

Summer Inventory Toolkit: Setting Up Next Year's Success

Summer isn't just for recharging — it's your best chance to lay a strong foundation for the year ahead.

A smooth inventory process now means fewer headaches later, when your teachers and students count on having the right materials at the right time.

Use this checklist to get ahead, stay organized, and make back-to-school feel less like a scramble and more like a victory lap.

Before You Start: Preparation Steps

Lay the groundwork so inventory runs smoothly.

- **Assemble your team.**
Identify textbook managers, inventory staff, and warehouse support. Ensure every school has a point person.
- **Clarify roles and expectations.**
Communicate clearly who handles consumables, technology, textbooks, and specialty materials (like novels or AP books).
- **Get your tools ready.**
 - » Setup your inventory management system — double-check access for school staff.
 - » Prepare forms for materials requests, audits, and new orders.
 - » Line up labels, scanners, boxes, and pallets.
- **Communicate early.**
 - » Send memos explaining inventory deadlines and expectations.
 - » Share why accurate inventory matters (fewer shortages, faster reorders, less wasted money).
- **Schedule smartly.**
 - » Build a four- to six-week window for inventory work.
 - » Avoid overlap between old material pickups and new deliveries.

While You Work: Key Actions During Inventory

Execution matters. Here's how to keep things moving.

- **Count what's on hand.**
Don't just "verify" what the system says — do a real count.
- **Label clearly.**
Every box should have the school name, contents, and destination if it's moving.

- **Track movements.**
 - » Update inventory records immediately when materials are boxed or moved.
 - » Log who packed it and where it's going (warehouse, recycling, another school).
- **Handle transitions carefully.**
 - » Special cases like grade realignments (e.g., moving 5th grade back to elementary) need extra oversight to avoid lost materials.
- **Prioritize fragile categories.**
 - » Novels, AP books, and niche resources often have limited backups.
 - » Make sure these items get special attention during both packing and receiving.

Before You Finish: Final Wrap-Up Steps

Close the loop so you start next year strong.

- **Clear obsolete materials.**
 - » Use a "stack and pack" memo to direct schools to box up old materials.
 - » Recycle responsibly and recover value when possible.
- **Reconcile records.**
 - » Match on-the-ground counts to inventory system entries.
 - » Resolve mismatches before closing the books.
- **Fill gaps strategically.**
 - » Pull surplus from other schools before buying new.
 - » Pad orders slightly to account for late enrollment changes.
- **Finalize orders early.**
 - » Use inventory counts and enrollment projections to place early orders for new or replacement materials.
 - » Ensure deliveries are timed to avoid crossing paths with recycling pickups.
- **Recognize contributors.**
 - » Acknowledge textbook managers, warehouse crews, and support staff for their efforts. It builds goodwill for next year.