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|  | **Back-to-School Procurement Checklist** |

This ‘Back-to-School Procurement Checklist’ is designed for school operations or finance teams to ensure everything is in place before day one. Treat this as a starting place and be sure to tailor it to your schools unique operations.

#### **🔄 Vendor & Account Updates**

* Audit top 10–15 vendor accounts for outdated contact info
* Update billing/shipping addresses for any building changes
* Confirm approval workflows with vendors and internal teams
* Remove terminated staff from vendor portals and internal systems
* Share updated org charts and key contacts with suppliers

#### **📚 Internal Documentation & Knowledge Sharing**

* Review and update internal procurement guide or onboarding docs
* Make preferred vendor list easily accessible to staff
* Document internal approval processes for new staff
* Schedule training or Q&A session for procurement procedures
* Align purchasing policy with current vendor contracts and procedures

#### **📈 Vendor Communication & Success Metrics**

* Reconnect with top suppliers and confirm account manager contacts
* Set up quarterly vendor check-ins to review service and performance
* Establish 3 core organizational KPIs to track throughout the year across all vendors
* Establish specific shared goals with key suppliers (e.g. faster delivery, better pricing)

#### **📦 Supplies & Budgeting**

* Finalize back-to-school supply orders
* Verify delivery schedules and inventory
* Check budget allocations by department or grade level
* Review past year’s purchasing data for trends or overages

#### **🛠️ System Readiness**

* Test procurement systems (internal and vendor portals) for login access
* Ensure purchasing platforms are updated with new users and permissions
* Confirm integration with finance/accounting systems
* Set up alerts or reminders for contract renewal dates