

Procurement Responsibilities

This resource outlines the different procurement responsibilities and provides a template that you can use for assigning those responsibilities. It also gives a sample procurement timeline.

It's helpful to designate one person at the central office who will be the point person for procurement. Early implementers set a goal of having teachers have materials in hand at the end of the school year so that they could use the summer to learn about the materials. Most systems have found it helpful to place the order at least three months prior to the date the materials are first needed. The chart below outlines tasks and gives space to name who will complete the task and by when. At the bottom of the resource, you can see a sample timeline.

Task (with notes)	Who	Deadline
Select point person		
Meet to review responsibilities and establish division of responsibilities and timelines for all involved		
Set date for delivery to schools		
Generate procurement numbers (both for students and teachers) <ul style="list-style-type: none"> ▪ Add 10% of the total to allow for changes in student body numbers ▪ Include ELL and SpEd teachers 		
Generate materials list for all needed materials		
Contact vendor and determine options for pricing (i.e. unit costs, bundles, shipping, etc.) and shipping details (locations and timelines) <ul style="list-style-type: none"> ▪ It can be more cost effective to ship to one location 		
Solicit bids for printing of resources (if necessary)		
Review bids and select printing provider (if necessary)		
Contact provider and initiate contract (if necessary)		
Establish timeline for printing, delivery, and distribution (if necessary)		
Determine if materials are being purchased all at once or over time		

▪ If materials are purchased over time, set all timelines		
Set dates for district approval and board approval (if necessary) of purchase		
Establish procedure for tracking the materials		
Generate the purchase order(s)		
Identify site(s) for delivery		
Set expectations with the vendor on payment, shipping, and backorders		
Place the order		
Create and send shipment information, expectations, and training details to each school contact person		
Send email to teachers regarding timeline and expectations (see resource in Key Action I.5.C)		
Follow up with vendor to check on order process and shipping details		
Create master inventory list for each site and share with respective contacts		
Check in with vendor to verify shipping date(s)		
Verify inventory space locations have been prepared		
Reconcile any requests for additional equipment and/or staffing for each site		
Verify shipments have been received at each site		
Complete process of reconciling each shipment manifest with the materials received		

Sample High-Level Timeline

Month	Key Tasks
January	<ul style="list-style-type: none"> ▪ Meet to determine point person, responsibilities, and timeline ▪ Collect purchase volume info (permanent, consumable, supplemental) ▪ Contact vendor/distributor

	<ul style="list-style-type: none"> ▪ Negotiate purchase ▪ Identify shipping location(s) ▪ Generate board item
February	<ul style="list-style-type: none"> ▪ Generate purchase order ▪ Complete order ▪ Create distribution plan ▪ Determine tracking procedure (central and school) ▪ Communicate tracking and distribution procedure ▪ Purchase tracking materials (if necessary)
March	<ul style="list-style-type: none"> ▪ Follow up with distributor ▪ Communicate distribution schedule to teachers/coaches/admin
April	<ul style="list-style-type: none"> ▪ Accept delivery ▪ Prepare for distribution ▪ Check inventory ▪ Settle discrepancies ▪ Re-communicate distribution plan
May	<ul style="list-style-type: none"> ▪ Distribute materials to teachers and leaders
August	<ul style="list-style-type: none"> ▪ Distribute materials to students ▪ Reconcile inventory