

Annual School Purchasing Checklist

A School Purchasing Resource from BulkSupply.com

Use this checklist as a starting point, then follow your district's own approval, budget and purchasing requirements.

Gather requests

- ☐ Collect supply lists from teachers, offices, custodial teams, facilities, and technology staff.
- ☐ Record the requesting school or department, product details, quantities, and needed-by dates.
- ☐ Check stockrooms and available supplies before placing new orders.

Prepare the purchasing list

- ☐ Consolidate overlapping requests while keeping special product requirements clear.
- ☐ Confirm item numbers, pack sizes and units of measure (each, pack, box, case, carton).
- ☐ Compare expected usage with published quantity-price tiers when available.
- ☐ Confirm delivery addresses, receiving hours, and building contacts.

Review and submit

- ☐ Review budget estimates and obtain required internal purchasing approval.
- ☐ Generate or review quotes and check current pricing and availability.
- ☐ Include appropriate approved PO references and tax-exempt documents where applicable.
- ☐ Retain the order confirmation, quote or approved PO under district recordkeeping policy.

Free resource from BulkSchoolSupply.com. Live products, prices and orders are handled by BulkSupply.com. PO terms require approval.