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Supplies Shopping: Where You Can Lose Money

Presented by Brent Lomas, ProcureK12



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About Procurement 101

- Goal: To share best practices and purchasing resources with educators of today, empowering compliant methods and improved outcomes.



Agenda

- The School Supply Purchasing Landscape
- Typical Supply Purchasing & Pitfalls
- Best Practice
- Bottom-up Purchasing and Stipends
- ProcureK12 + Amazon



The Procurement Umbrella

- **Less Complex (Shopping)**

- Accessing negotiated pricing and contracts
- Supply Orders
- Approval Workflows
- Allocating Budget
- Efficacy/Satisfaction



- **More Complex (Procurement)**

- Vendor Management
- Large Purchases
- Quote Requests
- Competitive Solicitation (Bids, RFPs, etc.)
- Compliance Tracking
- Audit-Readiness

The School Supply Purchasing Landscape



13 WHO tv.com MENU WEATHER 11°

1 WEATHER RELATED DELAYS AND CLOSINGS

State Auditor Explains the Process of Conducting Special Investigations

POSTED 6:29 PM, DECEMBER 17, 2018, BY MICHAEL DASILVA

Public School Teacher Spending on Classroom Supplies

U.S. DEPARTMENT OF EDUCATION
NCES 2018-097

The Teacher Questionnaire was administered as part of the 2015–16 National Teacher and Principal Survey (NTPS), which is a nationally representative sample survey of public K–12 schools, principals, and teachers in the 50 states and the District of Columbia. Community type is defined by the urban-centric school locale code based on the 2010 Decennial Census data, collapsed into four categories: city, suburban, town, and rural. Instructional level refers to the grade levels taught by a teacher and divides teachers into elementary or secondary based on a combination of the grades taught, main teaching assignment, and the structure of their classes.



How Schools Typically Purchase Supplies

Potential Pitfalls

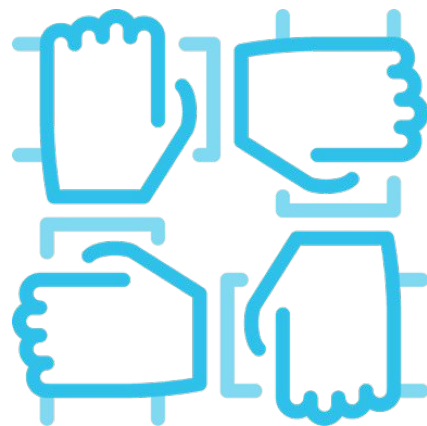
- Concentrated purchasing at beginning of year
 - Teacher must-haves, Student starter packs, Paper, etc.
- Throughout year, stakeholder maintains supply closet
- Teachers surface needs to administration
- Teachers and administrators buy out of pocket
- One-off purchases, often last minute or to physical stores
- Time-intensive reimbursements
- Open feedback loops and unclear inventory management
- Over-reliance on one vendor (or lack of relationships with dedicated vendors)
- Paying retail



Best Practices for Supplies Purchasing

Time Savings, Money Savings, Increased Compliance

- Access education pricing
- Properly avoid sales tax with documentation
- Quick approval workflows
- Centralized receiving for community resources
- Dedicated budget to teachers and other staff
- Limit need for one-off reimbursements
- Net 30 payments
- Avoid need for warehousing



Bottom-up Purchasing and Stipends

How can you give end users more say and budget in what gets purchased?

- Avoid spending waste via:
 - Early Purchasing
 - Approval Workflows
 - Stipends
 - Regular checks against budget
 - Close feedback loops
 - Digital records



Supplies Shopping via ProcureK12 (+ Amazon)

Centralize your supplies shopping.

- Improve your shipping and pricing options by choosing from multiple vendors, including Amazon Business for Education, Really Good Stuff and United Supply.
- Centralize spending data in one school-tailored interface, with easy export to back office provider, QuickBooks, etc.
- Access best in class merchandising, reliability, customer service, and user experience.
- Set approval workflows to empower staff, while maintaining oversight.
- Access school pricing.
- Use multiple payment options, including credit card, purchase order, net 30 payment terms, etc.
- Properly avoid sales tax.

The screenshot displays the ProcureK12 Purchasing Dashboard. At the top, there are navigation tabs for Quotes, RFIs / RFPs, Requisitions, Approvals, and Punchout. Below these are three vendor selection cards: Really Good Stuff (with a Setup button), amazon business (with a Shop button), and ProcureK12 (with a Shop button). Below the vendor cards is a section titled "Orders Created With Punchout" containing a table with columns for Vendor, Order Number, Status, PO Number, Number of Items, Subtotal, and Action.

Vendor	Order Number	Status	PO Number	Number of Items	Subtotal	Action
Content	This is longer content	Content	Content	Content	Content	Content
Content	This is longer content	Content	Content	Content	Content	Content
Content	This is longer content	Content	Content	Content	Content	Content
Content	This is longer content	Content	Content	Content	Content	Content

Next Steps

- Define supply approval workflows.
- Allocate stipends and how you will administer them
- Make sure to have appropriate tax exempt forms on file.
- Find out where you qualify for dedicated education pricing.
- Will you build “class packs?” or student starter kits? Add to your purchasing calendar.
- Consider Amazon Business for Education via ProcureK12. We'll make set up easy!



Procurement 101: Dates to Know

What's the Law? Purchasing Compliance: Thresholds and Quote Request Basics (Webinar)

Tuesday, January 8, 2019 at 4pm EST

The Purchasing Checklist for Founders: The Zillion Things You Need to Buy Before You Open (Training)

Thursday, January 17 at 4pm EST

Furniture Outreach for Founders: Let's Do Our First Quote Request Together. (Training)

Tuesday, January 22 at 4pm EST

Supplies Shopping: Where You Can Lose Money (Webinar)

Monday, January 28, 2019 at 4pm EST

School Uniforms: Choosing a Vendor and Engaging Your Community (Training)

Tuesday, February 5 at 4pm EST

Easing Out-of-Pocket Spending for Your Teachers (Webinar)

Tuesday, February 19, 2019 at 4pm EST

Contact

- **info.procureK12.com/procurement101**
- Brent Lomas, blomas@procurek12.com
- Emily Eapen, eeapen@procurek12.com

