



InformedK12

Perspectives from the Field: Managing Finance and Risk with K12 Process Orchestration



How SBO peers are navigating current challenges

The Era of Contraction

Public education is facing some of its most significant financial challenges in decades, and School Business Officials (SBOs) are on the front lines. In early 2025, Moody's, a global provider of credit ratings, research, and risk analysis, issued a negative outlook for K–12 schools, citing declining revenue, shrinking enrollment, and rising operating costs. In Minnesota, AMSD districts are working to close a \$280 million shortfall driven by inflation and new mandates. In Chicago, a \$500 million budget gap has pushed per-pupil costs to nearly \$93,000 in some half-empty schools.

This is not isolated. States like California, New York, and New Mexico are expected to lose 10 to 16 percent of their students over the next several years. These trends are unfolding at the same time communities are asking harder

questions about how school dollars are spent, requiring leaders to show both precision and purpose in every financial decision.

In this environment, School Business Officials continue to lead with clarity and resolve. Their focus on students, responsible stewardship, and legal compliance is not a matter of preference—it is the foundation of their work.

To move forward, many districts are taking a closer look at how they operate. Streamlining key processes, reducing inefficiencies, and improving accountability are helping leaders protect what matters most. While technology can support this work, the real progress comes from clear-eyed leadership and committed to doing right by students and staff.

Arundel, K. (2024, December 12). Moody's issues negative outlook for K-12 public schools in 2025. K-12 Dive. <https://www.k12dive.com/news/moodys-k-12-public-schools-negative-outlook-2025/735304/>

Association of Metropolitan School Districts. (2025, March). Survey shows AMSD school districts face more than \$280 million in shortfalls. AMSD. <https://www.amsd.org/2025/03/amsd2025shortfalls/>

Illinois Policy Institute. (2024). Chicago Public Schools faces \$500M deficit despite \$10B budget. Illinois Policy. <https://www.illinoispolicy.org/how-did-chicago-public-schools-create-a-money-mess-even-before-chicago-teachers-union-demands/>

1 Maximizing Financial Stewardship

Budgets are tight. For SBOs, ensuring every dollar supports student success while maintaining public trust means combining visibility with strong ethical controls.

ERPs track transactions, but don't show you which transactions are pending, stuck, or missing. That leaves district leaders unaware of approvals still pending on someone's desk, bottlenecks delaying payroll, or budget adjustments that have never been submitted. Visibility disappears between systems. Every expense starts with a form, and every expense should be tracked. How can technology help?

Return on Investment & Cost Savings

"We quickly calculated that ... we can pay for this and then some for ROI, efficiency, time that people are devoting."

— Dave Rodgers, Assistant Superintendent of Human Resources, Kent ISD (MI)

"We reduced costs by moving programs out of other systems and into Informed K12."

— Michele Leach, RTSBA, Chief Finance & Operations Officer, ESC Region 8 (TX)

Real-Time Budget Visibility & Decision-Making

"[Informed K12] helped us be transparent about where we're spending money—and who's approving it. We have to show value. We're fiscal stewards. It's public money."

— Analia Galloway, Director of Human Resources, Auburn School District (WA)

"Before, we were buried in paper. Now, I can approve forms from my phone between meetings. We're never caught off guard at year-end."

— Blake Prewitt, Superintendent, Newaygo County RESA (MI)

2 Managing Risk and Internal Controls

School Business Officials face the challenge of safeguarding district resources while navigating an increasingly complex regulatory environment. This becomes particularly difficult when approval processes rely on email chains or physical filing systems. A digital workflow system can provide comprehensive documentation for every form, including timestamps, approver actions, and supporting materials in a centralized, secure location. This approach helps districts maintain audit readiness and supports compliance with policy requirements.

Audit Readiness

"The auditor used to go to each school location to review the paper copies of receipts and use-approval forms. The audit took several days or weeks, depending on the size of the sample transactions. With Informed K12, it now takes one to two days to complete audits."

— Cheri Estrada, Director of Purchasing & Warehouse, Tacoma Public Schools (WA)

"The platform is audit-ready. We don't get accused of losing forms anymore because we can see exactly where it's at."

— Tricia Root, Associate Superintendent of Finance and Human Resources, Montcalm ISD (MI)

Visible Checks & Balances

"The audit trail is included on the forms... I can see exactly when a contract was executed and approved. That's critical for procurement."

— Michele Leach, RTSBA, Chief Finance & Operations Officer, Region 8 Educational Service Center (TX)

"Now there's no missing forms. You can't misplace it. You can see exactly what's going on with it— who made a mistake, who corrected it."

— Suzanne Slack, Assistant Superintendent for Administration, OCM BOCES (NY)

3 Protecting Service Delivery Capacity

Process breakdowns don't just slow operations; they undermine staff trust, delay student services, and strain interdepartmental relationships. SBOs understand that service equity and collaboration are not optional, but rather ethical duties. A K12 Process Orchestration platform enables SBOs to achieve these goals.

Faster Turnaround Times

"We took our RFA process from 15 days down to 6. Getting people onboard faster helps us keep programs staffed."

— Patrick Mangino, RIC Director, CNY RIC (NY)

"The satisfaction we've gotten from our administrators has been amazing. People are shocked at how fast the process now moves."

— Joseph Bufano, HR Director and School Attorney, OCM BOCES (NY)

Staff Time Recovery

"We were burning people out. Now I see my staff going home on time and taking vacations."

— Blake Prewitt, Superintendent, Newaygo County RESA (MI)

"We don't have to come back to a stack of things to approve. We keep the workflow going while we're out of office."

— Michele Leach, RTSBA, Chief Finance & Operations Officer, Region 8 Educational Service Center (TX)

Interdepartmental Coordination

"This isn't just about timesheets. Once a form is lost or delayed, pay is delayed, and departments start pointing fingers."

— Karen Waltman, Executive Director of Business Services, Claremont Unified School District (CA)

"It's no longer 'an HR thing' or 'a business office thing.' These processes connect us across departments."

— Dave Rodgers, Assistant Superintendent of Human Resources, Kent ISD (MI)

Most districts aren't struggling because people aren't doing the work; they're struggling because the systems they rely on weren't built for the work today requires.

What we're hearing from SBOs is that when they have the right tools to support clear approvals, better documentation, and faster collaboration, the whole district benefits. Strategic and financial impact comes from finding steady, sustainable ways to improve how processes are done every day.

About Informed K12

Conceived by educators for educators, Informed K12 is transforming how school districts manage critical operational workflows. Founded 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 450 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.

For more information about Informed K12, please contact hello@informedk12.com or visit www.informedk12.com.