

Rural Oregon District Analyzes Historical Data to Present Findings to the Board in a More Meaningful Way



Organization Type:
K-12 Public School

Enrollment:
1,300

Annual Operating Budget:
\$22M

Gervais School District is a small rural district in Oregon located in the heart of Willamette Valley's prime agricultural land. The district covers 65 square miles with five schools - including one virtual charter school. The district serves 1,300 students and 125 staff members.

THE SITUATION

Gervais School District is located in the heart of Willamette Valley. Serving 1,300 students across five schools, this rural district takes pride in their ability to provide all students with a rich and personalized learning experience. For Melissa Wolfer, Business Manager at Gervais, it was difficult to analyze the challenges the district was facing; declining enrollment and increasing health insurance costs were reducing available resources in the classroom. As a small district, Wolfer did not have the funds to pursue high-priced consulting services to mediate the issue. She also had difficulty analyzing the district's finances in a spreadsheet format. She knew there had to be an easy and affordable solution to compile her district's data, compare historical information and present findings visually.

THE SOLUTION

Wolfer first heard about Forecast5 from members of the Oregon Association of School Business Officials. OASBO members strongly encouraged districts to learn about the Forecast5 decision support suite, as they saw the value in leveraging visual analytics. In August of 2018, Gervais connected with Forecast5 and soon became subscribers of the peer comparison tool, 5Sight, the multi-year budgeting and forecasting tool, 5Cast, and the monthly budget performance tool, 5Cast *Plus*. The ability for the district to compile historical comparative data with the click of a button has allowed them access to the exact data needed by the Board in a timely manner and presented in an easy-to-understand visual format. Wolfer says, "In the past, putting this information together would have been a half day project, and the result would not have been as meaningful."

THE RESULTS

Using 5Sight, Gervais could identify similar districts in Oregon and compare data, allowing the district to gain a historical perspective on key areas, such as enrollment and staffing. Having access to this data in customizable visuals and board-ready reports has enhanced stakeholder engagement and allowed the team to identify potential issues, which initiated constructive conversations.

“Smaller districts might have a hard time deciding to invest in a product like Forecast5, but I would encourage them to look at the time saved by having readily available historical information for management and forecasting for the district’s budget documents”

— Melissa Wolfer, Business Manager

They have also been able to utilize graphics displaying recent student performance results to help communicate crucial information to their Board as well as during budget/financial presentations.

Beyond 5Sight, the district is also tapping into 5Cast and 5Cast *Plus* for multi-year forecasting and monthly reporting. Gervais is in the early stages of using the tools but is eager to learn more and begin using the software for additional projects and tasks.