



# 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?



# 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



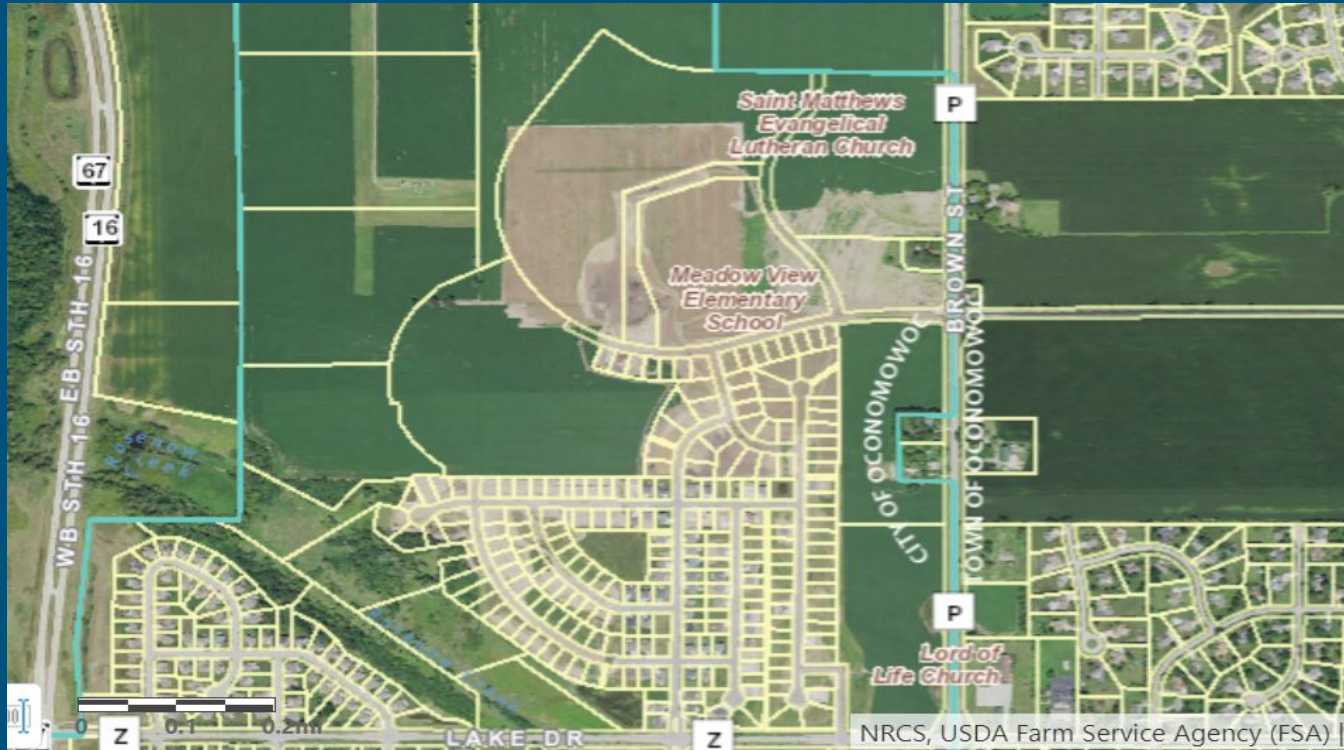
# Oconomowoc's Cost Share Agreement

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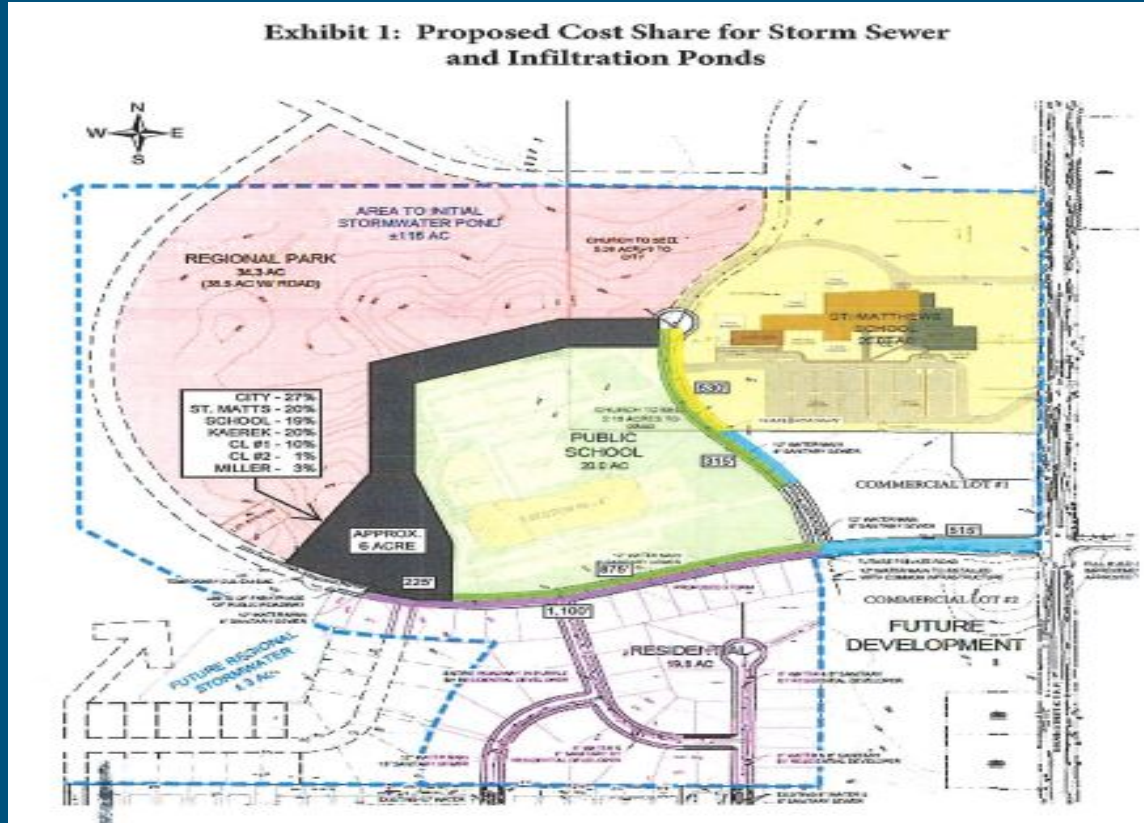


# Oconomowoc's Cost Share Agreement

2017 Aerial Photo

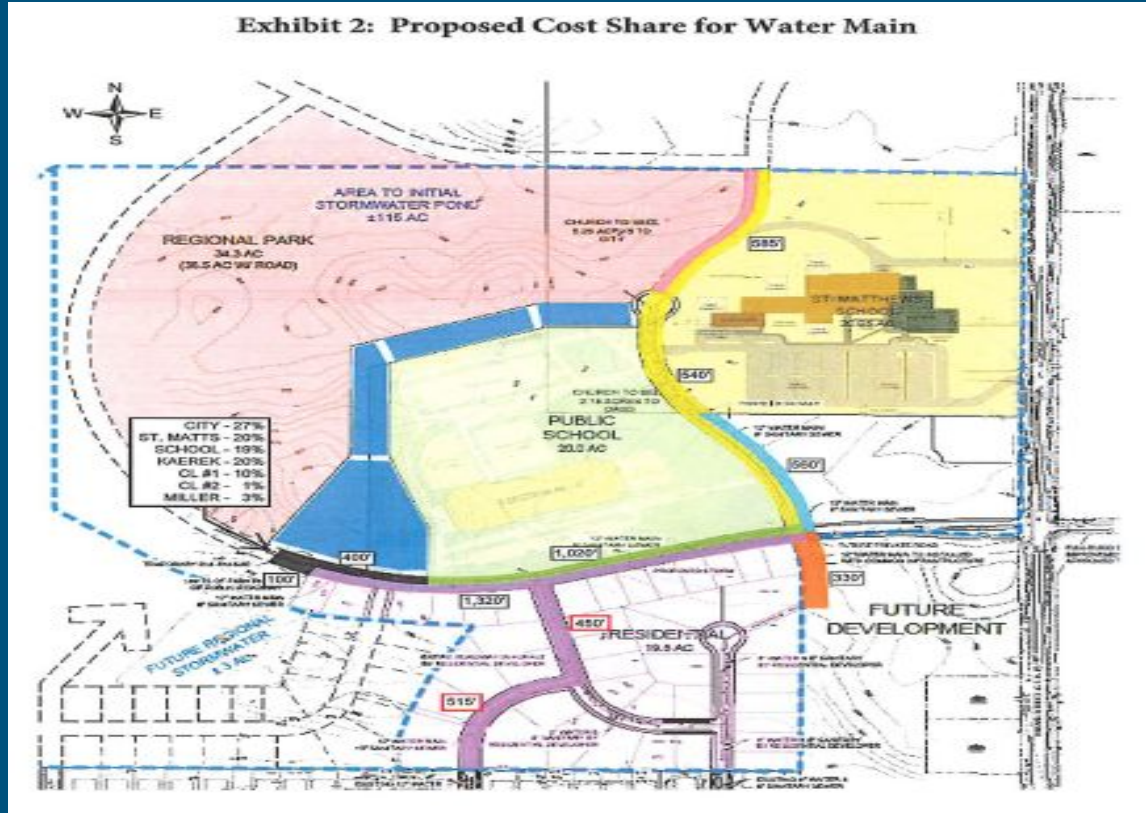


# Oconomowoc Cost Share Agreement



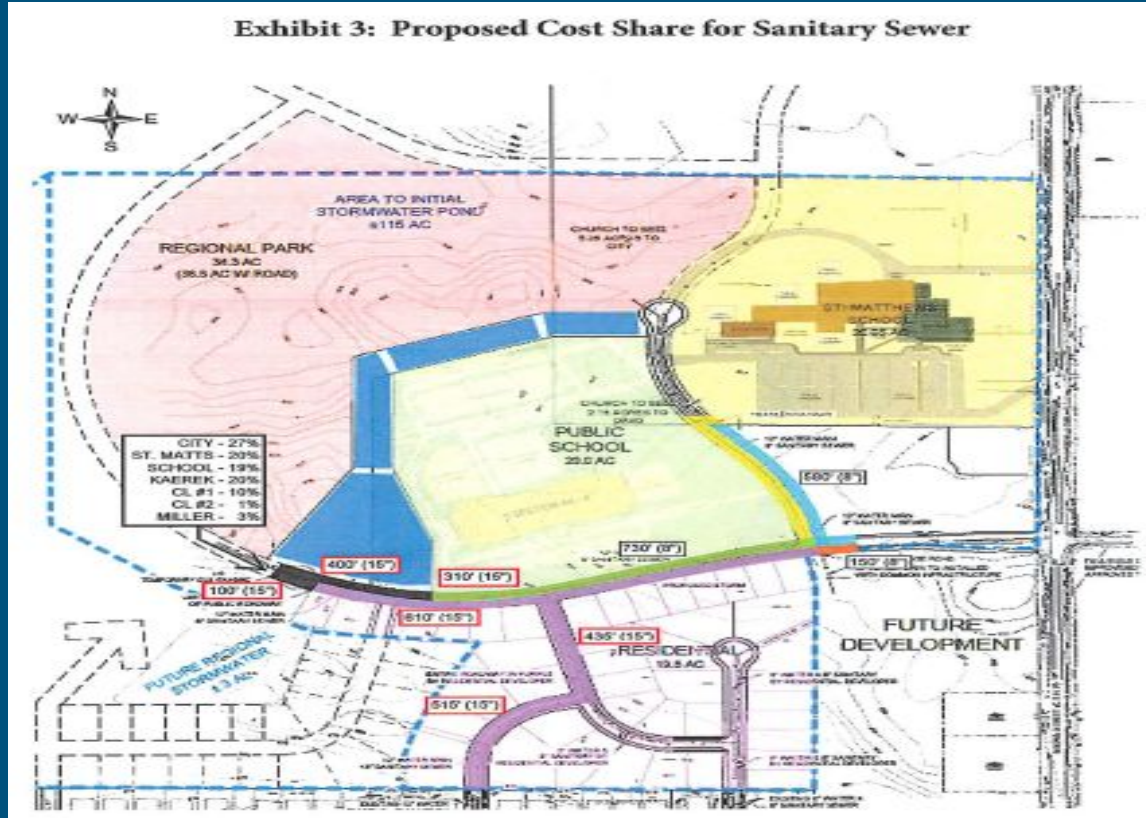
# Oconomowoc Cost Share Agreement

Exhibit 2: Proposed Cost Share for Water Main

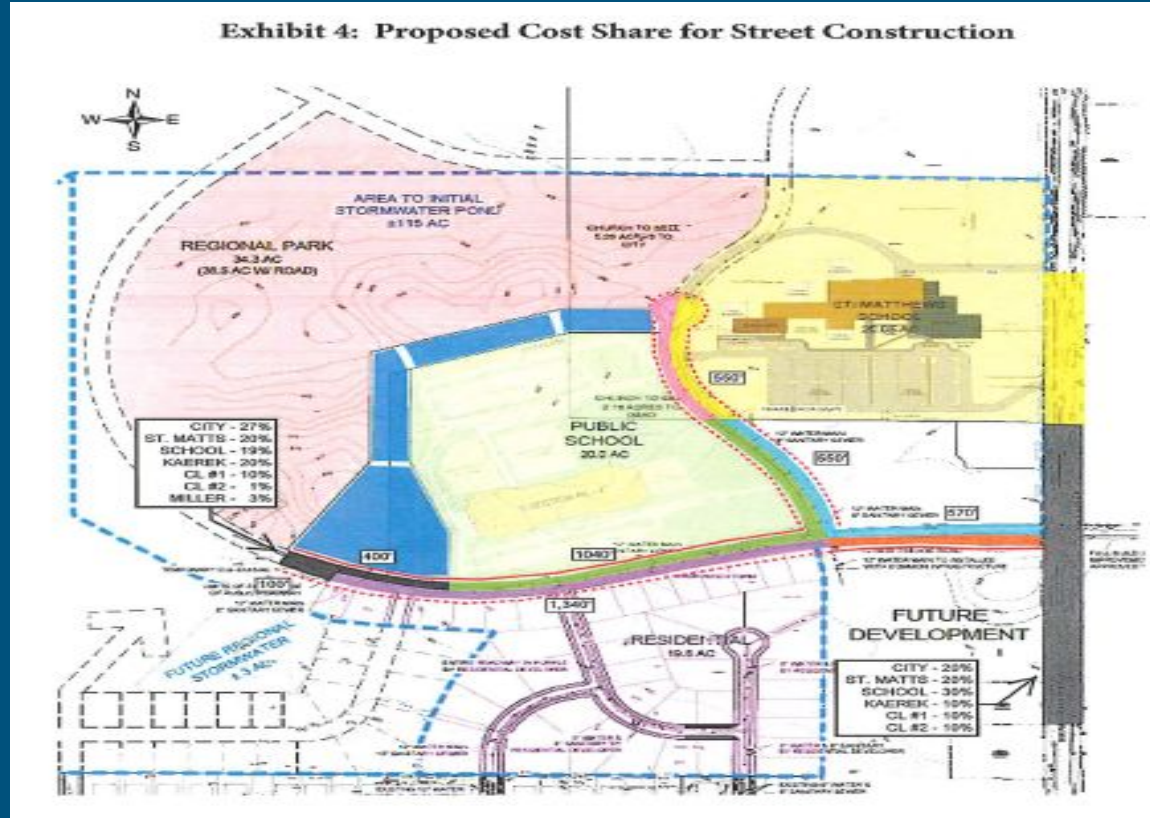


# Oconomowoc Cost Share Agreement

Exhibit 3: Proposed Cost Share for Sanitary Sewer



# Oconomowoc Cost Share Agreement





# Oconomowoc's Cost Share Agreement

2020 Aerial Photo





# Oconomowoc's Cost Share Agreement





# 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



# 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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# Working Your Way Up



# Qualities for moving up

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Knowledge and experience

Eager

Driven

Takes initiative

Self-motivated

Desire

Detail oriented



# Questions?

