

INVENTORY

Printable Workbook

INVENTORY → EVALUATE → COMPARE → DECIDE → AUDIT → IMPROVE

**Create visibility. Exercise discernment. Reduce redundancy.
Improve outcomes. Defend decisions.**

Belongs to: _____	School / District: _____
	Academic Year: _____

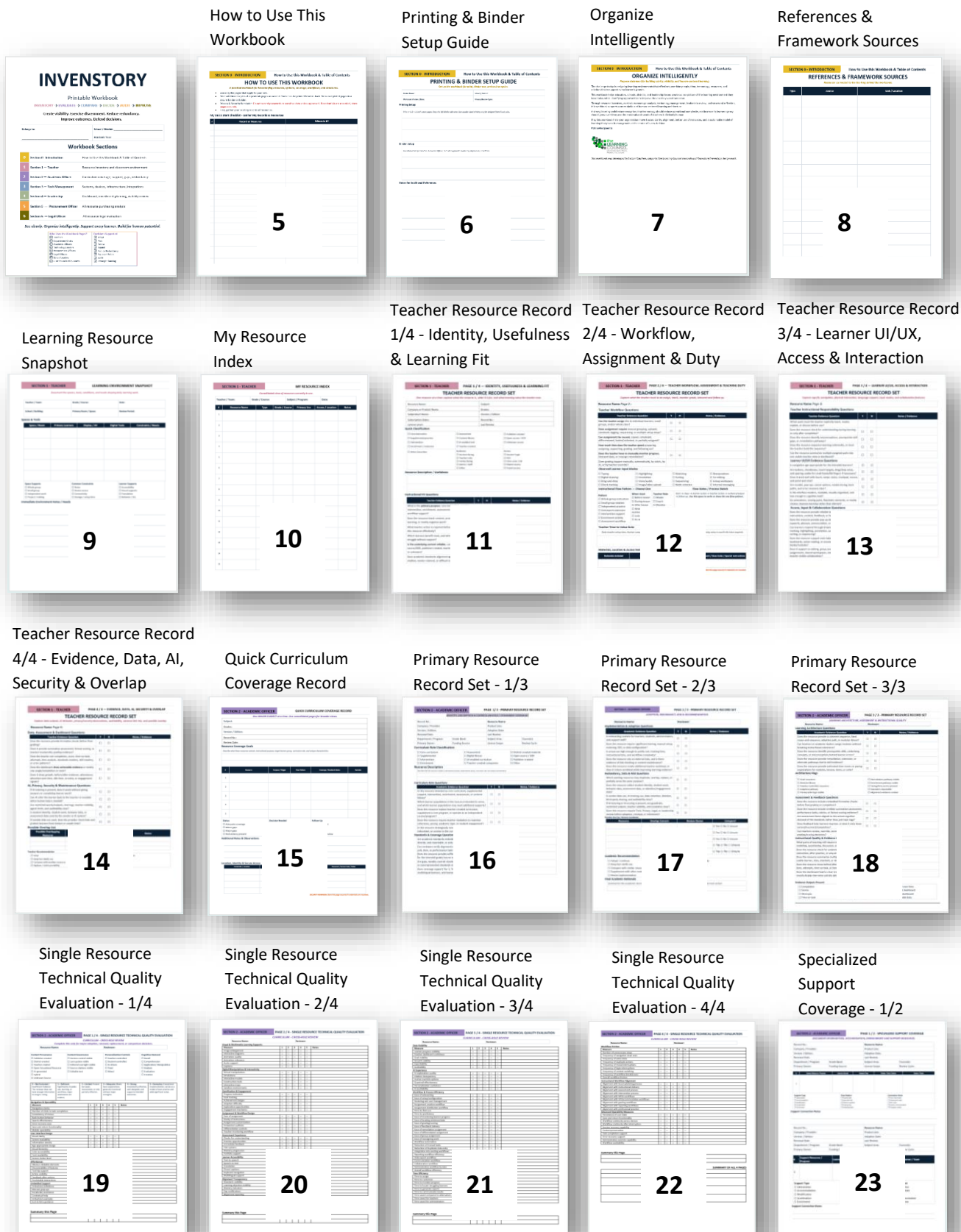
Workbook Sections

0	Section 0 - Introduction	How to Use this Workbook & Table of Contents
1	Section 1 — Teacher	Resource inventory and classroom environment
2	Section 2 — Academic Officer	Curriculum coverage, support, gaps, redundancy
3	Section 3 — Tech Management	Systems, devices, infrastructure, integrations
4	Section 4 — Leadership	Dashboard, investment planning, viability review
5	Section 5 — Procurement Officer	All resource purchasing analysis
6	Section 6 — Legal Officer	All resource legal evaluation

See clearly. Organize intelligently. Support every learner. Build for human potential.

Who Uses the Workbook Pages?	Decisions Supported
☒ Teachers	☒ Adopt
☒ Department Chairs	☒ Pilot
☒ Academic Officers	☒ Renew
☒ Technology Leaders	☒ Expand
☒ Procurement Officers	☒ Reduce Redundancy
☒ Legal Officers	☒ Replace / Retire
☒ School Leaders	☒ Audit
☒ District Leadership Teams	☒ Strategic Planning

Printable Workbook *Thumbnails*



Specialized
Support
Coverage - 2/2

Thumbnail of Specialized Support Coverage - 2/2 form. The form includes sections for 'Specialized Support Coverage' and 'Specialized Support Coverage - 2/2'. It features a table with columns for 'Specialized Support Coverage' and 'Specialized Support Coverage - 2/2'. The number 24 is displayed in the bottom right corner.

Curriculum
Resource Review by
Subject - Gaps

Thumbnail of Curriculum Resource Review by Subject - Gaps form. The form includes sections for 'Curriculum Resource Review by Subject - Gaps' and 'Curriculum Resource Review by Subject - Gaps'. It features a table with columns for 'Curriculum Resource Review by Subject - Gaps' and 'Curriculum Resource Review by Subject - Gaps'. The number 25 is displayed in the bottom right corner.

Curriculum
Resource Review -
Redundancy (Short)

Thumbnail of Curriculum Resource Review - Redundancy (Short) form. The form includes sections for 'Curriculum Resource Review - Redundancy (Short)' and 'Curriculum Resource Review - Redundancy (Short)'. It features a table with columns for 'Curriculum Resource Review - Redundancy (Short)' and 'Curriculum Resource Review - Redundancy (Short)'. The number 26 is displayed in the bottom right corner.

Curriculum Resource
Review - Redundancy
(Long) 1/3

Thumbnail of Curriculum Resource Review - Redundancy (Long) 1/3 form. The form includes sections for 'Curriculum Resource Review - Redundancy (Long) 1/3' and 'Curriculum Resource Review - Redundancy (Long) 1/3'. It features a table with columns for 'Curriculum Resource Review - Redundancy (Long) 1/3' and 'Curriculum Resource Review - Redundancy (Long) 1/3'. The number 27 is displayed in the bottom right corner.

Curriculum Resource
Review - Redundancy
(Long) 2/3

Thumbnail of Curriculum Resource Review - Redundancy (Long) 2/3 form. The form includes sections for 'Curriculum Resource Review - Redundancy (Long) 2/3' and 'Curriculum Resource Review - Redundancy (Long) 2/3'. It features a table with columns for 'Curriculum Resource Review - Redundancy (Long) 2/3' and 'Curriculum Resource Review - Redundancy (Long) 2/3'. The number 28 is displayed in the bottom right corner.

Curriculum Resource
Review - Redundancy
(Long) 3/3

Thumbnail of Curriculum Resource Review - Redundancy (Long) 3/3 form. The form includes sections for 'Curriculum Resource Review - Redundancy (Long) 3/3' and 'Curriculum Resource Review - Redundancy (Long) 3/3'. It features a table with columns for 'Curriculum Resource Review - Redundancy (Long) 3/3' and 'Curriculum Resource Review - Redundancy (Long) 3/3'. The number 29 is displayed in the bottom right corner.

Major System
Record 1/3

Thumbnail of Major System Record 1/3 form. The form includes sections for 'Major System Record 1/3' and 'Major System Record 1/3'. It features a table with columns for 'Major System Record 1/3' and 'Major System Record 1/3'. The number 30 is displayed in the bottom right corner.

Major System
Record 2/3

Thumbnail of Major System Record 2/3 form. The form includes sections for 'Major System Record 2/3' and 'Major System Record 2/3'. It features a table with columns for 'Major System Record 2/3' and 'Major System Record 2/3'. The number 31 is displayed in the bottom right corner.

Major System
Record 3/3

Thumbnail of Major System Record 3/3 form. The form includes sections for 'Major System Record 3/3' and 'Major System Record 3/3'. It features a table with columns for 'Major System Record 3/3' and 'Major System Record 3/3'. The number 32 is displayed in the bottom right corner.

Device Fleet
Summary

Thumbnail of Device Fleet Summary form. The form includes sections for 'Device Fleet Summary' and 'Device Fleet Summary'. It features a table with columns for 'Device Fleet Summary' and 'Device Fleet Summary'. The number 33 is displayed in the bottom right corner.

Infrastructure &
Specialized Tech
Record

Thumbnail of Infrastructure & Specialized Tech Record form. The form includes sections for 'Infrastructure & Specialized Tech Record' and 'Infrastructure & Specialized Tech Record'. It features a table with columns for 'Infrastructure & Specialized Tech Record' and 'Infrastructure & Specialized Tech Record'. The number 34 is displayed in the bottom right corner.

Device Assignment
Ledger (Front)

Thumbnail of Device Assignment Ledger (Front) form. The form includes sections for 'Device Assignment Ledger (Front)' and 'Device Assignment Ledger (Front)'. It features a table with columns for 'Device Assignment Ledger (Front)' and 'Device Assignment Ledger (Front)'. The number 35 is displayed in the bottom right corner.

Device Assignment
Ledger (Back)

Thumbnail of Device Assignment Ledger (Back) form. The form includes sections for 'Device Assignment Ledger (Back)' and 'Device Assignment Ledger (Back)'. It features a table with columns for 'Device Assignment Ledger (Back)' and 'Device Assignment Ledger (Back)'. The number 36 is displayed in the bottom right corner.

Device Image
Record

Thumbnail of Device Image Record form. The form includes sections for 'Device Image Record' and 'Device Image Record'. It features a table with columns for 'Device Image Record' and 'Device Image Record'. The number 37 is displayed in the bottom right corner.

Tech Vendor
Record

Thumbnail of Tech Vendor Record form. The form includes sections for 'Tech Vendor Record' and 'Tech Vendor Record'. It features a table with columns for 'Tech Vendor Record' and 'Tech Vendor Record'. The number 38 is displayed in the bottom right corner.

Dashboard - All
Resources

Thumbnail of Dashboard - All Resources form. The form includes sections for 'Dashboard - All Resources' and 'Dashboard - All Resources'. It features a table with columns for 'Dashboard - All Resources' and 'Dashboard - All Resources'. The number 39 is displayed in the bottom right corner.

Summary
Investment & Cost
Planning

Thumbnail of Summary Investment & Cost Planning form. The form includes sections for 'Summary Investment & Cost Planning' and 'Summary Investment & Cost Planning'. It features a table with columns for 'Summary Investment & Cost Planning' and 'Summary Investment & Cost Planning'. The number 40 is displayed in the bottom right corner.

Resource Decision

Thumbnail of Resource Decision form. The form includes sections for 'Resource Decision' and 'Resource Decision'. It features a table with columns for 'Resource Decision' and 'Resource Decision'. The number 41 is displayed in the bottom right corner.

Viability Review
1/4

Thumbnail of Viability Review 1/4 form. The form includes sections for 'Viability Review 1/4' and 'Viability Review 1/4'. It features a table with columns for 'Viability Review 1/4' and 'Viability Review 1/4'. The number 42 is displayed in the bottom right corner.

Viability Review
2/4

Thumbnail of Viability Review 2/4 form. The form includes sections for 'Viability Review 2/4' and 'Viability Review 2/4'. It features a table with columns for 'Viability Review 2/4' and 'Viability Review 2/4'. The number 43 is displayed in the bottom right corner.

[illegible][illegible]

PERSONAL INFORMATION		RESUME REQUIRED	
NAME	_____	NAME	_____
ADDRESS	_____	ADDRESS	_____
CITY	_____	CITY	_____
STATE	_____	STATE	_____
ZIP	_____	ZIP	_____
TELEPHONE	_____	TELEPHONE	_____
DATE OF BIRTH	_____	DATE OF BIRTH	_____
EDUCATION	_____	EDUCATION	_____
WORKING EXPERIENCE	_____	WORKING EXPERIENCE	_____
REFERENCES	_____	REFERENCES	_____
REMARKS	_____	REMARKS	_____

[illegible]

Date: _____	Page: _____
The first two are the starting point, the second is the starting point, the third is the starting point.	

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HOW TO USE THIS WORKBOOK

A practical workbook for inventorying resources, systems, coverage, workflows, and structures.

- Use only the pages that apply to your role.
- Print additional copies of repeatable pages as needed. Some can be printed front-to-back. Store completed pages in a secure binder or folder.
- Privacy & Security Reminder: Do not record passwords or sensitive data unless approved. If credentials are recorded, store pages securely.
- First, gather your existing records of resources.

My Quick Start Checklist - Gather My Records & Resources

[illegible]

PRINTING & BINDER SETUP GUIDE

Set up the workbook for print, binder use, and review cycles.

Binder Owner:	School / District:
Workbook Version / Date:	Primary Review Cycle:

Printing Setup

Print on 8.5 × 11 inch Letter paper. Keep the left binder side clear. Use double-sided printing only for designed front/back pairs.

Binder Setup

Use labeled tabs for Teacher, Academic Officer, Tech Management, Leadership, References, and Notes.

Notes for Additional References

ORGANIZE INTELLIGENTLY

Purpose statement for building clarity, viability, and human-centered learning.

The challenge today is designing learning environments that effectively combine people, time, technology, resources, and relationships to support every learner's growth.

This workbook helps educators, schools, districts, and leadership teams create a clear picture of the learning environment they have today while identifying opportunities to improve the one they want tomorrow.

Through resource inventory, curriculum coverage analysis, technology management, leadership review, and structural reflection, this workbook supports a more viable and human-centered learning architecture.

A strong learning architecture recognizes that technology should reduce operational complexity, not increase it; learner agency should grow over time; and the most valuable work of teachers is distinctly human.

May this workbook help your organization move toward clarity, alignment, better use of resources, and a sustainable model of learning that places human growth at the center of every decision.

Acknowledgments



This workbook was developed by LeiLani Cauthen, supported by Learning Counsel research and Knowstory/Invenstory design work.

REFERENCES & FRAMEWORK SOURCES

Resources connected to the thinking behind this workbook.

[illegible]

SECTION 1 - TEACHER

LEARNING ENVIRONMENT SNAPSHOT

Document the spaces, tools, conditions, and needs shaping daily learning work.

Teacher / Team:	Grade / Course:	Date:
School / Building:	Primary Room / Space:	Review Period:

Spaces & Tools

Space / Room	Primary Learners	Display / AV	Digital Tools	Constraints / Needs

Space Supports ☐ Whole group ☐ Small group ☐ Independent work ☐ Project / making	Common Constraints ☐ Noise ☐ Device access ☐ Connectivity ☐ Storage / setup time	Learner Supports ☐ Accessibility ☐ Visual supports ☐ Translation ☐ Behavior / SEL
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Immediate Environment Notes / Needs

Consolidated view of resources currently in use.

Teacher / Team:		Grade / Course:		Subject / Program:		Date:	
#	Resource Name	Type	Grade / Course	Primary Use	Access / Location	Notes	
1							
2							
3							
4							
5							
6							
7							
8							
9							
10							
11							
12							
13							
14							
15							

TEACHER RESOURCE RECORD SET

One resource at a time: capture what the resource is, what it is for, and what learning value the teacher sees.

Resource Name:	Subject:
Company or Product Name:	Grades:
Subproduct Name:	Version / Edition:
Subscription Dates:	Record No.:
License Level:	Last Review

Quick Classification

☐ Core instruction ☐ Supplemental practice ☐ Intervention ☐ Enrichment / extension	☐ Assessment ☐ Content library ☐ AI-enabled tool ☐ Teacher-created	☐ Publisher-created ☐ Open source / OER ☐ Unknown source
☐ Other (describe)	Audience ☐ Student-facing ☐ Teacher-only ☐ Family-facing ☐ Admin / staff ☐ Other	Access ☐ Student login ☐ SSO ☐ Class code / QR ☐ Shared access ☐ Parent access

Resource Description / Usefulness

Instructional Fit Questions

Teacher Evidence Question	Y	N	Notes / Evidence
What is the primary purpose : core instruction, practice, intervention, enrichment, assessment, creation, or workflow support?			
Does the resource teach content, provide practice, assess learning, or mostly organize work?			
What teacher action is required before learners can use this resource effectively?			
Which learners benefit most, and which learners may struggle without support?			
Is the underlying content reliable , custom-made, open-source/OER, publisher-created, teacher-created, AI-made, or unknown?	☐	☐	
Does academic standards alignment appear real , partial, shallow, vendor-claimed, or difficult to verify?	☐	☐	

TEACHER RESOURCE RECORD SET

Capture what the teacher must to do assign, teach, monitor grade, interpret and follow up.

Resource Name *Page 2* :

Teacher Workflow Questions

Teacher Evidence Question	Y	N	Notes / Evidence
Can the teacher assign this to individual learners, small groups, and/or whole class?	☐	☐	
Does assignment require manual grouping, uploads, standards tagging, sequencing, or multiple setup steps?	☐	☐	
Can assignments be reused, copied, scheduled, differentiated, locked/unlocked, or partially assigned?	☐	☐	
How much time does the teacher spend preparing, assigning, supporting, grading, and following up?			
Does the teacher have to manually monitor progress, interpret data, or reassign remediation?	☐	☐	
Does grading happen manually, automatically, by rubric, by AI, or by teacher override?			

Observed Learner Input Modes

☐ Typing	☐ Highlighting	☐ Matching	☐ Manipulatives
☐ Digital drawing	☐ Annotation	☐ Sorting	☐ Co-editing
☐ Drag-and-drop	☐ Voice/audio	☐ Sequencing	☐ Group workspace
☐ Check marking	☐ Image/video upload	☐ Math notation	☐ Internal messaging

Instructional Flow Pattern — Choose One

Flow Notes / Process Sketch

Pattern	When Used	Teacher Role	Start → steps → learner action → teacher action → evidence/output → follow-up. Use this space to write or draw the one flow pattern.
☐ Whole group instruction ☐ Small group rotation ☐ Independent practice ☐ Homework extension ☐ Intervention support ☐ Enrichment activity ☐ Assessment workflow	☐ Before lesson ☐ During lesson ☐ After lesson ☐ Weekly routine ☐ Unit review ☐ As needed	☐ Model ☐ Coach ☐ Monitor ☐ Score /review ☐ Conference ☐ Differentiate	

Teacher Time-to-Value Note

Note teacher setup time, learner completion time, grading time, hidden workload, and whether the learning value is worth the time required.

Materials, Location & Access Notes

Materials Included	Location / Link	Username / Login	Password / Class Code / Special Instructions

SECURITY REMINDER: Store this page securely if credentials are recorded.

TEACHER RESOURCE RECORD SET

Capture age fit, navigation, physical interaction, language support, input modes, and collaborative features.

Resource Name *Page 3:*

Teacher Instructional Responsibility Questions

Teacher Evidence Question	Y	N	Notes / Evidence
Which parts must the teacher explicitly teach, model, explain, or discuss before use?			
Does the resource check for understanding during learning or only after completion?	☐	☐	
Does the resource identify misconceptions, prerequisite skill gaps, or remediation pathways?	☐	☐	
Does the resource sequence learning coherently, or must the teacher build the sequence?	☐	☐	
Can the resource summarize multiple assigned parts into one usable teacher view or dashboard?	☐	☐	

Learner UI/UX Evidence Questions

Is navigation age-appropriate for the intended learners?	☐	☐	
Are buttons, checkboxes, touch targets, drag/drop areas, and spacing usable for small hands/fat fingers if necessary?	☐	☐	
Does it work well with touch, swipe, stylus, trackpad, mouse, and point-and-click?	☐	☐	
Are modals, pop-ups, cancel options, modal closing, back paths, and error recovery clear?	☐	☐	
Is the interface modern, readable, visually organized, and low enough in cognitive load?	☐	☐	
Do animations, moving parts, flat/static elements, or media choices improve learning rather than distract?	☐	☐	

Access, Input & Collaboration Questions

Does the resource provide reliable language translation for instructions, content, feedback, or family-facing text?	☐	☐	
Does the resource provide pop-up definitions, vocabulary supports, glossary, pronunciation, or contextual examples?	☐	☐	
Can learners respond through drawing, drag/drop, check marking, highlighting, annotation, audio, images, matching, sorting, or sequencing?	☐	☐	
Does the resource support note-taking, highlighting, bookmarks, active reading, or annotation inside books/modules?	☐	☐	
Does it support co-editing, group assignments, individual assignments, shared workspaces, internal messaging, or teacher-visible collaboration?	☐	☐	

TEACHER RESOURCE RECORD SET

Capture data outputs, AI behavior, privacy/security observations, auditability, external link risk, and possible overlap.

Resource Name *Page 4*:

Data, Assessment & Dashboard Questions

Teacher Evidence Question	Y	N	Notes / Evidence
Does the resource provide formative checks before final grading?	☐	☐	
Does it provide summative assessment, formal scoring, or teacher-trustworthy grading evidence?	☐	☐	
Does the teacher see completion, score, time-on-task, attempts, item analysis, standards mastery, skill mastery, or error patterns?	☐	☐	
Does the dashboard show actionable evidence or mostly raw usage/completion or none?	☐	☐	
Does it show growth, before/after evidence, attendance, attention-over-time, idle time, re-entry, or engagement signals?	☐	☐	

AI, Privacy, Security & Maintenance Questions

If AI tutoring is present, does it assist without giving answers or completing learner work?	☐	☐	
Can AI refer the learner back to the teacher or escalate when human help is needed?	☐	☐	
Are restricted words/outputs, chat logs, teacher visibility, agent limits, and auditability clear?	☐	☐	
Is student identity, student work, behavior data, or assessment data used by the vendor or AI system?	☐	☐	
If outside links are used, does the provider check links and protect learners from broken or unsafe links?	☐	☐	

Possible Overlap List

Possible Overlapping Resource	Why It Might Overlap	Same Purpose?	Notes
		☐ Yes ☐ No ☐ Unsure	
		☐ Yes ☐ No ☐ Unsure	
		☐ Yes ☐ No ☐ Unsure	

Teacher Recommendation

☐ Keep ☐ Keep but clarify use ☐ Compare with another resource ☐ Replace / retire possibility	☐ Needs Academic Officer review ☐ Needs Tech review ☐ Needs cost review ☐ Investigate further
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SECTION 2 - ACADEMIC OFFICER

QUICK CURRICULUM COVERAGE RECORD

One MAJOR SUBJECT at a time. Use consolidated pages for broader views.

Subject:
Grades:
Version / Edition:
Record No.:
Review Date:

Resource Coverage Goals

Describe what these resources contain, instructional purpose, target learner group, curriculum role, and unique characteristics.

#	Resource	Purpose / Trigger	Flow Pattern	Coverage / Standards Notes	Decision
1					
2					
3					
4					
5					
Status ☐ Adequate coverage ☐ Minor gaps ☐ Major gaps ☐ Redundancy present		Decision Needed ☐ Keep ☐ Revise use ☐ Replace ☐ Investigate		Follow-Up ☐ Teacher input ☐ Usage data ☐ Cost review ☐ Leadership review	

Additional Notes & Observations

Location, Identity & Secure Access

Portal URL / Location	LMS / Folder / Shelf	Username / Login	Password / Access Code / Notes

SECURITY REMINDER: Store this page securely if credentials are recorded.

IDENTITY, DESCRIPTION & CURRICULUM ROLE | STANDARDS COVERAGE

Record No.:		Resource Name:	
Company / Provider:		Product Line:	
Version / Edition:		Adoption Date:	
Renewal Date:		Last Review:	
Department / Program:	Grade Band:	Subject Area:	Course(s):
Primary Owner:	Funding Source:	License Scope:	Review Cycle:

Curriculum Role Classification

☐ Core curriculum	☐ Assessment	☐ District-created material
☐ Supplemental	☐ Digital library	☐ Open source / OER
☐ Intervention	☐ AI-enabled curriculum	☐ Publisher-created
☐ Enrichment	☐ Teacher-created companion	☐ Other

Resource Description

Describe what this resource contains, instructional purpose, target learner group, curriculum role, and unique characteristics.

Curriculum Role Questions

Academic Evidence Question	Y	N	Notes / Evidence
Is this resource intended as core curriculum, supplemental support, intervention, enrichment, assessment, or content library?	☐	☐	
Which learner populations is this resource intended to serve, and which learner populations may need additional supports?	☐	☐	
Does this resource replace teacher-created curriculum, supplement a core program, or operate as an independent course/program?	☐	☐	
Does this resource require teacher mediation to maintain coherence, pacing, academic rigor, or student engagement?	☐	☐	
Is this resource strategically necessary, nice-to-have, redundant, or unclear in the current academic architecture?	☐	☐	

Standards & Coverage Questions

Are academic standards embedded in instruction, assessed directly, and reportable, or only tagged superficially?	☐	☐	
Can reviewers verify alignment evidence at the lesson, module, unit, item, or performance-task level?	☐	☐	
Does the resource provide sufficient depth, rigor, and coverage for the intended grade/course expectations?	☐	☐	
Are gaps, weakly covered standards, prerequisite assumptions, or overrepresented standards visible?	☐	☐	
Does coverage support Tier 1, Tier 2, Tier 3, enrichment, multilingual learners, and learners with accommodations?	☐	☐	

ADOPTION, REDUNDANCY, RISK & RECOMMENDATION

Resource Name:

Reviewer:

Implementation & Adoption Questions

Academic Evidence Question	Y	N	Notes / Evidence
Is onboarding realistic for teachers, students, administrators, and support staff?	☐	☐	
Does the resource require significant training, manual setup, rostering, SSO, or data configuration?	☐	☐	
Is actual use high enough to justify cost, training time, instructional time, and workflow complexity?	☐	☐	
Does the resource rely on external links, and is there evidence of link-checking or content maintenance?	☐	☐	
Does this resource create additional teacher workload, or does it reduce workload while improving learning evidence?	☐	☐	

Redundancy, Data & Risk Questions

Which existing resources may duplicate, overlap, replace, or partially serve the same purpose?	☐	☐	
Does the resource collect student identity, student work, behavior data, assessment data, or attention/engagement data?	☐	☐	
Is vendor data use, AI training use, data retention, deletion, third-party sharing, and auditability clear?	☐	☐	
If AI tutoring or AI scoring is present, are guardrails, restricted outputs, teacher visibility, and escalation clear?	☐	☐	
Does this resource require Tech, Privacy, Legal, or Leadership review before adoption, renewal, or retirement?	☐	☐	

Possible Overlap / Review Candidates

Resource	Overlap Concern	Review Owner	Compare?
			☐ Yes ☐ No ☐ Unsure
			☐ Yes ☐ No ☐ Unsure
			☐ Yes ☐ No ☐ Unsure
			☐ Yes ☐ No ☐ Unsure
			☐ Yes ☐ No ☐ Unsure

Academic Recommendation

- | | |
|---|---|
| ☐ Adopt / continue | ☐ Retire / replace possibility |
| ☐ Keep but clarify use | ☐ Needs teacher evidence |
| ☐ Compare with similar resource | ☐ Needs Tech review |
| ☐ Supplement with other material | ☐ Needs privacy review |
| ☐ Revise implementation | ☐ Needs cost review |

Final Academic Rationale

Summarize the academic decision, evidence used, remaining uncertainty, and recommended next action.

LEARNING ARCHITECTURE, ASSESSMENT & INSTRUCTIONAL QUALITY

Resource Name:

Reviewer:

Learning Architecture Questions

Academic Evidence Question	Y	N	Notes / Evidence
Does the resource provide a coherent sequence, fixed scope-and-sequence, adaptive path, or modular library?	☐	☐	
Can teachers or academic leaders assign modules without breaking instructional coherence?	☐	☐	
Does the resource identify prerequisite skills, underlying concepts, or misconceptions behind learner errors?	☐	☐	
Does the resource provide remediation, extension, or alternate pathways tied to skill evidence?	☐	☐	
Does the resource provide estimated time norms or pacing expectations for modules, lessons, items, or units?	☐	☐	

Architecture Flags

☐ Fixed sequence	☐ Remediation pathway visible
☐ Modular library	☐ Enrichment pathway visible
☐ Teacher-controlled sequence	☐ Pacing/time norms present
☐ Adaptive pathway	☐ Standards reportable
☐ Prerequisite logic visible	☐ Alignment evidence unclear

Assessment & Feedback Questions

Does the resource include embedded formative checks before final grading or completion?	☐	☐	
Does the resource include credible summative assessment, performance tasks, rubrics, or formal scoring evidence?	☐	☐	
Are assessment items aligned to the actual cognitive demand of the standards rather than just topic tags?	☐	☐	
Does feedback help learners improve, or does it only show correct/incorrect/completion?	☐	☐	
Can teachers review, override, annotate, or adjust grading/scoring decisions?	☐	☐	

Instructional Quality & Evidence Questions

What parts of teaching still require teacher explanation, modeling, questioning, discussion, or reteaching?	☐	☐	
Does the resource check for understanding during instruction, after practice, or only at the end?	☐	☐	
Does the resource summarize multiple assignments into usable learner, class, standard, or skill views?	☐	☐	
Does the resource show before/after growth, progress over time, attempts, time-on-task, or item analysis?	☐	☐	
Does the dashboard lead to clear instructional action or mostly display low-value activity data?	☐	☐	

Evidence Outputs Present

☐ Completion	☐ Standards mastery	☐ Growth over time
☐ Scores	☐ Skill mastery	☐ Teacher dashboard
☐ Attempts	☐ Item analysis	☐ Admin dashboard
☐ Time on task	☐ Error patterns	☐ Exportable data

CURRICULUM - CROSS-ROLE REVIEW

Complete this only for major adoption, renewal, replacement, or comparison decisions.

Resource Name:

Reviewer:

Content Provenance ☐ Publisher-created ☐ District-created ☐ Teacher-created ☐ Open Educational Resource ☐ AI-generated ☐ Hybrid ☐ Unknown Source	Content Governance ☐ Version control visible ☐ Last update visible ☐ Editorial oversight visible ☐ Source citations visible ☐ Editable text	Personalization Controls ☐ Teacher-controlled ☐ Student-controlled ☐ AI-driven ☐ Fixed ☐ Mixed	Cognitive Demand ☐ Recall ☐ Comprehension ☐ Application/ Manipulative ☐ Analysis ☐ Evaluation ☐ Creation
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X – Not Evaluated / Insufficient Evidence: The reviewer does not have enough information to assign a rating.	1 – Deficient: Significantly impedes use, learning, or workflow; major weaknesses are evident.	2 – Limited: Present but weak, inconsistent, or only partially effective.	3 – Adequate: Meets basic expectations; generally functional without major strengths.	4 – Strong: Consistently effective, well-designed, and supports intended outcomes.	5 – Exemplary: Exceptional implementation; serves as a model of best practice and adds significant value.
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Navigation & Operability

Measure	1	2	3	4	5	Notes
Navigation clarity	☐	☐	☐	☐	☐	
Number of clicks to task completion	☐	☐	☐	☐	☐	
Consistency of menus	☐	☐	☐	☐	☐	
Back-button behavior	☐	☐	☐	☐	☐	
Search effectiveness	☐	☐	☐	☐	☐	
Error recovery ease	☐	☐	☐	☐	☐	
Save-and-return functionality	☐	☐	☐	☐	☐	
Mobile operability	☐	☐	☐	☐	☐	

User Interface Design

Visual clarity	☐	☐	☐	☐	☐	
Screen readability	☐	☐	☐	☐	☐	
Information density	☐	☐	☐	☐	☐	
Age-appropriate design	☐	☐	☐	☐	☐	
Visual hierarchy	☐	☐	☐	☐	☐	
Color accessibility	☐	☐	☐	☐	☐	
Font readability	☐	☐	☐	☐	☐	
Screen clutter level	☐	☐	☐	☐	☐	

Affordances

Obvious clickable elements	☐	☐	☐	☐	☐	
Discoverability of features	☐	☐	☐	☐	☐	
Tool-tip support	☐	☐	☐	☐	☐	
Action visibility	☐	☐	☐	☐	☐	
Feedback after actions	☐	☐	☐	☐	☐	
Predictable interactions	☐	☐	☐	☐	☐	

Embedded Support

Embedded definitions	☐	☐	☐	☐	☐	
Glossary pop-ups	☐	☐	☐	☐	☐	
Vocabulary assistance	☐	☐	☐	☐	☐	
Contextual help	☐	☐	☐	☐	☐	
Embedded examples	☐	☐	☐	☐	☐	
Just-in-time guidance	☐	☐	☐	☐	☐	

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CURRICULUM - CROSS-ROLE REVIEW

Resource Name:

Reviewer:

Visual & Multimedia Learning Supports

Measure	1	2	3	4	5	Notes
Image enlargement	☐	☐	☐	☐	☐	
Interactive diagrams	☐	☐	☐	☐	☐	
Animation quality	☐	☐	☐	☐	☐	
Animation relevance	☐	☐	☐	☐	☐	
Audio support	☐	☐	☐	☐	☐	
Captions	☐	☐	☐	☐	☐	

Digital Manipulatives & Interactivity

Virtual manipulatives	☐	☐	☐	☐	☐	
Simulations	☐	☐	☐	☐	☐	
Interactive models	☐	☐	☐	☐	☐	
Construction tools	☐	☐	☐	☐	☐	
Interactive maps	☐	☐	☐	☐	☐	
Sandbox environments	☐	☐	☐	☐	☐	

Gamification & Engagement

Progress indicators	☐	☐	☐	☐	☐	
Goal tracking	☐	☐	☐	☐	☐	
Achievement badges	☐	☐	☐	☐	☐	
Adaptive difficulty	☐	☐	☐	☐	☐	
Exploration opportunities	☐	☐	☐	☐	☐	
Engagement mechanics	☐	☐	☐	☐	☐	

Assignment & Workflow Design

Ease of assignment	☐	☐	☐	☐	☐	
Clarity of instructions	☐	☐	☐	☐	☐	
Assignment customization	☐	☐	☐	☐	☐	
Embedded scaffolds	☐	☐	☐	☐	☐	
Differentiation controls	☐	☐	☐	☐	☐	
Teacher monitoring workflow	☐	☐	☐	☐	☐	

Assessment Experience

Checks for understanding	☐	☐	☐	☐	☐	
Practice opportunities	☐	☐	☐	☐	☐	
Immediate feedback	☐	☐	☐	☐	☐	
Hint systems	☐	☐	☐	☐	☐	
Mastery progression	☐	☐	☐	☐	☐	
Portfolio support	☐	☐	☐	☐	☐	

Learner Accessibility

Text-to-speech	☐	☐	☐	☐	☐	
Speech-to-text	☐	☐	☐	☐	☐	
Translation	☐	☐	☐	☐	☐	
Closed captions	☐	☐	☐	☐	☐	
Keyboard navigation	☐	☐	☐	☐	☐	
Multilingual support	☐	☐	☐	☐	☐	

Alignment Transparency

Standards visibility	☐	☐	☐	☐	☐	
Learning objective visibility	☐	☐	☐	☐	☐	
Mastery indicators	☐	☐	☐	☐	☐	
Gap notifications	☐	☐	☐	☐	☐	
Alignment reporting	☐	☐	☐	☐	☐	

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CURRICULUM - CROSS-ROLE REVIEW

Resource Name:

Reviewer:

Data Visibility

Measure	1	2	3	4	5	Notes
Learner progress visibility	☐	☐	☐	☐	☐	
Teacher dashboard usefulness	☐	☐	☐	☐	☐	
Goal visibility	☐	☐	☐	☐	☐	
Growth visibility	☐	☐	☐	☐	☐	
Exportability	☐	☐	☐	☐	☐	
Auditability	☐	☐	☐	☐	☐	

AI Experience

AI explanation quality	☐	☐	☐	☐	☐	
Citation transparency	☐	☐	☐	☐	☐	
Human override options	☐	☐	☐	☐	☐	
Guardrail effectiveness	☐	☐	☐	☐	☐	
Personalization usefulness	☐	☐	☐	☐	☐	
AI auditability	☐	☐	☐	☐	☐	

Workflow & Process Efficiency

Ease of onboarding	☐	☐	☐	☐	☐	
Ease of setup/configuration	☐	☐	☐	☐	☐	
Rostering and user management	☐	☐	☐	☐	☐	
Assignment creation workflow	☐	☐	☐	☐	☐	
Assignment distribution workflow	☐	☐	☐	☐	☐	
Time-to-first-use	☐	☐	☐	☐	☐	
Time-to-proficiency	☐	☐	☐	☐	☐	
Ease of monitoring learner progress	☐	☐	☐	☐	☐	
Ease of locating evidence/data	☐	☐	☐	☐	☐	
Ease of grading/scoring	☐	☐	☐	☐	☐	
Ease of feedback delivery	☐	☐	☐	☐	☐	
Ease of remediation assignment	☐	☐	☐	☐	☐	
Ease of differentiated assignment	☐	☐	☐	☐	☐	
Ease of group assignment	☐	☐	☐	☐	☐	
Ease of reassigning work	☐	☐	☐	☐	☐	
Workflow automation	☐	☐	☐	☐	☐	
Reduction of manual tasks	☐	☐	☐	☐	☐	
Reduction of duplicate data entry	☐	☐	☐	☐	☐	
Integration into existing workflows	☐	☐	☐	☐	☐	
Reporting workflow efficiency	☐	☐	☐	☐	☐	
Data export workflow	☐	☐	☐	☐	☐	
Communication workflow	☐	☐	☐	☐	☐	
Collaboration workflow	☐	☐	☐	☐	☐	
Administrative workflow burden	☐	☐	☐	☐	☐	
Overall workflow efficiency	☐	☐	☐	☐	☐	

Time Efficiency

Time to assign	☐	☐	☐	☐	☐	
Time to customize	☐	☐	☐	☐	☐	
Time to monitor progress	☐	☐	☐	☐	☐	
Time to locate struggling learners	☐	☐	☐	☐	☐	
Time to generate reports	☐	☐	☐	☐	☐	
Time to communicate results	☐	☐	☐	☐	☐	
Time saved compared to alternatives	☐	☐	☐	☐	☐	
Time saved for teachers	☐	☐	☐	☐	☐	
Time saved for administrators	☐	☐	☐	☐	☐	

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CURRICULUM - CROSS-ROLE REVIEW

Resource Name:

Reviewer:

Workflow Friction

Measure	1	2	3	4	5	Notes
Number of unnecessary steps	☐	☐	☐	☐	☐	
Frequency of navigation dead ends	☐	☐	☐	☐	☐	
Frequency of extra clicks	☐	☐	☐	☐	☐	
Frequency of duplicate actions	☐	☐	☐	☐	☐	
Frequency of modal interruptions	☐	☐	☐	☐	☐	
Frequency of login interruptions	☐	☐	☐	☐	☐	
Frequency of context switching	☐	☐	☐	☐	☐	
Frequency of workflow breakdowns	☐	☐	☐	☐	☐	
Overall workflow friction	☐	☐	☐	☐	☐	

Instructional Workflow Alignment

Alignment with lesson planning process	☐	☐	☐	☐	☐	
Alignment with instructional delivery	☐	☐	☐	☐	☐	
Alignment with assessment process	☐	☐	☐	☐	☐	
Alignment with intervention process	☐	☐	☐	☐	☐	
Alignment with MTSS workflows	☐	☐	☐	☐	☐	
Alignment with IEP/accommodation workflows	☐	☐	☐	☐	☐	
Alignment with grading workflows	☐	☐	☐	☐	☐	
Alignment with reporting workflows	☐	☐	☐	☐	☐	
Alignment with professional practice	☐	☐	☐	☐	☐	

Advanced Operability Measures

Persistence of user state	☐	☐	☐	☐	☐	
Save-and-return functionality	☐	☐	☐	☐	☐	
Workflow continuity across devices	☐	☐	☐	☐	☐	
Workflow continuity after interruption	☐	☐	☐	☐	☐	
Session recovery capability	☐	☐	☐	☐	☐	
Context preservation	☐	☐	☐	☐	☐	
Task completion support	☐	☐	☐	☐	☐	
Error recovery support	☐	☐	☐	☐	☐	
Administrative override capability	☐	☐	☐	☐	☐	
Workflow auditability	☐	☐	☐	☐	☐	

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DOCUMENT INTERVENTION, ACCOMODATION, ENRINCHMENT AND SUPPORT RESOURCES.

Record No.:		Resource Name:	
Company / Provider:		Product Line:	
Version / Edition:		Adoption Date:	
Renewal Date:		Last Review:	
Department / Program:	Grade Band:	Subject Area:	Course(s):
Primary Owner:	Funding Source:	License Scope:	Review Cycle:

#	Support Resource / Program	Learners Served	Support Type	Trigger / Entry Criteria	Owner / Team
1					
Support Type ☐ Intervention ☐ Accommodation ☐ Modification ☐ Acceleration ☐ Enrichment		Flow Pattern ☐ Teacher-led ☐ Specialist-led ☐ Platform-guided ☐ Small group ☐ Individual plan		Connection Point ☐ Core instruction ☐ Assessment data ☐ IEP / plan ☐ Family communication ☐ Progress review	

Support Connection Notes

Record No.:		Resource Name:	
Company / Provider:		Product Line:	
Version / Edition:		Adoption Date:	
Renewal Date:		Last Review:	
Department / Program:	Grade Band:	Subject Area:	Course(s):
Primary Owner:	Funding Source:	License Scope:	Review Cycle:

#	Support Resource / Program	Learners Served	Support Type	Trigger / Entry Criteria	Owner / Team
2					
Support Type ☐ Intervention ☐ Accommodation ☐ Modification ☐ Acceleration ☐ Enrichment		Flow Pattern ☐ Teacher-led ☐ Specialist-led ☐ Platform-guided ☐ Small group ☐ Individual plan		Connection Point ☐ Core instruction ☐ Assessment data ☐ IEP / plan ☐ Family communication ☐ Progress review	

Support Connection Notes

DOCUMENT INTERVENTION, ACCOMODATION, ENRINCHMENT AND SUPPORT RESOURCES.

Record No.:		Resource Name:			
Company / Provider:		Product Line:			
Version / Edition:		Adoption Date:			
Renewal Date:		Last Review:			
Department / Program:	Grade Band:	Subject Area:	Course(s):		
Primary Owner:	Funding Source:	License Scope:	Review Cycle:		
#	Support Resource / Program	Learners Served	Support Type	Trigger / Entry Criteria	Owner / Team
3					
Support Type ☐ Intervention ☐ Accommodation ☐ Modification ☐ Acceleration ☐ Enrichment		Flow Pattern ☐ Teacher-led ☐ Specialist-led ☐ Platform-guided ☐ Small group ☐ Individual plan		Connection Point ☐ Core instruction ☐ Assessment data ☐ IEP / plan ☐ Family communication ☐ Progress review	

Support Connection Notes

Record No.:		Resource Name:			
Company / Provider:		Product Line:			
Version / Edition:		Adoption Date:			
Renewal Date:		Last Review:			
Department / Program:	Grade Band:	Subject Area:	Course(s):		
Primary Owner:	Funding Source:	License Scope:	Review Cycle:		
#	Support Resource / Program	Learners Served	Support Type	Trigger / Entry Criteria	Owner / Team
4					
Support Type ☐ Intervention ☐ Accommodation ☐ Modification ☐ Acceleration ☐ Enrichment		Flow Pattern ☐ Teacher-led ☐ Specialist-led ☐ Platform-guided ☐ Small group ☐ Individual plan		Connection Point ☐ Core instruction ☐ Assessment data ☐ IEP / plan ☐ Family communication ☐ Progress review	

Support Connection Notes

SECTION 2 - ACADEMIC OFFICER

CURRICULUM RESOURCE REVIEW BY SUBJECT - GAPS

IDENTIFY MISSING COVERAGE, WEAK ALIGNMENT, ACCESS LIMITATIONS, AND NEEDED ACTIONS.

Subject:		Grade Band:		Course/Program:		Review Date:	
#	Gap Area	Evidence / Source		Impact on Learners		Priority	
1							
2							
3							
4							
5							
6							
Action Needed		Owner	Timeline	Resource / Support Required		Status / Notes	

Leadership / Curriculum Notes

SECTION 2 - ACADEMIC OFFICER
CURRICULUM RESOURCE REVIEW - REDUNDANCY (SHORT FORM)

IDENTIFY OVERLAPPING RESOURCES AND OPPORTUNITIES TO SIMPLIFY WORK.

Subject(s)		Grade Band:		Course/Program:		Review Date:	
Purpose:							
#	Resource 1	Resource 2 / Overlap	Duplicate Function	Use Evidence	Decision		
1 > 2							
>3		Resource 3 / Overlap	Duplicate Function	Use Evidence	Decision		
>4		Resource 4 / Overlap	Duplicate Function	Use Evidence	Decision		
>5		Resource 5 / Overlap	Duplicate Function	Use Evidence	Decision		
>6		Resource 6 / Overlap	Duplicate Function	Use Evidence	Decision		
Keep Because • Distinct learning value • Required • High usage • Unique data		Reduce Because • Low use • Duplicate function • Cost concern • Access friction • Other		Support ☐ Training ☐ Position champions		Recommendation Keep _____ Retire _____ Pilot alternative _____ ☐ Escalate review	
Other:							

*COMPARE FOUR RESOURCES HOLISTICALLY.***Evidence Flags**

1 = Absent 2 = Weak 3 = Functional 4 = Strong 5 = Exceptional	
A. Vendor-claimed only B. Teacher evidence available C. Usage data available D. Student work sample available	E. Standards report available F. Assessment item quality unclear G. Content source unknown H. Needs curriculum review

Academic & Learning Quality Matrix

RESOURCE NAME:				
Analysis Area	Resource A	Resource B	Resource C	Resource D
Purpose fit / instructional role	Rate 1-5 A-H	Rate 1-5 A-H	Rate 1-5 A-H	Rate 1-5 A-H
Notes:				
Academic coverage depth	Rate 1-5 A-H	Rate 1-5 A-H	Rate 1-5 A-H	Rate 1-5 A-H
Notes:				
Standards alignment integrity	Rate 1-5 A-H	Rate 1-5 A-H	Rate 1-5 A-H	Rate 1-5 A-H
Notes:				
Content source reliability	Rate 1-5 A-H	Rate 1-5 A-H	Rate 1-5 A-H	Rate 1-5 A-H
Notes:				
Learning sequence architecture	Rate 1-5 A-H	Rate 1-5 A-H	Rate 1-5 A-H	Rate 1-5 A-H
Notes:				
Modular assignment flexibility	Rate 1-5 A-H	Rate 1-5 A-H	Rate 1-5 A-H	Rate 1-5 A-H
Notes:				
Skill dependency visibility	Rate 1-5 A-H	Rate 1-5 A-H	Rate 1-5 A-H	Rate 1-5 A-H
Notes:				
Remediation logic	Rate 1-5 A-H	Rate 1-5 A-H	Rate 1-5 A-H	Rate 1-5 A-H
Notes:				
Formative assessment quality	Rate 1-5 A-H	Rate 1-5 A-H	Rate 1-5 A-H	Rate 1-5 A-H
Notes:				
Summative assessment quality	Rate 1-5 A-H	Rate 1-5 A-H	Rate 1-5 A-H	Rate 1-5 A-H
Notes:				
Human intelligence development	Rate 1-5 A-H	Rate 1-5 A-H	Rate 1-5 A-H	Rate 1-5 A-H
Notes:				
Before/after growth evidence	Rate 1-5 A-H	Rate 1-5 A-H	Rate 1-5 A-H	Rate 1-5 A-H
Notes:				
1. SUMMARIZE AND AVERAGE				

Workflow & Learner Experience Matrix

RESOURCE NAME:				
Analysis Area	Resource A	Resource B	Resource C	Resource D
Ease of onboarding	Rate 1-5 A-H	Rate 1-5 A-H	Rate 1-5 A-H	Rate 1-5 A-H
Notes:				
Time to assign	Rate 1-5 A-H	Rate 1-5 A-H	Rate 1-5 A-H	Rate 1-5 A-H
Notes:				
Group vs individual assignment	Rate 1-5 A-H	Rate 1-5 A-H	Rate 1-5 A-H	Rate 1-5 A-H
Notes:				
Differentiation capability	Rate 1-5 A-H	Rate 1-5 A-H	Rate 1-5 A-H	Rate 1-5 A-H
Notes:				
Teacher instructional duty	Rate 1-5 A-H	Rate 1-5 A-H	Rate 1-5 A-H	Rate 1-5 A-H
Notes:				
Manual grading / scoring burden	Rate 1-5 A-H	Rate 1-5 A-H	Rate 1-5 A-H	Rate 1-5 A-H
Notes:				
Learner navigation age fit	Rate 1-5 A-H	Rate 1-5 A-H	Rate 1-5 A-H	Rate 1-5 A-H
Notes:				
Button/touch target usability	Rate 1-5 A-H	Rate 1-5 A-H	Rate 1-5 A-H	Rate 1-5 A-H
Notes:				
Modal closing / error recovery	Rate 1-5 A-H	Rate 1-5 A-H	Rate 1-5 A-H	Rate 1-5 A-H
Notes:				
Language translation support	Rate 1-5 A-H	Rate 1-5 A-H	Rate 1-5 A-H	Rate 1-5 A-H
Notes:				
Pop-up definitions / vocabulary	Rate 1-5 A-H	Rate 1-5 A-H	Rate 1-5 A-H	Rate 1-5 A-H
Notes:				
Learner input modes	Rate 1-5 A-H	Rate 1-5 A-H	Rate 1-5 A-H	Rate 1-5 A-H
Notes:				
Notes / highlighting / annotation	Rate 1-5 A-H	Rate 1-5 A-H	Rate 1-5 A-H	Rate 1-5 A-H
Notes:				
Co-editing / collaboration / messaging	Rate 1-5 A-H	Rate 1-5 A-H	Rate 1-5 A-H	Rate 1-5 A-H
Notes:				
2. SUMMARIZE AND AVERAGE				

Data, AI, Security & Risk Matrix

RESOURCE NAME:				
Analysis Area	Resource A	Resource B	Resource C	Resource D
Data output value	Rate 1-5 A-H	Rate 1-5 A-H	Rate 1-5 A-H	Rate 1-5 A-H
Notes:				
Dashboard actionability	Rate 1-5 A-H	Rate 1-5 A-H	Rate 1-5 A-H	Rate 1-5 A-H
Notes:				
Evidence aggregation across assignments	Rate 1-5 A-H	Rate 1-5 A-H	Rate 1-5 A-H	Rate 1-5 A-H
Notes:				
Attendance / attention-over-time tracking	Rate 1-5 A-H	Rate 1-5 A-H	Rate 1-5 A-H	Rate 1-5 A-H
Notes:				
Vendor data use transparency	Rate 1-5 A-H	Rate 1-5 A-H	Rate 1-5 A-H	Rate 1-5 A-H
Notes:				
Student identity risk	Rate 1-5 A-H	Rate 1-5 A-H	Rate 1-5 A-H	Rate 1-5 A-H
Notes:				
AI tutoring present and limited	Rate 1-5 A-H	Rate 1-5 A-H	Rate 1-5 A-H	Rate 1-5 A-H
Notes:				
AI escalation to teacher	Rate 1-5 A-H	Rate 1-5 A-H	Rate 1-5 A-H	Rate 1-5 A-H
Notes:				
Restricted outputs / guardrails	Rate 1-5 A-H	Rate 1-5 A-H	Rate 1-5 A-H	Rate 1-5 A-H
Notes:				
Auditability	Rate 1-5 A-H	Rate 1-5 A-H	Rate 1-5 A-H	Rate 1-5 A-H
Notes:				
External link checking	Rate 1-5 A-H	Rate 1-5 A-H	Rate 1-5 A-H	Rate 1-5 A-H
Notes:				
Privacy / security concerns	Rate 1-5 A-H	Rate 1-5 A-H	Rate 1-5 A-H	Rate 1-5 A-H
Notes:				
3. SUMMARIZE AND AVERAGE				
TOTAL OF SUMMARIES				

ONE MAJOR PLATFORM OR SYSTEM - IDENTITY, DESCRIPTION, ACCESS AND OWNERSHIP

System Name:		Vendor / Provider:	
Product Line:		Version / Edition:	
Internal Owner:		Business Owner:	
Review Date:		Next Review:	
System Type:	Primary Users:	Support Contact:	Contract Start:
Renewal Date:	License Scope:	Hosting Type:	Criticality Level:

System Classification

☐ SIS	☐ Identity / SSO	☐ Analytics / dashboard
☐ LMS	☐ Communication	☐ Content repository
☐ Assessment	☐ Finance / HR	☐ AI-enabled system
☐ Curriculum	☐ Operations	☐ Other

System Description

Describe the purpose of this system, major functionality, users served, business owner, operational importance, and known limitations.

Ownership & Operational Role Questions

Technical Evidence Question	Y	N	Notes / Evidence
Is this system mission-critical, instructional-critical, operational support, optional, or unclear in the ecosystem?	☐	☐	
Is there an internal owner and business owner responsible for decisions, support, renewal, and data governance?	☐	☐	
Which groups depend on this system daily, weekly, seasonally, or only during specific administrative cycles?	☐	☐	
Is the system substituting for, duplicating, or overlapping with another platform or manual process?	☐	☐	
Are support pathways, vendor contacts, escalation paths, and documentation accessible to the right staff?	☐	☐	

Access & Authentication Questions

Does the system use SSO, MFA for admins, role-based access, and least-privilege permissions?	☐	☐	
How are accounts created, updated, suspended, archived, and deleted?	☐	☐	
Are student, staff, admin, and family access roles clearly separated and documented?	☐	☐	
Can access changes be audited by user, date, role, and action?	☐	☐	
Is there a reliable process for offboarding users and removing unnecessary access?	☐	☐	

Auditability

☐	Documentation Available
☐	Evidence Available
☐	Vender Verified
☐	Archived

ONE MAJOR PLATFORM OR SYSTEM - DATA AND SECURITY

System Name:

Data & Security Questions

What student, staff, financial, behavioral, academic, assessment, or identity data is stored or processed?	☐	☐	
Is data encrypted, backed up, retained appropriately, deletable, and recoverable?	☐	☐	
Does the vendor use data for product improvement, analytics, AI training, or third-party processing?	☐	☐	
Are DPIA/DPA/privacy documents, breach procedures, SOC/security reports, and compliance evidence available?	☐	☐	
Is auditability sufficient for logins, admin changes, data exports, AI actions, and integration events?	☐	☐	

Data Sensitivity Flags

☐ Student PII	☐ Financial data	☐ Usage/clickstream
☐ Staff PII	☐ Behavior data	☐ Exportable data
☐ Assessment data	☐ Identity data	☐ Third-party processing
☐ Health/IEP/plan data	☐ AI/chat logs	☐ Unknown

Workflow & Integration Snapshot

Connected System Name	Data Exchanged	Direction	By API	Manual	Notes
		Sends / Receives / Both	☐	☐	
		Sends / Receives / Both	☐	☐	
		Sends / Receives / Both	☐	☐	
		Sends / Receives / Both	☐	☐	

Integration Reliability Questions

Technical Evidence Question	Y	N	Notes / Evidence
Are integration owners, technical contacts, refresh schedules, and failure alerts known?	☐	☐	
Are any workflows dependent on CSV uploads, manual exports, screenshots, email, or human re-entry?	☐	☐	
Are API scopes, permissions, tokens, secrets, and data fields documented and reviewed?	☐	☐	
What happens when the integration fails, duplicates records, sends stale data, or mismatches identities?	☐	☐	
Can integration activity be audited, including data transferred, timestamp, source, destination, and error state?	☐	☐	

Integration Methods Present

☐ API	☐ OneRoster	☐ Email attachment
☐ SFTP / file transfer	☐ Clever/ClassLink	☐ Webhook
☐ CSV upload	☐ Manual entry	☐ Unknown
☐ LTI	☐ Manual export	☐ Not integrated

ONE MAJOR PLATFORM OR SYSTEM - RISK, SUPPORT, LIFECYCLE AND RENEWAL DECISION

System Name:

Operational Risk Questions

Technical Evidence Question	Y	N	Notes / Evidence
Is there a single point of failure in ownership, data access, integrations, vendor support, or institutional knowledge?	☐	☐	
Is uptime, performance, incident history, support responsiveness, and vendor reliability acceptable?	☐	☐	
Does the system create manual work, duplicated data entry, unclear ownership, or shadow workflows?	☐	☐	
Does the system overlap with another system enough to consider consolidation, repositioning, or retirement?	☐	☐	
Is staff training, documentation, and support capacity sufficient for sustainable use?	☐	☐	

Lifecycle & Renewal Questions

Is the system still aligned to instructional, administrative, compliance, or operational priorities?	☐	☐	
Are cost, usage, support burden, integration complexity, and risk justified by current value?	☐	☐	
Are contract terms, renewal windows, data return/deletion, and exit requirements documented?	☐	☐	
What work would be required to migrate, replace, consolidate, or retire this system?	☐	☐	
Does this system require leadership, privacy/legal, finance, academic, or vendor review before renewal?	☐	☐	

Risk / Review Flags

☐ Security risk	☐ Vendor reliability risk	☐ Training gap
☐ Privacy risk	☐ Cost increase	☐ Redundant system
☐ Integration risk	☐ Low adoption	☐ Contract risk
☐ Data quality risk	☐ High manual workload	☐ Migration risk

Technical Recommendation

☐ Keep / maintain	☐ Needs vendor review
☐ Improve workflow	☐ Needs privacy/legal review
☐ Improve security controls	☐ Needs cost review
☐ Reduce manual process	☐ Needs training/support plan
☐ Replace / retire possibility	☐ Escalate to leadership

Final Technical Rationale

Summarize the technical decision, key evidence, risk level, required follow-up, and recommended next action.

SECTION 3 - TECH MANAGEMENT

DEVICE FLEET SUMMARY

SUMMARIZE DEVICE CATEGORIES, QUANTITIES, CONDITION AND REPLACEMENT NEEDS

District / School:		Prepared By:		Review Date:		Refresh Cycle:	
#	Device Category	Approx. Count	Primary Users	Assignment Model	Condition	Refresh / Need Notes	
1							
2							
3							
4							
5							
6							
7							
8							
9							
10							
11							
12							
13							
14							
15							
16							
17							
18							
19							
20							
21							
22							
23							
24							
25							
Fleet Status ☐ Adequate ☐ Shortage ☐ Aging devices ☐ Mixed condition			Priority Need ☐ Replacement ☐ Repair backlog ☐ Spare pool ☐ Inventory cleanup		Next Review ☐ Usage data ☐ Budget estimate ☐ Leadership decision ☐ Vendor quote		

SECTION 3 - TECH MANAGEMENT

INFRASTRUCTURE & SPECIALIZED TECH RECORD

DOCUMENT NON-STANDARD ASSETS, INFRASTRUCTURE, SPECIALIZED TOOLS, SPACES, AND SUPPORT NEEDS.

[illegible]

Implementation / Maintenance Notes

SECTION 3 - TECH MANAGEMENT

DEVICE ASSIGNMENT LEDGER (FRONT)

TRACK DEVICE ASSIGNMENT, LOCATION, USER/GROUP, AND RETURN/STATUS NOTES.

Ledger Type & Model & Location Issued

Ledger #.

Status ☐ Assigned ☐ Available ☐ In repair ☐ Needs Part or Cord ☐ Missing ☐ Retired	Assignment Model ☐ 1:1 ☐ Cart / shared ☐ Lab / fixed ☐ Checkout ☐ Staff device	Issuing Location: Actions > ☐ To Repair ☐ Order Replacement ☐ Collected ☐ Retire
---	---	--

Device Brand:	Asset Manager:
----------------------	-----------------------

#	Asset Tag / ID	Model Number
---	----------------	--------------

1						
	Image Ref. No.	Assigned To Name / Group	> Campus/ Room	Issued Date	Action >	Action Date

#	Asset Tag / ID	Model Number
---	----------------	--------------

Image Ref. No.	Assigned To Name / Group	> Campus/ Room	Issued Date	Action >	Action Date

#	Asset Tag / ID	Model Number
---	----------------	--------------

Image Ref. No.	Assigned To Name / Group	> Campus/ Room	Issued Date	Action >	Action Date

#	Asset Tag / ID	Model Number
---	----------------	--------------

4		
---	--	--

Image Ref. No.	Assigned To Name / Group	> Campus/ Room	Issued Date	Action >	Action Date

#	Asset Tag / ID	Model Number
---	----------------	--------------

5		
---	--	--

Image Ref. No.	Assigned To Name / Group	> Campus/ Room	Issued Date	Action >	Action Date

#	Asset Tag / ID	Model Number
---	----------------	--------------

6		
---	--	--

Image Ref. No.	Assigned To Name / Group	> Campus/ Room	Issued Date	Action >	Action Date

SECTION 3 - TECH MANAGEMENT

DEVICE ASSIGNMENT LEDGER (BACK)

Ledger Type & Model & Location Issued

Ledger # _____ -2

#	Asset Tag / ID	Model Number				
7						
	Image Ref. No.	Assigned To Name / Group	> Campus/ Room	Issued Date	Action >	Action Date
8						
	Image Ref. No.	Assigned To Name / Group	> Campus/ Room	Issued Date	Action >	Action Date
9						
	Image Ref. No.	Assigned To Name / Group	> Campus/ Room	Issued Date	Action >	Action Date
10						
	Image Ref. No.	Assigned To Name / Group	> Campus/ Room	Issued Date	Action >	Action Date
11						
	Image Ref. No.	Assigned To Name / Group	> Campus/ Room	Issued Date	Action >	Action Date
12						
	Image Ref. No.	Assigned To Name / Group	> Campus/ Room	Issued Date	Action >	Action Date
13						
	Image Ref. No.	Assigned To Name / Group	> Campus/ Room	Issued Date	Action >	Action Date

SECTION 3 - TECH MANAGEMENT

DEVICE IMAGE RECORD

DEFINE THIS ONE DEVICE IMAGE FOR STANDARD SOFTWARE, SETTINGS, SECURITY & ANY OTHER DEPLOYMENT BASELINE.

Image Name or Number:	Tech Coordinator:
Device Group:	Version / Date:

☐ Teachers	☐ Students	☐ Staff
Security Baseline ☐ Endpoint protection ☐ Device encryption ☐ Content filter ☐ Admin restrictions ☐ Patch policy	Access Setup ☐ SSO ☐ Rostering ☐ Local profiles ☐ Accessibility tools ☐ Language tools	Deployment Notes ☐ New device ☐ Refresh ☐ Repair return ☐ Summer reset ☐ Pilot group

No.	Component Area	Brand/Name	Standard Included	Version / Setting	Notes
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					

SECTION 3 - TECH MANAGEMENT

TECHNOLOGY VENDOR RECORD

DOCUMENT VENDOR CONTACT, SUPPORT, CONTRACT, RENEWAL, AND OTHER NOTES.

Vendor / Provider:	Product / Service:	Internal Owner:	Account Number:	
Notes:				
Contact / Role	Email / Phone	Contract / Term	Renewal Date	Support Notes
Value ☐ High use ☐ Critical system ☐ Good support ☐ Strong data value ☐ Low value	Risk ☐ Privacy / security ☐ Integration risk ☐ Cost increase ☐ Vendor reliability ☐ Low adoption	Decision ☐ Renew ☐ Renegotiate ☐ Replace ☐ Monitor ☐ Escalate review		
Action to Take	Owner	Due Date	Decision / Status	Notes

SECTION 4 - LEADERSHIP

DASHBOARD - ALL RESOURCES

SUMMARIZE RESOURCE, CURRICULUM, TECHNOLOGY, AND STRUCTURAL PRIORITIES.

FOR

- ☐ Curriculum
- ☐ Major Systems
- ☐ Technology

- ☐ Other Resource
☐ Operations

Status:					
Organization / School:		Leader:		Review Date:	
Area	Current Visibility	Primary Concern	Priority	Next Step	Notes
Visibility ☐ Clear ☐ Partial ☐ Unknown ☐ Needs update		Priority ☐ Low ☐ Moderate ☐ High ☐ Immediate		Next Step ☐ Investigate ☐ Plan ☐ Approve ☐ Communicate	

Leadership Reflection

SECTION 4 - LEADERSHIP

SUMMARY INVESTMENT & COST PLANNING

ESTIMATE COSTS, TRADE-OFFS, AND CONNECTIONS TO THE LEARNING ARCHITECTURE PORTFOLIO

Planning Period:		Prepared By:		Review Date:		Budget Context:	
#	Investment / Resource	Purpose	Estimated Cost	Funding Source	Priority	Decision / Notes	
1							
2							
3							
4							
5							
6							
7							
8							
9							
10							
#	Need / Request	Reason	Approximate Cost	Who Benefits	Timing	Decision / Notes	
1							
2							
3							
4							
5							
6							
Decision Lens		Value Lens		Risk Lens			
☐ Maintain ☐ Reduce ☐ Replace ☐ Expand		☐ Learner impact ☐ Workflow reduction ☐ Human support ☐ Compliance		☐ Cost increase ☐ Low adoption ☐ Security ☐ No owner			

SECTION 4 - LEADERSHIP

RESOURCE DECISION

ONE INVESTMENT.

Decision Summary

Product Name:		Vendor / Provider:	
Company:		Version / Edition:	
Internal Owner:		Business Owner:	
System Type:	Primary Users:	Support Contact:	Contract Start:
Renewal Date:	License Scope:	Hosting Type:	Criticality Level:

Cost Structure

☐ One Time Cost ☐ Monthly ☐ Annual ☐ Term: _____	Cost:	Budget month or start:
---	-------	------------------------

System Description

The purpose of this system, major functionality, users served, business owner, operational importance, and known limitations.

Summary Stakeholder Reviews

Dept. Chair	Name:	Endorsement date:
Statement:		
Staff	Name:	Endorsement date:
Statement:		
Staff	Name:	Endorsement date:
Statement:		
Staff	Name:	Endorsement date:
Statement:		
Technology	Name:	Endorsement date:
Statement:		
Legal	Name:	Endorsement date:
Statement:		
Procurement	Name:	Endorsement date:
Statement:		

Executive Decision: ☐ Approved ☐ Disapproved

☐ Adopt ☐ Pilot ☐ Renew ☐ Expand ☐ Replace ☐ Retire

Strategic Rationale:

Risks & Conditions:

Leadership Approval: _____ Date: _____

Reviewer(s):

Date:

Use this review to examine how people, time, technology, resources, and relationships function together as a learning architecture.

Component	What Is Visible?	What Is Fragmented or Stressed?	What Needs Leadership Attention?
Clarity ☐ Clear roles ☐ Clear systems ☐ Clear ownership ☐ Clear outcomes	Viability ☐ Sustainable ☐ Too complex ☐ Under-supported ☐ Needs redesign	Human-Centered Fit ☐ Supports agency ☐ Supports teachers ☐ Reduces friction ☐ Improves belonging	

Evidences/Observations:

Component	What Is Invisible?	A Process? A Structure? Emerging? A new environment or population condition?	What Needs Leadership Attention?
Hidden Conditions ☐ Lack of recognition ☐ Hidden workload ☐ Unseen dependencies ☐ Unclear impacts	Structural Blind Spots ☐ Missing process ☐ Missing ownership ☐ Missing capacity ☐ Missing awareness	Emerging Risks & Opportunities ☐ Growing friction ☐ Unrecognized strengths ☐ Untapped potential ☐ Needs restructuring	

Evidences/Observations:

Reviewer(s):

Date:

Use this review to examine how access, workflow and operational clarity are enabled or blocked.

Area	Current Pattern	Example	Impact	Improvement Opportunity

People ☐ Unclear roles ☐ Overload ☐ Duplicated work ☐ Training gaps	Time ☐ Too many steps ☐ Manual work ☐ Meeting burden ☐ Slow updates	Systems ☐ Disconnected tools ☐ Poor data flow ☐ Hidden workarounds ☐ Access issues
Evidences/Observations:		

Use this review to examine the organization against outside pressures and emerging trends.

Area	Current Pattern	Example	Impact	Improvement Opportunity

Existing Structures ☐ Fixed schedules ☐ Fixed groupings ☐ Fixed pacing ☐ Fixed pathways	Changing Expectations ☐ Individual pathways ☐ Flexible timing ☐ Variable readiness ☐ Continuous access	Needs Attention ☐ Where is alignment weakening? ☐ What assumptions no longer hold? ☐ What structures create friction? ☐ What is out of sync and needs redesign?
Evidences/Observations:		

Reviewer(s):

Date:

Use this review to examine how patterns for learners are effected by the current model.

Area	Current Pattern	Example	Impact	Improvement Opportunity

Current Design ☐ Whole-group instruction ☐ Common pacing ☐ Uniform experiences ☐ Standardized progression	Learner Reality ☐ Diverse readiness levels ☐ Diverse interests ☐ Diverse support needs ☐ Diverse rates of progress	Needs Attention ☐ Underserved learners ☐ Flexibility ☐ Barriers to change ☐ Leadership courage
Evidences/Observations:		

Use this review to examine the organization for learner agency, teacher human work and obstacles.

Area	Current Pattern	Example	Impact	Improvement Opportunity

Learner Agency ☐ Choice ☐ Goal setting ☐ Reflection ☐ Independent learning	Teacher Human Work ☐ Coaching ☐ Mentoring ☐ Questioning ☐ Diagnosing misconceptions	Obstacles Known ☐ Structural ☐ Workflow ☐ Access ☐ Support / relationship
Evidences/Observations:		

Reviewer(s):

Date:

Use this review to examine the organization future viability.

Area	Current Pattern	Example	Impact	Improvement Opportunity

Current operations ☐ Established processes ☐ Defined responsibilities ☐ Functioning systems ☐ Resources are allocated	Emerging Conditions ☐ Staffing pressures ☐ Resources pressures ☐ Enrollment shifts ☐ Technology acceleration	Needs Attention ☐ What is becoming unsustainable? ☐ What is becoming possible? ☐ What requires new capability? ☐ What should explored now?
Evidences/Observations:		

Use this review to examine the organization model for future viability.

Area	Current Pattern	Example	Impact	Improvement Opportunity

Current Organizational Model ☐ Centralized decisions ☐ Standardized pathways by age ☐ Customization by teaching level ☐ Classrooms/Halls/Block schedules	Emerging Patterns ☐ Networked rotational teaching ☐ Personalized experiences ☐ Anytime learning ☐ Learning obstacle diagnosis and resolution	Needs Attention ☐ Adaptability ☐ Updated logistics ☐ Personalization capacity ☐ Capacity for transformation & continuous improvement
Evidences/Observations:		

SECTION 5 - PROCUREMENT OFFICER

RESOURCE RECORD

BUSINESS VALUE & VENDOR ASSESSMENT

Resource:	Vendor:				
Category:					
Review Type: ☐ New acquisition ☐ Pilot ☐ Renewal ☐ Expansion ☐ Replacement ☐ Other	Organizational Need:				
Beneficiaries: ☐ Students ☐ Teachers ☐ Administration ☐ Technology ☐ Parents ☐ Operations					
Need by Date:	Internal Champion:				
Reviewer(s):	Date:				
Evaluation Area	1	2	3	4	5
Value for Cost	☐	☐	☐	☐	☐
Educational Impact	☐	☐	☐	☐	☐
Operational Benefit	☐	☐	☐	☐	☐
Strategic Alignment	☐	☐	☐	☐	☐
Long-Term Viability	☐	☐	☐	☐	☐
Vendor Stability	☐	☐	☐	☐	☐
Customer Support	☐	☐	☐	☐	☐
Product Maturity	☐	☐	☐	☐	☐
Responsiveness	☐	☐	☐	☐	☐
Market Confidence	☐	☐	☐	☐	☐
Cost Summary:	Annual Cost:	Per User:	Notes:		

Decision & Auditability

Verification Item:

Need Clearly Documented	☐
Costs Examined	☐
Alternatives Considered	☐
Evidence Supports Decision	☐
Decision Trail Complete	☐
Documents Available	☐

Contract Review: ☐ Pricing ☐ Renewal Terms ☐ Termination Clause ☐ SLA ☐ Accessibility ☐ Data Ownership

☐ Data Return ☐ Security Addendum ☐ AI Disclosure ☐ AI Guardrails

Procurement Evidence:

☐ Need Statement ☐ Stakeholder Feedback ☐ Evaluation Results ☐ Cost Analysis ☐ Contract Copy ☐ Funding Documentation

Final Determination:

☐ Purchase ☐ Pilot ☐ Renew ☐ Expand ☐ Renegotiate ☐ Replace ☐ Retire ☐ Further Review

Procurement Decision:

Procurement Officer Signature: _____ Date: _____

SECTION 5 - LEGAL OFFICER

RESOURCE RECORD

COMPLIANCE, PRIVACY, DATA GOVERNANCE, RISK & DEFENSIBILITY

Resource:	Vendor:
Category:	
Review Type: ☐ Master Service Agreements (MSAs) ☐ Terms of Service ☐ Click-through agreements ☐ Subscription agreements ☐ Purchase agreements ☐ Amendments	☐ Renewal clauses ☐ Auto-renewal provisions ☐ Termination rights ☐ Indemnification ☐ Limitation of liability ☐ Insurance requirements ☐ Service Level Agreements (SLAs)
Need by Date:	Internal Champion:
Legal Officer:	Date:

Student Data Collected: ☐ Name ☐ Email ☐ Student ID ☐ Learning Data ☐ Audio ☐ Video ☐ Other

Contract Protection Checklist: ☐ Data Ownership ☐ Data Return ☐ Data Deletion ☐ Breach Notification ☐ SLA
☐ Indemnification ☐ Insurance ☐ Accessibility Commitment ☐ AI Disclosure

Data Ownership, Retention, Deletion & Portability Notes:

Privacy & Compliance Area	Yes	No	Notes				
FERPA Compliant	☐	☐					
COPPA Compliant	☐	☐					
State Privacy Laws Reviewed	☐	☐					
Data Encrypted	☐	☐					
Accessibility Reviewed	☐	☐					
AI Use Disclosed	☐	☐					
Risk Category	1	2	3	4	5		
Privacy Risk	☐	☐	☐	☐	☐		
Accessibility Risk	☐	☐	☐	☐	☐		
Contract Risk	☐	☐	☐	☐	☐		
Liability Risk	☐	☐	☐	☐	☐		
AI Risk	☐	☐	☐	☐	☐		
Public Relations Risk	☐	☐	☐	☐	☐		

Defensibility Review: Could the district defend use of this resource? ☐ Yes ☐ No ☐ With Conditions

Evidence Available: ☐ Contract ☐ DPA ☐ Privacy Policy ☐ Terms of Service ☐ Procurement Records ☐ Accessibility Review
☐ Security Review

Legal Recommendation: ☐ Approve ☐ Conditional Approval ☐ Remediate Issues ☐ Further Review ☐ Not Approved

Legal Officer Notes:

Legal Officer Signature: _____ Date: _____

Use this front side for meeting notes, observations, planning thoughts, or additional workbook detail.

