hard to fix, or all the above.

A valuable, sustainable ERP system is built from the ground up to deliver all of your district's HR and business functions in a streamlined, efficient process. **The following are some common ERP system features that help accomplish this.**

One interface and one source for all departments

Most ERP systems feature a dashboard that brings together all the modules and applications your district needs to run its various front-office functions.

- From the dashboard, users can **select applications and drill down within each of them**

- All the tools and applications have a **consistent look and feel**, so it's easier for your staff to learn and use them

- An ERP system **brings together data from across your organization** so people don't need to request necessary information from other departments

Personalization

ERP systems generally allow districts to customize user interfaces.

- You can **adjust the look and feel of the system**, choosing the colors, fonts, background images, and logos. At higher levels, you can create custom dashboard layouts.

- This will be a **massive improvement** for people used to static interfaces connected to legacy mainframe networks

Paperless processing and approvals

Most users of new ERP systems say how much easier it is to process work like purchase orders without having to shuffle papers and wait for signatures.

- ERP platforms can be **configured** so a supply requisition automatically goes to one or more approvers who can open an email, click a link to see the details, and electronically approve it. It then becomes a purchase order that is automatically fulfilled by vendors who are plugged into the system and are paid electronically.

- Your approval system can **flag request originators** if the request hasn't been approved in a timely fashion

- Automated pipelines can help superintendents, principals, and district leaders **spend less time on administrative nuts and bolts and more time working on educational priorities**

> **We've created custom reports that work between our ERP system and employee records product that save staff 20 to 30 hours a week. The reports ensure accuracy with employee seniority dates, staff don't have to open multiple reports to double check dates, and it also makes sure we've got accurate seniority dates so that it puts the right employee in line for the job.**

LEVI MARTIN | HR Specialist, Kennewick School District, WA

Mobile-friendly benefits/ payroll portals

If your district hasn't caught up to the general workplace advancement of providing employees online access to their benefits, payroll, and other HR data, an ERP system can do that for you.

- Most modern ERP systems can present HR information in **mobile-friendly formats** so that employees can access it on their tablets and smartphones

- Some platforms can be configured so employees can **easily find necessary information** such as expense reimbursement status, accrued vacation, schedules, or other leave time

- You can also **provide downloadable or electronic forms** to request changes in tax status. Or a calculator that shows employees the effect of a change in tax status, retirement account contribution, and other benefits information, all on their future paychecks.

CASE STUDY

Saving Time with Better Access to Data

Since switching to a modern ERP, Columbia Public Schools (MO) enjoys automated, efficient workflows that make everyone's job easier.

"Approvals for purchase requests, cash receipts, warehouse orders, journal entries, budget transfers, and new vendor requests are all automated now," says **Martha Myers**, **Manager of Administrative Computing**. "We aren't passing documents around from department to department or building to building to obtain signatures. The time saved is huge."

All levels, including the superintendent, principals, coordinators, and managers, now have readily available information they need to get their jobs done.

"In improving our efficiency and the ease of attaining data, our staff can spend more time concentrating on improved student achievement," Myers says.

Read the full case study

Reconsidering the Process: A Powerful Precursor to ERP Transitions

Converting to an integrated ERP platform won't be nearly as effective if you're simply trying to recreate the same business functions exactly as your district has performed them in the past. In fact, one of the most powerful improvements an ERP conversion can produce comes from examining all your business functions from the ground up. This is a perfect opportunity to reevaluate inefficient, unnecessary, and outdated business processes and staff structures.

This is part of the ERP system package of services provided by some vendors. **Look for providers with direct experience in K-12 district conversions.**
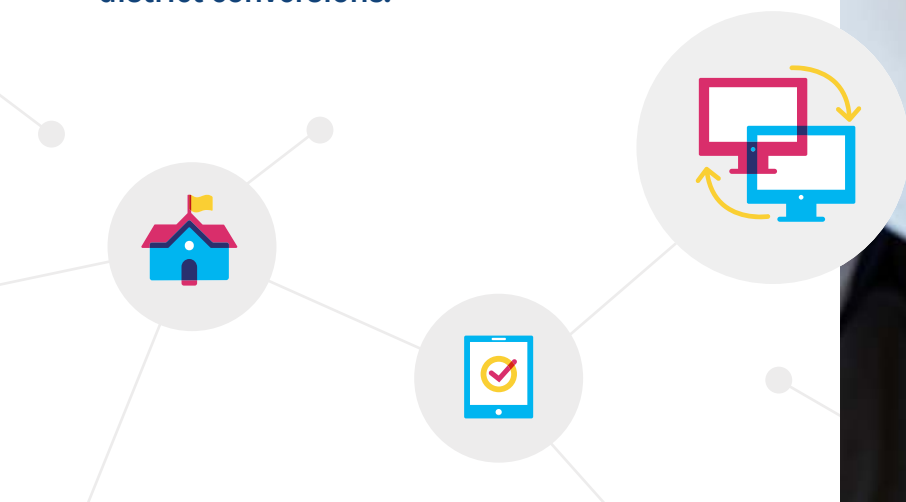
Example: Managing Professional Learning

A popular feature of many ERP systems is the ability to track professional development and learning requirements for teaching staff.

If your district currently "tracks" compliance with professional certification requirements by collecting teachers' course transcripts and certificates via email, paper file, or spreadsheet, you're not alone. Migrating the process online is an important step, but first take a closer look at how your professional learning program works.

You want teachers to be properly certified and to continue developing their knowledge and classroom skills. They're doing the heavy lifting by taking the required courses and training. Should you be adding administrative tasks to their efforts, or should you make it easier for them to comply with regulatory requirements and grow as professionals?

It's worth a little extra time to examine your current processes as part of your ERP system upgrade.

Modern ERP products can allow your district to post available professional learning opportunities for instructional staff in a central portal.

- Staff members can **search the listings**, **sign up for courses** that meet their needs, and **automatically receive confirmation** that the course has been satisfactorily completed

- **Payment to the course providers can also be integrated into the process**. Additionally, the system will generate the necessary reports for audits and other required compliance documentation.

Involve Critical Employees Closely

When taking a look at your HR/business processes, it's important to involve the people who do the day-to-day work. Their feedback about process improvements will add to the likelihood of a smoother migration and better buy-in among the daily users.

- For each functional area, **map current workflows,** and, together with the ERP system provider, **create an end-to-end model of an optimal workflow**

- The **new workflow** should be reviewed for accuracy by the key users of each function and approved by the appropriate area's leaders

Learn More

See the infographic: [10 Questions to Ask When Choosing a K-12 Finance & HR Solution](#)

SEE INFOGRAPHIC
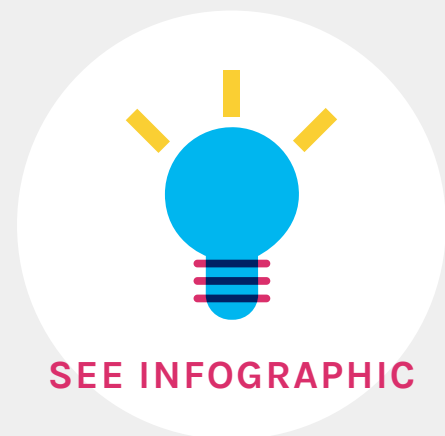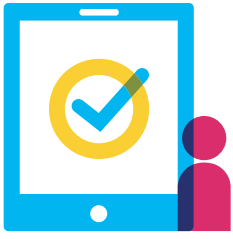
Steps for a **successful implementation:**

1   **Get commitment** from your board and leadership team

2   **Choose** the right product and partner

3   **Assemble** your transition team well

4   **Gain buy-in** throughout the organization

5   **Train,** train, and train

6   **Communicate** throughout the process

7   **Utilize support** after implementation is complete

Learn More

Download the eBook: **A Guide to Change Management in K-12 Education Technology**
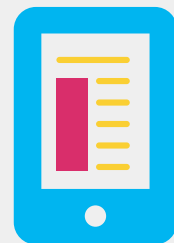
READ THE EBOOK

Connecting the ERP to Your Other Edtech Products

Interoperability between a school district's K-12 software products is becoming more important than ever. According to the Consortium for School Networking (CoSN) 2019 K-12 IT Leadership Report, technology leaders are focused on interoperability: 79% of those surveyed have implemented some form of single sign-on. And 85% said that interoperability is a requirement when making a software purchasing decision.

A K-12 business software suite of secure solutions can connect your entire district through a single partner. One set of integrated, interoperable tools can streamline efficiencies, improve security, increase data harmony, provide actionable insights, and enhance collaboration.

With interoperable district business operations software, today's schools and districts can take the right steps to become future-ready for the road ahead. Superintendents, HR directors, and administrators can collaborate better by looking at the same data from different tech applications.

ERP systems that connect with your other district products can lower your total cost of ownership, and deliver a positive ROI through the following benefits:

- **Save time** and improve productivity
- **Increase capabilities** with continued use
- **Cut costs** from better resource allocation
- **Reap long-term financial rewards o**f lower turnover among more effective educators
- **Improve** state reporting
- **Ensure** future-readiness
- **Strengthen** data security

Learn More

Download the **ROI of Unified Edtech eBook** to find out the costs of fragmented tools, and steps you can take to start building your district's cohesive system.

READ THE EBOOK

Conclusion:
The Bottom-Line Benefits of Data-Driven Decision Making

A major drag on morale in any organization is the perception that big decisions are made unilaterally or arbitrarily. Beyond simply improving your operations from the outset, a vital advantage of a holistic ERP system is that all the data you generate can be captured, analyzed, and used to further improve your district operations.

Upgrading to a modern ERP platform is also an important step in eventually conducting powerful predictive analytics. In the short term, the new system can make the reporting process for audits and compliance easier—and the reports you generate more insightful.

You can use your ERP system to develop a culture of continuous improvement. It's easier to adjust business procedures within an integrated and flexible platform, and employee observations and suggestions are easier to act upon quickly and cost-effectively.

Staff satisfaction can come from being able to do what you've always done, only simpler. But even more satisfaction comes from being able to do more than you could before with a greater impact on improving your district's overall performance and results.

About PowerSchool Unified Administration™

At PowerSchool, we understand that school district success and efficiency go hand in hand. That's why PowerSchool Unified Administration gives administrators a single, integrated solution to simplify the management of school operations, bringing functions like finance, human resources, and payroll together. Experience an easy-to-use interface that eliminates the frustration of multiple logins and systems to train your staff on. Break down traditional data silos and get a clear picture of your student, staff, and operational information for powerful and flexible decision-making, leading to a more successful school district.

Single, end-to-end administration solution

With single sign-on and a smooth user experience, let your employees use the extra moments they get back to become more productive and efficient. All the operational data and tools they need to make decisions and take action are in one place.

Gain visibility into your data

Get actionable views of your district performance that help you ensure your resources are always strategically allocated. Build a culture of accountability and engagement by giving your staff the information and access they need to operate fluidly.

Maximize your resources

Regain control of your front-office operations with automated processes and simple approvals and actions all in one, easy-to-use interface. Improve your ability to adapt to changes and adjust your processes to maximum efficiency, making the most of your employees' time and your district's budget.

Fit for K-12

Built with K-12 education in mind, enjoy a partnership with an established company that truly understands your school and district's needs, and will work to ensure you stay in compliance with changing regulatory requirements. Easily manage teacher contracts, payroll, workflow, and fund accounting, all with the state-required reports you need for compliance.

Learn More

Find out how **PowerSchool Unified Administration™ eFinancePlus** streamlines the management of K-12 financial and human resources data. That way, school administrators and employees can focus on keeping the district running as efficiently as possible.

Sign up for a demo!

PRODUCT DEMO

PowerSchool

Powering Brighter Futures

At PowerSchool, we believe in the simple truth that every student deserves the best opportunities in life. That's why our mission is to power the education ecosystem with unified technology that helps educators and students realize their potential, in their way. From the front office to the classroom to the home, PowerSchool helps schools and districts efficiently manage instruction, learning, grading, attendance, assessment, analytics, state reporting, special education, student registration, talent, finance, and HR. Today, we're proud to be the leading provider of K-12 education application technology supporting over 45 million students in over 80 countries.

www.PowerSchool.com