

Annual Procurement Planning Guide



Good procurement isn't just about buying things.

It's about aligning purchasing
with academic, operations,
and financial goals.

In this guide, we'll cover:

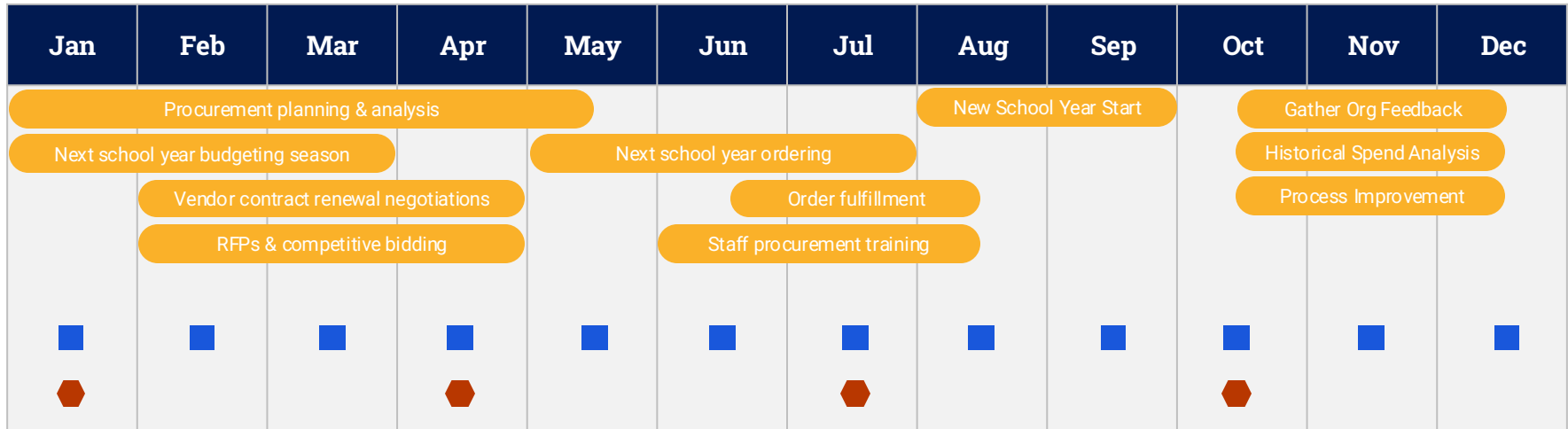
- 1 Overview of Key Procurement Workstreams
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Key Procurement Workstreams

Workstream	Core Actions
Policy & Training	• Review & update procurement policies • Train staff on procurement systems, processes, policies, and best practices
Systems & Tools	• Maintain approved item lists, catalogs, and kits • Optimize workflows and streamline processes
Budget Alignment	• Categorize spend and map to budget line items • Ensure purchases align with school priorities and funding sources
Vendor Management	• Evaluate and select preferred vendors • Negotiate discounts, contract terms, benefits, and service-level expectations • Monitor and manage vendor service & quality
Ordering & Fulfillment	• Place orders aligned to academic and operational needs • Coordinate delivery and resolve fulfillment issues
Track & Analyze spend	• Track purchases against GL codes and budgets • Analyze trends and flag variances

Arc of the School Year: Procurement Edition

Procurement is a year-around effort that begins in January to ensure a strong start to the new school year.



Seasonal Focus Area

	Months	Focus Areas
Ready	January - April	• Planning for next year's big-ticket orders • Engage staff in forecasting and needs assessments • Negotiate and lock in vendor contracts for next fiscal year • Start early procurement of long lead-time items
Set	May - July	• Submit summer orders • Reconcile POs, budget balances, and close out other financials • Receive deliveries & monitor fulfillment activities • Set up spend tracking systems and reporting • Train staff on procurement policies, ordering systems, and procurement processes • Reflect on procurement lessons learned and update processes
Go	August - September	• Distribute supplies to classrooms and ensure items are ready for Day 1 • Monitor early-year spend to flag any unexpected trends or overages • Document any immediate procurement pain points for mid-year adjustments
Grow	October - December	• Conduct spend analysis and adjust forecasts • Check mid-year supply and organizational needs • Identify gaps or pain points in purchasing processes • Prepare for mid-year program expansion needs

Procurement Best Practices

STRATEGY & PLANNING



Planning = Saving

Early planning helps you avoid rush fees, get better pricing, and ensure smoother fulfillment



Align to Org Strategy

Connect procurement to school goals, academic initiatives and grant spending timelines



Quarterly Check-Ins

Schedule quarterly internal check-ins to keep stakeholders aligned and enable mid-year course correction



Start Early

Avoid summer backlogs and limited inventory availability – submit large orders by May or earlier



Map Purchasing Cycles

Align procurement activities with academic needs and school operations (e.g. summer orders, state testing, year-end purchases)



Annual Vendor Reviews

Prevent auto-renewals and encourage renegotiation based on performance

Procurement Best Practices

PROCESS & SYSTEMS



Centralize, If Possible

Centralize high-volume or regulated categories (e.g. office supplies, maintenance)



Review Spend Monthly

Review spend against plans & budgets every month to avoid overruns and year-end surprises



Automate Restocking

Use auto-recurring shipment services for high-use, low-variance items with predictable consumption (e.g. printer paper, markers)



Standardize Ordering

Create pre-approved kits or standardized catalogs to minimize errors, save time, get better pricing, and ensure faster fulfillment



Use GL Codes Accurately

Consider using pre-defined GL codes or a GL code automation tool to ensure accurate spend categorization upfront and avoid budget chaos later



Debrief at Year End

Review what worked and didn't work, then update processes & systems accordingly

Procurement Best Practices

VENDOR & CONTRACT MANAGEMENT



Leverage GPO Contracts

Take advantage of pre-negotiated pricing, compliance, and vendor vetting



Prequalify Vendors

Maintain a list of vetted, approved vendors—especially for large or federally funded purchases



Centralize Records

Store vendor contacts, pricing, renewals, and contract terms in a shared location to ensure continuity during staff transitions and avoid missing renewals or deadlines



Partner with Vendors

Build relationships with vendors, negotiate terms, leverage economies of scale, and establish service expectations



Consolidate Vendors

Reduce the number of vendors for similar products to consolidate volume and strengthen vendor partnerships



Use Vendor Scorecards

Use vendor scorecards to objectively track quality, timeliness pricing, and responsiveness

Procurement Best Practices

TRAINING & COMPLIANCE



Train All Levels

Everyone from new hires, APs, principals to central office staff should understand procurement basics



Designate a Lead

Even if it's not a full-time role, assign a go-to person (or small team) responsible for fielding procurement-related questions



Create User Guides

Provide staff with quick-reference guides on preferred vendors, approval thresholds, and key contacts



Offer Refresher Training

Host short annual or semiannual training sessions to reinforce procurement policies, share process updates, and address recurring mistakes or questions to keep staff aligned



Make Compliance Easy

Don't assume staff know the rules—share procurement do's and don'ts clearly using plain language, quick guides, and visuals to build a culture of compliance and reduce risk



Create Procurement FAQ

Develop a simple, accessible FAQ that answers common questions about purchasing processes, approvals, vendor use, and documentation requirements

Procurement Best Practices

COST EFFICIENCY



Standardize High-Usage Items

Choose consistent versions of frequently purchased items (e.g. pencils, headphones) across classrooms or schools to simplify ordering, ensure quality, and unlock volume discounts



Consider Total Cost of Ownership

Look beyond the sticker price—consider the full cost of ownership, including shipping, setup, training, maintenance, and replacement, to make smarter long-term purchasing decisions



Use Spend Data to Inform Negotiations

Analyzing past purchasing patterns gives you leverage in vendor negotiations by showing your true value as a customer and identifying areas for cost savings or service improvements



Rebid Strategically

Rather than automatically renewing contracts, use expiring agreements as a chance to re-evaluate needs, test market pricing, and consolidate vendors for stronger purchasing power

Common Procurement Pitfalls to Avoid

1 Procurement = Transactional

Overlooking the strategic role of procurement leads to reactive, short-term decisions instead of long-term value creation

2 Underestimating lead times

Not accounting for vendor delays, supply chain issues, or approval bottlenecks can derail timelines

3 Under-budgeting for incidentals

Failing to budget for shipping, installation, accessories, or unexpected replacements results in scrambling for funds mid year.

4 Inconsistent definitions of “emergency” purchases

Lack of clarity around what qualifies as an urgent need opens the door for policy workarounds and overspending.

5 Unmanaged reimbursements

Too many staff buying out-of-pocket and seeking reimbursement can muddy financial controls and reduce oversight.

6 No regular reconciliation between procurement and accounting

Procurement may think an item was ordered, but finance sees it differently – leading to gaps or double spending.

7 Neglecting end-user input

Purchasing decisions made without input from the people using the products (e.g. teachers, custodians) lead to misaligned or ineffective buys.

8 Lack of routine inventory management processes & systems

Without tracking what’s already on hand, schools risk over-purchasing, wasting resources, or running short when it matters most.