

Streamlining School Finance Workflows: Building Transparency and Saving Time



PASBO 71st Annual Conference and Exhibits



Change Management Playbook

6 steps from paper to digital

Paper-to-Digital Rollout

1

Inventory

Identify forms

2

Prioritize

High volume + high friction

3

Map

Real handoffs + exceptions

4

Design

Routing + controls

5

Enable

District builds its own

6

Launch

Launch in waves + train by role

What to Do After PASBO

1

Identify your highest-pain processes

Flag what has the most room for improvement

TEMPLATE A

Form Inventory Worksheet

Dept.	Form Name	Annual Vol.	Pain (1–5)	Format	Owner	Priority
<i>Business</i>	<i>Payment Order</i>	<i>1,300+</i>	<i>4</i>	<i>Paper</i>	<i>[Role]</i>	H

List every form. Score pain 1–5. Prioritize by volume + friction.



What to Do After PASBO

1

Identify your highest-pain processes

Flag what has the most room for improvement

2

Prioritize based on volume and friction

Select the first processes to change and identify some quick wins

Prioritization Matrix



What to Do After PASBO

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3

Map the current process and your future state

Handoffs and exceptions for your first forms and workflows

TEMPLATE C

Workflow Mapping Template

Step	Who	Current State	Future State	Time	Exceptions
1	Staff	Fill paper form	Submit via link	5 min	Additional approvals needed

Map current → future for each step. Note time-in-step and exceptions.



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4

Enable your staff

Both form owners and form users



Training & Launch

Internal Confirmation

- Form approval meeting on _____
- District intro provided by _____

Full District Trainings

- Office Managers/Secretaries
 - _____
- Administrators/Supervisors
 - _____



Launch [Enter Date]

- Official launch comms go out
- Grant accounts (as needed, for online platforms)
- Forms go live



After Training

- Conduct four-week check-in outreach to users
- Continue momentum with new forms/workflows

TEMPLATE E

Adoption & Training Checklist

	Action Item	Owner	Status
<input type="checkbox"/>	Schedule training within 1 week of go-live		
<input type="checkbox"/>	Create launch communication (email + intranet)		
<input type="checkbox"/>	Confirm approvers and permissions		
<input type="checkbox"/>	Test with pilot group (5+ submissions)		
<input type="checkbox"/>	Collect sign-off from project team		
<input type="checkbox"/>	Send launch communication to all staff		
<input type="checkbox"/>	Publish single access point for all forms		
<input type="checkbox"/>	Week 1: training follow-up		
<input type="checkbox"/>	Week 2: 1:1 support outreach		
<input type="checkbox"/>	Week 3: tips + collect feedback		
<input type="checkbox"/>	Week 4: FAQs + iterate		
<input type="checkbox"/>	Review metrics, plan next batch		



MEASURE

4 Metrics. No Dashboard Required.

Cycle Time

How long does it take forms to be completed?

Return Rate

How many forms are returned with errors?

Step-Level Efficiency

Where do forms get stuck?

Adoption %

Who is using the new process?

Plus qualitative signals: fewer “where is it?” emails, less re-entry, positive feedback

Avoid These Pitfalls

- ✘ Digitizing the PDF without fixing routing
- ✘ Letting exceptions become the norm
- ✘ Launching without anticipating employee needs
- ✘ No owner for updates and approvals
- ✘ Not continuing to care for and monitor the process

If You Want a Partner

- ✓ Working sessions
- ✓ Workflow mapping
- ✓ Builder enablement
- ✓ Training + support
- ✓ Adoption measurement
- ✓ Identify and resolve bottlenecks

Informed K12

Questions?

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15

