



K12 Process Orchestration

Unlocking Innovation in School
District Business Offices



It's Tuesday morning, and urgent emails keep coming in. A substitute teacher hasn't been paid because her approval form disappeared somewhere between HR and Finance. The state auditor is requesting purchase order documentation that exists across multiple systems. Principals are calling about field trip approvals that should have been processed weeks ago. An accounting specialist just discovered the same vendor was paid twice—money that's now tied up in a recovery process that will take months.

This isn't crisis management. This is Tuesday.

Behind every crucial service in K12—teaching, special education, enrollment—there is a process that must be completed accurately to comply with district, county, state, and federal regulations. New hire onboarding, student transfers, volunteer forms, field trip requests, reimbursements, vendor contracts—these aren't just paperwork, but rather, essential actions that enable education in the classroom.

The root cause of Tuesday's chaos? With legacy ERPs, HRIS, and SIS platforms unable to meet district needs, CBOs are left to figure out how to route these critical forms and accomplish essential services on their own. For too long, this meant paper. Now, it often means cobbled-together solutions adapted from generic service providers that don't understand district budget codes, compliance requirements, or approval hierarchies.

Each form represents a critical service, so what happens when a single process fails? For Chief Business Officers, broken processes aren't just administrative headaches—they're barriers to student success that compound daily. Every delayed approval, every missing form, and every manual workaround pulls resources away from student-facing activities, creates compliance risks, and disrupts strategic focus.

“Broken processes aren't just administrative headaches—they're barriers to student success that compound daily.”

District business offices under pressure

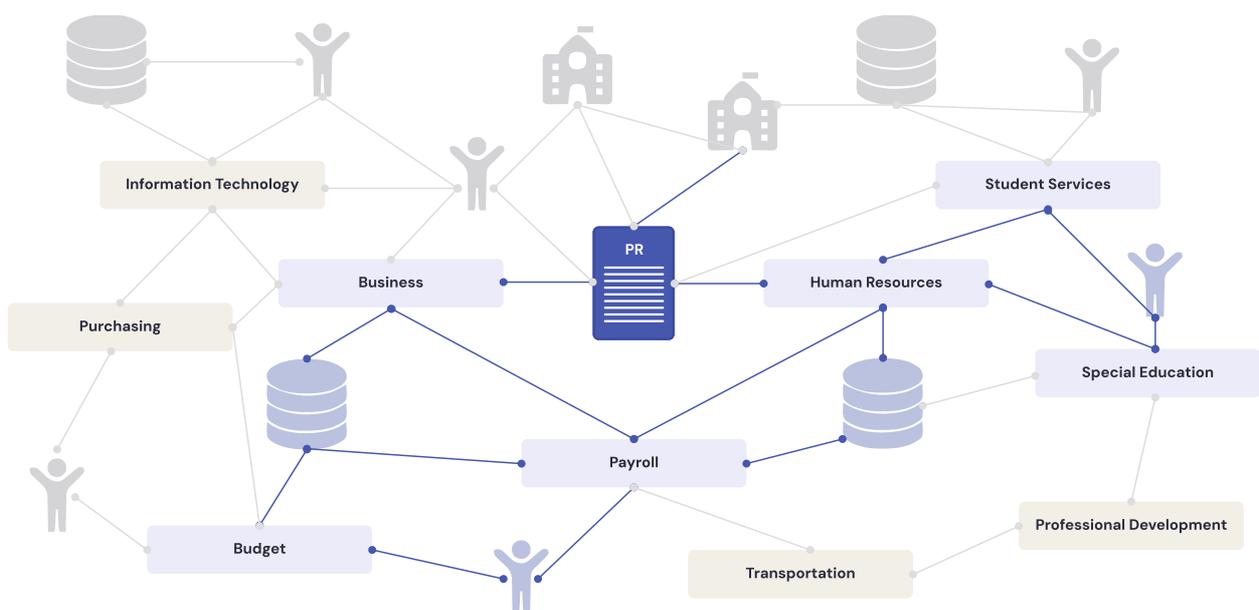
What factors are converging to create the perfect storm in school district business operations?

- Budget **pressures** have reached new heights, with the uncertainty of federal funding and the ESSER funding cliff exacerbated by enrollment declines and widespread voucher legislation.
- Business leaders are facing **talent issues** at districts and school sites. At the district level, CBOs are competing against private industry for new hires. Flat compensation levels, retirements, and burn-out are impacting all teams. High principal turnover rates and ongoing teacher shortages contribute to high work loads at the district level for both HR and business offices.
- **State and federal requirements** are becoming increasingly complex, necessitating audit trails and more documentation, consuming time that districts don't have to spare.
- The business office serves **important and varied stakeholders**—from school boards to school sites, parents to state auditors. The CBO role is highly visible, with competing demands and constant expectations.
- The move to enterprise systems is not new, but districts are now reaching a threshold of installed software products, where **fragmented and siloed systems** are no longer sustainable. The complexity, cost, and lack of integration hinder the very processes they're meant to support.

All of these pressures intensify the decisions CBOs must navigate routinely. More critically, they compound the operational complexity that CBOs face daily, turning routine administrative processes into multi-layered challenges that require coordination across departments, systems, and stakeholders.

Increasing process complexity

School districts may have anywhere from 100 to 1,000 budget codes. Managing the budget alongside the complexity of payees, revenue sources, and state and federal compliance can mean an abundance of processes—and often, an abundance of discrete systems to manage these processes. Each process typically requires multiple touchpoints, approvals, and data validations that must flow seamlessly between departments while maintaining compliance standards and audit trails.



Forms as process connectors

This operational reality plays out most visibly in the forms that serve as the backbone of district operations. A single form, for example, a personnel requisition form, becomes a microcosm of this complexity, as it may require involvement from nine departments on its path to final approval. When you explore how many processes are mission-critical to a school district, each supported by a form, the complexity grows exponentially. These forms don't just capture data; they orchestrate the intricate workflows that keep districts functioning while satisfying the competing demands of efficiency, accuracy, compliance, and accountability.

However, with so many departments involved, processes can become siloed, leaving the CBO without the visibility needed to make strategic decisions.

Business Services

- Travel and Conference
- Budget Transfer
- Mileage Reimbursement
- Reimbursements (General)
- Bus Pass Application
- Purchase Card Form
- Purchase Order / Req
- Vendor Application

Human Resources

- Timesheets
- Transfer Requests
- Onboarding
- Offboarding
- Personnel Action
- Resignation
- Retirement
- PD Requests

Special Education

- 30 Day Interim Placement Amendment Form
- 504 Plan Consent Form
- Assessment Plan
- Transportation
- Teletherapy Consent
- SEIS IEPs for E-Signature
- IEP Consent and Signature

Education Services

- Inter-district Transfer
- Intra-district Transfer
- Summer School Application
- Remote Learning Agreement
- Special Program Applications
- Transcript Request
- Course Placement / Drop
- Senior Grad / Non Grad

Student Services

- Residency Affidavit
- Student Work Permit
- After School Applications
- Field Trip
- Discipline Forms

Early Childhood

- Application for Care
- Enrollment Packet
- Parent Income Declaration
- Residency Declaration
- Employment Verification
- Child Information Sheet
- Caregiver Authorization

Administration

- Board Reports
- Donations
- Fundraising Requests
- Handbooks
- Contact Change Form
- Textbook and Library

Legal

- Contracts
- Agreements
- Collective Bargaining

Limitations of legacy software

K12 is no stranger to technology. Indeed a recent Edtech article showcased 7 categories of 5k+ software solutions to support district needs.¹ However, common refrains soon emerge:

“The implementation was too intensive on my team.”

“None of my systems talk to each other.”

“It created more work for me, not less.”

“It promised to be a one-stop-shop.”

“We didn’t have the resources to implement, so it languished until the contract ended.”

¹ Marketmap: K-12 EdTech: https://tracxn.com/d/sectors/k-12-edtech/_H_HRI51x4Jo_CjK67yA6Zd1l9Mcm2FLGjZbcfGtPeZY#market-map

Systems challenges

Districts have adopted hundreds of systems, and the challenges bubble up to four main areas.

High burden on staff

- Very high implementation time and expenses
- Manual and homegrown systems may rely on one point of failure
- Lack of customer support during implementation and beyond

Poor end user experience for school sites and parents

- UX is prioritized for software administrator — not the end user
- Multiple log-ins for all users
- Limited access and lack of controls for school sites

Rigid software

- Unable to handle complexity of K12 budget codes
- Requires a single administrator to make changes
- Reliant on heavily coded workflow logic, making it hard to strategically update or replicate

Siloed across departments

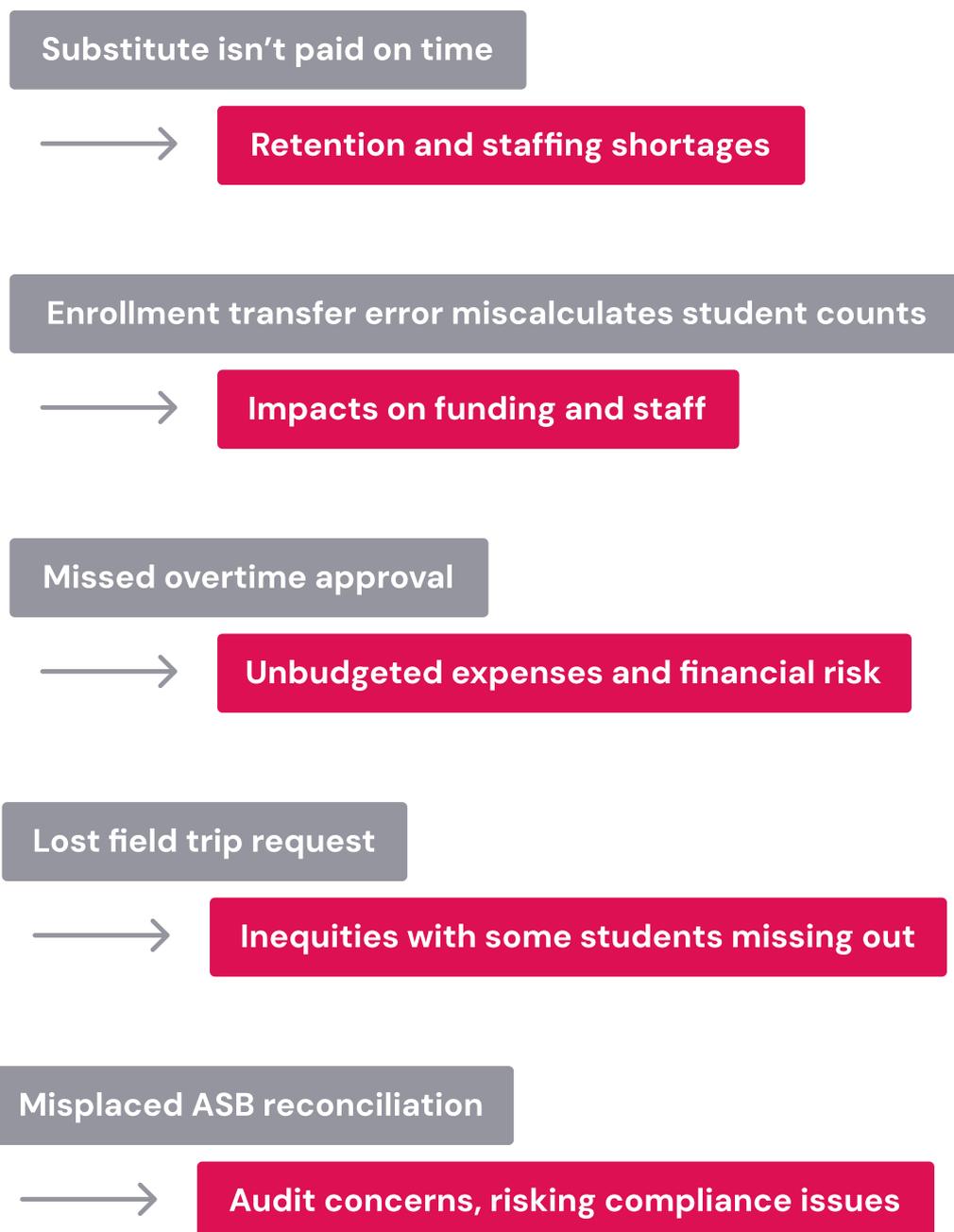
- Systems are not integrated as promised. The problems are interconnected, but the software solutions can't interconnect.
- API requirements too high for district staff
- Highly fragmented process owners across HR, IT, Finance

The majority of software solutions do not accommodate the needs of districts, especially as budgets, people, and priorities change. Change management becomes increasingly important at every phase. With these interconnected teams and challenges, software solutions must be nimble, connected, and flexible to evolve with districts.

The cost of inaction

Despite CBOs working tirelessly to hold operations together, the perfect storm of financial pressure, talent shortages, and system fragmentation is pushing districts toward a breaking point. The cost of maintaining the status quo extends far beyond operational inconvenience—it creates cascading financial, compliance, and strategic risks that compound over time.

Each form represents a critical service, so what happens when a single process fails?



Budget, risk, and efficiency

Even one broken process can create budget overruns, compliance risks, and service disruptions. Multiple broken processes amplify these problems exponentially, causing interdepartmental chaos. Siloed software, changing expectations from stakeholders, and staff turnover make it more complicated. In today's environment of needing to achieve more with fewer resources, maintaining this inefficient model is unsustainable.

The stakes are high with real consequences.

Budget

When processes break down, the financial fallout is substantial:

- Wasted staff hours, as teams chase down missing approvals and manually enter data
- Untapped funding opportunities from incomplete or overdue forms
- Duplicate payments from clerical errors or miscoding

Risk

Serious financial, legal, and compliance risk is created when processes fail.

- Financial risk, when spending exceeds budgeted amounts
- Legal risk, if contractual commitments and payments are not met
- Compliance risk, from incomplete documentation and lack of audit trails

Efficiency

Beyond dollars and data, broken processes erode morale and stall mission-critical services.

- Lack of accountability creates mistrust and finger-pointing
- Manual, time-consuming processes mean staff work late and skip vacations, because, for example, payroll will not get done without them
- Delayed approvals slow down everything from new hires and professional development to field trips and special ed placements

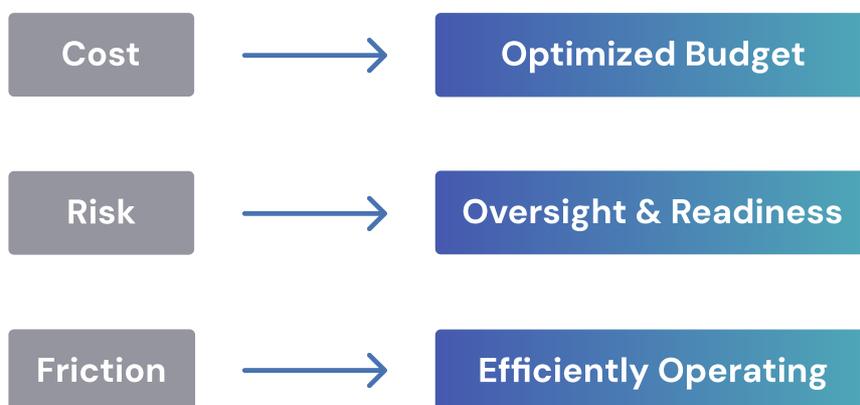
In today's lean environment, districts simply can't afford the drag of outdated workflows; every approval delay is a critical service not being delivered.

Introducing K12 Process Orchestration

Processes are key to a school district's success, and there are serious consequences when the proper platform is not in place. ERP and HR systems each hold a piece of the puzzle, but rarely support district complexity and the volume of information that needs to be routed on forms internally and externally.

K12 Process Orchestration is the end-to-end platform—spanning software, data, and service—that connects discrete legacy systems (ERP, HRIS, SIS) and routes every mission-critical form through workflows, approvals, and signatures, transforming hidden form data into actionable insights.

With K12 Process Orchestration, move from:



Software, data, service

K12 Process Orchestration consists of three critical components:

- Software
- Data
- Service

A platform for K12 process orchestration must support business and HR processes from start to finish, from the form build and send, through the workflow, approval, and signature. While the form is seemingly at the center of the process, in reality, it only represents a fraction of the underlying value.

Your forms create—and sit on—a wealth of data. The metadata of a form and the audit history are essential components to consider alongside the data collected on the form itself.



A best-in-class orchestration platform activates the hidden data for a district's strategic needs. This data—and change management to drive adoption—unlocks the true value for school business leaders.

Inside the Informed K12 platform

Software

Online Forms

- Form Builder
- Data Validation
- e-Signature
- Mobile-friendly access

Workflow routing

- Online approvals
- Custom workflows
- Form re-routing
- Email notifications

Real-time tracking

- Mass emailing
- Centralized management
- Reminders and corrections
- Role-based permissions

Service

K12 Expertise

- Dedicated K12 expert account manager
- Best practices from hundreds of districts

Support at every stage

- Hands-on implementation support
- Change management expertise
- Weekly support webinars

Enablement for all users

- Training for school sites and district users
- Help desk (8 am–5 pm PST), with 95% of replies under one hour

Data and Insights

Reporting

- Filter and search
- Custom reports

Data Management

- Document archive
- Bulk download

API Integrations



Informed K12's unique advantages

Informed K12 stands out as the most comprehensive and adaptable solution available, uniquely equipped with enterprise-level capabilities to support even the largest districts. Our dedicated team offers deep K-12 domain expertise, with many members having firsthand experience as educators and district administrators. Unlike other solutions, the value offered by Informed K12's platform grows over time, as forms and data build a robust picture of your district's financial and personnel activities.

Benefits that CBOs realize with Informed K12:

Complete Operational Visibility

- Silos removed with cross-functional and departmental usage
- Reporting and audits centralized
- Current ERP, HRIS, and SIS investments continue working while gaining new capabilities

Rapid Adaption to Change

- Consistent, intuitive user experience on all processes, reducing training time
- New processes launch in days when district needs evolve
- Form modifications happen in real-time, without IT bottlenecks

Accelerated Implementation Success

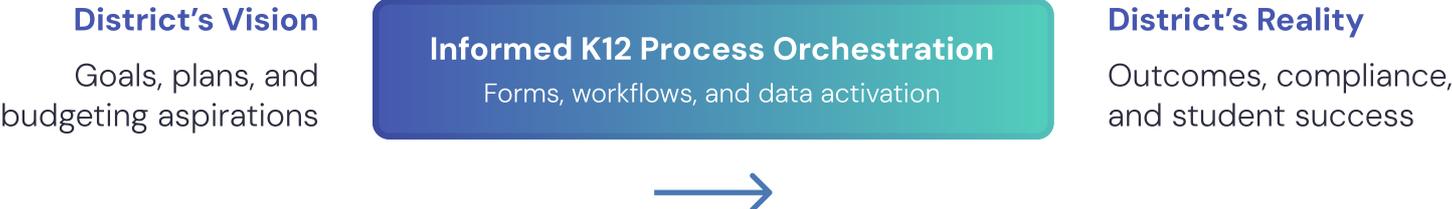
- Change management expertise ensures staff adoption, not just software deployment
- K-12 specificity reduces time-to-value compared to generic solutions
- Comprehensive post-implementation support ensures sustained success and adoption

Bridging vision and reality with K-12 Process Orchestration

Informed K12 is more than software—it’s the lifeline that keeps every district process moving smoothly, from the moment a form is created to the moment a dollar is spent. Designed specifically for K-12, it scales as districts grow, adapts as tools change, and evolves as staff do. The result is a single, consistent experience for everyone—district administrators, school-site staff, even parents—so valuable information never gets lost in the shuffle and support requests drop dramatically.

What sets Informed K12 apart is its unwavering focus on school realities. Districts won’t be shoehorning data into a generic ERP or wrestling with one-off form builders. Instead, CBOs receive hands-on guidance at every turn, a platform tuned to their unique budget codes and compliance rules, and a track record of rapid “time to value” that comes from helping over 400 districts nationwide. As budgets tighten, staffing pressures intensify, and transparency demands grow, districts gain the confidence that every contract, requisition, and fund transfer flows exactly as it should.

By weaving together forms, workflows, data, and change management support, Informed K12 removes the barriers between a district’s vision and its reality. It turns complexity into clarity, risk into resilience, and day-to-day operations into an engine for student success. When every process is in harmony, districts can finally focus on what matters most—delivering an exceptional education for every student.



Is your district is ready to join the hundreds of educational organizations managing K12 Process Orchestration through Informed K12?

Contact us at informedk12.com or email us at hello@informedk12.com.

About us

Conceived by educators for educators, [Informed K12](#) is transforming how school districts manage critical operational workflows. Founded in 2012 to address the unique challenges facing public education finance and HR teams, Informed K12 operates the leading workflow automation platform designed specifically for K-12 operations.

Over 400 districts across the United States choose Informed K12's technology for onboarding, procurement and contracts, budget approvals, and compliance management. Informed K12 provides district-first solutions for the full operational lifecycle, from initial request to final approval, audit readiness to strategic reporting, process optimization to stakeholder accountability.