

Policy Number: F 006	Title: Inventory Policy
Performance Standard:	Original Date: 8/2006
	Policy Council Approval/Revision: 1/12/2009 1/2018 BOE Approval: 1/2018

POLICY:

According to the Head Start standards a formal inventory list will be maintained for the program. Inventories will be maintained on non-consumable items purchased. Occasionally items need to be discarded. Items that should be discarded include those broken, those that cause a hazard to children or staff, those deteriorated or outdated beyond appropriate use.

Items purchased and items disposed of will be documented and documentation will be given to the (inventory) secretary for input into the tracking system. Inventory Add/Reduction forms can be accessed by contacting an Early Childhood Secretary. These forms will be completed by staff purchasing or discarding items at the time of the event.

Each classroom will be given their building’s list in May for review and any needed up-dating. All items on the list will be manually accounted for every 2 years.

Inventory stickers will be placed on all electronics, all furniture, and items over \$100 in value. Inventory over \$5,000 must be preapproved for purchase through the Region VII Head Start Office. Any Inventory with a remaining value of \$5,000. must have authorization to remove from the inventory list through the Region Vii Head Start office.

DISTRICT PROCEDURE:

Inventory Instructions

Please do not print any documents unless it is absolutely necessary

1. Open this [Building-Room Assignments](#) spreadsheet to find all of the rooms for which you are responsible. One tab in the spreadsheet is sorted by Building, and the other tab is sorted by Last Name.

- 2a. **If you have previously created a Google Drive spreadsheet inventory** for one of your assigned rooms, all you need to do is open that spreadsheet and make your changes. See the next page for the Data Input Rules.

2b. **If you are responsible for a new room**, ask the person previously assigned to that room to share their spreadsheet with you so you can make your changes (ask for editing privileges). If that person is no longer available, send an email to inventory@mcpherson.com and request access to that spreadsheet. See the next page for the Data Input Rules.

2c. **If there is no previous inventory spreadsheet available for your new room(s)**, you need to create a new spreadsheet using this [Inventory Template](#) for *each* of your rooms. For example, if you are responsible for the three rooms MHS 020/20A, MHS 021, and MHS 022, you should create three spreadsheets. Open the [Inventory Template](#), choose File > Make a copy and use your Building-Room ID as the filename for each spreadsheet (e.g., MHS 020, EES 110, etc.). Be sure to delete or type over the sample data in the template. See the next page for the Data Input Rules.

3. When you have completed your inventory, share it with your building principal/supervisor and the USD 418 Inventory Manager (inventory@mcpherson.com). **Make the USD 418 Inventory Manager the owner** so the file will not be lost if you leave USD 418. Give the principal editing privileges and keep editing privileges for yourself.

To share your spreadsheet: Click on the Share button in the upper right corner. Enter your principal/supervisor and inventory@mcpherson.com in the People field. Click on the Advanced button and change the owner to inventory@mcpherson.com.

Basic Editing Tips for Google Drive Spreadsheets

If you make a mistake at any time, click the Undo button to undo previous

entries.



To Delete Items:

Delete items that you no longer have (consumed, discarded, missing, sent to warehouse).

To delete an item, select the entire row by **clicking on the row number**. Then select Edit > Delete Row #.

To Add Items:

Click on the button to Add more rows at the bottom (don't add more than 20 rows). To insert a new row between other rows, click on a row number, and select Insert > Row above or Row below.

Data Input Rules

Do not add:

- Technology items that have a USD 418 barcode – they are in a separate inventory
- Monitors, keyboards or mice
- Pieces of district artwork – they are in a separate inventory
- Personal property

When in doubt, add it to your inventory.

Field	Usage
Building-Room	This is the building and room where an item is located.
Item	Enter a brief description of the item. You can create a single entry for a group of small-value items, like "Miscellaneous Office Equipment".
Category	Enter one of the following codes.
	B Business Property. Almost everything will fall under this category, including items that are checked out to staff or students (except for musical instruments).
	E Mobile Equipment. Items that are mobile and are utilized away from the assigned building. In certain cases this might include items such as vehicles, lawnmowers, snow blowers, tools, athletic equipment, scoreboard controls, lightning monitors, etc.
	M Musical Instruments.
Quantity	Make sure the quantity matches the item description. Example: "10 Piece Wrench Set" Quantity: 1, or "Wrenches" Quantity: 10
Serial Number	Required only for items that have a serial number. Do not put multiple serial numbers in this field - create a separate record for each item that has a serial number.
Current Value	Estimate the total value of all of the items on each line based on the current value (not replacement value), age and condition. Round to nearest dollar.
Inventory Date	Enter the date you conducted the inventory using month/day/year format (e.g., 3/25/15). If you enter the month/day and press Enter, the year will be automatically filled in.

Comments	Not required - this field should only be used if the Item field does not adequately describe the item's purpose or location.
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