

Finding Answers and Communicating to Stakeholders!



2022 Oregon Small Schools Conference

Finding Answers and Communicating to Stakeholders!

Learn how a small school district can utilize analytics to research student and financial issues, develop plans, and share vital information to their stakeholders



Presenters...



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FORECAST⁵
ANALYTICS

A Frontline Education Company



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Forecast5*



Comparative Analytics

— formerly 5Sight —



Student Analytics Lab

— formerly 5Lab —



Financial Planning Analytics

— formerly 5Cast —



Budget Management Analytics

— formerly 5Cast Plus —



Location Analytics

— formerly 5Maps —

Agenda

- Board Report Examples
- Early Identification of Supplemental Budget Needs
- Year Over Year Budget Variances
- Budget Presentation Examples
- Negotiation Resources



Gervais SD 1

“Staff at small districts wear many hats.

Despite a district's size, we are all required to complete the same reporting requirements to our board, stakeholders and ODE, as the larger districts.

Time and expertise to fulfill all requirements can be challenging.

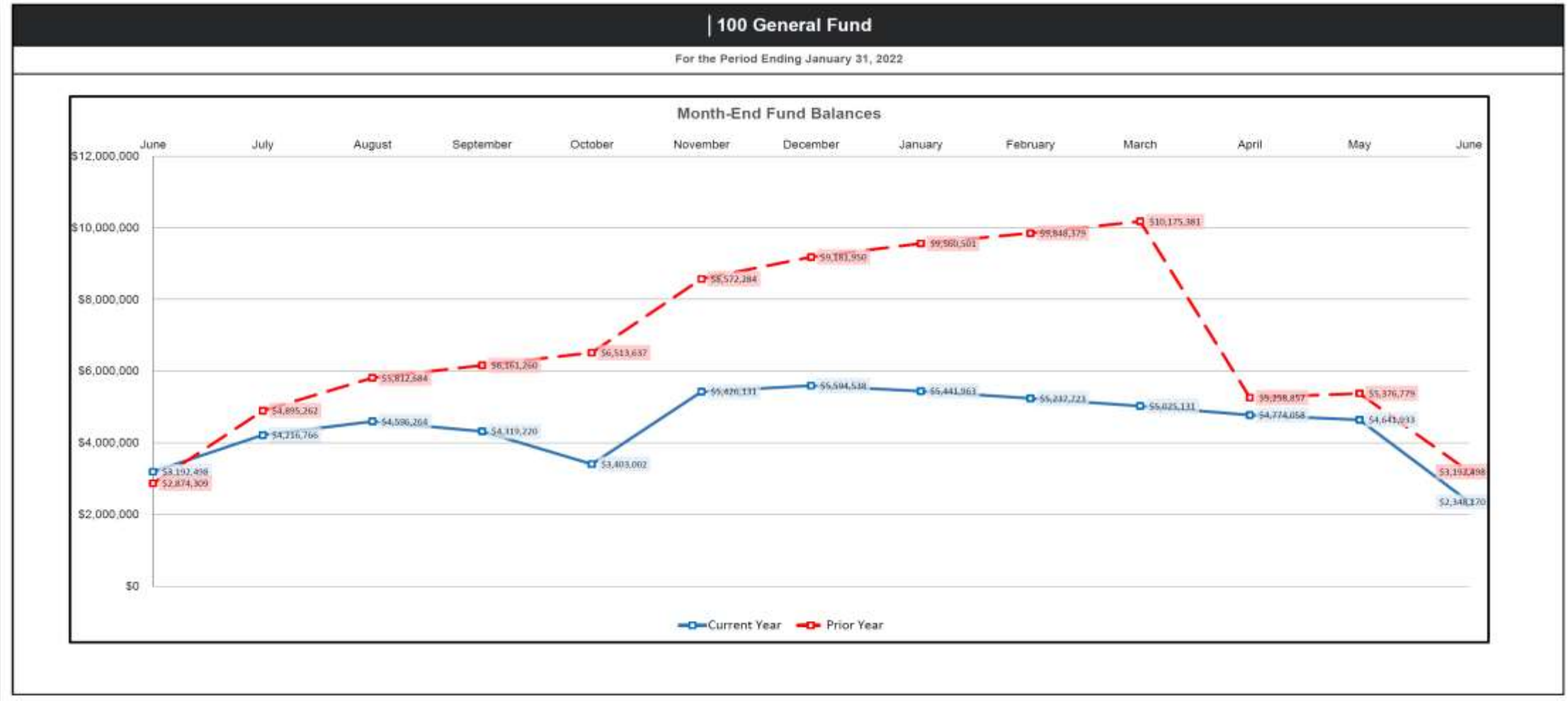
Gervais SD considers Forecast 5 to be a partner in helping us through some of these challenges.”





Board Report Examples

Ending Fund Balance Projections...

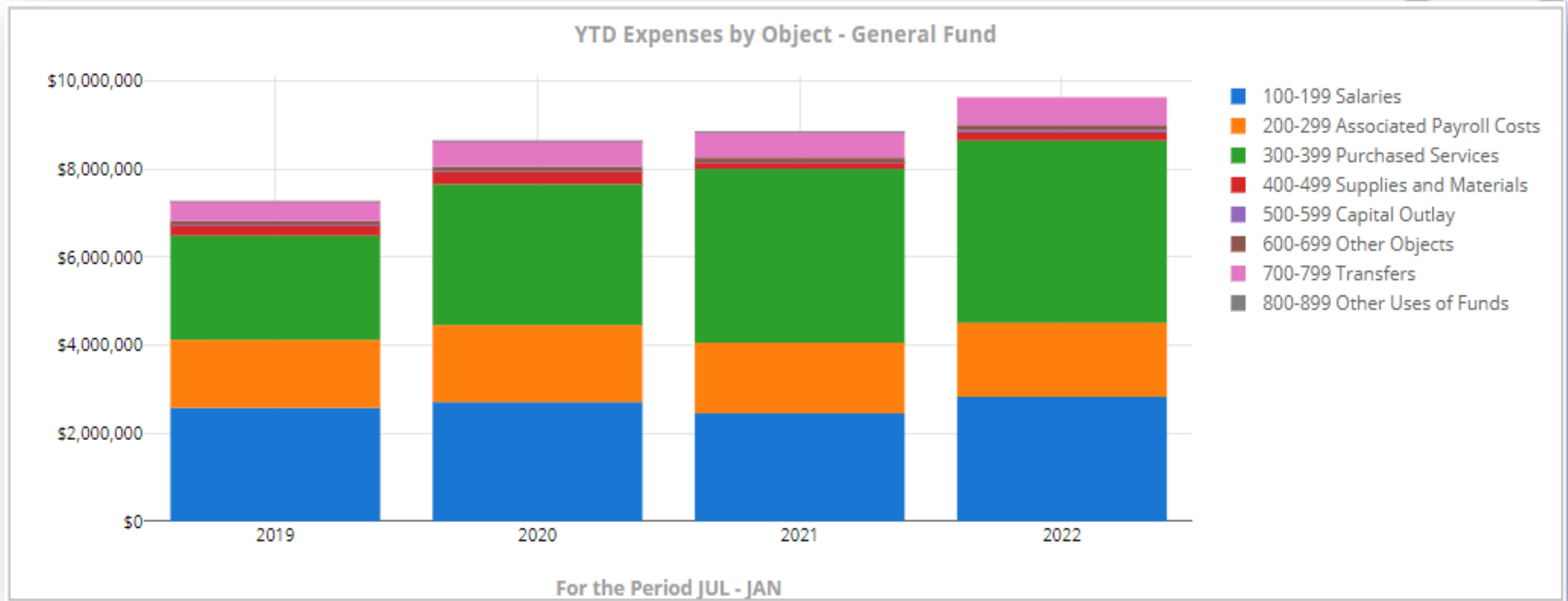


All Funds Financial Overview...

- Expense and Revenue Analysis
- YTD analysis as percentage of Budget



YTD Expenses by Object...



Early Identification of Supplemental Budget Needs



Financial Projection by Function...

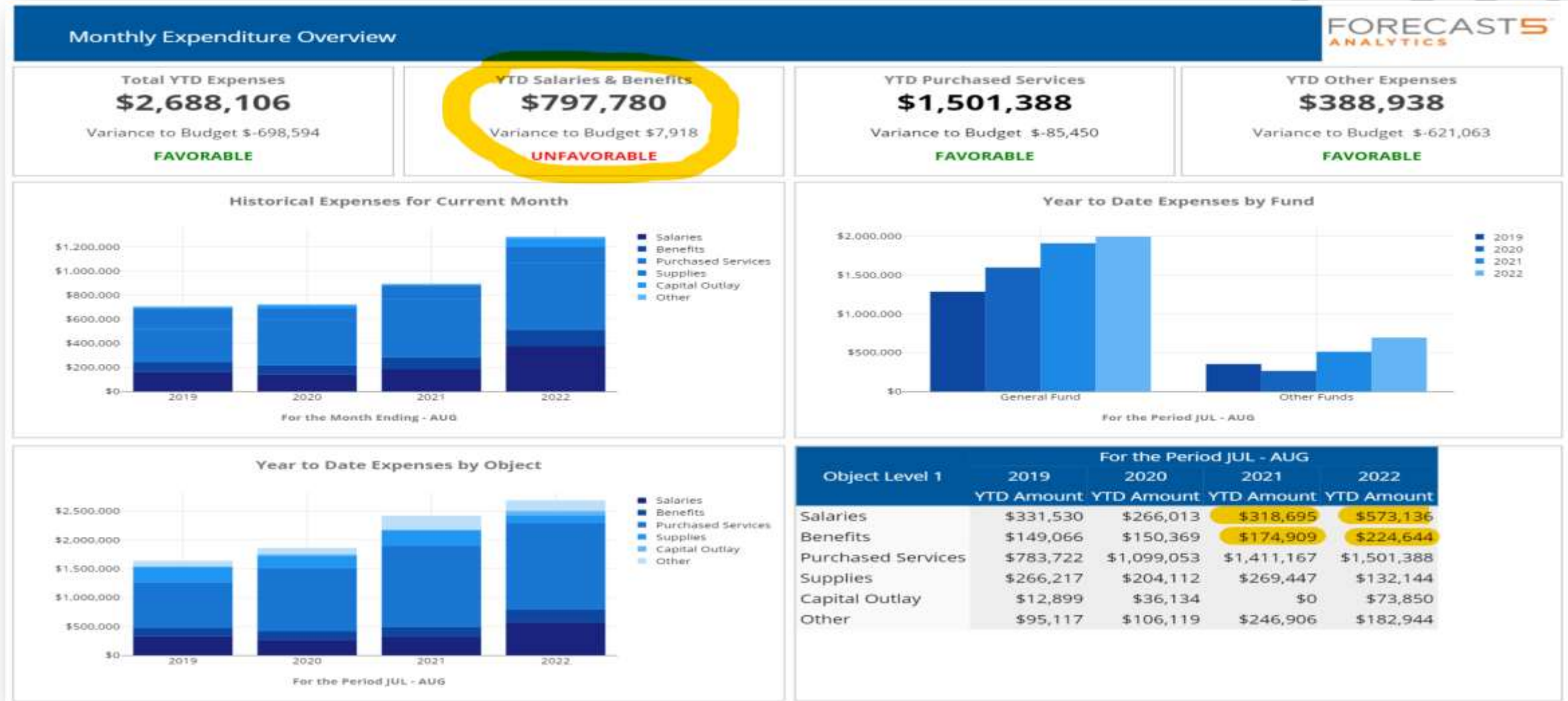
	Prior YTD	Current YTD	Add: Projections	Annual Forecast	Annual Budget	Variance Fav / (Unfav)
Beginning Fund Balance	\$ 1,099,402	\$ 1,527,671	\$ -	\$ 1,527,671	\$ 1,519,698	\$ 7,973
REVENUES						
Local Sources	159,815	325,825	251,514	577,339	726,399	(149,060)
Intermediate Sources	-	-	-	-	-	-
State Sources	410,258	1,203,072	600,657	1,803,729	2,198,206	(394,478)
Federal Sources	1,435,713	1,148,490	1,675,626	2,824,116	4,842,440	(2,018,324)
Other Sources	214,500	246,500	-	246,500	246,500	-
TOTAL REVENUE	\$ 2,220,287	\$ 2,923,887	\$ 2,527,797	\$ 5,451,683	\$ 8,013,545	\$ (2,561,862)
EXPENDITURES						
Instruction	\$ 903,610	\$ 1,964,337	\$ 1,407,424	\$ 3,371,761	\$ 4,006,802	\$ 635,042
Support Services	776,805	1,000,327	613,377	1,613,704	1,466,249	(147,456)
Enterprise and Community Services	1,035,369	769,457	778,153	1,547,610	2,260,682	713,072
Facilities Acquisition and Construction	-	47,346	788,790	836,136	1,526,150	690,015
Other Uses	1,680	2,400	21,680	24,080	273,360	249,280
Contingencies	-	-	-	-	-	-
Unappropriated Ending Fund Balance	-	-	-	-	-	-
TOTAL EXPENDITURES	\$ 2,717,465	\$ 3,783,866	\$ 3,609,424	\$ 7,393,290	\$ 9,533,243	\$ 2,139,953
SURPLUS / (DEFICIT)	\$ (497,178)	\$ (859,980)	\$ (1,081,627)	\$ (1,941,607)	\$ (1,519,698)	\$ (421,909)
Projected Year End Fund Balance				\$ (413,936)		



Year Over Year Budget Variances

Monthly Expenditure Overview...

- Discrepancies from prior year to date

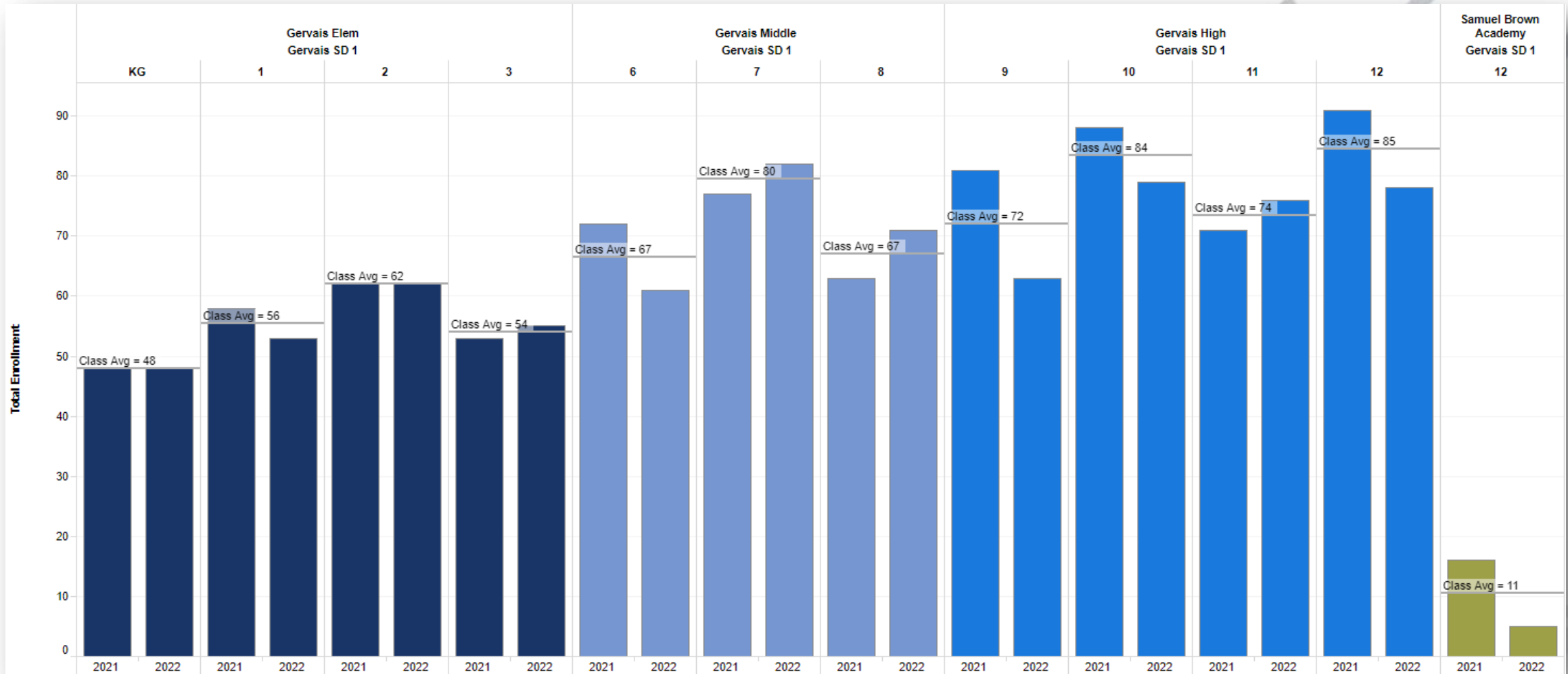


Budget Presentation Examples



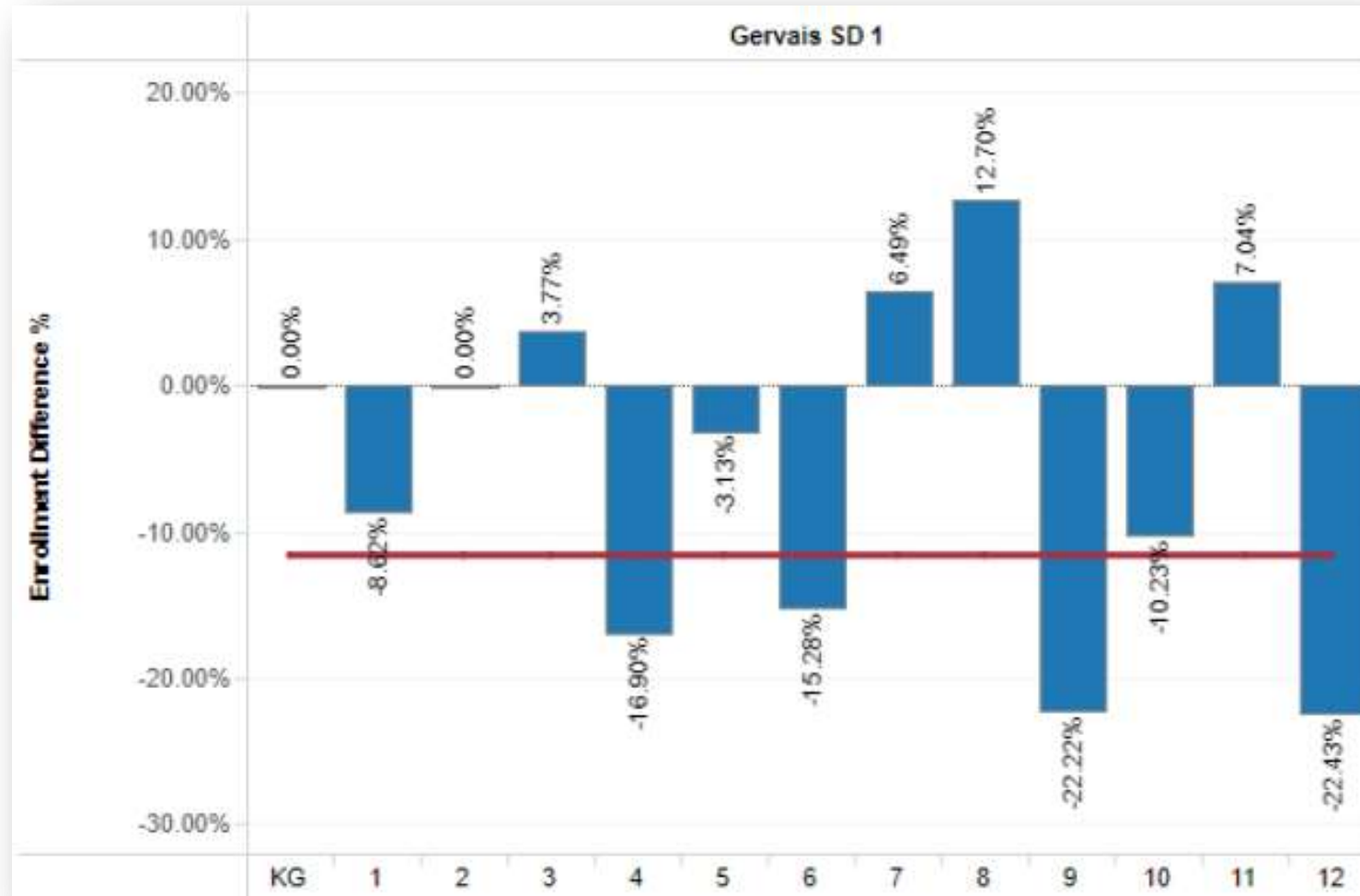
Enrollment by Grade Analysis...

- 20-21 to 21-22 Change



Enrollment Change % by Grade...

- 20-21 to 21-22 Change



2017-18 to 2020-21 Enrollment Change by Building...

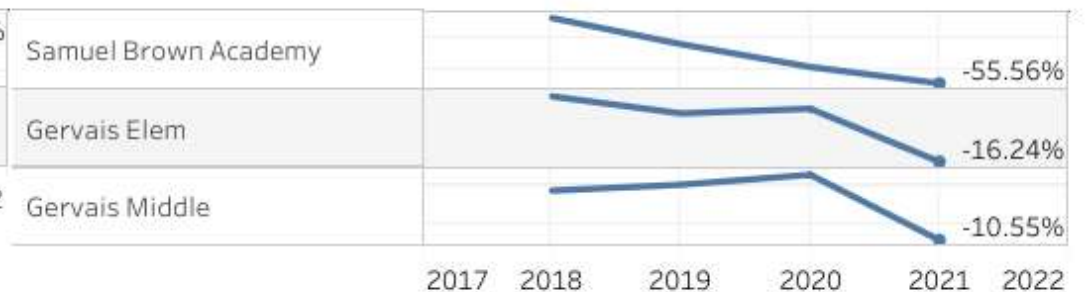
Gervais SD 1 Enrollment Story

Even if overall district enrollment is stable, fluctuations between buildings can still present staffing challenges. Use the table below to identify which buildings have seen the largest increases and decreases over the last three years (2018 to 2021).

Largest increase in 3 years



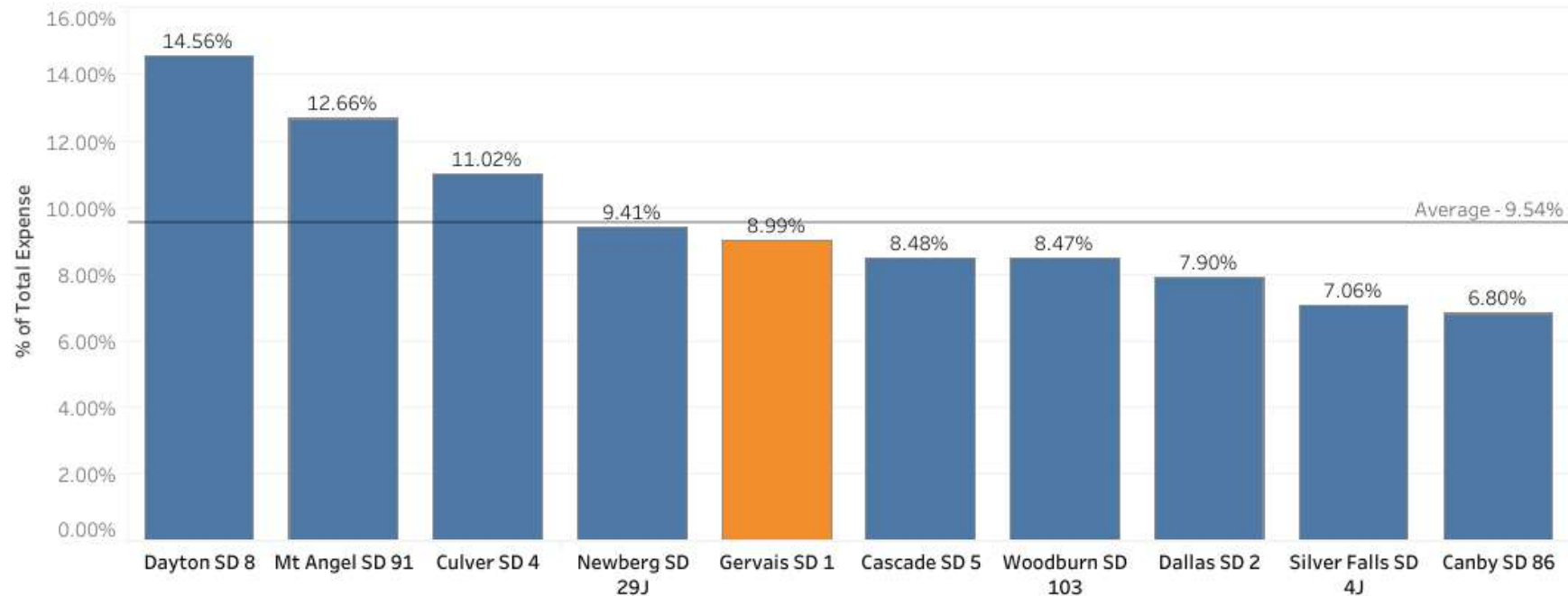
Steepest decline in 3 years



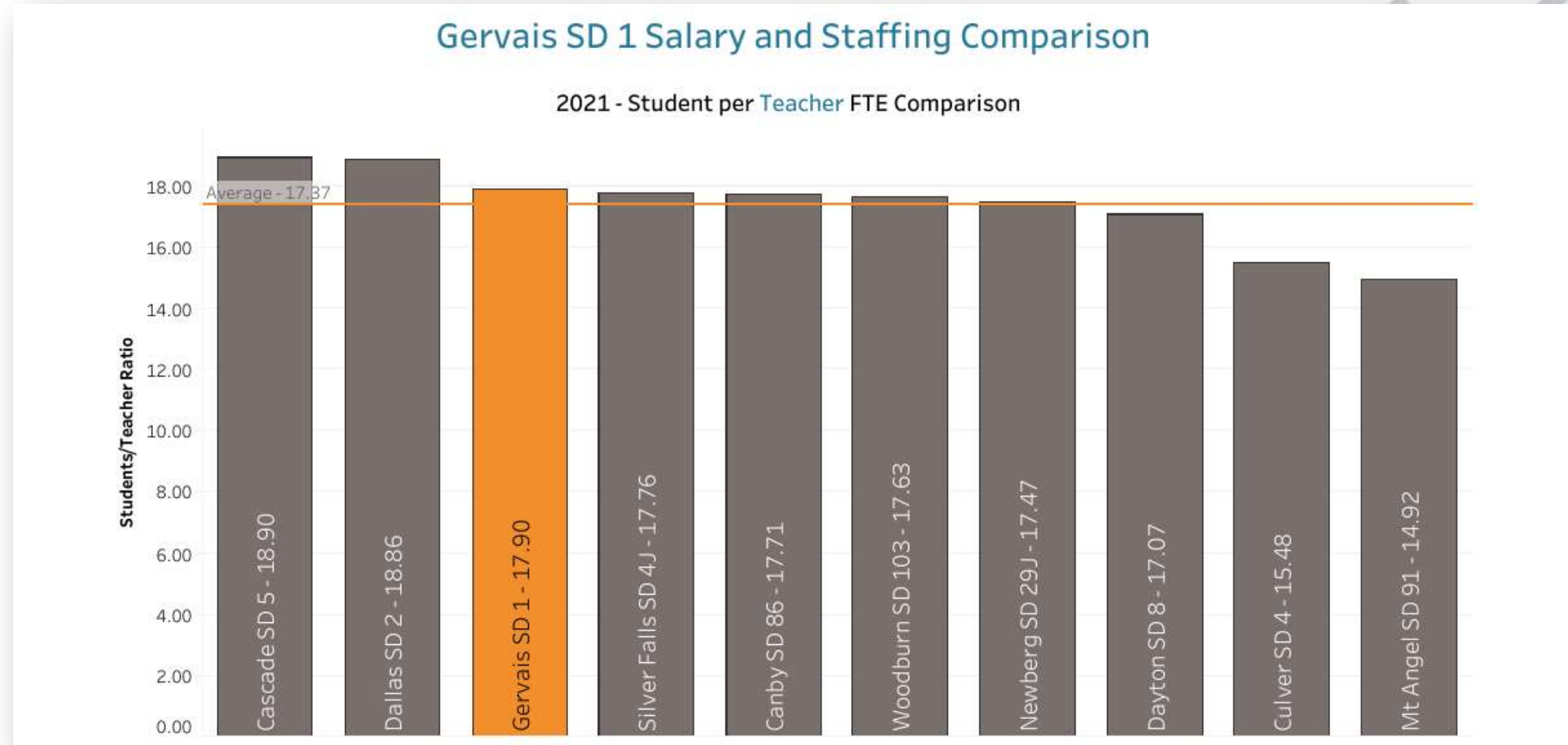
General Fund Administration Spending Comparison...

Gervais SD 1 Expenditure Story

2020 General funds Includes Function: (2300) General Administration and (2400) School Administration only

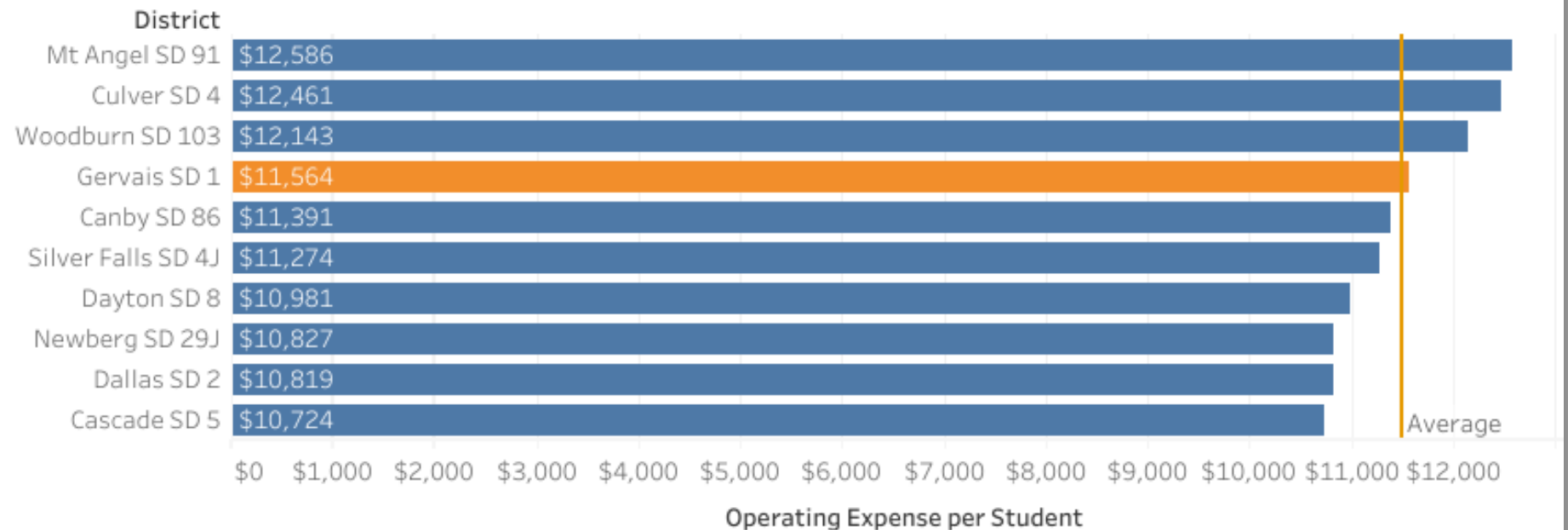


Students per Teacher FTE Comparison...



General Fund Spending per Pupil Comparison...

Operating Expenditures per Student is a reflection of available resources and student needs. The chart below shows the district's operating expenditures per student for 2020 compared to its peers.



Gervais SD 1

Working with Forecast5...

- Allows us to present accurate, high-quality reports to our board and stakeholders
- Gives us valuable information to help make timely decisions
- Turns complex detailed figures into understandable graphics
- Partners with us to help with the every-growing load that small district face





Negotiation Resources

Survey Data Available Beyond ODE Collections...

Visuals Stories Create Workbooks Custom Content Search

What Are You Working On Today?

☐ COSA Admin Survey

☐ OSBA Classified Staff Salary Survey

☐ OSBA Health Insurance Surveys

☐ OSBA Licensed Staff Salary Survey

☐ OSBA Superintendent's Survey

Sort: Alphabetical

OSBA Licensed Staff Salary Survey

Base Salary Comparison

Extra-Duty Stipends

Leaves/ Days Off Data Grid

Salary Incentives

Salary Schedule Comparison

Salary Schedule Survey Grid

Teacher Collective Bargaining Q&A

Tuition Reimb. & PD

Workdays Comparison

ODE Historical Staff Data...

- Licensed/Classified data by position (\approx 40 positions available)
- FTE by Individual Employee
- Total Salary Paid by Year
- Experience (In/Out state and District)



Salary Survey Data...

- Current year data
- Positions not aggregated
- Additional metrics related to compensation not currently provided by ODE



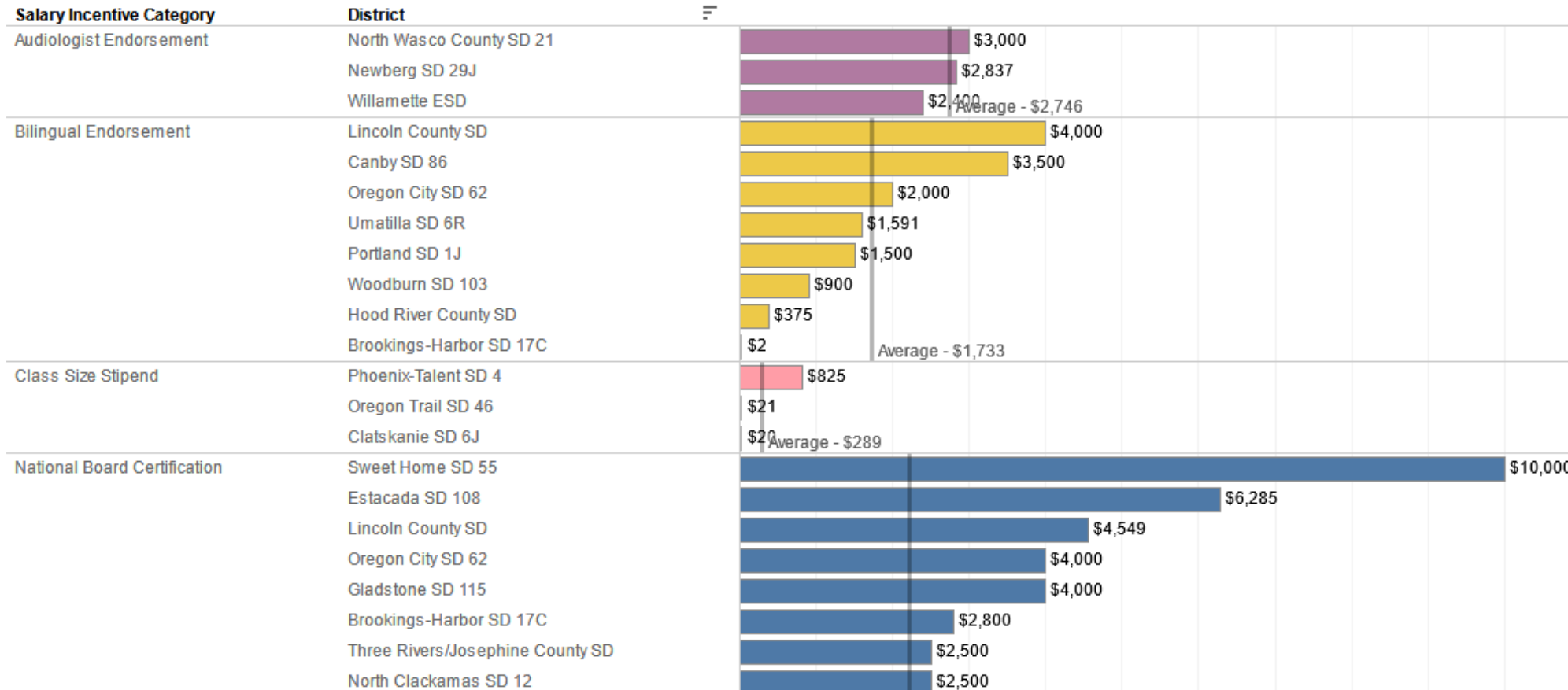


Licensed Salary Data

Salary Incentives for Licensed

Salary Incentives

Source: OSBA Teacher Salary Survey 2021-22



Salary Incentive Type

- ☒ Max Amount Paid
- ☐ Min Amount Paid

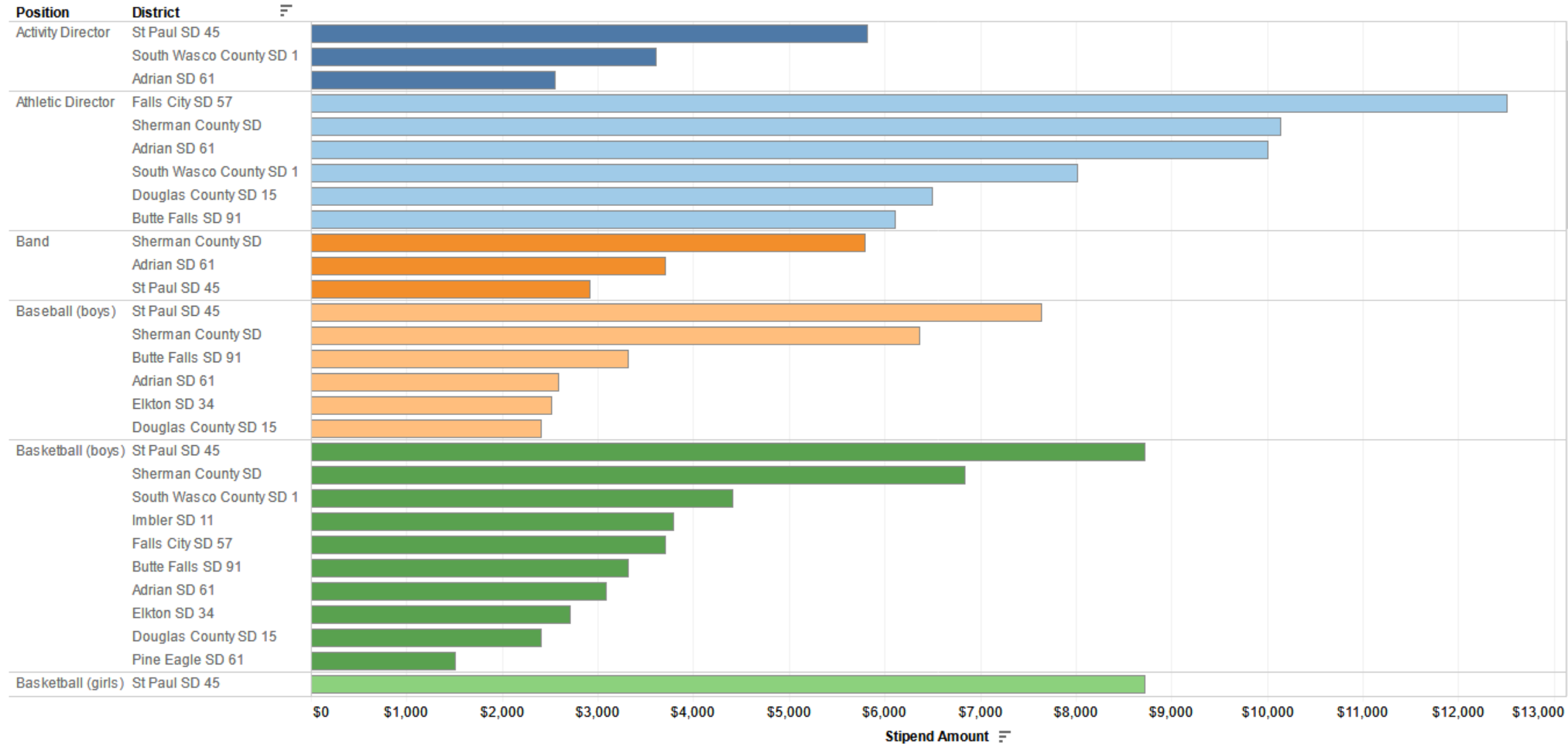
Salary Incentive Category

- ☒ (All)
- ☒ Audiologist Endorsement
- ☒ Bilingual Endorsement
- ☒ Class Size Stipend
- ☒ National Board Certification
- ☒ Other Stipend
- ☒ Psychologist Endorsement
- ☒ Physical Therapist Endorsement
- ☒ Speech Pathologist Endorsement



Extra-Duty Stipends...

Extra-Duty Stipends
Minimum Paid
Source: OSBA Teacher Salary Survey 2021-22



- Position**
- ☒ (All)
 - ☒ Activity Director
 - ☒ Athletic Director
 - ☒ Band
 - ☒ Baseball (boys)
 - ☒ Basketball (boys)
 - ☒ Basketball (girls)
 - ☒ Cheer
 - ☒ Choir
 - ☒ Cross-Country (boys)
 - ☒ Cross-Country (co-ed)
 - ☒ Cross-Country (co-ed)
 - ☒ Cross-Country (girls)
 - ☒ Dance/ Drill Team
 - ☒ Drama
 - ☒ Football
 - ☒ Orchestra
 - ☒ Paper
 - ☒ Soccer (boys)
 - ☒ Soccer (co-ed)
 - ☒ Soccer (girls)
 - ☒ Softball (girls)
 - ☒ Speech/ Debate
 - ☒ Track (boys)
 - ☒ Track (co-ed)
 - ☒ Track (girls)
 - ☒ Volleyball (girls)
 - ☒ Wrestling (boys)
 - ☒ Yearbook



Leaves/Days Off Data...

Leaves/ Days Off Data Grid

Note: To download this data into an Excel spreadsheet, click "Download" in the upper right-hand corner. Select the Crosstab option and then click Download

Source: OSBA Teacher Salary Survey 2021-22

District	Personal Paid Leave?	Hours of Leave?	Days of Unpaid Leave	Sabbatical Leave?'	Sabbatical Last Year?	Paid Holidays?	Sick Leave?	Unpaid Leave?	Flex time?
Adel SD 21	Yes	24		No		6	Front-loaded	Yes	Yes
Adrian SD 61	Yes	2		No		7	Front-loaded	No	No
Blachly SD 90	Yes	27		No		7	Front-loaded	Yes	No
Butte Falls SD 91	Yes	24		No		7	Front-loaded	No	No
Condon SD 25J	Yes	40		No		5	Accrued	No	No
Dayville SD 16J	Yes	16		No		8	Front-loaded	Yes	No
Douglas County SD 15	Yes	32		No		7	Front-loaded	Yes	No
Dufur SD 29	Yes	16		No		7	Front-loaded	Yes	No
Elgin SD 23	Yes	16		No		6	Accrued	No	No
Elkton SD 34	Yes	16		No		4	Front-loaded	Yes	No
Helix SD 1	Yes	16		Yes	No	6	Front-loaded	Yes	No
Imbler SD 11	Yes	24		No		4	Front-loaded	No	No
Jordan Valley SD 3	Yes	16		No		19	Front-loaded	Yes	No
Long Creek SD 17	Yes	16		Yes	No	8	Front-loaded	Yes	No
McKenzie SD 68	Yes	27		Yes	No	5	Front-loaded	Yes	Yes
Nestucca Valley SD 101	Yes	16		No		7	Front-loaded	Yes	No
Paisley SD 11	Yes	24		Yes	No	5	Front-loaded	Yes	No
Pilot Rock SD 2	Yes	16		No		7	Front-loaded	No	No
Pine Eagle SD 61	Yes	16		No		7	Front-loaded	No	No
Sherman County SD	Yes	24		No		6	Front-loaded	Yes	No



Salary Schedule Survey Data...

Salary Schedule Survey Grid

Note: The "Schedule Extremes" option analyzes the highest and lowest salaries from the salary schedule, regardless of column. The "PERS Pick Up" filter comes from the survey, which asked "Does the district pay employee's contribution to PERS (i.e. PERS "pickup")?".

Source: OSBA Teacher Salary Survey 2020-21 & District Salary Schedules

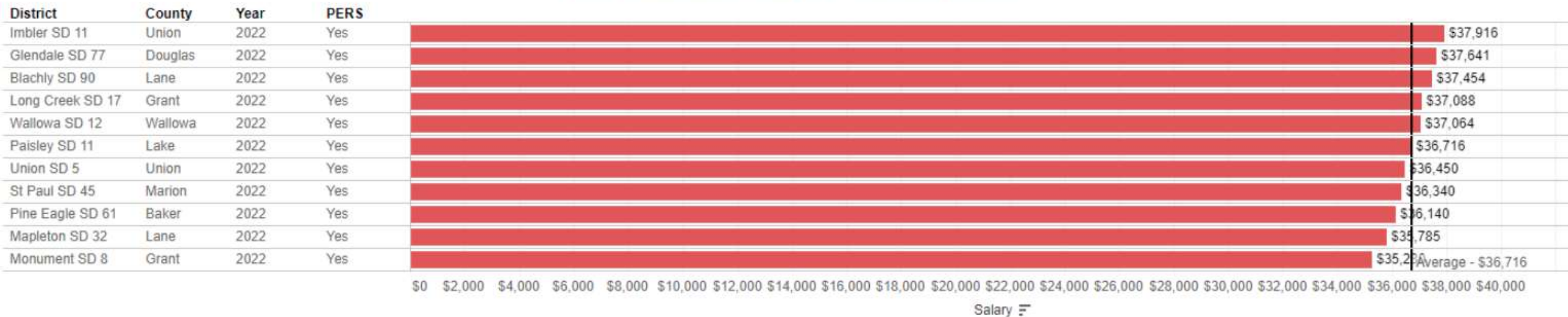
District	County	Year	PERS	Max Column	Highest Step	Minimum Salary	PERS Adjusted Minimum Salary	Average PERS Adjusted Minimum	% of Average PERS Adjusted Minimum	Maximum Salary	PERS Adjusted Maximum Salary NEW	Average PERS Adjusted Maximum	% of Average PERS Adjusted Maximum
Adrian SD 61	Malheur	2022	Yes	BA-105	16	\$38,492	\$40,802	\$40,369	101.07%	\$47,451	\$50,298	\$52,327	96.12%
				MA-30	16	\$38,492	\$40,802	\$40,369	101.07%	\$47,451	\$50,298	\$52,327	96.12%
Arlington SD 3	Gilliam	2022	Yes	BA-105	20	\$37,938	\$40,214	\$40,369	99.62%	\$45,330	\$48,050	\$52,327	91.83%
				MA-30	20	\$37,938	\$40,214	\$40,369	99.62%	\$45,330	\$48,050	\$52,327	91.83%
Blachly SD 90	Lane	2022	Yes	BA-96	17	\$37,454	\$39,701	\$40,369	98.35%	\$50,809	\$53,858	\$52,327	102.93%
				MA-36	17	\$37,454	\$39,701	\$40,369	98.35%	\$50,809	\$53,858	\$52,327	102.93%
Butte Falls SD 91	Jackson	2022	Yes	BA-75	15	\$38,329	\$40,629	\$40,369	100.64%	\$57,251	\$60,686	\$52,327	115.98%
Camas Valley SD 21J	Douglas	2022	Unreported	BA-105	18	\$39,589	\$39,589	\$40,369	98.07%	\$53,242	\$53,242	\$52,327	101.75%
				MA-45	18	\$39,589	\$39,589	\$40,369	98.07%	\$53,242	\$53,242	\$52,327	101.75%
Central Curry SD 1	Curry	2022	Yes	MA-15	16	\$39,562	\$41,936	\$40,369	103.88%	\$47,870	\$50,742	\$52,327	96.97%
Colton SD 53	Clackamas	2022	No	MA-45	16	\$41,617	\$41,617	\$40,369	103.09%	\$61,770	\$61,770	\$52,327	118.05%
Condon SD 25J	Gilliam	2022	Yes	MA-45	15	\$38,533	\$40,845	\$40,369	101.18%	\$56,682	\$60,083	\$52,327	114.82%
Douglas County SD 15	Douglas	2022	Yes	BA-90	17	\$40,500	\$42,930	\$40,369	106.34%	\$46,967	\$49,785	\$52,327	95.14%
				MA-30	17	\$40,500	\$42,930	\$40,369	106.34%	\$46,967	\$49,785	\$52,327	95.14%
Dufur SD 29	Wasco	2022	Yes	MA-45	16	\$44,208	\$46,860	\$40,369	116.08%	\$54,798	\$58,086	\$52,327	111.01%
Elkton SD 34	Douglas	2022	Yes	BA-100	17	\$38,619	\$40,936	\$40,369	101.40%	\$52,527	\$55,679	\$52,327	106.41%
				MA-40	17	\$38,619	\$40,936	\$40,369	101.40%	\$52,527	\$55,679	\$52,327	106.41%
Gaston SD 511J	Washington	2022	No	BA-105	17	\$40,838	\$40,838	\$40,369	101.16%	\$68,421	\$68,421	\$52,327	130.76%
				MA-45	17	\$40,838	\$40,838	\$40,369	101.16%	\$68,421	\$68,421	\$52,327	130.76%
Glendale SD 77	Douglas	2022	Yes	BA-100	20	\$37,641	\$39,899	\$40,369	98.84%	\$50,390	\$53,413	\$52,327	102.08%
				MA-40	20	\$37,641	\$39,899	\$40,369	98.84%	\$50,390	\$53,413	\$52,327	102.08%



Salary Schedule Comparison...

Salary Schedule Comparison

Note: The "Schedule Extremes" option analyzes the highest and lowest salaries from the salary schedule, regardless of column. The "PERS Pick Up" filter comes from the survey, which asked "Does the district pay employee's contribution to PERS (i.e. PERS "pickup")?".
Source: OSBA Teacher Salary Survey 2020-21 & District Salary Schedules



Column to Analyze

- ☒ BA
☐ MA
☐ Schedule Extremes

PERS

- ☒ (All)
☒ Yes
☒ No

Salary to Analyze

- Minimum Salary
Maximum Salary
PERS Adjusted Minimum Salary
PERS Adjusted Maximum Salary



Other Licensed Staff Data...

- ☒ (All)
- ☒ Does the district offer "Personal" paid leave?
- ☒ Does the district offer flex time?
- ☒ Does the district offer sabbatical leave?
- ☒ Does the district offer unpaid leave?
- ☒ Does the district pay employee's contribution to PERS (i.e. PERS "Pickup")?
- ☒ Does your district provide a specified number of hours or a dollar amount for tuition reimbursement?
- ☒ Does your district provide professional development (PD)?
- ☒ Does your district provide tuition reimbursement for college courses?
- ☒ Does your district require advance approval for the Course(s)?
- ☒ Does your district require approval for the PD?
- ☒ Does your district require that the courses taken:
- ☒ During the last round of negotiations, were the negotiation sessions:
- ☒ How does your district allocate the amount of PD that is offered each year for teachers?
- ☒ Is it a fixed pool of money that is available for the district to spend on PD each year?
- ☒ Is it a fixed pool of money that is available per year for the district?
- ☒ Is Sick leave front-loaded or accrued?
- ☒ Is there a maximum step placement for employees newly hired by the district?
- ☒ Was there a sabbatical leave granted last year?
- ☒ What was the last method of bargaining used?
- ☒ What year does your collective bargaining agreement end?
- ☒ What year does your collective bargaining agreement start?
- ☒ Which schedule does the district operate on?



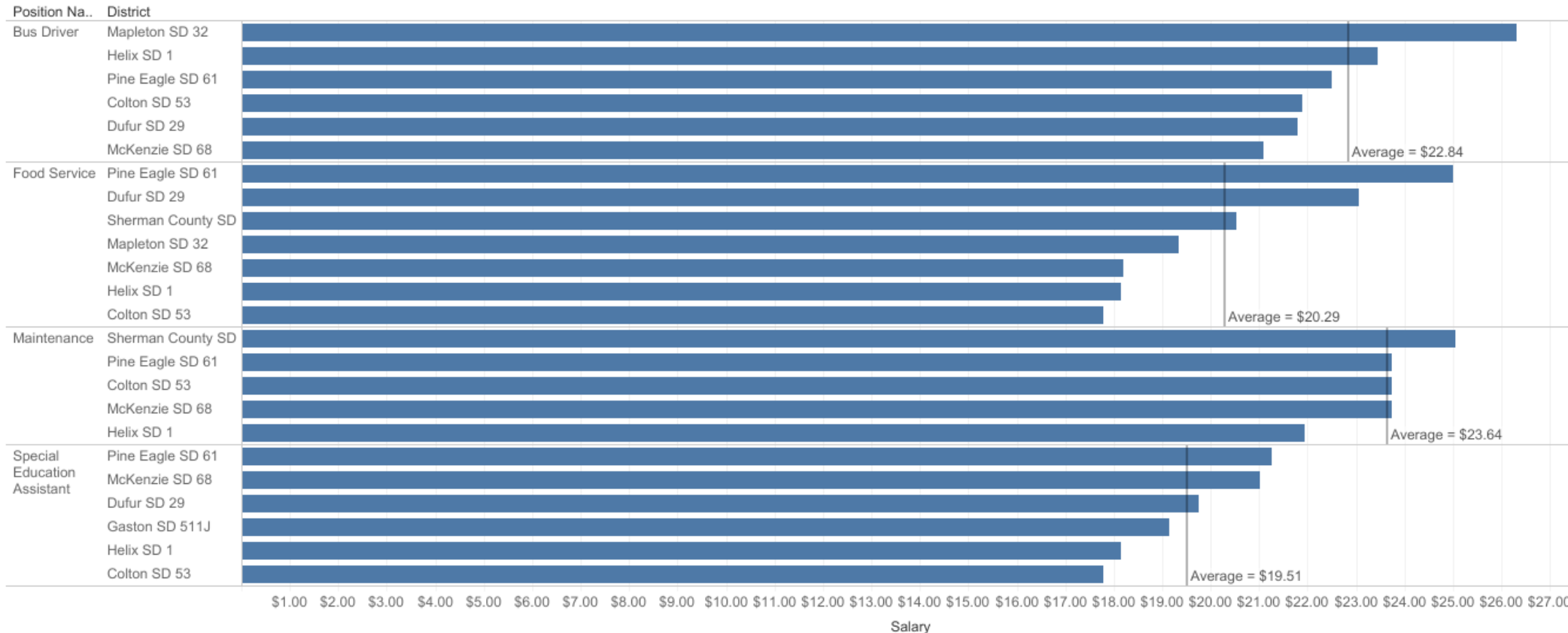


Classified Salary Data

Classified Staff Salary Data...

Classified Staff Salary Comparison

Source: OSBA Classified Salary Survey 2021-22



Position Name

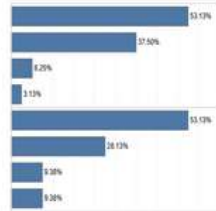
- ☒ (All)
- ☒ Bookkeeper
- ☒ Bus Driver
- ☒ Custodian
- ☒ Education Assistant
- ☒ Food Service
- ☒ Grad Coordinator
- ☒ Groundskeeper
- ☒ Inst Asst.
- ☒ Library/Media Assistant
- ☒ Maintenance
- ☒ Mechanic
- ☒ Nurse Assistant
- ☒ Office Manager
- ☒ School Resource Officer
- ☒ Secretary
- ☒ Special Education Assistant
- ☒ Technology Coordinator
- ☒ Other



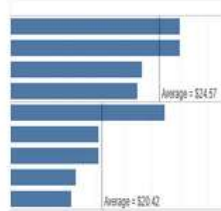
Other Classified Staff Data...

OSBA Classified Staff Salary Survey

Sort:



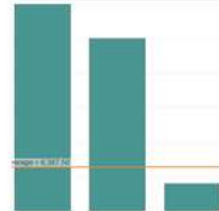
Classified Collective Bargaining QA



Classified Staff Salary Comparison

Sabbatical Leave?	Sabbatical Leave in past year?	Post Holidays?	Sick Leave?
No	7	Accrued	
No	8	Accrued	
No	8	Front-loaded	
No	8	Front-loaded	
No	10	Accrued	
No	8	Front-loaded	
No	6	Accrued	
No	7	Front-loaded	
No	11	Front-loaded	
No	8	Front-loaded	

Leaves/ Days Off Data Grid



Tuition Reimb. & PD

Does the district offer 'Personal' paid leave?

Does the district offer flex time?

Does the district offer sabbatical leave?

Does the district offer unpaid leave?

Does the district pay employee's contribution to PERS (i.e. PERS "pickup")?

Does your district provide professional development (PD)?

Does your district provide tuition reimbursement for college courses?

Does your district require advance approval of the course(s)?

Does your district require advance approval of the PD?

During the last round of negotiations, were the negotiation sessions:

How does your district allocate the amount of PD that is offered each year for classified employees?

How is tuition reimbursed?

Is it a fixed pool of money that is available for the district to spend on PD each year?

Is it a fixed pool of money that is available per year for the district?

Is sick leave front-loaded or accrued?

Is there a maximum step placement for employees newly hired by the district?

Was there a sabbatical leave granted last year?

What was the last method of bargaining used?

Which year does your collective bargaining agreement end?

Which year does your collective bargaining agreement start?

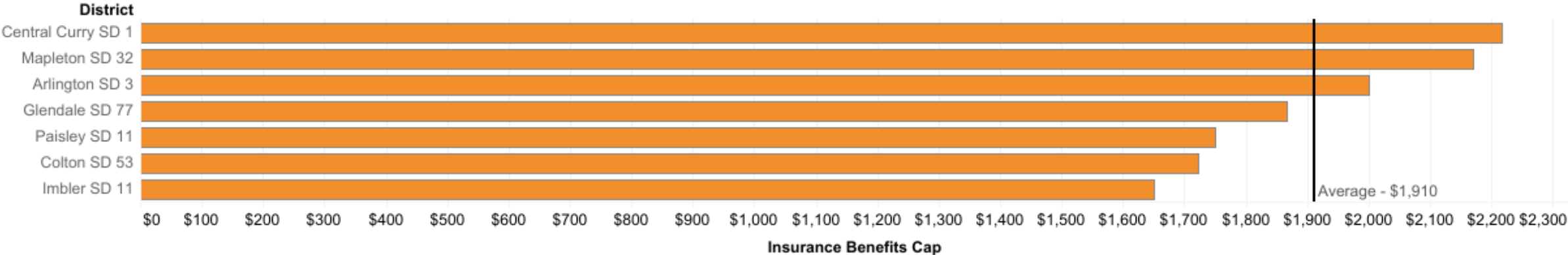




Health Insurance Data

Insurance Cap Data...

Insurance Caps
Source: Source: OSBA Health Insurance Survey 2021-22



Employee Type

Licensed Employees ▼

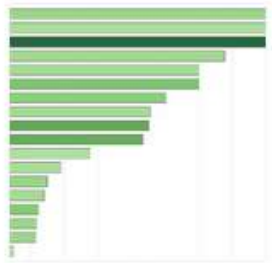
Classified Employees

Licensed Employees

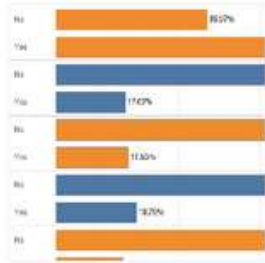


Health Insurance Data...

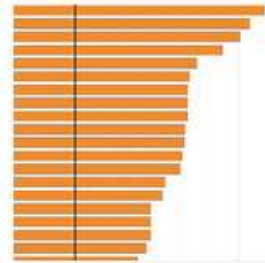
OSBA Health Insurance Surveys



HSA/HRA Annual Contributions



Health Insurance Q&A



Insurance Caps

- ☒ (All)
- ☒ Are there any early retirees enrolled in a district's health plan?
- ☒ Does the district contribute toward the monthly premium of any early retirees enrolled in a district's health plan?
- ☒ Does the district contribute toward the monthly premium?
- ☒ If Medicare retirees are allowed to stay on the district's plan, does the district contribute toward the monthly premium?
- ☒ Is there an insurance pool to cover employees with a premium above the cap?The district pools contribution amounts
- ☒ Once early retirees become Medicare eligible, are they allowed to stay on the district's plan?
- ☒ Please select which option best describes your district. The district:
- ☒ Which health, dental, and vision insurance plans does your district offer to classified employees?





Administration Data



Questions??



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