



Department Planning Request Kit

For K-12 department teams and the business managers who support them.

Start with the problem. Make the next step clear.

A useful request explains what is getting in the way, what has already been tried, and what a decision would commit the school to. This kit helps teams bring that context to a planning conversation.

BEFORE: AN ITEM WITHOUT CONTEXT

"We need two storage carts for the art room."

AFTER: A NEED PEOPLE CAN DISCUSS

"Shared supplies take time to locate and reset between classes. We want to test a clearer storage routine, compare available shelving with a mobile option, and agree on who will maintain the system."

See it worked through | pages 2-3

Follow a fictional art department request from observation to options and follow-up.

Prepare your own request | pages 4-5

Use the brief and commitment check. Unknowns become questions with named owners.

Leave with a next step | page 6

Use the review prompts and outcome record to keep the request moving.

Original planning tools. Use your district's approval process. This kit does not authorize spending.



Worked example: explain the need

Fictional art department scenario. Observations, dates, and estimates are illustrative.

THE OBSERVATION

Across five observed class transitions, the teacher spent about six minutes per transition finding and resetting shared supplies. The observation log covers one week; it is not yet a schoolwide finding.

WHO IS AFFECTED

Students waiting to begin art tasks and staff sharing the preparation area. The concern is predictable access to supplies, not simply a preference for new furniture.

WHAT HAS BEEN TRIED

One labeled shelf helped, but mixed materials returned to the same bins. The team has not yet tried a consistent reset checklist or assigned responsibility for each supply area.

WHAT BETTER WOULD LOOK LIKE

Test a goal of three minutes or less for setup and reset across five comparable transitions, with supplies returned to labeled locations. Record what happens; do not promise a time saving before testing.

THE TIMING

Decision requested by November 6 so staff can prepare for a November 16 trial. These are planning dates, not a funding deadline. If a purchase is considered, confirm lead time before promising implementation.

THE REQUEST FOR THIS MEETING

Agree on a short trial using existing storage, assign a facilities fit check for a possible cart, and set a review date. No purchase is being requested for immediate approval.



Worked example: compare the options

Illustrative amounts only. These are not vendor quotes or confirmed district costs.

A | REORGANIZE WHAT WE HAVE

Use existing shelves and bins. Allow \$30 for labels, plus two staff hours to sort and set up. Trial for two weeks. Benefit: tests the routine quickly. Limit: supplies still travel between work areas.

B | ADD ONE MOBILE STORAGE CART

Planning estimate: cart \$240 + bins \$60 + labels \$30 = \$330 before any applicable tax, delivery, assembly, or other charges. Allow two staff hours for setup. Benefit: supplies move together. Limit: fit, stability, storage location, and suitability still need checking.

C | DEFER THE CHANGE

No new purchase now; current setup and reset work continues. Record the impact and a date to revisit. Deferral should be a deliberate choice, not a request that disappears.

Make the comparison honest

The \$300 difference between A and B covers the cart and bins in this example. It excludes unverified charges and does not assign a dollar value to staff time. Existing materials and staff time still have a cost or competing use.

Responsibility after setup

Art lead maintains labels and the reset routine. Facilities checks the proposed cart location and suitability. Business office confirms estimates and the approval route if a purchase is proposed. Review after the trial before choosing a longer-term option.



Your request: explain the need

One request per brief. Use observation or record references; avoid confidential details.

Department / owner: _____ Prepared on: _____

1. What is getting in the way?

Describe the task or problem, who is affected, and what happens today. Name the need before an item.

2. What supports this observation?

Give a dated example, count, log, or other source. Note what is still uncertain.

3. What have you tried, and what would improve?

List prior steps and a realistic sign of improvement. How and when could you check it?

4. When is a decision needed? When would the change start?

Separate both dates. Explain the reason for each and the practical effect of waiting.

5. What decision or help are you requesting now?

Examples: a small trial, more information, a fit check, discussion, or referral for approval.



Options and ongoing commitments

Attach to the request brief. Use estimates with sources and dates; label unknowns.

A. Use or adapt existing resources

What could you reuse, repair, share, reorganize, or trial? What benefit and limitation remain?

B. Proposed change or smaller version

What would change? Note benefit, limitation, and evidence needed to compare it fairly.

C. Wait or do nothing for now

What continues? Who is affected? When should the department revisit the need?

Cost and effort: one-time / recurring / unknown

Include setup, delivery, training, staff time, consumables, maintenance, renewals, and replacement as relevant.

Who will own the work after launch?

Name setup and ongoing owners. Check space, access, storage, support, and other department dependencies.

For each estimate, attach: amount or range + source + date + what is excluded. Do not treat an unknown as \$0.



Review together. Record the next step.

A 15-minute conversation guide and a reusable outcome record.

0-4 MINUTES | Understand the need

Ask the requester to explain the problem and evidence. Clarify missing information together; an incomplete form is a starting point for help.

4-9 MINUTES | Compare the paths

Discuss an existing-resource option, a proposed change, and deferral. Check ongoing work and which estimates still need confirmation.

9-15 MINUTES | Agree on the next step

Name one coordinator, a specific action, a due date, and who needs the update. Confirm the district approval route if spending or another authorization is involved.

Request / review date: _____

Next step: ☐ Gather information ☐ Trial ☐ Discuss ☐ Refer for approval

☐ Defer until _____ ☐ Other _____

Action + owner + due date

Record what happens next and how the requester will receive an update.

Follow-up result + next review

What was learned or decided? Reference the authorized approval record if applicable.

A planning status is not a spending approval. Keep student and personnel details in approved systems.