



# Workforce Management Software Buyer's Guide for K-12 School Districts

Your guide to making the best WFM  
choice for your district



# Introduction

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Workforce management (WFM) is an organizational method and approach that helps your district maintain a productive workforce. WFM allows districts to manage leave, make decisions based on labor tracking and job costing, and leverage document management capabilities to avoid risk. It also includes tools for supervising mobile and remote administrators, teachers and staff.

Genuine workforce management happens when school districts integrate key activities into one platform. Regardless of the size of your district or your role, chances are you're looking for information about how to choose the right workforce management (WFM) software because your:

- Systems are incomplete, insufficient or fragmented which makes it difficult to pay K-12 workers in a way that ensures accurate coding and funding.
- Leaders don't have the access they need to reliable data about employee trends for hours worked and leaves of absence taken.
- Outdated or manual processes don't allow you to efficiently track compliance against federal labor laws and union regulations.
- Scheduling and tracking substitute teachers has become a headache for everyone involved.

Whatever brought you to this search for a WFM solution, you're in good company. Many districts are realizing a need to elevate their workforce management approach.



# Use Systems to Empower Workforce Management

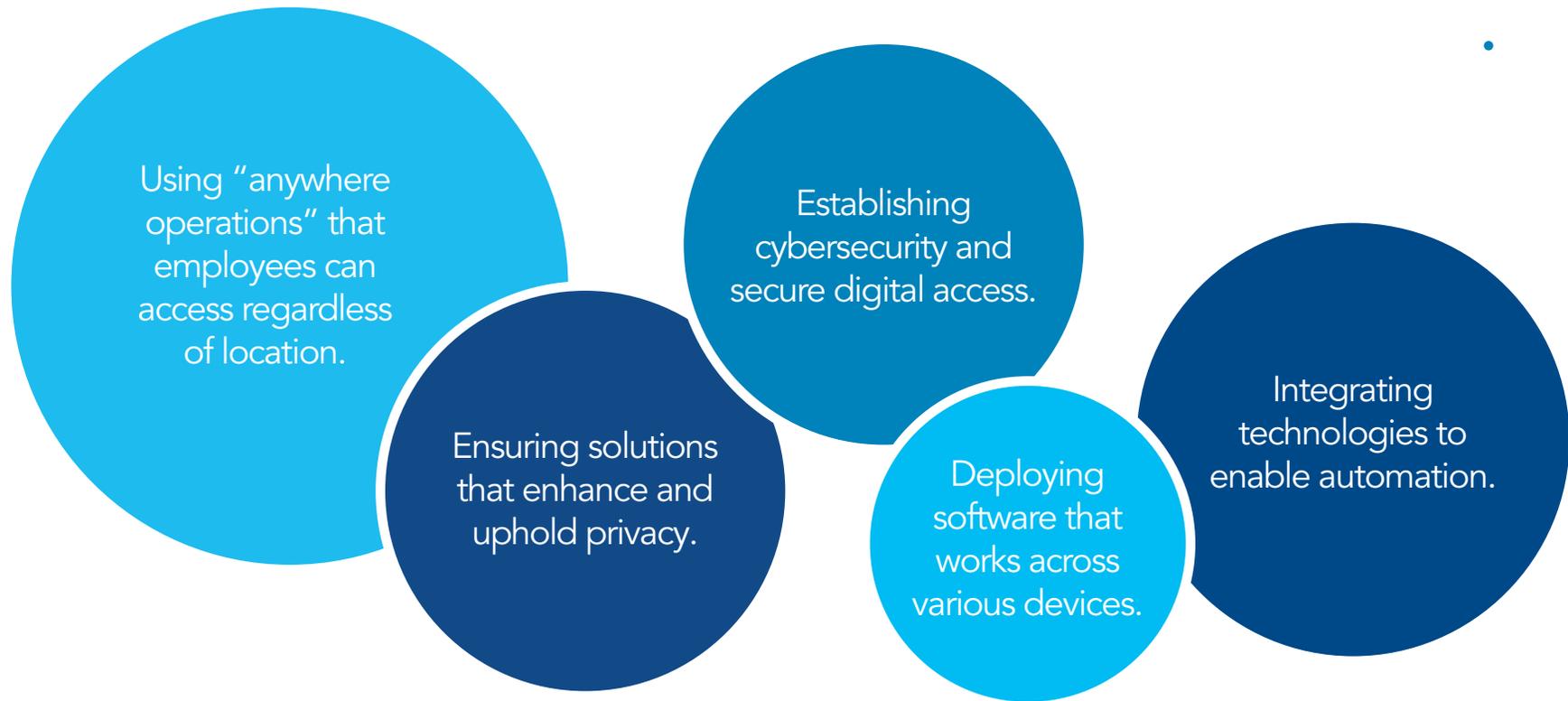
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Given recent global challenges, agile workforce management systems have become more critical than ever.

“In a remote and hybrid work setting, technology continues to have even more of a direct impact on the day-to-day work of employees and how they collaborate with each other,” states [an analyst from Gartner](#). “Yet it is becoming increasingly important for HR leaders to plan for their technology investments with more caution than in years past.”

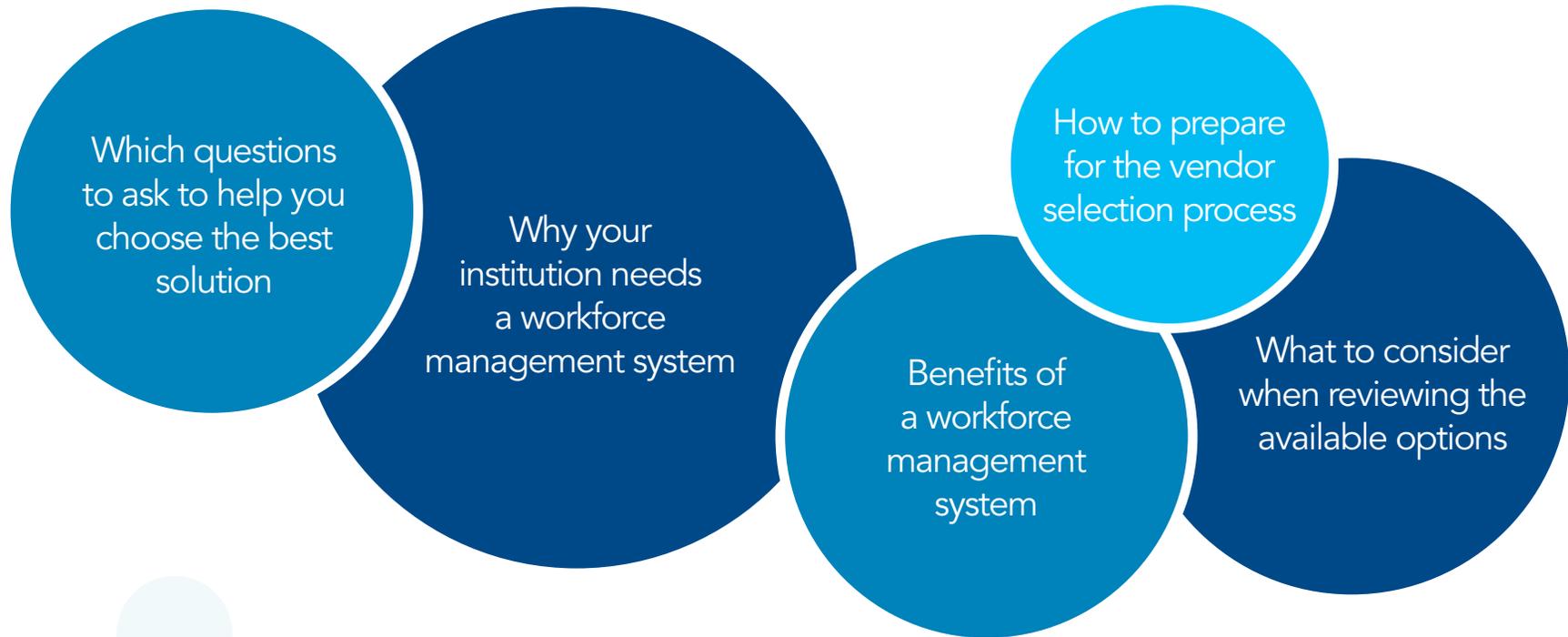


Gartner notes five key trends that are crucial for HR leaders to address today's workforce challenges:



You may know your school district has outgrown the current approach but updating your systems or implementing workforce management software can feel overwhelming for the first time. You're also likely feeling the stress of needing to choose the right solution that will meet existing and future needs. The bottom line: it's tough to know where to start. That's where this guide comes in.

# This buyer's guide will help you understand:



We'll guide you through key steps to help identify what you need to consider and who needs to be involved. Selecting a workforce management solution may seem like an ominous task, but with this guide, you have what you need to ensure you will be prepared for a successful journey.

# Benefits of Better Workforce Management

You don't need convincing that there's a better way. But here are some examples of the benefits your K-12 district will experience with more effective, efficient workforce management systems:



Supervisors and administrators use WFM to easily create, share and update schedules.

Digital systems enable you to find, track and pay substitutes.

Absence and leave management processes are simple to administer.

The calculation of weighted or blended overtime can be automated.

Fast, efficient and accurate data transfer allows you to run payroll that meets regulatory compliance.

With these benefits in mind, it's time to take the steps that will help you analyze and review the impact a workforce management solution will have on your district.

# Why Your K-12 District Needs a WFM System

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In today's constantly evolving educational environment, effective workforce management is an essential organizational process that simplifies crucial activities. Now more than ever, district leaders and administrators want to maintain staff productivity, effectively manage mobile or remote workers, promptly schedule staff members and/or substitutes, as well as administer leave management and manage documents.

If workforce management is an entirely new undertaking for your institution, our eBook ["Everything You Need to Know About Workforce Management"](#) will help educate you on the terms and definitions involved with workforce management solutions, as well as the challenges WFM will help you solve. Two of the immediate benefits of implementing WFM software are **improved productivity** and **staff empowerment**.



# Improved productivity

In the simplest terms – productivity requires that you’re effectively managing your workforce. For a school district’s students to be successful, teachers and staff must be productive. Unfortunately, according to research, a significant amount of time is wasted in the workplace. [Finances Online](#) reports that:

**60%**



of employees’ tasks include work to organize files and communicate about tasks

**49%**



of American employees openly admit to time theft, which can cost as much as 7% of gross annual payroll

Employees spend up to

**four hours a week**

on unproductive tasks



These issues and others have a significant impact not only by creating unnecessary costs but also by decreasing employee satisfaction. If workforce management software doesn't engage your staff, your chances for success are severely limited. According to [technology marketplace advisor G2](#), employee engagement with software has a significant impact on its organizational longevity and success:

**24.06%**



of employees have considered leaving their job because they didn't have the right software

**51.95%**



of employees are unhappy at work because of the software they're using

Thankfully, you can support and enhance staff productivity and district effectiveness through a system that enables effective time and attendance, substitute assignments, leave management and document management.

With the right tools, your leaders, administrators and supervisors have access to the information they need to handle labor, scheduling and absences all from one system. Ideally, they can also use the WFM system to manage employee leave and retain important documents.

# Empowered staff members

Workforce management software not only helps streamline management activities in a way that enables you to achieve district goals, but the right system also helps your teachers and staff focus on student needs. WFM systems improve transparency and efficiency by giving employees access to view the hours they've worked, their schedules, leave accruals, and other personal information.

Not only does employee self-service in WFM software reduce the need for manager or HR assistance but it also empowers staff to review data prior to approval to ensure it's accurate. This level of autonomy is what teachers and staff have come to expect from K-12 districts.



# Efficient automated processes

Manual processes are prone to errors. These errors take time to fix. If they aren't caught in time, they can even cost significant amounts of money to resolve – either through backpay, lawsuits or regulatory fines.

When you put automated WFM processes to work, district efficiency can skyrocket. Thanks to the power of WFM technology, it's possible to track hours across multiple jobs and automate labor calculations. The ability to automate weighted/blended overtime and extra-duty calculations also dramatically decreases the time required for payroll processing time, while also increasing accuracy.

Most importantly, with improved automation of WFM processes, administrators, teachers and staff can focus on what truly matters: the students.

With the understanding that your district needs a workforce management solution that can improve productivity and increase employee empowerment, you're ready to start talking to companies that provide WFM solutions.



# Request and Review RFP Submissions from WFM Providers

To choose the right workforce management solution, you need to align on “must-have” and “nice to have” capabilities and establish comparison criteria to ensure all systems are reviewed fairly.

Before you post the Request for Proposal (RFP) and meet with vendors, define these essential parameters:

- Articulate your goals and the issues you want the system to solve.
- Draft a list of system requirements; prioritize each item based on necessity.
- Review your timeline to establish ideal dates for system implementation and go-live.
- Identify who should be involved in the system review and selection process as well as who contributes to the final decision. Note: if your district has “represented workers,” such as those from a union, make sure they have representation during the system selection process.

It's essential to identify these parameters before you start requesting system information from vendors. Gather the necessary input and information so that you can explain and inform vendors what you need.

In addition to identifying your parameters, there are questions you must ask to gather the information you need – from your internal stakeholders, as well as your vendors.

## Questions to Ask Stakeholders

- #1** Does our WFM system need to integrate with other systems, such as payroll, enterprise resource planning (ERP) or human capital management (HCM)?
- #2** Will this system support our needs for full-time, part-time and substitute workers?
- #3** What system capabilities do we require beyond basic time tracking (e.g., labor tracking, job costing, grant tracking, leave management, document management)?

- #4** How do we want district staff to access the system (e.g., via wall-mounted clocks, web-based access or mobile options)?
- #5** How do we anticipate staff will react to this change?
- #6** What change management and communication resources do we have to help ensure successful implementation and user adoption?

# Questions to Ask Vendors

**#1** How long will implementation take for a district of our size and with our needs?

**#2** What level of customer service does your company provide after implementation?

**#3** If we provide remote access to staff members, can we control or limit their access?

**#4** What tracking features exist for mobile-enabled functionality in the system?

**#5** Was your system designed as an all-in-one offering or has it evolved?

**#6** What system integrations do you currently offer?



Investing in a WFM solution is an important – and significant – step. One audit revealed [more than \\$2.7 million in misspent technology funding](#) at the district level for schools in Fort Worth, Texas.

Asking these questions and doing your homework is essential to find the right solution and avoid wasting valuable funds.

# Consider Important Workforce Management Factors

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Successful school districts rely on great teachers and staff. In turn, they depend on district administrators and leaders to select and implement the systems that will support and enhance their work.

As you look for the right system to enhance workforce management in your district, keep these factors and considerations in mind.



<b>Factors</b> <hr style="width: 50px; margin-left: 0;"/>	<b>Considerations</b> <hr style="width: 50px; margin-left: 0;"/>
<b>End User</b>	<p>Think about the people who will use the WFM system – leaders, administrators, supervisors, teachers and staff all have different system needs. You need to understand them and identify how the new system specifically meets their needs.</p> <p>Consider creating focus groups with end-users to gather their input and to their needs. This is the first step in an effective change management process.</p>
<b>System levels</b>	<p>Today's systems are highly configurable. Make sure you're considering what level of sophistication you require in your WFM system.</p> <p>For example, do you need basic time tracking or do you need a system that will allow you to add job and cost codes? What type of approvals and visibility do you require for staff or substitute scheduling?</p> <p>Make sure your future needs are part of the consideration – as your district expands, you want your WFM system to grow with you.</p>

<b>Factors</b>	<b>Considerations</b>
<b>Integration options</b>	<p>There are wide-reaching WFM systems that cover many functions but don't excel in all of them. Not all systems are created equal, and not every K-12 district has the same needs and strategies. At the same time, patching together a system built on the best tool for every function can create an IT stack that is very difficult to manage.</p> <p>As you look at your options, use a "best-of-breed strategy" in which an ERP, accounting/payroll system or HCM, is at the center and can be supported by integrations that will extend the functionality.</p>
<b>Cloud vs. on-premises solutions</b>	<p>Depending on your district's model, you may benefit from workforce management software that is cloud-enabled, or you may require an on-premises solution.</p> <p>If teachers and staff require access to critical business systems while working remotely, a cloud solution is likely the best option. An on-premises or blended solution may be a better option for employees such as foodservice staff who don't work remotely.</p> <p>Make this decision based on your current and possible operational needs which could arise in the future.</p>

<h2>Factors</h2>	<h2>Considerations</h2>
<p><b>Budget considerations</b></p>	<p>If you haven't had a WFM system in place, it's understandable to be concerned about adding a new expense to your budget. Keep in mind that when you're leveling up your systems there are long-term benefits for both employees and the district.</p> <p>As you look at the options, consider up-front costs, individual license costs, and additional training or customer service costs. Not every vendor has the same cost model, so make sure you evaluate each offering accordingly.</p> <p>Also, be sure to calculate how your WFM solution will save you money. Whether it's fewer payroll errors, improved job cost reporting, more efficient document management or faster schedule creation, you'll potentially reduce costs with a better WFM system in place.</p> <p>Worried about getting the boss on board? Read our blog, "<a href="#">Building a Business Case for Time &amp; Attendance Software</a>" for some tips to help you calculate savings.</p>

### Not sure where to start?

Download our Scope of Work comparison tool to easily compare WFM solutions and their capabilities.

[▶ Check it Out](#)



# Gather Input from Trusted Sources

As the saying goes, you don't know what you don't know. That's why it's essential to gather input from a variety of trusted sources as you consider various WFM system options. Once you have a list of your top choices, it's time to ask for feedback regarding your top vendors.

At a minimum, make sure you cover your bases with these sources:

## Talk to your peers:



- Current and former colleagues
- Fellow members in professional organizations
- Industry groups on LinkedIn

## Refer to software review sites:



- [G2](#): Discover and compare software options.
- [Capterra](#): Find software, compare options and read reviews.
- [Software Advice](#): Get one-on-one help and personalized recommendations about software options.



## Stay on top of trends:



As of 2021, many experts have cited the following workplace predictions that could influence your decisions about which WFM system is right for you:

- Health screenings are required in many schools and at district offices.
- Demand for and the need to quickly schedule substitute teachers is increasing.
- The need for mobile and remote access for teachers and staff will continue.
- Desires for demand-based scheduling is increasing.

In the final stages of your decision-making, these trusted sources can provide objective insights from others who understand the unique school district needs.

## Attend industry conference sessions:

- [Association of School Business Officials \(OSBO\) International Annual Conference](#) (or your local ASBO Conference): Get access to insights regarding the crucial educational, economic, business, and technology trends that affect school finance.
- [School Bus Summit](#): Meet with other student directors and industry leaders for solution-based conversations.
- [HR Technology Conference & Exposition](#): Meet vendors and gain insights needed to make critical HR system decisions.

# Conclusion

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Within the field of K-12 education, there are multiple technology trends to consider and numerous system options available. Like other administrators, you're dedicating valuable time and resources to assess and plan for the introduction of new technologies that will assist with crucial workforce processes.

As you weigh WFM options and make decisions, stay focused on your district's unique technology needs and capabilities. Find a system that makes it easy for users with a modern, well-designed user interface.

Involve a cross-functional team to assist with this decision and ensure it will benefit departments and educational programs across the district. Together K-12 school district administrators and department leaders can unite to improve teacher and staff experiences, increase productivity and reduce compliance risks by maximizing all that a workforce management system has to offer.

