

Southwest Michigan School Business Officials Annual Conference

Managing in Turbulent Times

**Kalamazoo, Michigan
Wednesday – March 4, 2026**

Agenda

- Presenter Introduction
- Change – Uncertainty – Turbulence
- Change & Change Management
- Change & Uncertainty - The New Normal
- The New Normal – Case Studies
- Coping Tools & Strategies
- Summary & Questions

Presenters

- Sam Ball – Martin PS
 - Superintendent/CFO
 - MPS Grad & 12 year employee
- Abbie Jeplawy – Kentwood PS
 - Director of Finance
 - KPS 10 yr-HR, AP, Payroll, Grants, Director
- Tom Lagone – Kentwood PS
 - Exec Dir of Finance & Business Operations
 - CPA private sector/K12 Bus Ofcl – 11 yr
- Tim Raymer
 - School Business Official – 36 years
 - MSBO Business Manager Academy

Change-Uncertainty-Turbulence

- COVID
- Federal Funding – ESSER - \$\$ come/go
- Community, Superintendent, Board change
- State Budget – SEP/OCT
- Declining enrollment – marches on
- Structural deficit pressures
 - Revenues - FA, Enrollment
 - Expenditures - Employee Costs

Concept of Change - Types

- Organizational
 - New IT system
 - New Superintendent
- Structural
 - Economic changes impacting revenues
 - Supply of job candidates=>Increased cost
- Strategic
 - Change in response to opportunity/threat
 - Declining enrollment
 - Federal grant funding decrease

Change Management

- Assess the situation
- Determine relevant history
- Develop all options w/pros & cons
 - Factor in risks and costs
 - Debate tradeoffs
- Develop implementation/execution plan
- Monitor progress
 - Course correct as necessary
- Review – Lessons Learned

Change/Uncertainty

New Normal

- Staffing changes
- Superintendent/Board change
- State requirements
- 147xxxxxxxxxxxxxxxxxxxxxx
- Audit requirements
- Salary realignment – Competitive
- Health Care – PA 152/HB6058
- Technology

The 100-Year Legacy Void

- The Scenario – Extreme Turbulence
 - Nearly 100 years of experience depart
- 2025 Construction Scope
 - Six major bond construction projects
- Strategy: Honor the Past & Build the Future
 - Relationship management
- The Shift: Developing Systems
 - Focus on sustainability and documentation

Building Public Trust

- Radical Transparency
 - From reactive reporting to proactive partnership
- Addressing complexity and misinformation
 - Control narrative: Proactive Data Sharing
- Financial Systems & Internal Controls
 - Building integrity into the budget process
 - Systems, controls, targeted reporting
- Project Management Systems

Small District Challenges

- Turnover – Board & Superintendent
 - Board – 5 seats on Ballot
 - 4 Superintendents in 12 years
- Challenges of “Multiple Hats”
 - Do it all – spread thin – Time Management
 - Technical changes – keeping current
 - Communicating – Board – Community – Staff
 - The “GO TO” on everything
- The district is the community

Small District - Staffing

- Staffing Challenges
 - Position fit
 - Personalities
- How handled
 - Open, honest communication
 - Did well – Could have done better
- Did Well
 - Focus on growth/improvement & Support
- Could have done better
 - Move sooner on the issue

Large District – Grants +

- Grants – Grants – Grants
 - Changes – Amounts – Timing
 - Stability – Uncertainty
- Strategies
 - Assess situation and impact(s)
 - Determine range of options/possibilities
 - Communicate–Communicate – Communicate
 - Utilize all resources
- Proactive vs Reactive

Working with Other Departments

- Human Resources
 - Staffing Levels and Controls
 - Benefits
- Instruction/Curriculum
- Buildings
 - Building Budgets
- Facilities/Operations and Transportation
 - Department Budgets
 - Equipment & Materials

Coping Tools & Strategies

- **Communication – Two-way – Frequent**
 - Input – Listen
 - Especially those executing project
- **Back-Date Planning**
 - Determine completion date
 - Work backward & build in time buffers
- **Progress Meetings – Regular Schedule**
 - Key team members – Agenda driven
 - Accountability w/course corrections as needed

Coping Tools - Contd

- Data Driven Focus
- Incrementalism
 - Break projects into manageable components
- Controllable vs Uncontrollable
 - Know the difference
- Structure and process
 - Develop your plan
 - Work your plan
 - Adjust when needed

Summary

- Change & Uncertainty - New normal
- Embrace it
- Manage it – aggressively
- Learn from it

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