**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) * 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)* 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**

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| --- | --- |
| **Month** | **Key Tasks** |
| January  | * Meet to determine point person, responsibilities, and timeline
* Collect purchase volume info (permanent, consumable, supplemental)
* Contact vendor/distributor
* Negotiate purchase
* Identify shipping location(s)
* Generate board item
 |
| February  | * 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 | * Follow up with distributor
* Communicate distribution schedule to teachers/coaches/admin
 |
| April | * Accept delivery
* Prepare for distribution
* Check inventory
* Settle discrepancies
* Re-communicate distribution plan
 |
| May | * Distribute materials to teachers and leaders
 |
| August  | * Distribute materials to students
* Reconcile inventory
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