

# Producing Monthly Financial Reports in Minutes Helps North Mason School District Identify \$800,000 in Savings



**Organization Type:**  
K-12 Public School

**Enrollment:**  
2,200

**Annual Operating Budget:**  
\$32M

## **North Mason School District**

is a relatively small district committed to a big vision. The vision of the school is to constantly improve their students' performances in all core subjects, while still maintaining an emphasis on the education of the 'whole child.' Their aim behind this mission is to help students master a rigorous set of skills as they become independent, complex thinkers.

## **THE SITUATION**

Located miles from the coast, North Mason School District enjoys the rainy weather commonly found in Northwest, Washington. Serving over 2,200 students, the teachers and administrators work hard to uphold their school's mission of, "To Educate, Empower, and Inspire All Students." The district is committed to success, ensuring that each student meets or exceeds the high academic standards set in place by state and national assessments.

Ashley Supry, the Executive Director of Finance and Operations, is a model of this effort. Being a leader in a class 1 (>2,000 FTE) school district, Supry wears many hats and oversees the Transportation, Food Service, IT, Grounds, Facilities & Maintenance, Human Resources, Athletics/ASB, and day-to-day finance and business operations. This is Supry's second year as head of the Business Office, but first year as the head of district operations. She entered this role with the intention of learning the requirements and expectations of the profession while using her diverse experience to make improvements. With balancing so many responsibilities, it was challenging to find the time necessary to prepare her predecessor's version of the district's monthly financial reports. In order to work on this task and adequately prepare for meetings, Supry found herself working upwards of 70 hours a week. She knew there had to be a more efficient and effective way to build her budget and communicate the district's position to the Board and community.

## **THE SOLUTION**

Supry was first introduced to Forecast5™ from the Finance Director at a neighboring school district. Intrigued by the features, functionalities and time-saving capabilities of the tools, Supry quickly became a user of 5Sight™, 5Cast™, and 5Cast™ Plus. She believed Forecast5 provided the solutions to multiple challenges she was facing, ranging from the manual maintenance of detailed financial data to producing board-ready reports that filled a need of transparency with the community. The ability to develop multi-year projections with 5Cast and monthly financial reports with 5Cast Plus in a matter of minutes was a game changer for Supry. Reporting became automated, allowing her to devote more attention to other responsibilities, while establishing a better understanding of the district's financial position and providing opportunities to be more fiscally responsible.

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“NOW THE PROCESS TO CREATE MONTHLY BOARD REPORTS TAKES APPROXIMATELY FIVE MINUTES. ONCE THE MONTH-END DATA HAS BEEN UPLOADED INTO 5CAST PLUS, THE MONTHLY BOARD REPORTS ARE FULLY READY WITH THE CLICK OF A BUTTON.”

— Ashly Supry, Executive Director of Finance and Operations

## THE RESULTS

The district used 5Cast Plus to upload monthly financials to run a variety of analyses and create one-click ready board reports. When reviewing the reports, a good communication point came to light. Due to a lack of oversight, one of the changes Supry implemented in her new role was restricting the use of credit cards as a form of payment for general supply and equipment purchases. Using 5Cast Plus, Supry was able to generate a report and quickly identify projected savings upwards of \$800,000 in Supplies expense, directly attributed to the change in credit card restrictions. This insight allowed Supry to estimate cost savings earlier in the year in time for funds to be allocated elsewhere. In addition, the Dashboards feature in 5Cast Plus has allowed detailed reports to be added to the District's website and has enhanced transparency and understanding among stakeholders. Supry also noted the excellent customer service that she has received from Forecast5. Her advisors were available during non-business hours to ensure the client was prepared and all issues were addressed. North Mason School District now uses 5Cast to produce budget trends and detailed one-year and four-year budgets. 5Sight is being leveraged to identify similar peer districts and run financial peer comparison analyses. With these tools in place, the district is confident that they will be able to better support their students and prepare them for success. To districts considering using Forecast5 Analytics, Supry says “Consider the value of your time. What could you be doing in the time you would save utilizing the functions of this program?”