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| Picture | **Inventory Management Standard Operating Procedure (SOP)** |

**Prepared by BuyQ Consulting Services**

## **1. Purpose**

To establish a standardized, school-wide process for tracking, managing, and maintaining inventory in a way that supports timely access to materials, budget efficiency, and operational excellence.

## **2. Scope**

This SOP applies to all staff members involved in ordering, storing, distributing, and managing school inventory, including curriculum materials, office supplies, technology, and reusable equipment.

## **3. Roles & Responsibilities**

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| **Role** | **Responsibility** |
| **Inventory Champion** | Point person at each site/department for maintaining records, conducting audits, and enforcing processes |
| **Operations/Office Staff** | Support inventory tracking, execute check-in/check-out procedures, and flag low stock |
| **Teachers & Support Staff** | Follow check-out procedures, report issues, and avoid duplicative orders |
| **Procurement Team (if applicable)** | Coordinate orders with inventory data, forecast based on usage trends |

## **4. Inventory Management System**

* **Tool**: [Insert tool used—e.g., Google Sheets, Excel 365, or Inventory Software]
* **Access**: Shared with defined permissions
* **Tracking Fields**:
  + Item Name
  + Quantity On Hand
  + Location
  + Condition
  + Last Restocked Date
  + Reorder Threshold

## **5. Standard Operating Procedures**

### **A. Receiving New Inventory**

* Record item details in tracking system within 48 hours
* Verify condition and quantity
* Label items with barcodes or identifiers
* Place in designated storage area

### **B. Storage & Organization**

* Organize items by category, grade, or department
* Use labeled bins/shelves and an updated storage map
* Apply visual reorder indicators (e.g., colored lines)

### **C. Inventory Check-In / Check-Out**

* Use a physical or digital form to record:
  + Staff Name
  + Item
  + Quantity
  + Date Checked Out/In
* Integrate entries into centralized tracker weekly
* Flag damaged/lost items to inventory champion

### **D. Audits & Routine Checks**

* Conduct formal inventory audits [insert frequency: e.g., monthly, quarterly]
* Use documented checklist for each storage area
* Address discrepancies and update records
* Review auto-restock subscriptions as part of audit

### **E. Restocking Process**

* Track inventory levels weekly
* Reorder when stock hits reorder threshold (e.g., 20% of full inventory)
* Automate restocks for high-usage items through vendor subscriptions
* Avoid automation for seasonal or irregular items

### **F. Historical Data & Forecasting**

* Review historical usage every [insert time frame: e.g., semester]
* Adjust ordering quantities based on trends
* Align forecasts with academic calendars
* Include teacher input and instructional planning needs

## **6. Maintenance Schedule**

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| **Task** | **Frequency** | **Responsible** |
| Tidy supply areas | Weekly (15 min) | Inventory Champion |
| Update tracker | Weekly | Office/Admin Staff |
| Check restock levels | Weekly | Inventory Champion |
| Audit auto-restock items | Monthly/Quarterly | Operations or Purchasing |
| Conduct full inventory audit | Quarterly | Inventory Champion + Admin |
| Update SOP & provide training | Annually or as needed | Admin Team |

## **7. Training**

* All staff must be trained annually or when SOP is updated
* Include training in staff onboarding
* Provide refresher sessions at the start of each semester

## **8. Continuous Improvement**

* Solicit feedback from staff on process effectiveness
* Track issues such as:
  + Misplaced inventory
  + Overuse or misuse
  + Procedural non-compliance
* Adjust SOPs based on real-world feedback and evolving needs

## **9. Appendices**

To access the appendices, please reach out to our team.

* Appendix A: Sample Inventory Tracker
* Appendix B: Audit Checklist Template
* Appendix C: Check-In/Check-Out Form
* Appendix D: Storage Map Template
* Appendix E: Restock Threshold Reference Sheet