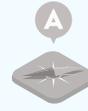




Site Level  
Autonomy



Management



Alignment of  
Spending to Goals



Resource  
Equity



Transparency

## Case Study

# Indianapolis Public Schools support principals with better finance tools

## Key Takeaway

When district administrators and principals have instant access to up-to-date budgets, it's easier for them to make strategic decisions that benefit students. Modern finance technology solutions empower district leaders to fully align their resources and strategic priorities without requiring significant time or prior product knowledge. Tools like *Balance* support the transition to decentralized budgeting without requiring principals and administrators to learn the intricacies of the district's accounting system.

## Challenge

The Superintendent introduced reforms to transform **Indianapolis Public Schools (IPS)** into a decentralized portfolio model with a goal of providing more control to principals. School leaders would now be responsible for both annual budget creation and day-to-day financial management at their schools.

However, very few principals had backgrounds in finance or had received training on building budgets. Principals could not independently access data in the accounting system. The financial system required specific knowledge and training that was limited to the accounting team and produced reports that were not user-friendly. Annual budgets and staffing plans were created in spreadsheets that were complicated to use and highly prone to manual-entry errors.

## District Highlights

Student Enrollment	31,820
Number of Schools	74
Employees	4,478
State	Indiana
ERP	MUNIS

## Solution

IPS implemented *Balance Budget* to improve the annual budget process with principals and *Balance Manage* to help them monitor spending throughout the year. Providing central office administrators with access to *Balance* improved collaboration with principals.

Now, every budget owner has immediate access to their budget and spending information, eliminating the dependency on a small central finance team. Principals have greater confidence in their ability to manage their school's finances and advocate for the resources their students need. Freed from ad-hoc data requests, the finance department can focus on strategic support and analysis.

**Using *Balance*, simple questions that could previously only be answered by reaching out to Central Office can now be obtained through self-service in minutes. *Balance* allows district administrators and school leaders to strategically and efficiently plan and manage spending.**

**SMART Pathways** is a district financial management and strategy rubric with five Pathways and 48 indicators of success designed to move districts to holistic and sustainable financial management practices. When districts work to improve the **site-level autonomy** pathway, they work to ensure their budget owners have control over the dollars spent at their location and are provided the corresponding professional development needed to ensure their success.

Interested in learning more about the **SMART Pathways**? Let's talk.

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