



# Good Business Leadership

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# Module 8 - Good Business Leadership

## Learning Objectives

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- Contracts, Bids & Purchasing Policies
- Communication Strategies
- Negotiation Do's and Don'ts
- Working with Municipalities & Local Government, Rec & Other Entities
- Working Your Way Up
- Generational Differences



# Contracts, Bids & Purchasing Policies

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- Policies and Procedures
  - Methods of Purchasing
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# Purchasing Objective

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- Seek bids from those sources able to offer the best prices, consistent with quality, delivery and service.

# What is Procurement?

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- The complete process of obtaining goods and services.
- A good purchasing system ensures that goods and/or services are obtained in a way that maximizes the value of funds.

# Methods of School Purchasing

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- Informal Procurements
- Formal Procurements
- Non Competitive Procurements

# Informal Procurement Methods

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- Cash
- Check
- Reimbursement
- Open Orders
- Purchase Order/Requisition
- Purchasing Cards (P-Cards)

# Formal Procurement Methods

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- Written Quote
- Request for Proposal (RFP)
- Invitation for Bid (IFB)
- State Contracts
- Cooperative Purchasing
- Lease and Lease to Purchase



# Non-Competitive Procurement

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- Single Sourced
- Emergency Procurement
- Inadequate Competition

# Purchasing & Bidding Policy - Language Commonalities

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- All purchasing procedures shall comply with all applicable laws of the State
- Given equality of service, quality, delivery and price, the District shall purchase, whenever possible, from local suppliers and services. The employee shall not feel bound to purchase any item locally that can be secured at a savings from outside services.
- Purchase under the budget and controls established and set by Board of Education
- Purchase of materials, equipment, or supplies and all public work contracts of \$10,000 or more shall be made on the basis of competitive bids or quotations

# Purchase & Bidding Policy - Language Commonalities

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- Language stating accepting lowest bidder isn't required under set criteria
- The use of state, municipal or consortium contracts are the equivalent to competitive bids
- The Board reserves the right to accept or reject any bid which it feels is in the best interest of the District, and delegates this authority to those responsible for purchases not required to come to the Board.

# Vendor Relations Policy - Language Commonalities

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- The Board wishes to maintain good working relationships with vendors who furnish materials, supplies and services. The District Administration shall be encouraged to seek the services of vendors as resource persons in giving demonstrations, speaking at staff meetings and disseminating information on procedures, new products, and new programs.
- Suppliers and vendors are an extension of our district resources. All district personnel are expected to maintain professional, considerate relationships and communications with district suppliers and vendors.

# Group Discussion

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- How do purchases work in your district?
- What is the approval and accountability process that is followed?



# Communication Strategies



# Communication Strategies

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- Understand your audience for the message you are conveying
- Eliminate slang or weak language
- Focus on clarity and consistency for your message
- Be aware of body language or non-verbal cues
- Encourage feedback



# Negotiation Practices Do's and Don'ts





# What is Negotiation?

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Negotiation is a process where two or more parties with different needs and goals discuss an issue to find a mutually acceptable solution.

# Reasons for Negotiation

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- Reduce costs
- Add value
- Improve performance
- Resolve conflict
- Problem solve
- Quality control
- Reach agreement

# Stages of Negotiation

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- Prepare
- Exchange
- Bargain
- Conclude
- Execute

# Negotiation Do's

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- Be prepared
- Know your bottom line
- Use a friendly approach
- Listen to others
- Consider ways to offer and find mutually beneficial solutions
- Be up front about the fact that other potential suppliers/contractors are also being reviewed
- Document everything in writing following the meeting and send it to the other party. Don't allow for misperceptions or misinterpretations

# Negotiation Don'ts

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Don't take negotiations personally

Never make assumptions

Don't gloat after a win

Don't needlessly draw lines in the sand for issues that require flexibility

Don't make unreasonable demands

Don't accept a bad deal

# Working with Municipalities & Local Government, Rec & Other Entities

Ways in which schools work with  
others

# Facility Use

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- Before and After School Programs & Partnerships
- Recreation Departments
- Community Programs
- Meeting Space
- Athletic Venues
- Adult Programs
- Youth Programs
- Polling Locations
- Farmer's Market
- Any others?

# Health and Safety

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- School Resources Officer (SRO)
- Routine police patrols and visits to schools
- Emergency management and preparedness
- Fire safety inspections
- Fire Department outreach programs
- Safe routes to schools
- Domestic water testing partnerships
- Any others?



# Miscellaneous

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- Winter salt purchase and storage agreements
- Parade support
- Department of Public Works coordination
- Park and Recreation Department coordination
- Equipment sharing
- Land use and development planning
- Any others?

# Oconomowoc's Cost Share Agreement

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Farmers desire to sell land

St. Matthew plan to build a new school and church

OASD plan to replace our old Meadow View Elementary School

Developer plan to build more housing

City of Oconomowoc plan to build a new park

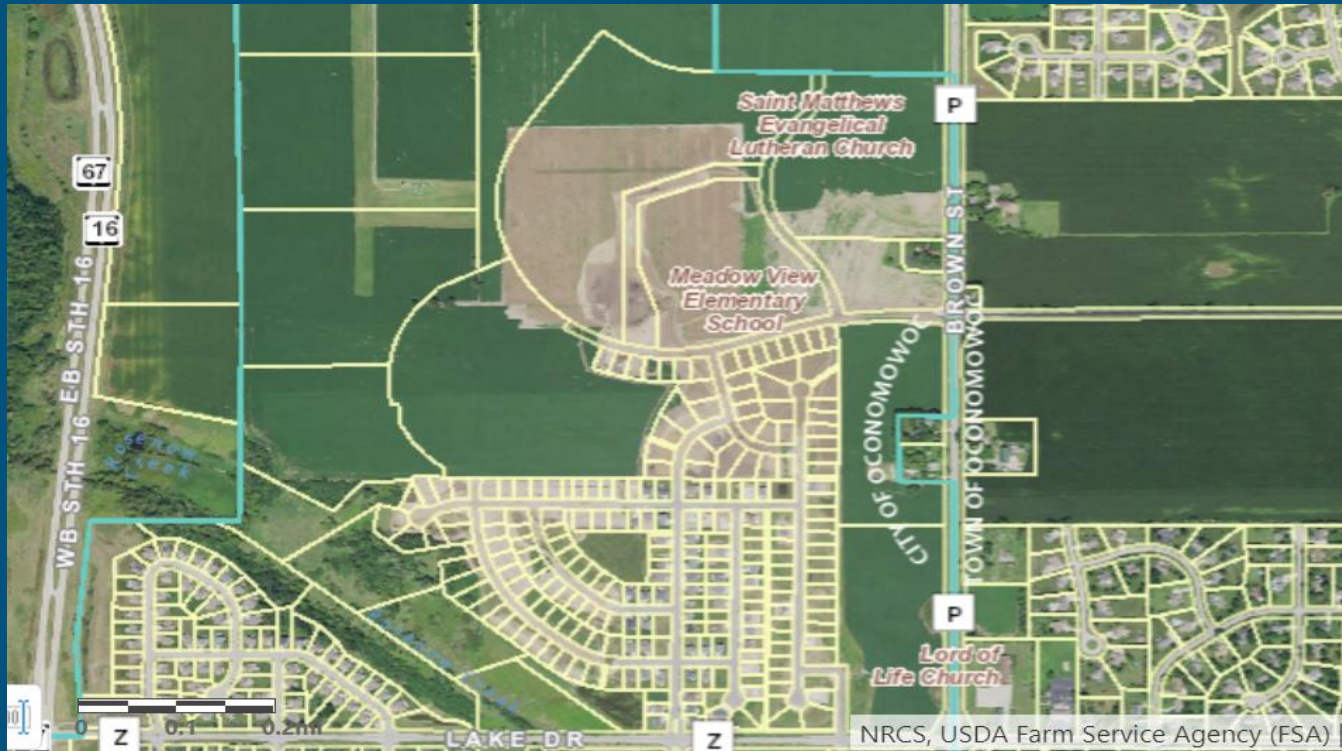
# Oconomowoc's Cost Share Agreement

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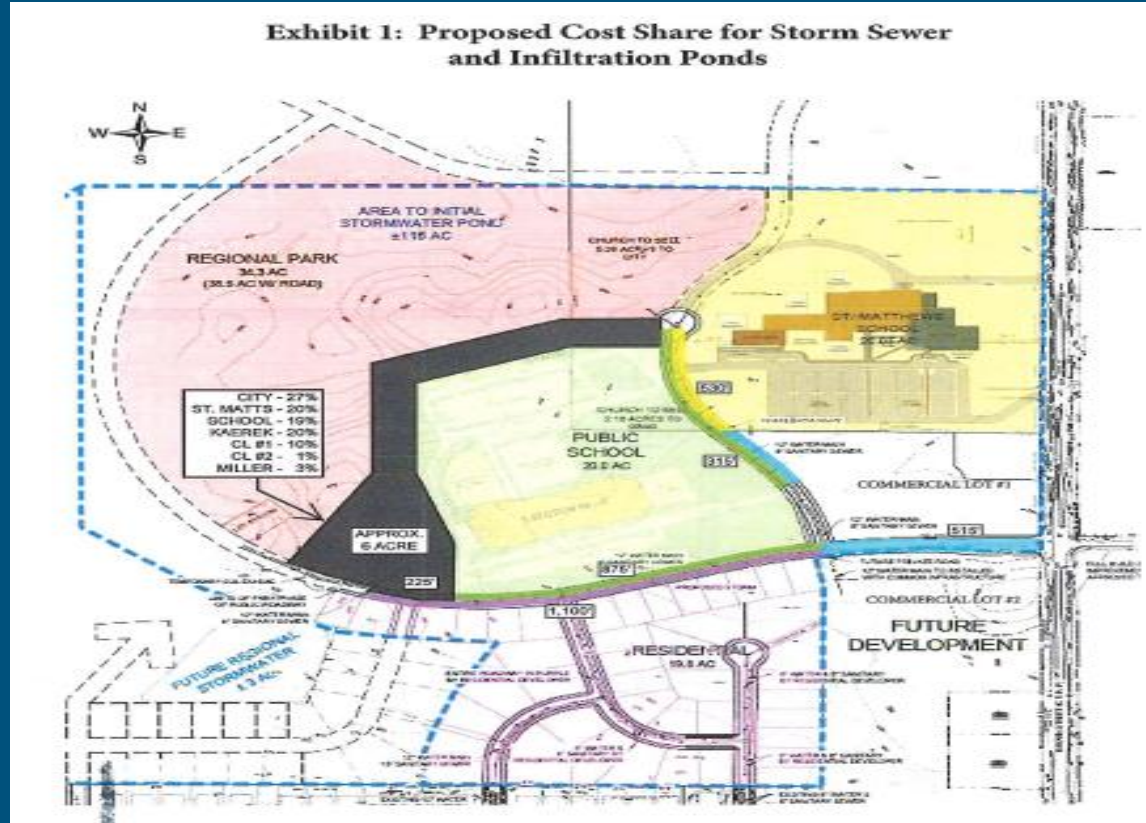


# Oconomowoc's Cost Share Agreement

2017 Aerial Photo

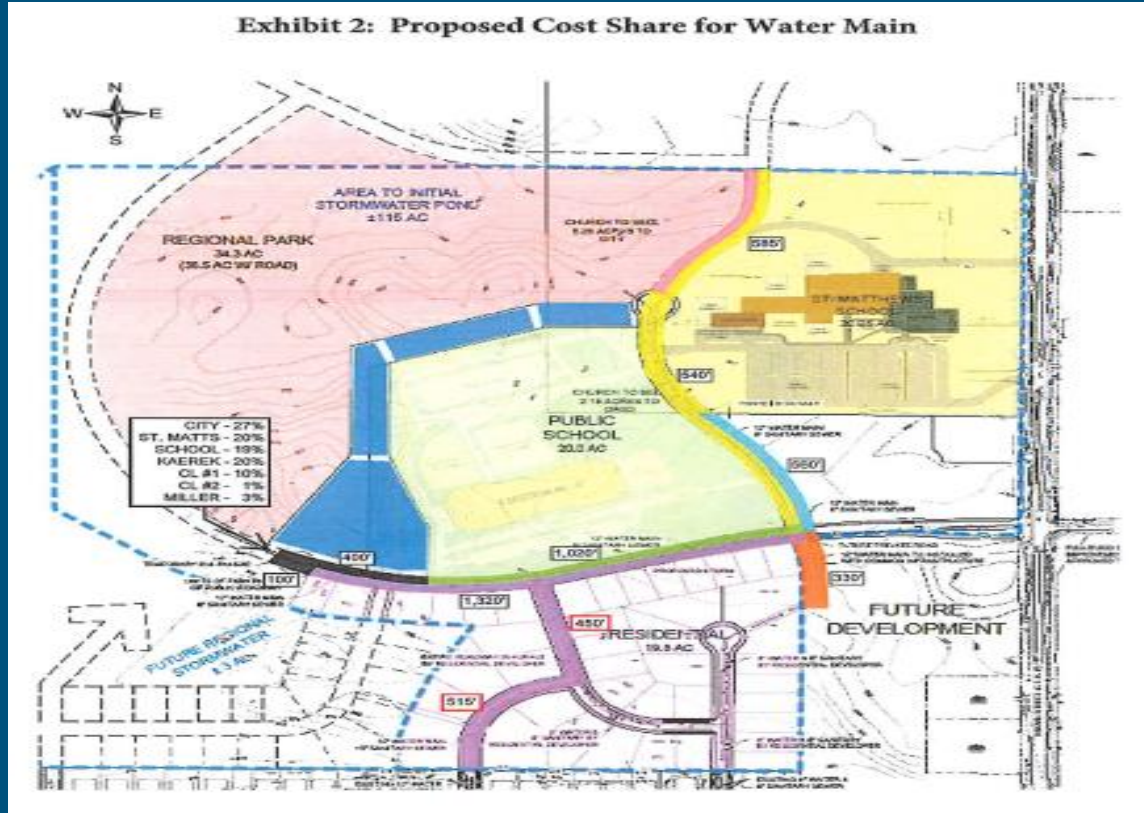


# Oconomowoc Cost Share Agreement



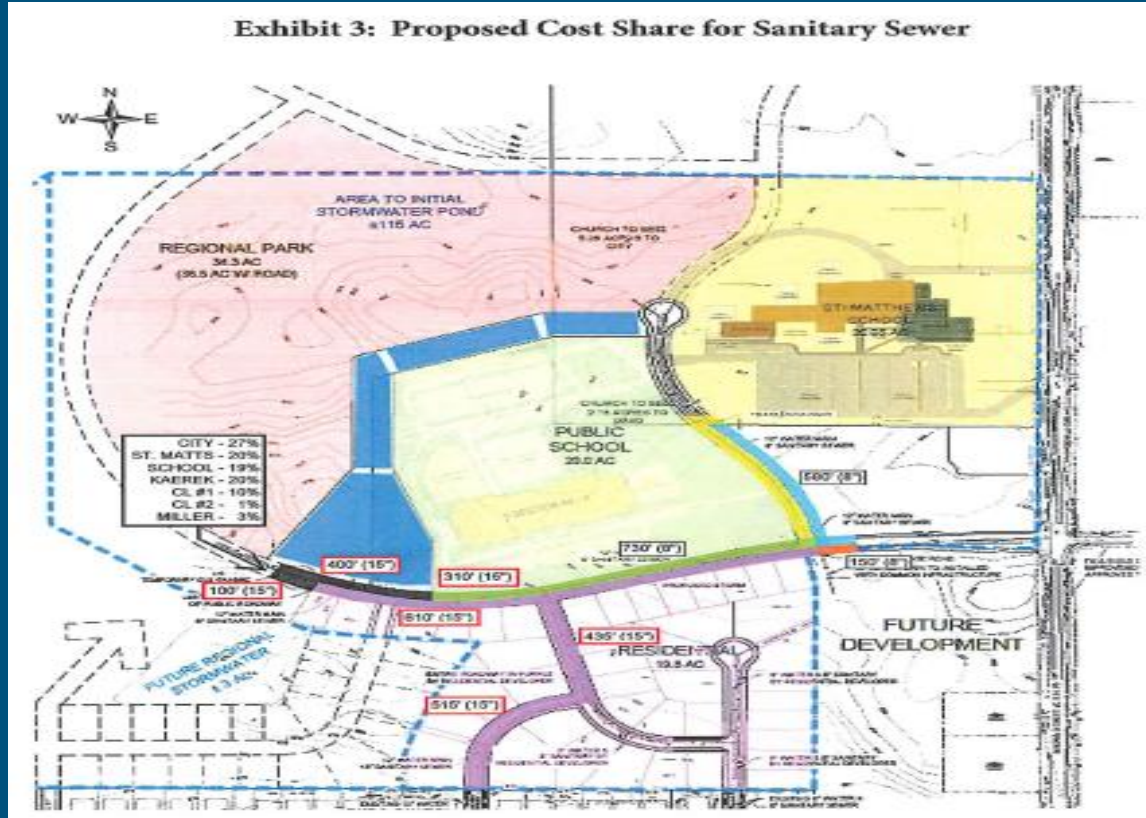
# Oconomowoc Cost Share Agreement

Exhibit 2: Proposed Cost Share for Water Main

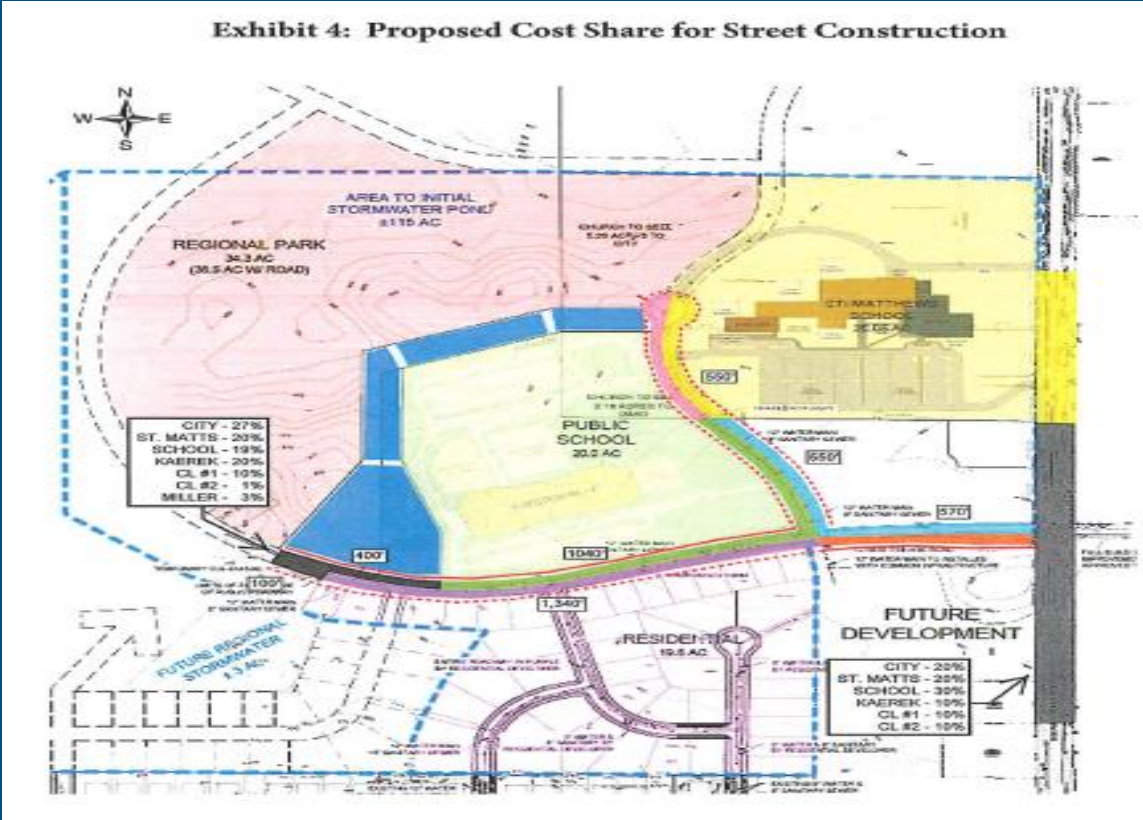


# Oconomowoc Cost Share Agreement

Exhibit 3: Proposed Cost Share for Sanitary Sewer



# Oconomowoc Cost Share Agreement





# Oconomowoc Cost Share Agreement

**DRAFT**  
**PROPOSED COST SHARE FOR N. SIDE UTILITIES AND STREET EXTENSION**  
 REVISED: 2.16.17

ENTIRE PROJECT				CITY				ST. MATTHEWS				ECONOMOWOC SCHOOL DISTRICT				COMMERCIAL LOT #1				COMMERCIAL LOT #2				UNDEVELOPED			
ITEM #	DESCRIPTION	UNIT	EST. QTY.	UNIT PRICE	TOTAL COST	EST. QTY.	COST	EST. QTY.	TOTAL COST	EST. QTY.	COST	EST. QTY.	COST	EST. QTY.	COST	EST. QTY.	COST	EST. QTY.	COST	EST. QTY.	COST	EST. QTY.	COST	EST. QTY.	COST		
<b>CUSTOM SHARE</b>																											
1	14-Inch Storm Sewer	LF	2524	\$45	\$113,520	21	\$1,224	360	\$12,720	915	\$41,235	396	\$17,724	712	\$31,756	128	\$5,760	128	\$5,760	128	\$5,760	128	\$5,760	128	\$5,760	128	\$5,760
2	14-Inch Storm Manhole	EA	14	\$5,000	\$70,000	0.2	\$2,000	2	\$4,000	5	\$15,000	3	\$9,000	3	\$9,000	1	\$3,000	1	\$3,000	1	\$3,000	1	\$3,000	1	\$3,000	1	\$3,000
3	12-Inch Catch Basin Lead	LF	209	\$40	\$8,360	23	\$920	23	\$920	77	\$3,080	47	\$1,880	47	\$1,880	9	\$360	9	\$360	9	\$360	9	\$360	9	\$360	9	\$360
4	Catch Basin	EA	2	\$1,500	\$3,000	0.2	\$2,000	2	\$4,000	0.72	\$2,880	0.47	\$1,880	0.47	\$1,880	0.13	\$510	0.13	\$510	0.13	\$510	0.13	\$510	0.13	\$510	0.13	\$510
5	Storm End Section	EA	2	\$1,500	\$3,000	0.23	\$3,450	0.23	\$3,450	0.72	\$2,880	0.47	\$1,880	0.47	\$1,880	0.13	\$510	0.13	\$510	0.13	\$510	0.13	\$510	0.13	\$510	0.13	\$510
6	Excavation Control	LS	1	\$7,800	\$7,800	0.21	\$26,040	0.12	\$918	0.36	\$2,808	0.23	\$1,824	0.35	\$2,730	0.02	\$156	0.02	\$156	0.02	\$156	0.02	\$156	0.02	\$156	0.02	\$156
City (to be used)				\$24,820	\$24,820	0.21	\$26,040	0.12	\$918	0.36	\$2,808	0.23	\$1,824	0.35	\$2,730	0.02	\$156	0.02	\$156	0.02	\$156	0.02	\$156	0.02	\$156	0.02	\$156
St. Matthews (to be used)				\$24,820	\$24,820	0.21	\$26,040	0.12	\$918	0.36	\$2,808	0.23	\$1,824	0.35	\$2,730	0.02	\$156	0.02	\$156	0.02	\$156	0.02	\$156	0.02	\$156	0.02	\$156
Economicowoc (to be used)				\$24,820	\$24,820	0.21	\$26,040	0.12	\$918	0.36	\$2,808	0.23	\$1,824	0.35	\$2,730	0.02	\$156	0.02	\$156	0.02	\$156	0.02	\$156	0.02	\$156	0.02	\$156
<b>CITY WATER INFRASTRUCTURE FUNDS</b>																											
7	Excavation & Grading	CY	18000	\$5	\$90,000	1800	\$9,000	6900	\$34,500	2700	\$13,500	800	\$4,000	2000	\$10,000	380	\$1,900	380	\$1,900	380	\$1,900	380	\$1,900	380	\$1,900	380	\$1,900
8	Trench Backfilling	CY	12000	\$5	\$60,000	1200	\$6,000	2800	\$14,000	2100	\$10,500	2400	\$12,000	2400	\$12,000	120	\$600	120	\$600	120	\$600	120	\$600	120	\$600	120	\$600
9	Excavation	EY	28000	\$6	\$168,000	2800	\$16,800	2800	\$16,800	3200	\$19,200	2600	\$15,600	2800	\$16,800	280	\$1,680	280	\$1,680	280	\$1,680	280	\$1,680	280	\$1,680	280	\$1,680
10	Stormflow	SF	18000	\$4	\$72,000	2700	\$10,800	2800	\$11,200	3200	\$12,800	2600	\$10,400	3000	\$12,000	180	\$720	180	\$720	180	\$720	180	\$720	180	\$720	180	\$720
11	Strip Edge	LF	30	\$25	\$750	3	\$75	3	\$75	3	\$75	3	\$75	3	\$75	3	\$75	3	\$75	3	\$75	3	\$75	3	\$75	3	\$75
12	Equalization Culverts	LF	308	\$40	\$12,320	24.0	\$960	40.8	\$1,632	18.0	\$720	18.0	\$720	48.0	\$1,920	26.0	\$1,040	26.0	\$1,040	26.0	\$1,040	26.0	\$1,040	26.0	\$1,040	26.0	\$1,040
13	Land Acquisition	LS	1	\$40,000	\$40,000	1.6	\$64,000	1.2	\$48,000	1.1	\$44,000	1.3	\$52,000	1.2	\$48,000	0.8	\$32,000	0.8	\$32,000	0.8	\$32,000	0.8	\$32,000	0.8	\$32,000	0.8	\$32,000
14	Excavation Control	LS	1	\$7,800	\$7,800	0.2	\$15,600	0.2	\$1,560	0.2	\$1,560	0.2	\$1,560	0.2	\$1,560	0.2	\$1,560	0.2	\$1,560	0.2	\$1,560	0.2	\$1,560	0.2	\$1,560	0.2	\$1,560
City (to be used)				\$12,320	\$12,320	0.2	\$9,600	0.2	\$7,200	0.2	\$2,880	0.2	\$864	0.2	\$864	0.2	\$3,264	0.2	\$3,264	0.2	\$3,264	0.2	\$3,264	0.2	\$3,264	0.2	\$3,264
St. Matthews (to be used)				\$12,320	\$12,320	0.2	\$9,600	0.2	\$7,200	0.2	\$2,880	0.2	\$864	0.2	\$864	0.2	\$3,264	0.2	\$3,264	0.2	\$3,264	0.2	\$3,264	0.2	\$3,264	0.2	\$3,264
Economicowoc (to be used)				\$12,320	\$12,320	0.2	\$9,600	0.2	\$7,200	0.2	\$2,880	0.2	\$864	0.2	\$864	0.2	\$3,264	0.2	\$3,264	0.2	\$3,264	0.2	\$3,264	0.2	\$3,264	0.2	\$3,264
<b>NO COST SHARE</b>																											
15	12-Inch Excelsior Iron Water Main (overhead)	LF	803	\$15	\$12,045	--	--	--	--	--	--	508	\$7,620	--	--	--	--	--	--	--	--	--	--	--	--	--	
16	Overriding Cap	LF	868	\$15	\$12,920	--	--	--	--	--	--	508	\$7,620	--	--	--	--	--	--	--	--	--	--	--	--	--	
17	12-Inch Excelsior Iron Water Main	LF	2452	\$16	\$39,232	361	\$5,776	1104	\$17,664	156	\$2,496	711	\$11,376	384	\$6,144	324	\$5,184	324	\$5,184	324	\$5,184	324	\$5,184	324	\$5,184	324	\$5,184
18	12-Inch Valve (overhead)	EA	3	\$1,200	\$3,600	--	--	--	--	--	--	3	\$3,600	--	--	--	--	--	--	--	--	--	--	--	--	--	
19	Overriding Cap	EA	3	\$750	\$2,250	--	--	--	--	--	--	3	\$2,250	--	--	--	--	--	--	--	--	--	--	--	--	--	
20	12-Inch Valve	EA	8	\$24,000	\$192,000	1	\$1,600	3	\$12,000	1	\$8,000	1	\$8,000	1	\$8,000	1	\$8,000	1	\$8,000	1	\$8,000	1	\$8,000	1	\$8,000	1	\$8,000
21	18-Inch Water Service	LF	1000	\$40	\$40,000	--	--	--	--	--	--	200	\$8,000	--	--	--	--	--	--	--	--	--	--	--	--	--	
22	18-Inch Water Valve	EA	3	\$1,800	\$5,400	--	--	--	--	--	--	3	\$5,400	--	--	--	--	--	--	--	--	--	--	--	--	--	
23	18-Inch Water Service	LF	1000	\$40	\$40,000	--	--	--	--	--	--	200	\$8,000	--	--	--	--	--	--	--	--	--	--	--	--	--	
24	18-Inch Tap, Saddle and Coping Valve	EA	25	\$180	\$4,500	--	--	--	--	--	--	25	\$4,500	--	--	--	--	--	--	--	--	--	--	--	--	--	
25	18-Inch Curb Valve and Box	EA	25	\$180	\$4,500	--	--	--	--	--	--	25	\$4,500	--	--	--	--	--	--	--	--	--	--	--	--	--	
26	Hydrant Assembly	EA	12	\$12,000	\$144,000	--	--	\$3,000	\$36,000	3	\$36,000	--	--	\$3,000	\$36,000	1	\$12,000	1	\$12,000	1	\$12,000	1	\$12,000	1	\$12,000	1	\$12,000
27	6-Inch Hydrant Lead	LF	148	\$80	\$11,840	15	\$1,200	47	\$3,760	23	\$1,840	68	\$5,440	32	\$2,560	32	\$2,560	32	\$2,560	32	\$2,560	32	\$2,560	32	\$2,560	32	\$2,560
28	Excavation Control	LS	1	\$7,800	\$7,800	0.21	\$16,380	0.26	\$2,028	0.27	\$2,106	0.23	\$1,824	0.27	\$2,106	0.27	\$2,106	0.27	\$2,106	0.27	\$2,106	0.27	\$2,106	0.27	\$2,106	0.27	\$2,106
City (to be used)				\$25,140	\$25,140	0.21	\$16,380	0.26	\$2,028	0.27	\$2,106	0.23	\$1,824	0.27	\$2,106	0.27	\$2,106	0.27	\$2,106	0.27	\$2,106	0.27	\$2,106	0.27	\$2,106	0.27	\$2,106
St. Matthews (to be used)				\$25,140	\$25,140	0.21	\$16,380	0.26	\$2,028	0.27	\$2,106	0.23	\$1,824	0.27	\$2,106	0.27	\$2,106	0.27	\$2,106	0.27	\$2,106	0.27	\$2,106	0.27	\$2,106	0.27	\$2,106
Economicowoc (to be used)				\$25,140	\$25,140	0.21	\$16,380	0.26	\$2,028	0.27	\$2,106	0.23	\$1,824	0.27	\$2,106	0.27	\$2,106	0.27	\$2,106	0.27	\$2,106	0.27	\$2,106	0.27	\$2,106	0.27	\$2,106
<b>SALESIAN SERVICE</b>																											
29	12-Inch PVC Sanitary Sewer	LF	1460	\$30	\$43,800	--	--	250	\$7,500	305	\$9,150	355	\$10,650	365	\$10,950	33	\$990	33	\$990	33	\$990	33	\$990	33	\$990	33	\$990
30	12-Inch PVC Sanitary Sewer (overhead)	LF	1460	\$30	\$43,800	65	\$1,950	30	\$900	198	\$5,940	188	\$5,640	23	\$690	3	\$90	3	\$90	3	\$90	3	\$90	3	\$90	3	\$90
31	Overriding Cap	LF	1460	\$30	\$43,800	--	--	40	\$1,200	40	\$1,200	--	--	40	\$1,200	--	--	--	--	--	--	--	--	--	--	--	
32	12-Inch Sanitary Lateral	LF	1800	\$30	\$54,000	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	
33	6-Inch Sanitary Lateral	LF	1800	\$15	\$27,000	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	
34	Sanitary Manholes	EA	20	\$3,500	\$70,000	0.26	\$9,100	2.28	\$80,160	1.1	\$3,860	1.1	\$3,860	2.49	\$87,240	0.46	\$1,638	0.46	\$1,638	0.46	\$1,638	0.46	\$1,638	0.46	\$1,638	0.46	\$1,638
35	Excavation Control	LS	1	\$7,800	\$7,800	0.21	\$16,380	0.21	\$1,638	0.21	\$1,638	0.21	\$1,638	0.21	\$1,638	0.21	\$1,638	0.21	\$1,638	0.21	\$1,638	0.21	\$1,638	0.21	\$1,638	0.21	\$1,638
City (to be used)				\$42,800	\$42,800	0.26	\$9,100	2.28	\$80,160	1.1	\$3,860	1.1	\$3,860	2.49	\$87,240	0.46	\$1,638	0.46	\$1,638	0.46	\$1,638	0.46	\$1,638	0.46	\$1,638	0.46	\$1,638
St. Matthews (to be used)				\$42,800	\$42,800	0.26	\$9,100	2.28	\$80,160	1.1	\$3,860	1.1	\$3,860	2.49	\$87,240	0.46	\$1,638	0.46	\$1,638	0.46	\$1,638	0.46	\$1,638	0.46	\$1,638	0.46	\$1,638
Economicowoc (to be used)				\$42,800	\$42,800	0.26	\$9,100	2.28	\$80,160	1.																	

# Oconomowoc's Cost Share Agreement

2020 Aerial Photo



# Oconomowoc's Cost Share Agreement





Working Your Way Up



# Qualities for moving up

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Knowledge and experience

Eager

Driven

Takes initiative

Self-motivated

Desire

Detail oriented



# Generational Differences



# Baby Boomers

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Born: 1946 - 1964

- Positions of authority
- Recognition for achievements
- Workplace benefits

# Generation X

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Born: 1965 - 1980

- Family-based benefits
- Lifestyle benefits
- Corporate wellbeing
- Recognition of achievement
- Professional development opportunities



# Generation Y (Millennials)

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Born: 1980 - 1995

- Money
- Opportunities to learn new technologies
- An enjoyable workplace environment
- Short, changeable and fast tasks
- Opportunities to express creativity and opinions

# Generation Z

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Born: 1996 -

- Respect
- Out of work socialisation
- Money saving schemes
- Experience days
- Mentoring platforms



# Generational Differences

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- Know your drivers, what motivates them
  - Must have multiple strategies to achieve desired outcome or set objectives
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