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|  | **30-Minute Procurement Planning Calendar** |

**Prepared by BuyQ Consulting Services**

**A simple monthly view to reduce scrambles and gain control**

Use this calendar at the **start of each month** to identify routine or expected needs across your school, so you can batch orders, anticipate expenses, and reduce last-minute purchases.

### **Week 1: Anticipate What’s Coming**

* What supplies were low last month?
* Any special events, field trips, or projects planned?
* What orders do we usually place around this time of year?

### **Week 2: Confirm and Combine**

* Collect any team-specific requests (create a quick shared doc or send a reminder email)
* Look for **overlap** or duplicate requests you can combine
* Choose 1–2 vendors to source from and check availability

### **Week 3: Place the Order**

* Finalize quantities, delivery timeline, and funding codes
* Submit the order early in the week to allow buffer time
* Let teams know what’s on the way (especially if shared items)

### **Week 4: Reflect + Prepare**

* Track anything that came in late, broken, or missing
* Note any recurring requests so you can **automate** or **pre-schedule** next month
* Set a 15-minute calendar reminder for the first of next month to restart the cycle

**Tip:** Use a digital version in Google Docs/Sheets with tabs for each month.

**A checklist to reduce scrambles and gain control**

Use this checklist at the **start of each week or month** to identify routine or expected needs across your school, so you can batch orders, anticipate expenses, and reduce last-minute purchases.

### **Anticipate What’s Coming**

* What supplies were low last week or last month?
* Any special events, field trips, or projects planned for the coming days or weeks?
* What orders do we usually place around this time of year?
* Do any high-use items need to be restocked proactively?
* Are there any team-specific requests to account for?
* Are there any subscription or auto-restock items that should be paused, canceled, or adjusted to better match current needs?
* Are there any subscriptions, licenses, or recurring purchases due for renewal?
* Are there any upcoming staff transitions that require onboarding/offboarding supplies?

### **Coordinate & Consolidate**

* Can orders be bundled across classrooms or departments to save time and shipping costs?
* Are there purchases that multiple teams are planning separately that could be combined?
* Is there anything that should be sourced through preferred vendors or contracts?
* Are there bulk buy opportunities to take advantage of this month?

### **Review & Plan Ahead**

* Has last month’s purchasing been reviewed to spot trends or overspending?
* Are there budget limits or deadlines coming up that could impact orders?
* Is there a clear record of what’s already been ordered and received?
* Is alignment required with your approver, school leader, finance department, or central network teams on any anticipated purchases?
* Are there upcoming grants or funding windows that should inform your purchasing timeline?
* Are there any large or unusual purchases coming up that may need additional documentation or planning?

### **Place the Order**

* Have you gathered all the necessary details (item, quantity, cost, vendor) before submitting the order?
* Are you using preferred vendors or contracts when available?
* Is the order being placed early enough to account for shipping or delivery delays?
* Have all required approvals been obtained before submitting the request?
* Is the order being placed through the correct system or process (e.g. purchasing platform, PO system, procurement system, etc.)
* Have the order timeline and expectations been communicated with the requester?
* Is backup documentation included if required for finance or compliance (e.g. quote, notes, etc.)?

### **Reflect & Prepare**

* Were all purchases received as expected, and in a timely manner?
* Were there any issues with the vendors, shipping, or product quality that need to be addressed?
* What feedback did you get from staff about the usefulness or timing of ordered items?
* Were there any last-minute scrambles that could be prevented next time?
* Are there upcoming needs you can plan for now based on past trends?
* Are inventory levels in a good place for the upcoming week/month?
* Have you documented any lessons learned or updates to processes for future reference?

### **Pro Tips to Stay Ahead**

* **Block 15 minutes each week to scan for upcoming needs:** A little prep time now saves hours later
* **Keep a running “restock list” visible in shared staff spaces: C**apture low supplies in real time
* **Set calendar reminders for seasonal or recurring purchases** (e.g. field trips, state testing supplies, events, etc.)
* **Use past purchase history:** Use data to forecast and avoid overbuying or missing key items
* **Batch orders when possible:** Fewer orders = less admin time, lower shipping costs, and easier tracking
* **Partner with your approver early:** Looping approvers in before crunch time speeds up approvals and builds trust
* **Document vendor issues:** Document things like delays, wrong items, or poor service so you can make better decisions next time