

Southlake–Carroll ISD Leverages Data Analytics to Educate and Empower Board Members

**Organization Type:**

K-12 Public School

Enrollment:

8,327

Annual Operating Budget:

\$124,480,709

Carroll ISD is a K-12 public school system located in the heart of the Dallas-Fort Worth Metroplex. This 21-square-mile district consists of 11 schools serving more than 8,000 students and 1,100 employees. The district is one of the largest in the state of Texas to earn the top rating of “Exemplary” by the Texas Education Agency. In addition, the district and all campuses met the federal guidelines for the No Child Left Behind Act.

THE SITUATION

When Southlake-Carroll Independent School District brought in William Wooten as their Assistant Superintendent for Financial Services, his predecessor left him with a well-organized desk. However, during his first week with the district, he was faced with the daunting task—clean desk aside—of sharing the district’s financial information with newly elected board members during onboarding training.

With members eager to understand the status of the district, Wooten wanted to ensure he was providing them with an accurate picture of the district’s financial situation, with the ultimate goal of empowering them to utilize the data—including key performance indicators—to inform their strategy and decision-making process. He called upon Forecast5 to help him prepare.

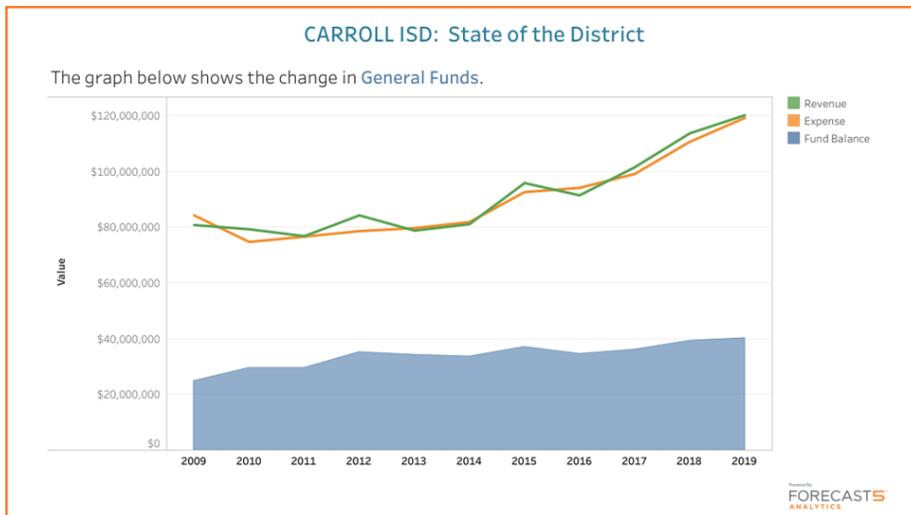
THE SOLUTION

Forecast5 worked with Wooten to create a visual, data and dashboard-based PowerPoint presentation to walk new board members through the district’s financial story. Together, they also created a one-page dashboard which provided board members with a comparison of actual, trend, and projection figures of revenues, expenditures, and the fund balance. One board member stated, “I thought fund balance was a flat amount each month. The trends and projections on the budget performance dashboard brought a higher level of clarity to future decision-making.”

Wooten credits Forecast5 with empowering him to quickly understand Southlake-Carroll’s past, visualize its present, and forecast future trends. He then felt confident translating the data from the system for the new board members—as well as for the Budget, Finance, and Accounting Committee stakeholders.

“Anyone interested in partnering with Forecast5 really needs to know that the analytic software will give your School Board the confidence to trust you. Let’s be honest, our financial day is full of staying ahead, looking ahead, and—more importantly—planning ahead for future budgetary requirements.”

William Wooten, Assistant Superintendent for Financial Services,
Southlake-Carroll Independent School District



THE RESULTS

Wooten set out to create a true “data culture” which would use data to identify the issues and then ask the right questions. He has been successful in doing just that. Wooten has leveraged Forecast5 tools to empower departments to monitor, optimize, and lead more effectively by providing insights based on trends and data visualizations.

Wooten emphasized that Forecast5 tools have been a major time saver, as they have given him the ability to quickly provide actionable insights to the Board to inform their decision making.

For more information about how Southlake-Carroll Independent School District implemented tools to leverage data analytics and empower board members, please contact us at web@forecast5analytics.com or [request a live demo](#).