



District Guide to K-12 ERP

Unique Considerations for K-12



Introduction

School districts turn to ERP solutions to automate, simplify and support the complexities and requirements of K-12 back- and front-office operations.

ERP solutions should enable your district to manage critical financial operations—including accounting, payroll, procurement, and human resources—from within a single platform.

However, not all ERP solutions are created equal. Learn more about the considerations and steps toward navigating your district's financial solution.

Using a K-12 ERP solution—one created specifically to meet the needs of school districts—has significant benefits for the district as a whole.



ERP Essentials

The ins and outs of K-12
ERP





Why an ERP Solution built for K-12?

Gain efficiency, visibility, and accuracy in the business office and beyond with a K-12 ERP solution.

#1

Better compliance. A K-12 ERP solution addresses the unique needs behind educators, schools, districts, *and* your respective state agency. Other solutions may require expensive customization.

#2

Integrated Work. K-12 ERP solutions help to eliminate data silos, increase visibility, and keep everyone and everything on track— aligning and powering the processes of finance, HR, payroll, and more.

One Centralized ERP Solution

The Chief Financial Officer

CFOs can eliminate data silos and tap into total visibility across all areas of a district's financial operations—even monitoring spend while managing costs from a single system.

The Chief Information Officer

Modern, cloud-based K-12 ERP systems improve data quality, workflows, and security, while creating a consolidated view to support better, data-driven decision making.

The HR & Payroll Staff

A robust K-12 ERP system equips HR and payroll teams with all the tools needed to manage and manage and deliver on an efficient and seamless employee experience. That same ERP uses a cyber-resilient system to ensure personal information is always secure.

The Finance & Accounting Team

Streamlining your district's mission critical business functions can reduce redundancy, increase efficiency, improve data quality and make reporting easier.

The District Administrators

Essential for administrators who must fulfill a long list of state and federal reporting requirements. An ERP system backed by a knowledgeable K-12 provider ensures compliance needs and report deadlines are always met —reducing time, money, and stress.

How many estimated hours per week do you spend working on tasks and processing data between multiple systems?

- ☐ 1-5 hours
- ☐ 6-10 hours
- ☐ 11-20 hours
- ☐ 0 hours in our centralized ERP solution

POST ANSWER

K-12 ERP Adoption

Steps to Success



Evaluating for K-12 ERP

What to look for and where to start...

Adopting a K-12 ERP solution can be felt throughout a school district, so it's worth taking the time to ensure the system you pick does everything you and your team need.

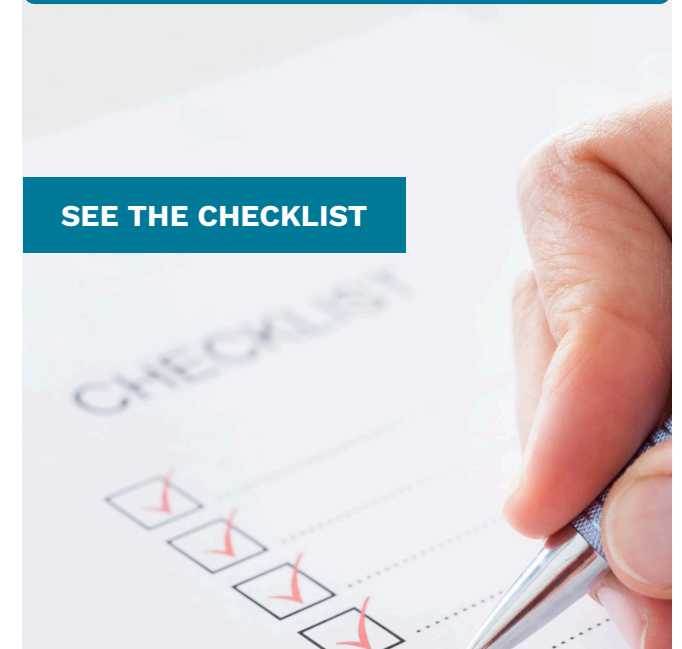
Finance is among the most cross-functional business units in a district. CFOs and Finance Directors work directly with each school and department to gain insight, centralize data, and calculate the corresponding budgets and forecasts.

Finance teams can lay a strong foundation for future success by prioritizing, planning, and partnering with other district leaders to:

- Evaluate current processes
- Set the finance function's roadmap
- Identify the right tools and software

Reminder: Requirements will vary depending on a district's unique needs and priorities, but, at a minimum any ERP solution should check the boxes for standard functionality and common tasks and processes.

[SEE THE CHECKLIST](#)



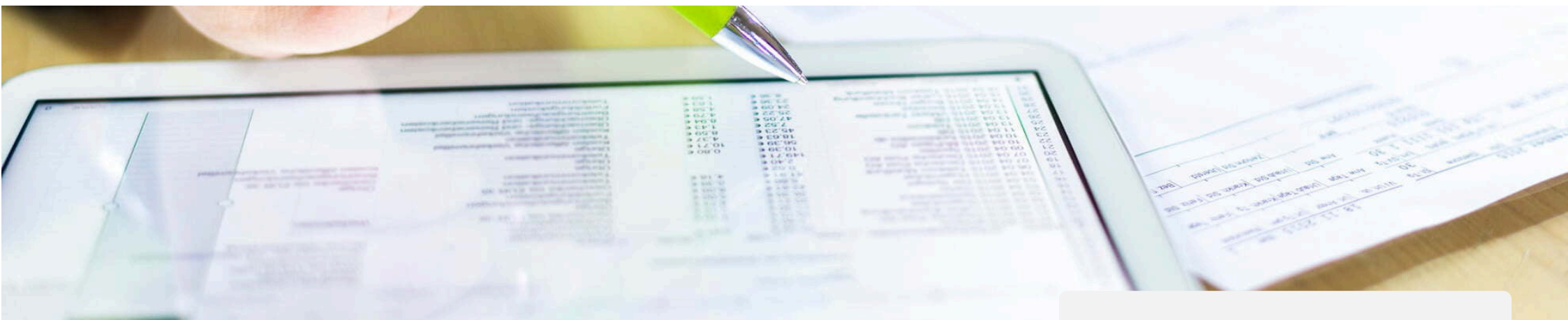
Evaluate current processes

Where does the data come from? Is the data reliable? Start by verifying that you have control over financial and operational data. District data is siloed across multiple systems used by individual departments within the back office. Finance leaders should ask:

- What software does the team use?
- How is payroll processed, and which systems are used?
- How are supplier contracts managed?
- How are expenses paid?
- What level of reporting is expected by the district leadership and the board?

As you capture findings, apply further evaluation criteria to identify status, urgency for improvement, and impact. Prioritized needs will bubble up to the top and provide prioritized requirements.

STATUS	URGENCY	IMPACT
<div>1. Not working</div> <div>2. Will break</div> <div>3. Could be improved</div> <div>4. No issue</div>	<div>1. ASAP</div> <div>2. First 90-180 days</div> <div>3. This school year</div> <div>4. Future date TBD</div>	<div>1. Major</div> <div>2. Medium</div> <div>3. Minor</div> <div>4. No impact</div>
<div>For example, a broken payroll system is a “1” regarding status, urgency, and impact. You can’t have a district where teachers and other staff are not paid, especially in today’s challenging staffing environment!</div>		



Roadmap

K-12 finance is about more than financial viability – it's the funding and process by which students can succeed. Finance teams have an opportunity to help others in the district and in the community to see the big picture and set the path forward.

With cross-functional relationships established and processes evaluated and prioritized, it's time to set the course for the finance function. It's critical to prioritize communication, set milestones, and drive visibility.

Teams should consider the following as part of the roadmap build:

- Create KPIs and performance and tracking measures
- Hire and fill roles that address any existing gaps in skills and support future system opportunities and adoption
- Introduce new processes and opportunities to streamline current efforts to be more efficient
- Break down solution and business process silos to improve efficiency and effectiveness
- Ensure that the team is prepared and open to change

Have you found this guide insightful so far?

- ☐ Yes, very much so!
- ☐ There are some useful takeaways.
- ☐ Not so relevant to me at this time.

POST ANSWER

Identify Tools & Software

Automating manual tasks, streamlining compliance, and eliminating redundancies can ensure that everyone on the finance team can be more strategic.

Having the right tools for the job matters more than ever. District Finance should look for solutions that are accessible, secure, and enable district employees to optimize their efficiency. This means selecting solutions that meet the demands of the modern K-12 school district.

[Access the complete ERP Checklist in our ERP Buyers' Guide >](#)

When it comes to requirements, not all ERP solutions are equal. Ensure all the necessary boxes are checked for each and all of the following:

- ☐ General Ledger & Fund Accounting
- ☐ Encumbrance Accounting
- ☐ Purchase Orders
- ☐ Accounts Receivable
- ☐ Fixed Asset Inventory
- ☐ Warehouse
- ☐ General HR
- ☐ Payroll
- ☐ Salary Administration & Position Control
- ☐ Benefits Administration
- ☐ Employee Services Portal

ERP Implementation

Planning for Success



Best Practices

Proven steps to ensure success implementing K-12 ERP

Selecting a K-12 ERP whose features and functionality meet your district's requirements is critical to success, but only one part of the equation. In addition to the right solution, districts should consider how they will be supported after the contract is signed. What will the implementation process look like? How is onboarding managed? What support is provided? Having the right partner in place ensures your K-12 ERP will be providing value for the long haul.

An ERP implementation is a significant project with a broad impact, supporting many of a district's critical business activities, including accounting, budgeting, human resources, payroll, and inventory management.

Investing additional time and effort into your implementation can ensure success. Following best practices through each phase of the process can help your implementation run smoothly and help your district realize the immediate benefits of your new system.

Because a K-12 ERP plays an integral role in aligning different members of your business office, bringing together a diverse group of key stakeholders that understand existing processes can create a strong project team for implementation success. Your project team should include the following:

- An executive sponsor to help adjust priorities and pull in additional resources if necessary.
- An internal project manager committed to working with the ERP vendor to keep the project on track.
- Representatives from different roles (Finance, HR, etc.) who will be using the K-12 ERP can guide the implementation so that the system can address real user needs. After the go-live, end-user feedback can help identify the problems and suggest future improvements.

Once assembled, the project team should clearly define the goals of the K-12 ERP

Documenting these goals will allow you to establish formal requirements for your implementation. While your team may have identified some primary objectives as part of the evaluation process, a solution selected district staff to have a new context for analyzing

Requirements

A K-12 ERP implementation presents a unique opportunity to introduce better processes - not just automation of existing, inefficient ones. Take the time to:

- Research relevant K-12 best practices
- Collect feedback on and document how things are done today
- Compare existing processes to best practices – what could be improved?
- Hold workshops to share and review staff feedback.
- Sketch out revised processes based on best practices, user feedback, and your new K-12 ERP's capabilities

KPIs

The resulting improvements? Those are your KPI. With existing processes documented and revised, consider using your new K-12 ERP data to answer the following:

- How much time have you saved?
- How have you reduced the number of payroll errors?
- Are you able to accurately forecast spending and budget needs?
- What efficiencies have you realized in your warehouse?

Tip: Keep communication lines open. Communication sets the stage for an effective change management plan that helps to meet requirements and deliver on KPIs.

Foundation for Success

Set a foundation for long-term success

A go-live date is a reason to celebrate, but once people begin using the system – even those who have received training – they may encounter issues or have questions. In addition to providing internal resources for technical support, lean on your K-12 ERP partner. Implementing an ERP system will always come with its unique setbacks and challenges. Access to an experienced team will make your experience smoother and more manageable and will ensure they understand how your new system will support your district.

Investing additional time and effort into your implementation can ensure success. Following best practices through each phase of the process can help your implementation run smoothly and help your district realize the immediate benefits of your new system.

Final Thoughts

Depending on your district's needs, budget, and timing, you will likely have a variety of ERP systems to choose from – including those designed uniquely to address the needs of K-12. But selecting the system is only part of the puzzle. Your results will also depend on how you implement the plan. Applying best practices throughout the process, from requirements gathering to data preparation, training, and support, can deliver value upon launch and for years to come.

Dive into more K-12 ERP and Finance insights, tips, and industry trends with LINQ

[ACCESS AND SUBSCRIBE TO OUR BLOG >](#)

Want to learn more?

www.linq.com

