Forward > Human Agency Design

Get back to face-forward work.

AUDIT WORKBOOK

Digital Fill or Binder-Ready Print Instruments

A whole-of-district audit of workflow, systems, resources, procurement, instructional architecture, strategy execution, and human capacity.



Understanding Human Purpose,
Organizational Coherence & AI-Era Execution

SELECT YOUR WORKBOOK DOCUMENT

SECTION 0 - INTRODUCTION & COMMUNICATIONS REVIEW		
DOCUMENT / FORM	USE THIS WHEN YOU NEED TO...	PAGE
How to Use This Workbook	Understand the organization and select the forms relevant to the review.	4
Printing & Binder Setup Guide	Prepare print, binder, or digital working copies.	5
Annual Audit & Review Calendar	Place evidence gathering and decisions within the school year.	6
Organize Intelligently	Introduce the purpose and human-centered direction of the audit.	7
References & Framework Sources	Record source material supporting methods, findings, or decisions.	8
Human Communication & Agency Review, Pages 1-2	Review purpose, communication, closure, and human-to-AI work allocation.	9-10
SECTION 1 - TEACHER		
DOCUMENT / FORM	USE THIS WHEN YOU NEED TO...	PAGE
Learning Environment Snapshot	Document the physical and digital conditions shaping one learning environment.	11
My Resource Index	List the resources a teacher or course team actually uses.	12
Teacher Resource Record Set, Pages 1-4	Evaluate resource fit, workflow, experience, evidence, AI, security, and overlap.	13-16
Teaching Workflow: Course Architecture	Map course, unit, lesson, support, assessment, and resource structure.	17
Teaching Workflow: Lesson 1	Document the unit opening and complete structure of its first lesson.	18
Teaching Workflow: Lessons 2 Forward	Repeat the lesson structure for subsequent lessons.	19
SECTION 2 - ACADEMIC OFFICERS		
DOCUMENT / FORM	USE THIS WHEN YOU NEED TO...	PAGE
Instructional Architecture & Orchestration	Frame coherence, workflow, handoffs, and teacher capacity as one model.	20
Human Development Architecture Review, Pages 1-2	Test whether intended graduate capabilities are deliberately developed.	21-22
System Stack, Pages 1-2	Make the full instructional environment and workflow foundation visible.	23-24
Instructional Assembly Time Audit	Measure teacher work required to turn materials into instruction.	25
Instructional Assembly Burden Summary	Aggregate individual logs into a school or district capacity view.	26
Course Blueprint Readiness Baseline	Measure what is ready before live learner variability.	27
Midyear Instructional Regeneration Review	Reveal what teachers had to build, rebuild, or repeatedly adapt.	28
Quick Curriculum Coverage Record	Obtain a rapid view of major-subject curriculum coverage.	29
Primary Resource Record Set, Pages 1-3	Establish one major resource's role, coverage, quality, risk, and recommendation.	30-32
Digital Curriculum Quality & Workflow Evaluation, Pages 1-4	Evaluate navigation, data, AI, workflow, time, friction, and operability.	33-36
Specialized Support Coverage, Pages 1-2	Document intervention, accommodation, enrichment, and support resources.	37-38
Curriculum Resource Review by Subject: Gaps	Identify missing coverage, weak alignment, access limits, and needed action.	39
Curriculum Resource Review: Redundancy, Short Form	Make an initial keep, reduce, retire, pilot, or investigate decision.	40
Curriculum Resource Review: Redundancy, Long Form, Pages 1-4	Compare resources across quality, workflow, data, AI, security, and risk.	41-44
Review Integrity & Audit Sequence	Confirm the method, evidence environment, and review conditions are defensible.	45
Forward Procurement Process Audit, Pages 1-2	Audit the process creating the RFP and review environment.	46-47
Forward RFP & Review Alignment Record	Translate findings into corrections, owners, controls, and evidence.	48

SECTION 3 - TECHNOLOGY OFFICER		
DOCUMENT / FORM	USE THIS WHEN YOU NEED TO...	PAGE
Major System Record, Pages 1-3	Review platform ownership, access, data, security, lifecycle, risk, and renewal.	49-51
Device Fleet Summary	Summarize device categories, quantities, condition, and replacement needs.	52
Infrastructure & Specialized Tech Record	Document infrastructure, specialized tools, spaces, and support needs.	53
Device Assignment Ledger, Front and Back	Track assignment, location, user or group, return, and status.	54-55
Device Image Record	Define the standard software, settings, security, and deployment baseline.	56
Technology Vendor Record	Maintain contract, support, renewal, value, risk, and action information.	57
SECTION 4 - LEADER		
DOCUMENT / FORM	USE THIS WHEN YOU NEED TO...	PAGE
Organizational Human Network Review, Pages 1-2	Examine constituencies, communication flow, modeling, and AI-era agency.	58-59
District Identity, Brand & Human Direction Review, Pages 1-2	Clarify identity, public human promise, language, and coherence.	60-61
Dashboard: All Resources	Consolidate curriculum, technology, structural, and capacity priorities.	62
Summary Investment & Cost Planning	Connect costs, trade-offs, timing, risks, and architecture priorities.	63
Resource Decision: One Investment	Make and defend an adopt, pilot, renew, replace, or retire decision.	64
Viability Review, Pages 1-4	Assess structure, systems, workflow, learning design, and human agency.	65-68
Execution Architecture, Pages 1-3	Differentiate organization structure from architecture producing outcomes.	69-71
Strategic Planning & Execution. Pages 1-15	Translate the district promise into a traceable execution chain.	72--86
SECTION 5 - PROCUREMENT OFFICER		
DOCUMENT / FORM	USE THIS WHEN YOU NEED TO...	PAGE
Procurement Resource Record	Assess value, cost, vendor, evidence, auditability, contract, and determination.	87-88
SECTION 6 - LEGAL OFFICER		
DOCUMENT / FORM	USE THIS WHEN YOU NEED TO...	PAGE
Legal Resource Record	Review compliance, privacy, governance, accessibility, AI, and risk.	89

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

✓	Record or Resource	Where is it?

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, Technology Management, Leadership, References, and Notes.

Notes for Additional References

Annual Audit & Review Calendar

Complete the right evidence at the right point in the instructional year.

Use school-year weeks rather than fixed dates so the sequence works across district calendars. Do not treat every page as an annual assignment. Select pages by role, decision, renewal cycle, and evidence need.

RECOMMENDED REVIEW WINDOWS

School-Year Window	Purpose	Primary Owner(s)	Workbook Pages to Complete	Interpretation / Output
4-6 weeks before start of school year	Course-readiness baseline	Academic Officer + course teams	Course Blueprint Readiness Baseline; Quick Curriculum Coverage; System Stack	Measures what already exists before live instructional demand. Do not use as the normal weekly burden measure.
Opening weeks 1-3	Access and launch check	Teachers + Technology Management	Learning Environment Snapshot; Resource Index; Major System Record; Device Fleet / Assignment pages	Confirm access, setup, ownership, and launch problems. Record exceptions, but do not generalize this as steady-state burden.
Weeks 6-8	Primary assembly burden review	Representative teachers + Academic Officer	Instructional Assembly Time Audit; Teacher Workflow; Teaching Workflow lesson pages	Best view of recurring assembly after teachers know learners and Tier 2, Tier 3, multilingual, accessibility, and extension needs are visible.
Weeks 9-10	Aggregate and diagnose	Academic Officer + leadership	Instructional Assembly Burden Summary; Course Blueprint gap review; Curriculum Gaps / Redundancy	Separate course-design gaps, repeated work, and system-to-system friction. Set reduction priorities.
Midyear, after return	Regeneration review	Course teams + Academic Officer	Midyear Instructional Regeneration Review; Specialized Support Coverage; updated Teaching Workflow pages	Shows what had to be newly built, rebuilt, or repeatedly adapted after the opening term.
60-120 days before renewals	Resource and system decisions	Academic, Tech, Procurement, Legal	Primary Resource Record; Technical Quality; Major System; Vendor; Procurement; Legal pages	Use accumulated workflow, use, risk, cost, and instructional evidence before renewal or replacement decisions.
Spring planning / budget cycle	Leadership synthesis	Leadership team	Dashboard; Investment & Cost Planning; Resource Decision; Viability Review	Translate evidence into investment, retirement, redesign, staffing, and next-year blueprint actions.
End of year / summer handoff	Preserve institutional knowledge	Owners across roles	Update blueprints, ownership, system records, decisions, and next-review dates	Carry completed instructional assets forward so next year does not restart as teacher-by-teacher reconstruction.

LOCAL CALENDAR ANCHORS

First student day: _____ **Week 6 begins:** _____ **Week 8 ends:** _____ **Midyear return:** _____

Budget planning begins: _____ **Major renewal window:** _____ **Leadership decision date:** _____

Measurement rule: Use the same definitions and preferably the same representative week when comparing teachers or schools. Always report who participated, what courses were represented, and whether the window was launch, steady-state, midyear regeneration, or renewal review.

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

the LEARNING COUNSEL

This workbook was developed by Learning Counsel Research.

Founding Underwriter

KIDDOM Digital forward. Human first.

Kiddom builds technology enabling teachers and learners to unlock their full potential. It is an all-in-one education platform designed to help school districts launch, manage, and scale high-quality digital curriculum. Built for modern K-12 classrooms, the platform seamlessly integrates core curriculum with powerful tools for teacher lesson planning, student assessment, and real-time performance analytics with print versions.

By transforming static materials into dynamic, interactive learning experiences, Kiddom gives administrators centralized control over instructional equity while empowering teachers to easily differentiate lessons and address learning gaps. It provides decision-makers with a secure, cloud-based solution that maximizes curriculum investments, simplifies technology ecosystems, and drives measurable student growth.

Contributing Underwriter

KnowStory

KnowStory supports ongoing exploration of Human Agency Design, educational orchestration, Time AI, and future-ready learning systems.

REFERENCES & FRAMEWORK SOURCES

Resources connected to the thinking behind this workbook.

Type	Source	Link / Location

ANY ROLE

PURPOSE Every job exists within a human communication network. A communication begins at an origination point, travels through a channel, reaches a receiver, and must be understood. The receiver then becomes an originator by responding, relaying, deciding, or acting. A group is made of these connected exchanges. When a required communication does not originate, arrive, become understood, transfer, or close, the failure can interrupt work as completely as a computer that will not boot, a keyboard that will not accept input, or a network outage. A culture of responsible communicators will also relay and answer communications to keep the human network clean of non-responsiveness to the public and fellow staff.

Role / Function: _____ **Department / School:** _____ **Reviewer:** _____ **Date:** _____

A. Defining Purpose

What is the primary purpose of your role?

How is the work defined?

What is the actual work predominately?

Who or what must be made better because this role exists?

What human value should this role create?

B. The Communication Exchange

ORIGINATOR	CHANNEL	RECEIVER	UNDERSTANDING	RESPONSE / TRANSFER
Who starts?	How does it travel?	Who must receive it?	How is meaning confirmed?	What must happen next?

Name one or more communication this role must originate without waiting to be asked.

Name one or more communication this role must reliably receive and understand.

ANY ROLE

C. Communication Flow and Failure

What must this role relay, transfer, or carry forward rather than allowing it to stop here?

What communication requires a reply, decision, acknowledgment, completion, or other closure?

Where does communication most often fail for this role?

☐ Failure to originate ☐ Wrong or missing channel ☐ Failure to receive ☐ Failure to understand ☐ Failure to relay ☐ Failure to close

What is the human or operational consequence of that failure?

D. Human and AI Recognition

How would you define human intelligence in your own words?

How would you define artificial intelligence in your own words?

What work in this role could AI help perform?

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

Immediate Environment Notes / Needs

SECTION 1 - TEACHER

MY RESOURCE INDEX

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 do to 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 the 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

Pattern	When Used	Teacher Role	Flow Notes / Process Sketch
☐ 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	*Start → steps → learner action → teacher action → evidence/output → follow-up.* ***Use this space to write or draw the one flow pattern.***

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,** mostly raw usage/completion data, or no evidence?	☐	☐	
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	☐ Needs Academic Officer review
☐ Keep but clarify use	☐ Needs Tech review
☐ Compare with another resource	☐ Needs cost review
☐ Replace / retire possibility	☐ Investigate further

TEACHING WORKFLOW

Visualizing Course Management

Building a Manageable Course Architecture

Effective instruction is not created as one large document. It is assembled from interconnected building blocks that can be organized, reused, adapted, and improved over time. A well-designed course typically follows this structure:

Course → Units → Lessons → Learner Supports & Extensions, with each part having its own Check-for-Understanding

- A **course** defines the overall learning experience.
- Each course contains multiple **units** organized around major concepts or standards.
- Each unit contains multiple **lessons** that guide daily instruction.
- Each lesson can include differentiated pathways and resources for varying learner needs.

The result is a flexible instructional architecture that supports consistency while allowing personalization.

Lesson Variations and Supports

For each Course, a Core Curriculum should be noted, with each unit and lesson identifying the resource or module used, and preferably, normal time to complete Tier 1.

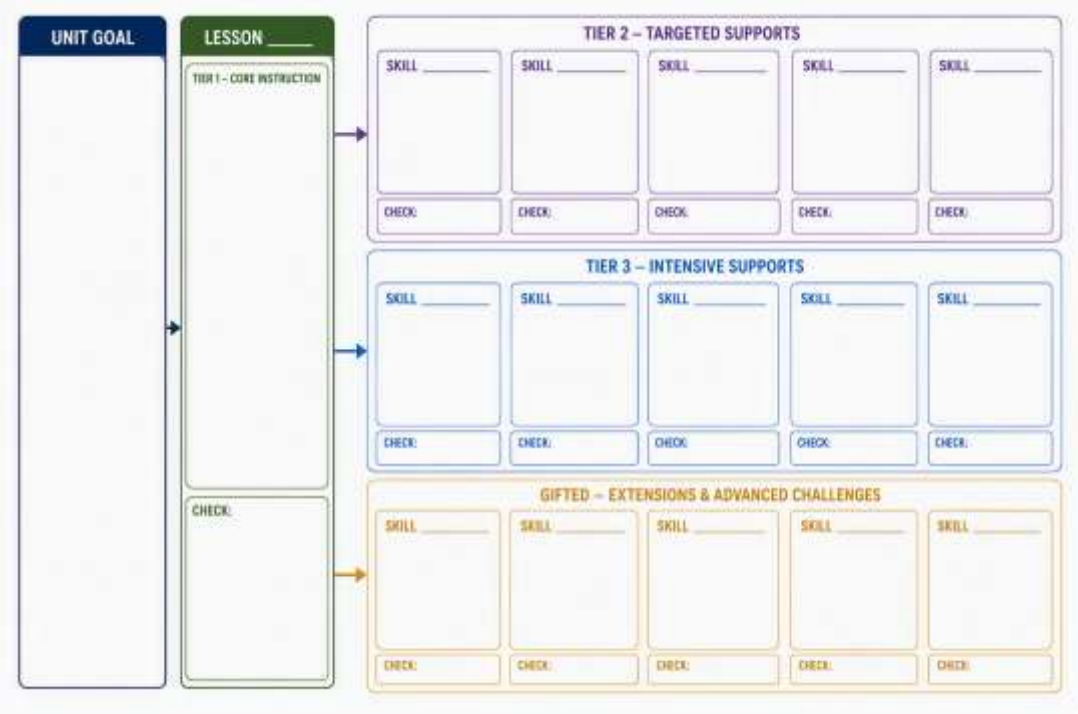
Checklist for Each Lesson Within Each Unit:

- Core instructional resource
- MTSS Tier 2 interventions skills map
- MTSS Tier 3 interventions skills map
- Gifted and advanced learner extensions map
- Check-for-understanding or assessment teacher reminders for Tier 1 and each skill for the other tiers
- Digital tools and media to be used for each part
- Multilingual learner supports for each lesson part
- Notes per *each lesson component and tier addressing accessibility and special needs:*

  ☐ Color Blindness ☐ Low Vision ☐ Dyslexia ☐ ADHD ☐ Autism ☐ English Learner ☐ Hearing Support ☐ Fine Motor Support

Because resources are attached to individual lessons rather than the entire course, teachers can customize targeted support.

The following pages can be copied repeatedly so that each of a teacher's units has a unit-opening page and one or more additional pages for subsequent lessons. The open boxes and form provide the workspace.



SECTION 1 - TEACHER

TEACHING WORKFLOW - LESSON 1

Unit Planning

UNIT GOAL	LESSON 1 TIER 1 CHECK:

TIER 2 - TARGETED SUPPORTS

SKILL:	SKILL:	SKILL:	SKILL:	SKILL:
CHECK:	CHECK:	CHECK:	CHECK:	CHECK:

TIER 3 - TARGETED SUPPORTS

SKILL:	SKILL:	SKILL:	SKILL:	SKILL:
CHECK:	CHECK:	CHECK:	CHECK:	CHECK:

GIFTED - EXTENSIONS & ADVANCED CHALLENGES

SKILL:	SKILL:	SKILL:	SKILL:	SKILL:
CHECK:	CHECK:	CHECK:	CHECK:	CHECK:

Core Resource(s):_____

Curriculum, textbook, module, video, activity, assessment, or digital content used for this lesson for any Tier:

_____

Est. Tier 1 Time to complete: Class blocks _____ or Total minutes _____
Est. Tier 2 Time to complete: Class blocks _____ or Total minutes _____ + Remediation minutes _____
Est. Tier 3 Time to complete: Class blocks _____ or Total minutes _____ + Remediation minutes _____
Est. Gifted/Extension Additional Time: Total Minutes _____

Multilingual Supports:_____

Accessibility & Special Needs Notes:_____

Other Notes & Teacher Reminders:_____
Teacher Tier 1 Prep time: _____ Tier 2 Prep: _____ Tier 3 Prep: _____ Gifted Prep: _____
Total Resources/Systems used/accessed: _____ Total Teacher-Created Supports:_____
Notes on the Largest Workflow Bottleneck, Resource Gaps, and AI Orchestration Opportunities:

SECTION 1 - TEACHER

TEACHING WORKFLOW - LESSONS 2 Forward

Unit Planning

LESSON ___

TIER 1 CHECK:

TIER 2 - TARGETED SUPPORTS

SKILL:	**SKILL:**	**SKILL:**	**SKILL:**	**SKILL:**
CHECK:	**CHECK:**	**CHECK:**	**CHECK:**	**CHECK:**

TIER 3 - TARGETED SUPPORTS

SKILL:	**SKILL:**	**SKILL:**	**SKILL:**	**SKILL:**
CHECK:	**CHECK:**	**CHECK:**	**CHECK:**	**CHECK:**

GIFTED - EXTENSIONS & ADVANCED CHALLENGES

SKILL:	**SKILL:**	**SKILL:**	**SKILL:**	**SKILL:**
CHECK:	**CHECK:**	**CHECK:**	**CHECK:**	**CHECK:**

Core Resource(s):_____

Curriculum, textbook, module, video, activity, assessment, or digital content used for this lesson for any Tier:
_____

Est. Tier 1 Time to complete: Class blocks _____ or Total minutes _____
Est. Tier 2 Time to complete: Class blocks _____ or Total minutes _____ + Remediation minutes _____
Est. Tier 3 Time to complete: Class blocks _____ or Total minutes _____ + Remediation minutes _____
Est. Gifted/Extension Additional Time: Total Minutes _____

Multilingual Supports:_____

Accessibility & Special Needs Notes:_____

Other Notes & Teacher Reminders:_____
Teacher Tier 1 Prep time: _____ Tier 2 Prep: _____ Tier 3 Prep: _____ Gifted Prep: _____
Total Resources/Systems used/accessed: _____ Total Teacher-Created Supports:_____
Notes on the Largest Workflow Bottleneck, Resource Gaps, and AI Orchestration Opportunities:

SECTION 2 - ACADEMIC OFFICER | INSTRUCTIONAL ARCHITECTURE & ORCHESTRATION

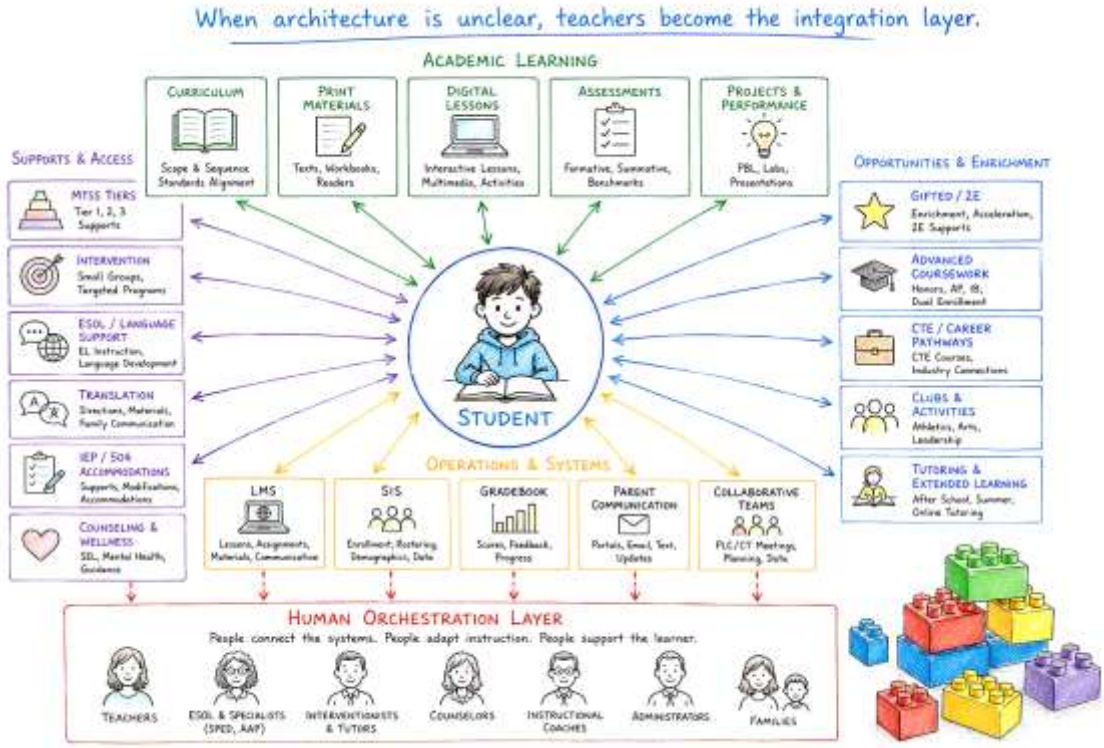
The Core Idea

Most districts do not have a clean instructional architecture. They have a collection of disconnected instructional components. Cross-system integrations do not necessarily simplify workflow. This section helps educators make the pile visible, trace the actual human handoffs, and redesign the work so teachers are not entirely the hidden integration layer.

The important insight from this working section is this: Educators experience architecture as workflow, not as a diagram. Their workflow involves multiple logins and interfaces, but those systems should collectively reduce teacher workload, improve coherence, and create a less confusing learner experience. District leaders and tech directors see systems. Academic leaders see content, modality, alignment, lesson quality, and instructional execution. Teachers experience handoffs -- and the more sources, the more learner variability, the more time is lost moving among those elements.

Coherence is the condition in which curriculum, assessments, supports, resources, technology, AI, communications, and time are deliberately organized around a common instructional architecture. In coherent schools, teachers deliver, adapt, diagnose, coach, and build relationships.

In incoherent schools, teachers spend much of their time connecting systems, filling gaps, creating missing supports, reconciling conflicting resources, and acting as the institution's integration layer.



This workbook section should help a district or school distinguish between having tools and curriculum components and having a coherent operating model:

1. What systems exist that touch instruction or are used primarily for instruction? What courseware, textbooks, and other instructional resources are in use?
2. Where does the teacher have to manually move information or materials?
3. Where do MTSS tiers, multilingual, 2E, gifted and other intervention needs create additional workflows?
4. Where do print and digital resources align or fail to align?
5. Where is the same work repeated by multiple teachers when it could be replaced by a single, high-quality sourced instructional resource?
6. Where could better human or AI orchestration reduce labor?
7. Where should teacher judgment remain versus teachers defer to purchased curriculum to create operational continuity?

SECTION 2 - ACADEMIC OFFICER

PAGE 1 of 2 - HUMAN DEVELOPMENT ARCHITECTURE REVIEW

From Intended Graduate to Actual Learner Experience

PURPOSE Portraits of a Graduate make desired learner capabilities explicit. This review examines whether the district learning architecture gives all learners repeated opportunities to practice and demonstrate those capabilities. It does not duplicate curriculum, standards, resource, assessment, or technology reviews elsewhere in the workbook. It asks whether intended human development is designed, broadly accessible, and visible in actual learner experience.

Use the district's own Portrait of a Graduate or equivalent language. Do not replace it with a new competency list. Reference other workbook pages for curriculum, workflow, system, and resource evidence.

District / School: _____ **Academic reviewer(s):** _____ **Grade / Program scope:** _____ **Date:** _____

A. PORTRAIT OF A GRADUATE ALIGNMENT

DISTRICT GRADUATE CAPABILITY	WHERE INTENTIONALLY PRACTICED	HOW LEARNERS DEMONSTRATE OWNERSHIP	ACCESS / EVIDENCE

B. INTENDED CAPABILITY VS. DAILY EXPERIENCE

DESIGN QUESTION	EVIDENCE / FINDING
Which capabilities are explicitly designed into courses, projects, routines, advising, extracurriculars, or community experiences?	
Which capabilities are named but depend on isolated teachers, special programs, advanced courses, electives, or chance?	
What do daily schedules, rules, assignments, feedback, and assessment practices reinforce most strongly?	
Where may learner initiative, questioning, choice, leadership, self-advocacy, or authentic contribution be unnecessarily limited?	
Where are reliability, responsibility, sequence, procedure, and follow-through developed constructively alongside agency?	

Opportunity distribution check

☐ Available across schools	☐ Available across grade levels	☐ Available in core learning	☐ Available beyond advanced/elective programs
☐ Visible to multilingual learners	☐ Visible to learners with disabilities	☐ Includes authentic audiences or consequences	☐ Includes learner reflection or defense

Most important gap between the intended graduate and the actual learner experience

SECTION 2 - ACADEMIC OFFICER

PAGE 2 of 2 - HUMAN DEVELOPMENT ARCHITECTURE REVIEW

Capability Development, Adult Modeling & AI-Era Readiness

PURPOSE This page helps academic leadership determine whether graduate capabilities are reinforced by adult practice, learning design, and responsible AI use. It stays within familiar Portrait of a Graduate work while exposing where organizational incoherence, unequal opportunity, or automation may unintentionally weaken the human capabilities the district intends to develop.

District / School: _____ **Academic reviewer(s):** _____ **Grade / Program scope:** _____ **Date:** _____

HUMAN DEVELOPMENT CONDITION	NOT VISIBLE	ISOLATED / ACCIDENTAL	DESIGNED / REPEATABLE	EVIDENCE / LOCATION
Learners communicate for real audiences and purposes	☐	☐	☐	
Learners collaborate with meaningful interdependence	☐	☐	☐	
Learners initiate, make choices, or set direction	☐	☐	☐	
Learners solve unfamiliar or open-ended problems	☐	☐	☐	
Learners exercise judgment and consider consequences	☐	☐	☐	
Learners adapt, revise, persist, and learn from feedback	☐	☐	☐	
Learners assume responsibility and demonstrate ownership	☐	☐	☐	
Learners appropriately direct, inspect, question, or challenge AI output	☐	☐	☐	

ADULT AND ORGANIZATIONAL MODELING

GRADUATE CAPABILITY	HOW ADULT PRACTICE MODELS IT	WHERE ORGANIZATIONAL CONDITIONS CONTRADICT IT	CHANGE NEEDED

AI-ERA HUMAN DEVELOPMENT

QUESTION	RESPONSE
What human capabilities become more valuable as AI assumes more retrieval, production, routing, analysis, or coordination work?	
Where does AI expand learner agency, access, expression, feedback, or opportunity?	
Where could AI bypass practice, judgment, ownership, relationship, or genuine understanding?	
What must educators continue to observe, discuss, coach, verify, and decide?	

Academic design direction: What should become more intentional, more equitable, and more distinctly human?

SECTION 2 - ACADEMIC OFFICER

PAGE 1 - SYSTEM STACK

Visualizing Your District or School InvenStory as Workflow Foundations

List every system, app, platform, content source, assessment tool, data source, print resource, communication channel, office suite, and manual process teachers touch in one instructional cycle *for one example teacher in one grade, one subject.* Or use the blank blocks to visualize any set of categories.

Categories:

Enterprise Systems

- SIS
- LMS
- Assessment platform
- Gradebook
- Rostering/SSO
- Data dashboard
- MTSS/intervention tracker

Curriculum and Content

- Core curriculum
- Assessment or quizzing
- Print materials
- Digital curriculum
- E-books
- Videos
- Supplemental resources
- Teacher-created materials
- AI-generated materials

Student Learning Tools

- Office Suites
- Courseware
- Content libraries
- Practice apps
- Adaptive software
- Creativity tools
- Translation tools
- Reading tools
- Math tools
- Intervention tools
- Enrichment tools

Human Support Systems or Services

- ESOL support
- Special education support
- Gifted/AAP support
- Instructional coach
- MTSS skills maps
- Counselor
- Family liaison
- Tutor/interventionist

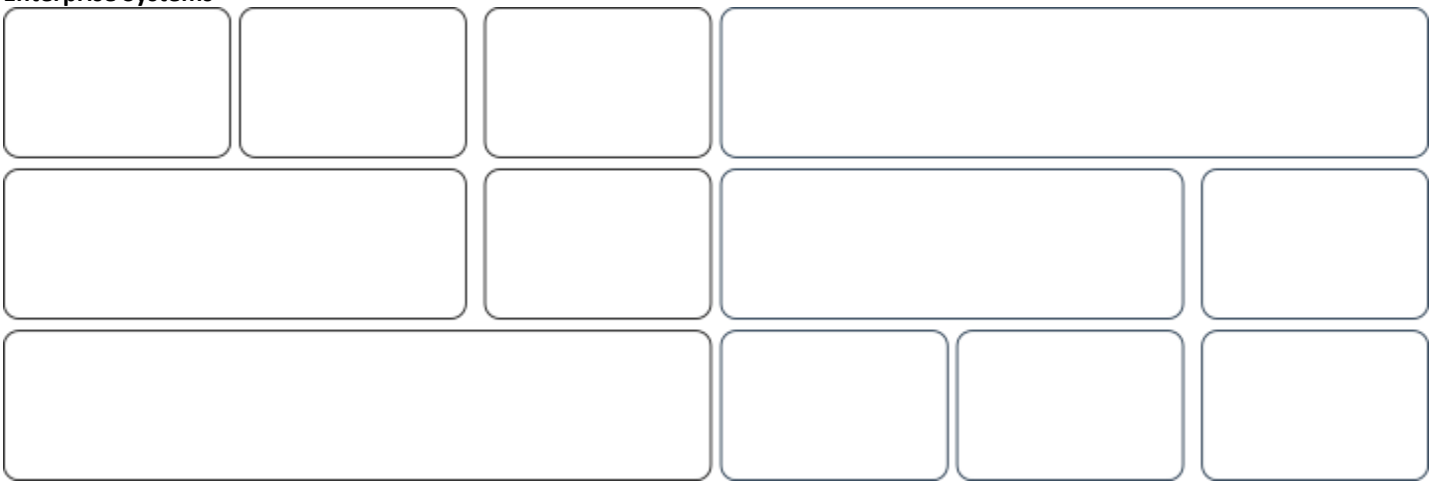
Communication & Office Suites

- Parent portal postings
- Email
- Texting app
- Translation app
- LMS messages
- Paper handouts

Manual Work & Digital Traffic

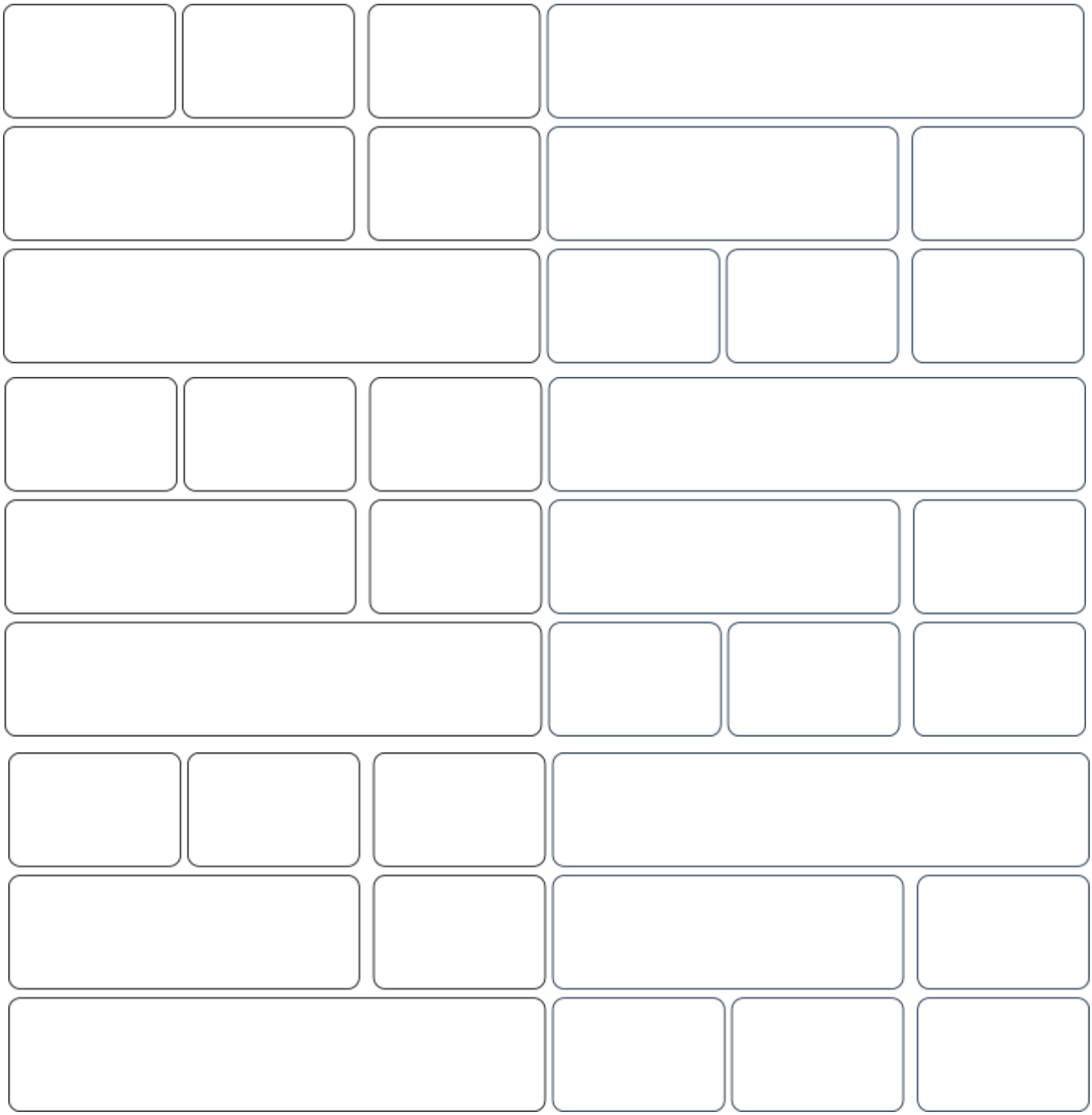
- Lesson distribution & collection
- Copy/paste between systems
- Manual data entry per lesson
- Manual translation per task
- Manual regrouping per lesson
- Manual scaffold creation per lesson
- Manual enrichment creation per lesson
- Manual printing per lesson or task
- Manual grading per lesson by part
- Manual parent explanation per learner
- Manual scheduling per lesson

Enterprise Systems



Visualizing Your District or School InvenStory Enterprise
Use multiple copies of this page for other categories: Enterprise systems, Curriculum & Content, Student Learning Tools, Human Support Systems or Services, Communications & Office Suites, Manual & Digital Traffic.

Label_____



SECTION 2 - ACADEMIC OFFICER

INSTRUCTIONAL ASSEMBLY TIME AUDIT

Capture the work required to turn available materials into teachable instruction.

Teacher / Team: _____ **Grade / Course:** _____ **Subject:** _____ **Representative Week:** _____

Complete for one representative week. Record only teacher work time, not learner instructional time. Include work completed before school, after school, during planning periods, at home, or during team collaboration.

ASSEMBLY WORK LOG

Assembly Activity	What Counts	Minutes	Times This Week	Weekly Total Minutes
Locate and review instructional resources	Searching, comparing, validating fit and quality			
Build or revise lesson sequence	Selecting parts, ordering activities, filling transitions			
Align standards and objectives	Tagging, verifying depth, reconciling sources			
Create missing instructional materials	Slides, examples, prompts, handouts, models			
Prepare Tier 2 and Tier 3 supports	Scaffolds, remediation, alternate explanations			
Prepare enrichment or advanced extensions	Acceleration, deeper tasks, gifted supports			
Adapt for multilingual learners	Translation, vocabulary, language scaffolds			
Adapt for IEPs, accommodations, or access	Format changes, accessibility, learner-specific supports			
Create or modify assessments	Checks for understanding, rubrics, items, performance tasks			
Configure and distribute assignments	Uploads, links, groups, due dates, system setup			
Move or reconcile information across systems	Copy/paste, duplicate entry, exports, uploads			
Review evidence and plan follow-up	Data interpretation, regrouping, re-teaching decisions			
Other instructional assembly work	Describe in notes			

QUICK TOTAL

Total assembly minutes	÷ 60 = assembly hours	Total teacher work hours	Assembly % of work time

SECTION 2 - ACADEMIC OFFICER

INSTRUCTIONAL ASSEMBLY BURDEN SUMMARY

Convert individual logs into a school or district view of capacity, repetition, and redesign opportunities.

School / District: _____ **Course / Grade-Subject Scope:** _____ **Review Period:** _____

Aggregate completed teacher audits only when the same definition of instructional assembly and preferably the same representative period were used. Report the number of participating teachers with every percentage.

AGGREGATE FINDINGS

Teachers represented		**Courses / grades represented**	
Average weekly work hours		**Average weekly assembly hours**	
Average assembly percentage		**Range of assembly percentages**	
Median assembly percentage		**Most common high-burden activity**	
Estimated repeated work across teachers		**Highest-value reduction opportunity**	

WHERE THE TIME IS GOING

Top Assembly Activity	Avg. Hours / Teacher	Teachers Repeating Work	Current Owner	Opportunity

REDUCTION DECISION

Work to Eliminate or Reduce	What Should Be Shared / Pre-Built	Human Judgment to Preserve	Owner & Next Action

LEADERSHIP INTERPRETATION

☐ **Isolated burden** ☐ **Course-level design gap** ☐ **System-to-system friction** ☐ **Districtwide structural burden**

Decision statement: What work should no longer be rebuilt teacher by teacher, and what capacity should be returned to direct instruction, diagnosis, coaching, relationships, and learner support?

_____

_____

SECTION 2 - ACADEMIC OFFICER

COURSE BLUEPRINT READINESS BASELINE

Measure what already exists before teachers encounter live learner variability.

Course: _____ **Grade / Subject:** _____ **Reviewer / Team:** _____ **Baseline Date:** _____

Complete 4-6 weeks before students arrive, or at the start of a course redesign. This is a readiness measure, not a weekly time study. Count an element as complete only when it is findable, usable, aligned, and ready for assignment or delivery.

BLUEPRINT COMPLETENESS BY INSTRUCTIONAL LAYER

Blueprint Element	Complete / Expected	% Ready	Primary Source or Builder	Status	Evidence / Location /Notes
Course scope, outcomes, and standards	____ / ____	____%	☐ District / publisher ☐ School / team ☐ Individual teacher	☐ Ready ☐ Partial ☐ Missing	
Unit sequence and prerequisite relationships	____ / ____	____%	☐ District / publisher ☐ School / team ☐ Individual teacher	☐ Ready ☐ Partial ☐ Missing	
Tier 1 lessons / modules	____ / ____	____%	☐ District / publisher ☐ School / team ☐ Individual teacher	☐ Ready ☐ Partial ☐ Missing	
Checks for understanding and assessments	____ / ____	____%	☐ District / publisher ☐ School / team ☐ Individual teacher	☐ Ready ☐ Partial ☐ Missing	
Tier 2 targeted supports	____ / ____	____%	☐ District / publisher ☐ School / team ☐ Individual teacher	☐ Ready ☐ Partial ☐ Missing	
Tier 3 intensive supports	____ / ____	____%	☐ District / publisher ☐ School / team ☐ Individual teacher	☐ Ready ☐ Partial ☐ Missing	
Gifted / advanced extensions	____ / ____	____%	☐ District / publisher ☐ School / team ☐ Individual teacher	☐ Ready ☐ Partial ☐ Missing	
Multilingual learner supports	____ / ____	____%	☐ District / publisher ☐ School / team ☐ Individual teacher	☐ Ready ☐ Partial ☐ Missing	
IEP, accessibility, and accommodation supports	____ / ____	____%	☐ District / publisher ☐ School / team ☐ Individual teacher	☐ Ready ☐ Partial ☐ Missing	
Estimated instructional time / pacing norms	____ / ____	____%	☐ District / publisher ☐ School / team ☐ Individual teacher	☐ Ready ☐ Partial ☐ Missing	
Required systems, resources, and handoffs	____ / ____	____%	☐ District / publisher ☐ School / team ☐ Individual teacher	☐ Ready ☐ Partial ☐ Missing	

BASELINE READINESS FINDING

Overall blueprint readiness: _____ % **Tier 1 readiness: _____ %** **Tier 2-3 readiness: _____ %** **Extension / access readiness: _____ %**

Interpretation: Missing blueprint elements predict work that must be sourced, built, adapted, connected, or invented during instruction. Identify the missing elements, but do not yet call all missing work recurring burden. The Week 6-8 time audit determines what teachers actually have to assemble.

SECTION 2 - ACADEMIC OFFICER

MIDYEAR INSTRUCTIONAL REGENERATION REVIEW

Reveal what teachers had to build, rebuild, or repeatedly adapt after instruction began.

Teacher / Team: _____ **Course / Grade: _____** **Subject: _____** **Review Period: _____**

Complete at midyear after teachers have experienced real learner variability. Review completed work, not estimates alone. Count what was newly created, substantially rebuilt, or repeatedly adapted because the existing course blueprint did not provide a usable element.

WHAT HAD TO BE REGENERATED

Created or Rebuilt Element	Number	Approx. Hours	Teachers Doing Similar Work	Pattern	Evidence / Example / Notes
Tier 1 lesson or major lesson component				☐ Once ☐ Repeated	
Lesson sequence / transition				☐ Once ☐ Repeated	
Assessment or check for understanding				☐ Once ☐ Repeated	
Tier 2 scaffold / targeted support				☐ Once ☐ Repeated	
Tier 3 intervention / intensive support				☐ Once ☐ Repeated	
Gifted or advanced extension				☐ Once ☐ Repeated	
Multilingual support / translation				☐ Once ☐ Repeated	
IEP, accommodation, or accessibility adaptation				☐ Once ☐ Repeated	
Re-teaching pathway / prerequisite repair				☐ Once ☐ Repeated	
Assignment setup / system configuration				☐ Once ☐ Repeated	
Data reconciliation / regrouping workflow				☐ Once ☐ Repeated	
Family-facing explanation or communication				☐ Once ☐ Repeated	

REGENERATION BURDEN AND INSTITUTIONAL RESPONSE

Total items created / rebuilt: _____ **Total hours: _____** **Repeated across teachers: _____** **Reusable assets preserved: _____**

Decision Category	Specific Work / Evidence	Owner & Next Action
Work that should become a shared course asset		
Work that should be sourced from a provider		
Work that can be automated or system-connected		
Work that requires teacher judgment & should remain human		

Final finding: Regeneration is structural when multiple teachers repeatedly rebuild the same missing course element. Preserve the strongest versions in the Course Blueprint, assign ownership, and track whether the next review cycle reduces recurring assembly without removing teacher judgment.

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, their instructional purpose, target learner groups, curriculum roles, and unique characteristics.

#	Resource	Purpose / Trigger	Flow Pattern	Coverage / Standards Notes	Decision
1					
2					
3					
4					
5					

Status	Decision Needed	Follow-Up
☐ Adequate coverage	☐ Keep	☐ Teacher input
☐ Minor gaps	☐ Revise use	☐ Usage data
☐ Major gaps	☐ Replace	☐ Cost review
☐ Redundancy present	☐ Investigate	☐ 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.

SECTION 2 - ACADEMIC OFFICER

PAGE 1 of 3 - PRIMARY RESOURCE RECORD SET

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?	☐	☐	

SECTION 2 - ACADEMIC OFFICER

PAGE 2 of 3 - PRIMARY RESOURCE RECORD SET

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.

SECTION 2 - ACADEMIC OFFICER

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?	☐	☐	
Can one lesson be automatically versioned, adapted, or differentiated while preserving instructional coherence?	☐	☐	
Can instructional pacing be adjusted across courses, units, weeks, and days without rebuilding instructional materials?	☐	☐	
Can learner misconceptions be automatically grouped and converted into actionable instructional groupings?	☐	☐	

Architecture Flags

		Evidence Outputs Present	
☐ Fixed sequence	☐ Remediation pathway visible	☐ Completion	☐ Item analysis
☐ Modular library	☐ Enrichment pathway visible	☐ Scores	☐ Error patterns
☐ Teacher-controlled sequence	☐ Pacing/time norms present	☐ Attempts	☐ Growth over time
☐ Adaptive pathway	☐ Standards reportable	☐ Time on task	☐ Teacher dashboard
☐ Prerequisite logic visible	☐ Alignment evidence unclear	☐ Standards mastery	☐ Admin dashboard
		☐ Skill mastery	☐ Exportable data

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?	☐	☐	

SECTION 2 - ACADEMIC OFFICER | PAGE 1 of 4 - DIGITAL CURRICULUM QUALITY & WORKFLOW EVALUATION

CROSS-ROLE REVIEW - LEARNER EXPERIENCE, AGE FIT & INTERFACE DESIGN

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

Resource Name:	**Reviewer:**

Content Provenance	**Content Governance**	**Personalization Controls**	**Cognitive Demand**
☐ Publisher-created	☐ Version control visible	☐ Teacher-controlled	☐ Recall
☐ District-created	☐ Last update visible	☐ Student-controlled	☐ Comprehension
☐ Teacher-created	☐ Editorial oversight visible	☐ AI-driven	☐ Application
☐ Open Educational Resource	☐ Source citations visible	☐ Fixed	☐ Manipulative
☐ AI-generated	☐ Editable text	☐ Mixed	☐ Analysis
☐ Hybrid			☐ Evaluation
☐ Unknown Source			☐ Creation

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.

Measure	1	2	3	4	5	Notes
Age-Appropriate Navigation & Recognition						
Navigation vocabulary, labels, icons, and reading demand are appropriate for learner age and subject.	☐	☐	☐	☐	☐	
Menu conventions are recognizable for intended learners (full labels, hamburger menu, three-dot menu, tabs, tiles).	☐	☐	☐	☐	☐	
Learners can identify current location, prior step, next step, lesson status, and a reliable route back.	☐	☐	☐	☐	☐	
Navigation does not hide core curriculum parts in unrelated areas or require excessive searching.	☐	☐	☐	☐	☐	
Affordance, Signifiers & Action Design						
Buttons and clickable objects look actionable; action targets are large enough for intended age and device.	☐	☐	☐	☐	☐	
Drag-and-drop zones, selectable objects, toolbars, links, and disabled states are visually clear.	☐	☐	☐	☐	☐	
Feedback confirms an action occurred; destructive actions warn, allow cancel, and support recovery.	☐	☐	☐	☐	☐	
Feature discoverability and interface density fit the subject, task complexity, and learner maturity.	☐	☐	☐	☐	☐	
Responsive, Touch & Device Design						
Touch, swipe, stylus, mouse, trackpad, and keyboard behavior is appropriate on district devices.	☐	☐	☐	☐	☐	
Touch-dependent functions remain usable on non-touch laptops, including Apple laptops and other deployed devices.	☐	☐	☐	☐	☐	
Orientation, window resizing, browser zoom, and increased text size do not hide controls or interrupt task completion.	☐	☐	☐	☐	☐	
When text is enlarged, modal close controls, navigation, response fields, and submit controls remain visible.	☐	☐	☐	☐	☐	
Information Architecture, Nesting & Continuity						
Nesting reflects the logic of the curriculum: course, unit, lesson, activity, evidence, feedback, and next action.	☐	☐	☐	☐	☐	
Related resources, supports, notes, and assessments remain contextually connected rather than disjointed across the site.	☐	☐	☐	☐	☐	
Save-and-return, location memory, completed-state visibility, and interruption recovery preserve learner context.	☐	☐	☐	☐	☐	
Learners and teachers do not lose prior work, place, filters, annotations, or selected settings.	☐	☐	☐	☐	☐	
Accessibility & Inclusive Interface						
Color, contrast, font, spacing, captions, keyboard navigation, focus order, and screen-reader behavior are usable.	☐	☐	☐	☐	☐	
Error messages identify the problem and corrective action without relying only on color, sound, or technical codes.	☐	☐	☐	☐	☐	
Language, symbols, examples, avatars, and imagery are age-appropriate and allow policy-respectful cultural or religious representation.	☐	☐	☐	☐	☐	

Interface Evidence to Demonstrate

☐ Large-text and zoom test	☐ Touch and non-touch device test	☐ Keyboard-only navigation	☐ Screen-reader path
☐ Modal close at enlarged text	☐ Age-level learner walkthrough	☐ Interrupted-session recovery	☐ Curriculum nesting/path map

Summary of this Page

	1	2	3	4	5	

SECTION 2 - ACADEMIC OFFICER

PAGE 2 of 4 - DIGITAL CURRICULUM QUALITY & WORKFLOW EVALUATION

CROSS-ROLE REVIEW- DIGITAL LEARNING FUNCTIONS, CREATION & SOCIAL USE

Resource Name:	**Reviewer:**

Rate each item: X = insufficient evidence | 1 = deficient | 2 = limited | 3 = adequate | 4 = strong | 5 = exemplary

Measure	1	2	3	4	5	Notes
Annotation, Retention & Personal Organization						
Learners can annotate, highlight, markup, or take notes inside relevant documents, books, lessons, images, or media.	☐	☐	☐	☐	☐	
Annotations are retained, searchable or recoverable, visible on return, and exportable or shareable where appropriate.	☐	☐	☐	☐	☐	
Teachers and learners can bookmark content, reports, evidence, passages, and return points separately.	☐	☐	☐	☐	☐	
Teachers and learners can create, name, rename, organize, and retain their own folders and subfolders of system elements.	☐	☐	☐	☐	☐	
Learner Proof, Sketching & Multimodal Response						
Learners can demonstrate understanding through text, drawing, sketching, annotation, math notation, audio, image, video, or presentation.	☐	☐	☐	☐	☐	
Learners can record and submit video or audio proof without requiring disconnected tools or unsafe workarounds.	☐	☐	☐	☐	☐	
Sketching, diagramming, storyboarding, comic-book making, or visual composition functions fit the subject and assignment.	☐	☐	☐	☐	☐	
The system preserves original work, revisions, feedback, ownership, and portfolio evidence.	☐	☐	☐	☐	☐	
Authoring, Manipulation & Construction						
Drag-and-drop authoring allows teachers or learners to build lessons, sequences, mixed-media work, or proofs without coding.	☐	☐	☐	☐	☐	
Interactive diagrams, manipulatives, simulations, construction tools, maps, models, sandboxes, or probeware support authentic subject work.	☐	☐	☐	☐	☐	
Learners can manipulate variables, observe consequences, repeat actions, and compare results rather than passively watch.	☐	☐	☐	☐	☐	
Authoring permissions, templates, revision history, reuse, and sharing are appropriate to learner and teacher roles.	☐	☐	☐	☐	☐	
Communication, Collaboration & Social Interaction						
Whole-group activities use echoing, reactions, emojis, polling, posting, or response signals in an instructionally useful way.	☐	☐	☐	☐	☐	
Class-level co-editing, discussion, peer feedback, group workspaces, and teacher-visible collaboration are supported.	☐	☐	☐	☐	☐	
Schoolwide and districtwide sharing or interest groups have age, moderation, identity, audience, and archive controls.	☐	☐	☐	☐	☐	
Live chat clearly identifies whether the responder is AI, a human tutor, teacher, peer, or other authorized person.	☐	☐	☐	☐	☐	
Identity, Avatars, Incentives & Safety						
Assigned avatars are policy-appropriate, editable or switchable, and inclusive of approved clothing, head coverings, symbols, and identity choices.	☐	☐	☐	☐	☐	
Avatars do not expose unnecessary identity and do not force culturally or religiously inappropriate representations.	☐	☐	☐	☐	☐	
Incentives reward learning without simulated gambling, wagering, purchasable chance, or coin economies that distract from learning.	☐	☐	☐	☐	☐	
Badges, progress indicators, recognition, leaderboards, and rewards are optional, age-appropriate, and do not publicly stigmatize learners.	☐	☐	☐	☐	☐	

Digital Function Profile

☐ Annotation retained	☐ Teacher bookmarks	☐ Learner bookmarks	☐ Teacher folders/subfolders
☐ Learner folders/subfolders	☐ Audio proof	☐ Video proof	☐ Sketch/diagram
☐ Comic/storyboard	☐ Drag-and-drop authoring	☐ Co-editing	☐ Class social interaction
☐ School interest groups	☐ District interest groups	☐ Human live chat	☐ AI chat clearly labeled

Summary of this Page

	1	2	3	4	5	

CROSS-ROLE REVIEW - MULTIMEDIA TEACHING, AUDIO, INTELLIGENCE & AI

Resource Name: **Reviewer:**

Rate each item: X = insufficient evidence | 1 = deficient | 2 = limited | 3 = adequate | 4 = strong | 5 = exemplary

Measure	1	2	3	4	5	Notes
Learner progress visibility	☐	☐	☐	☐	☐	
Animation, Audio & Multimedia Teaching Quality						
Animations explain, model, sequence, demonstrate, or allow manipulation of the lesson idea rather than decorate or distract.	☐	☐	☐	☐	☐	
Animation timing, labels, replay, pause, speed, narration, and learner control support comprehension and reduce cognitive load.	☐	☐	☐	☐	☐	
Images, video, interactive media, maps, diagrams, and audio are instructionally accurate and necessary for the subject.	☐	☐	☐	☐	☐	
Audio enhancement supports accessibility, pronunciation, fluency, language learning, attention, or concept understanding where needed.	☐	☐	☐	☐	☐	
Voice recording and playback identify required microphone, speakers/headset, browser, permissions, storage, bandwidth, and device compatibility.	☐	☐	☐	☐	☐	
Assessment, Feedback & Learning Evidence						
Checks for understanding occur during learning and lead to useful feedback, support, practice, or teacher action.	☐	☐	☐	☐	☐	
Feedback explains improvement rather than showing only correct, incorrect, score, completion, or reward.	☐	☐	☐	☐	☐	
The system identifies error patterns, misconceptions, prerequisite gaps, mastery, attempts, growth, and time in context.	☐	☐	☐	☐	☐	
Teachers can inspect, annotate, override, approve, reject, or revise scoring, grouping, feedback, and suggested next actions.	☐	☐	☐	☐	☐	
Curriculum & Learning Intelligence						
The system recommends aligned practice, resources, reteaching, intervention, extension, or next instructional action from evidence.	☐	☐	☐	☐	☐	
Lessons can be versioned, compressed, expanded, translated, scaffolded, accommodated, or differentiated while preserving source and objectives.	☐	☐	☐	☐	☐	
Tier 2, Tier 3, multilingual, accessibility, and advanced versions remain connected to the core lesson and evidence.	☐	☐	☐	☐	☐	
Shared misconceptions or readiness patterns can become actionable groupings with explainable evidence and teacher control.	☐	☐	☐	☐	☐	
AI Boundary, Role & Trust						
AI level and boundary are explicit: independent generative AI; one-system bounded or streaming AI; multi-system; institution-wide.	☐	☐	☐	☐	☐	
Approved data, curriculum, role, actions, model/service connection, retention, and prohibited uses are visible.	☐	☐	☐	☐	☐	
AI chat, tutoring, scoring, feedback, recommendations, and agents identify themselves and escalate appropriately to a human.	☐	☐	☐	☐	☐	
Guardrails, citations, logs, explanation, review points, override, reversibility, and failure handling are demonstrated.	☐	☐	☐	☐	☐	
Data Visibility & Instructional Action						
Dashboards connect evidence to an understandable instructional decision rather than only displaying activity or completion.	☐	☐	☐	☐	☐	
Learner, group, standard, skill, course, and time views preserve context and allow appropriate drill-down.	☐	☐	☐	☐	☐	
Data and AI outputs are exportable, auditable, attributable, and usable in the district instructional workflow.	☐	☐	☐	☐	☐	

AI / Intelligence Classification

☐ No AI ☐ Independent generative AI ☐ Bounded inside one system ☐ Streaming external AI/API

☐ Operational multi-system intelligence ☐ Institution-wide intelligence ☐ Human review required ☐ Action can be reversed

Summary of this Page

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SECTION 2 - ACADEMIC OFFICER | PAGE 4 of 4 - DIGITAL CURRICULUM QUALITY & WORKFLOW EVALUATION

CROSS-ROLE REVIEW - WORKFLOW, CAPACITY RETURN & ORCHESTRATION

Resource Name: **Reviewer:**

Rate each item: X = insufficient evidence | 1 = deficient | 2 = limited | 3 = adequate | 4 = strong | 5 = exemplary

Measure	1	2	3	4	5	Notes
End-to-End Instructional Workflow						
Planning, assignment, delivery, learner response, evidence review, feedback, grading, regrouping, and follow-up operate as a coherent flow.	☐	☐	☐	☐	☐	
The system reduces repeated entry, exports, uploads, copying, toggling, reconciliation, and manual transfer between roles or systems.	☐	☐	☐	☐	☐	
Individual, small-group, whole-class, reassignment, scheduling, locking/unlocking, and reuse controls are efficient and understandable.	☐	☐	☐	☐	☐	
Common exceptions and failed connections have a visible owner, recovery path, notification, and audit trail.	☐	☐	☐	☐	☐	
Instructional Workflow Alignment						
Workflow aligns with lesson planning, live delivery, assessment, grading, MTSS, intervention, IEP/accommodation, reporting, and communication.	☐	☐	☐	☐	☐	
Teacher judgment remains at consequence-bearing decisions while routine assembly, routing, and reporting can be reduced or automated.	☐	☐	☐	☐	☐	
The product preserves curriculum coherence when teachers customize pacing, sequence, assignments, supports, or learner groups.	☐	☐	☐	☐	☐	
Time, Pace & Continuity						
Estimated and actual lesson time, learner pace, re-entry, interruptions, and completion status are visible and usable.	☐	☐	☐	☐	☐	
Course, unit, week, and day pacing can change for shortened days, weather disruption, absence, or learner progress without rebuilding materials.	☐	☐	☐	☐	☐	
User state, annotations, versions, evidence, settings, and work persist across sessions, devices, school years, and authorized role changes.	☐	☐	☐	☐	☐	
Instructional continuity survives staff turnover because assets, decisions, versions, and context are institutionally retained.	☐	☐	☐	☐	☐	
Capacity Return by Work Category						
Lesson assembly, retrieval, sequencing, differentiation, translation, accommodation, practice creation, and assignment work are reduced.	☐	☐	☐	☐	☐	
Grading, feedback, grouping, intervention, evidence interpretation, reporting, communication, and data reconciliation work are reduced.	☐	☐	☐	☐	☐	
Schedule, hour parsing, pacing, cohort, specialist, tutor, or support coordination can be reduced or orchestrated where appropriate.	☐	☐	☐	☐	☐	
Any new verification, correction, monitoring, configuration, or administrative burden is measured rather than hidden.	☐	☐	☐	☐	☐	
Orchestration & Operating Model						
The system coordinates curriculum, evidence, people, time, roles, supports, decisions, notifications, and next actions where promised.	☐	☐	☐	☐	☐	
Workflow does not depend on the teacher serving as the manual integration layer among print, digital, data, and support systems.	☐	☐	☐	☐	☐	
The inherited operating model, required staffing, integrations, ownership, training, governance, and continuing human work are explicit.	☐	☐	☐	☐	☐	

Comparable Outcome Capture

☐ Total steps	☐ Elapsed time	☐ Systems touched	☐ Manual transfers
☐ Residual human work	☐ New oversight work	☐ Weekly hours returned	☐ Role receiving capacity
☐ Workflow failures	☐ Human decision points	☐ Automation boundaries	☐ Evidence location

Summary of this Page

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SUMMARY OF ALL 4 PAGES

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SECTION 2 - ACADEMIC OFFICER

PAGE 1 of 2 - SPECIALIZED SUPPORT COVERAGE

DOCUMENT INTERVENTION, ACCOMMODATION, ENRICHMENT 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	Flow Pattern	Connection Point
☐ Intervention	☐ Teacher-led	☐ Core instruction
☐ Accommodation	☐ Specialist-led	☐ Assessment data
☐ Modification	☐ Platform-guided	☐ IEP / plan
☐ Acceleration	☐ Small group	☐ Family communication
☐ Enrichment	☐ Individual plan	☐ 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	Flow Pattern	Connection Point
☐ Intervention	☐ Teacher-led	☐ Core instruction
☐ Accommodation	☐ Specialist-led	☐ Assessment data
☐ Modification	☐ Platform-guided	☐ IEP / plan
☐ Acceleration	☐ Small group	☐ Family communication
☐ Enrichment	☐ Individual plan	☐ Progress review

Support Connection Notes

SECTION 2 - ACADEMIC OFFICER

PAGE 2 of 2 - SPECIALIZED SUPPORT COVERAGE

DOCUMENT INTERVENTION, ACCOMMODATION, ENRICHMENT 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	Flow Pattern	Connection Point
☐ Intervention	☐ Teacher-led	☐ Core instruction
☐ Accommodation	☐ Specialist-led	☐ Assessment data
☐ Modification	☐ Platform-guided	☐ IEP / plan
☐ Acceleration	☐ Small group	☐ Family communication
☐ Enrichment	☐ Individual plan	☐ 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	Flow Pattern	Connection Point
☐ Intervention	☐ Teacher-led	☐ Core instruction
☐ Accommodation	☐ Specialist-led	☐ Assessment data
☐ Modification	☐ Platform-guided	☐ IEP / plan
☐ Acceleration	☐ Small group	☐ Family communication
☐ Enrichment	☐ Individual plan	☐ 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:

SECTION 2 - ACADEMIC OFFICER

PAGE 1 of 4 - CURRICULUM RESOURCE REVIEW - REDUNDANCY (LONG FORM)

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				

Workflow & Learner Experience Matrix (Continued)

RESOURCE NAME:				
Analysis Area	**Resource A**	**Resource B**	**Resource C**	**Resource D**
Lesson versioning	Rate 1-5 | A-H	Rate 1-5 | A-H	Rate 1-5 | A-H	Rate 1-5 | A-H
Notes:				
Lesson version retention (year to year)	Rate 1-5 | A-H	Rate 1-5 | A-H	Rate 1-5 | A-H	Rate 1-5 | A-H
Notes:				
Automated differentiation	Rate 1-5 | A-H	Rate 1-5 | A-H	Rate 1-5 | A-H	Rate 1-5 | A-H
Notes:				
Practice generation	Rate 1-5 | A-H	Rate 1-5 | A-H	Rate 1-5 | A-H	Rate 1-5 | A-H
Notes:				
Feedback automation	Rate 1-5 | A-H	Rate 1-5 | A-H	Rate 1-5 | A-H	Rate 1-5 | A-H
Notes:				
Feedback human-teacher-in-the-loop for checking feedback to send	Rate 1-5 | A-H	Rate 1-5 | A-H	Rate 1-5 | A-H	Rate 1-5 | A-H
Notes:				
Unforeseen schedule shifts allow drag-and-drop of lessons into future (weather days, etc.)	Rate 1-5 | A-H	Rate 1-5 | A-H	Rate 1-5 | A-H	Rate 1-5 | A-H
Notes:				
Pacing flexibility	Rate 1-5 | A-H	Rate 1-5 | A-H	Rate 1-5 | A-H	Rate 1-5 | A-H
Notes:				
Misconception groupings automated	Rate 1-5 | A-H	Rate 1-5 | A-H	Rate 1-5 | A-H	Rate 1-5 | A-H
Notes:				
Instructional Action recommendations	Rate 1-5 | A-H	Rate 1-5 | A-H	Rate 1-5 | A-H	Rate 1-5 | A-H
Notes:				
Automated coaching tips for learner or learners	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				

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:				
4. SUMMARIZE AND AVERAGE				
TOTAL OF SUMMARIES				

SECTION 2 - ACADEMIC OFFICER REVIEW INTEGRITY & AUDIT SEQUENCE

Verify the review method before relying on the recommendation.

PURPOSE Before scoring a curriculum, system, or resource, confirm that the review represents real instructional conditions and that findings reflect verified evidence rather than discovery limitations.

COMMON REVIEW FAILURE MODES

- ☐ **Not found is treated as not present**
  Evidence was not independently located or verified.
- ☐ **Wrong role view**
  Teacher, learner, administrator, intervention, or specialist evidence was not examined.
- ☐ **Empty review environment**
  Courses, assignments, history, dashboards, or reports were not populated.
- ☐ **Workflow not demonstrated**
  Features were inspected without observing end-to-end instructional use.
- ☐ **Verification not requested**
  The provider was not asked to identify the exact evidence location.
- ☐ **Workload not measured**
  Capability was scored without documenting residual human work.
- ☐ **Operating model ignored**
  Ownership, systems, time, staffing, and implementation consequences were excluded.
- ☐ **Integrations and data transactions ignored**
  No inquiry or documentation of shared data needed for other systems operations or consequences.
- ☐ **Capacity Blindness**
  The review verified that features exist but failed to examine whether the system reduces instructional workload, coordination burden, planning effort, grading effort, intervention effort, or cross-system labor. **Risk:** Products appear equivalent despite dramatically different operational consequences.

REVIEW RULE

Before assigning a deficiency, distinguish **not found • not accessible • not demonstrated • verified absent • if not measured or ignored, explain why**

FORWARD REVIEW SEQUENCE

1. MAKE THE ENVIRONMENT VISIBLE
   - ☐ System Stack, Pages 1-2
   - ☐ Quick Curriculum Coverage Record
   - ☐ Specialized Support Coverage
2. MEASURE WORK AND CAPACITY
   - ☐ Instructional Assembly Time Audit
   - ☐ Instructional Assembly Burden Summary
   - ☐ Course Blueprint Readiness Baseline
   - ☐ Midyear Instructional Regeneration Review
3. EVALUATE THE RESOURCE
   - ☐ Primary Resource Record Set
   - ☐ Digital Curriculum Quality & Workflow Evaluation
   - ☐ Curriculum Gaps Review
   - ☐ Resource Redundancy Review
4. VERIFY CROSS-FUNCTIONAL CONSEQUENCES
   - ☐ Major System Record, when applicable
   - ☐ Forward Procurement Process Audit
   - ☐ Forward RFP & Review Alignment Record
   - ☐ Procurement and Legal Resource Records, when applicable
5. CONFIRM REVIEW CONDITIONS
   - ☐ Representative users and data were included
   - ☐ Common end-to-end workflows were demonstrated
   - ☐ Teacher burden and learner experience were documented
   - ☐ Accessibility and support populations were considered
   - ☐ Human capacity gained or consumed was documented

FINAL ADOPTION QUESTION

Have we reviewed the instructional resource, the workflow it creates, the burden it produces, the operating model it introduces, and the human capacity it returns or consumes?

☐ Proceed to recommendation	☐ Pause for missing evidence	☐ Qualify the decision record

SECTION 2 - ACADEMIC OFFICER

PAGE 1 OF 2 FORWARD PROCUREMENT PROCESS AUDIT

Audit the process that creates the RFP and review environment, not merely the vendor responses.

PROCUREMENT / ADOPTION _____

OWNER / REVIEW TEAM _____

REVIEW DATE _____

RESOURCE / CATEGORY _____

DECISION NEEDED BY _____

CURRENT STAGE _____

AUDIT STANDARD

A Forward-aligned procurement process must establish the complete need, operating conditions, human work, evidence requirements, cross-functional consequences, and decision rules before products are compared. The question is not only whether a product meets specifications. It is what operating model the district will inherit and whether the decision returns usable human capacity.

FORWARD CONDITION	Y	N	EVIDENCE / FINDING	PRIORITY
1. Need and outcome definition The RFP begins with the instructional or operational condition to change, intended beneficiaries, success evidence, and the human capacity the district intends to recover.	☐	☐	*Need statement; current-state evidence; desired outcome; success measures* Finding: _____	☐ Immediate ☐ High ☐ Moderate ☐ Monitor
2. Whole-system scope Requirements reflect curriculum, systems, roles, time, data, learner variability, workflow, cost, risk, and implementation dependencies.	☐	☐	*Cross-functional scope map; affected roles; systems and handoffs* Finding: _____	☐ Immediate ☐ High ☐ Moderate ☐ Monitor
3. Work and workflow visibility The district documents the work people perform now and identifies what should be eliminated, updated, connected, automated, or preserved.	☐	☐	*Current workflow; task inventory; handoff map; baseline time or burden* Finding: _____	☐ Immediate ☐ High ☐ Moderate ☐ Monitor
4. Authentic evidence requirements Criteria require observable evidence in the correct role, location, data condition, and workflow context.	☐	☐	*Evidence map; exact asset paths; role access; demonstration script* Finding: _____	☐ Immediate ☐ High ☐ Moderate ☐ Monitor
5. Representative review environment Finalists are reviewed in populated, realistic conditions rather than empty accounts or feature tours.	☐	☐	*Representative users, courses, history, assignments, submissions, reports* Finding: _____	☐ Immediate ☐ High ☐ Moderate ☐ Monitor
6. Common workflow demonstrations Every finalist performs the same end-to-end scenarios so steps, residual work, system support, and evidence can be compared.	☐	☐	*Scenario set; captured steps; work remaining; outputs* Finding: _____	☐ Immediate ☐ High ☐ Moderate ☐ Monitor
7. Total cost and capacity effect The review examines price plus implementation, training, integration, local creation, ongoing coordination, and workload.	☐	☐	*Total cost of use; capacity gained or consumed; continuing labor* Finding: _____	☐ Immediate ☐ High ☐ Moderate ☐ Monitor
8. Decision defensibility The final record distinguishes verified evidence, limitations, assumptions, risks, conditions, ownership, and next review.	☐	☐	*Decision trail; qualifications; owners; review date; measures* Finding: _____	☐ Immediate ☐ High ☐ Moderate ☐ Monitor

Findings:

_____

_____

REQUIRED DEMONSTRATION SCENARIOS

Compare identical end-to-end work, not isolated features or vendor-selected tours.

PROCUREMENT / ADOPTION: _____ **OWNER / REVIEW TEAM:** _____ **REVIEW DATE:** _____

RESOURCE / CATEGORY: _____ **FINALIST / PROVIDER:** _____ **DEMONSTRATION DATE:** _____

DEMONSTRATION STANDARD Each finalist completes the same scenarios using representative roles, courses, learner conditions, assignments, submissions, and data. Reviewers capture steps, time, residual human work, system movement, outputs, exceptions, and teacher control.

#	SCENARIO	REQUIRED OBSERVATION	Y	N	EVIDENCE / NOTES
1	Lesson adaptation & versioning	Adapt or compress a lesson for a changed schedule or learner need while preserving the original objective, sequence, and source integrity.	☐	☐	
2	Differentiation & targeted support	Create and assign coherent variations for individual learners or groups, including Tier 2, Tier 3, multilingual, accessibility, or extension needs.	☐	☐	
3	Practice, assessment & feedback	Generate or select aligned practice; score or route work; draft useful feedback; show where teacher review, override, or approval remains.	☐	☐	
4	Misconception identification & grouping	Identify prerequisite gaps or shared misconceptions, form actionable learner groupings, and recommend an appropriate instructional response.	☐	☐	
5	Evidence-to-instruction workflow	Move from learner evidence to the next instructional action without manual reconciliation, repeated exports, or disconnected decision steps.	☐	☐	
6	Pacing & schedule adjustment	Adjust course, unit, week, or day pacing for interruptions, shortened time, or changed progress without rebuilding the instructional sequence.	☐	☐	
7	Progress monitoring & re-entry	Locate learner status, resume interrupted work, monitor progress, and show continuity across lessons, devices, roles, or reporting views.	☐	☐	
8	Cross-system and human handoffs	Show required integrations, data transactions, notifications, manual transfers, ownership handoffs, and what happens when a connection fails.	☐	☐	

COMPARABLE OUTCOME CAPTURE

TOTAL STEPS	ELAPSED TIME	SYSTEMS TOUCHED	RESIDUAL HUMAN WORK	CAPACITY EFFECT
_____	_____	_____	_____	☐ Returns ☐ Neutral ☐ Consumes

COMPARABILITY CONTROL: Do not compare vendors unless the same scenarios, evidence conditions, and scoring rules were used.

FORWARD RFP & REVIEW ALIGNMENT RECORD

Translate the audit into specific changes to the RFP, review protocol, evidence environment, and final decision record.

A. RFP AND REVIEW CORRECTION PLAN

AUDIT FINDING	CHANGE REQUIRED	WHERE CHANGE APPEARS	OWNER / DUE	EVIDENCE OF COMPLETION

B. MINIMUM REVIEW CONTROLS

☐ Criteria map to exact evidence, user role, location, and expected workflow.

☐ The district uses representative courses, users, learner conditions, assignments, history, and reporting.

☐ A finding of absence requires verification. “Not found,” “not accessible,” “not demonstrated,” and “confirmed absent” remain distinct.

☐ The decision compares academic or operational value, total cost of use, capacity effect, risk, and the inherited operating model.

☐ Reviewers receive orientation to the complete evidence environment before scoring.

☐ All finalists complete identical end-to-end workflow demonstrations.

☐ Review records capture steps, human judgment, manual work, system movement, exceptions, and follow-up.

☐ The final record names conditions, owners, review dates, and measures used to determine whether the change worked.

C. FINAL FORWARD DETERMINATION

PROCESS ALIGNMENT	DECISION USE	LEADERSHIP ACTION
☐ Not aligned	☐ Proceed	☐ Approve correction plan
☐ Partially aligned	☐ Proceed with conditions	☐ Assign cross-functional owner
☐ Substantially aligned	☐ Pause and repair method	☐ Require evidence verification
☐ Forward-aligned	☐ Redesign before procurement	☐ Schedule post-implementation review

Decision statement: What must change so the district selects not only an acceptable product, but a coherent and defensible operating model that returns people to face-forward work?

SECTION 3 - TECHNOLOGY MANAGEMENT

PAGE 1 of 3 - MAJOR SYSTEM RECORD

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
☐	Vendor Verified
☐	Archived

SECTION 3 - TECHNOLOGY MANAGEMENT

PAGE 2 of 3 - MAJOR SYSTEM RECORD

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

SECTION 3 - TECHNOLOGY MANAGEMENT

PAGE 3 of 3 - MAJOR SYSTEM RECORD

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 - TECHNOLOGY 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	Priority Need	Next Review
☐ Adequate	☐ Replacement	☐ Usage data
☐ Shortage	☐ Repair backlog	☐ Budget estimate
☐ Aging devices	☐ Spare pool	☐ Leadership decision
☐ Mixed condition	☐ Inventory cleanup	☐ Vendor quote

SECTION 3 - TECHNOLOGY MANAGEMENT

INFRASTRUCTURE & SPECIALIZED TECH RECORD

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

Asset / System Name:	Location:	Owner / Custodian:	Review Date:

Asset Category	Purpose	Location / Space	Users Served	Condition	Support Notes

Asset Type
- ☐ Network
- ☐ Display / AV
- ☐ Lab / maker
- ☐ Assistive tech
- ☐ Security / safety

Support Need
- ☐ Vendor support
- ☐ Internal support
- ☐ Training
- ☐ Documentation
- ☐ Replacement plan

Risk Area
- ☐ Aging
- ☐ Single point of failure
- ☐ Limited access
- ☐ Security concern
- ☐ Unfunded need

Implementation / Maintenance Notes

SECTION 3 - TECHNOLOGY MANAGEMENT

DEVICE ASSIGNMENT LEDGER (FRONT)

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

Ledger Type & Model & Location Issued **Ledger #_____**

Status	**Assignment Model**	**Issuing Location:**
☐ Assigned ☐ Available ☐ In repair ☐ Needs Part or Cable ☐ Missing ☐ Retired	☐ 1:1 ☐ Cart / shared ☐ Lab / fixed ☐ Checkout ☐ Staff device	_____ **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**				
2						
	Image Ref. No.	**Assigned To Name / Group**	**> Campus/ Room**	**Issued Date**	**Action >**	**Action Date**
#	**Asset Tag / ID**	**Model Number**				
3						
	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**

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

SECTION 3 - TECHNOLOGY 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					

Notes:

SECTION 3 - TECHNOLOGY 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	Risk	Decision
☐ High use	☐ Privacy / security	☐ Renew
☐ Critical system	☐ Integration risk	☐ Renegotiate
☐ Good support	☐ Cost increase	☐ Replace
☐ Strong data value	☐ Vendor reliability	☐ Monitor
☐ Low value	☐ Low adoption	☐ Escalate review

Action to Take	Owner	Due Date	Decision / Status	Notes

SECTION 4 - LEADERSHIP | PAGE 1 of 2 - ORGANIZATIONAL HUMAN NETWORK REVIEW

Superintendent & Executive Leadership: Constituency and Communication Architecture

PURPOSE A district continuously teaches employees, students, families, partners, and the public how an organization functions. This review examines the district as a human network: how signals reach leadership, how communication moves across departments, where information terminates prematurely, and whether people receive response and closure. It evaluates organizational conditions rather than individual leaders or departments.

Complete with the Superintendent and cabinet or executive leadership team. Reference detailed workflow, system, cost, procurement, and viability evidence elsewhere in the workbook rather than repeating it here.

District: _____ **Executive review team:** _____ **Review period:** _____ **Date:** _____

A. ENTERPRISE CONSTITUENCY MAP

CONSTITUENCY	SIGNALS THAT MUST REACH LEADERSHIP	WHAT LEADERSHIP MUST ORIGINATE	ROUTE / OWNER / CLOSURE
Students			
Families / community			
Teachers / staff			
School leaders			
Departments / cabinet			
Board / governance			
Partners / providers			

B. CROSS-DEPARTMENT COMMUNICATION NETWORK

CRITICAL COMMUNICATION FLOW	ORIGIN	INTERMEDIATE ROLE(S)	CORRECT DESTINATION	WHERE IT STALLS / DISTORTS	HOW CLOSURE IS CONFIRMED

Executive communication conditions

☐ Signals can reach the level able to resolve them	☐ Filtering is purposeful and transparent
☐ Originator receives acknowledgment	☐ Originator receives closure
☐ Escalation path is known	☐ Cross-department owner is named
☐ Translation from executive direction to local action is reliable	☐ Institutional memory survives leadership transitions
☐ Communication quality is owned as an enterprise function	☐ Access to executive attention is not based only on personal relationships

Most consequential enterprise communication break or missing connective function

SECTION 4 - LEADERSHIP | PAGE 2 of 2 - ORGANIZATIONAL HUMAN NETWORK REVIEW

Portrait of the Organization & AI-Era Human Agency

PURPOSE Many districts define the capabilities graduates should possess but do not examine whether the adult organization models and enables those same capabilities. This page compares declared graduate outcomes with operating reality, identifies what the organization teaches adults through daily experience, and defines how AI should increase responsiveness and human capacity without displacing accountability, judgment, relationships, or stewardship.

District: _____ **Executive review team:** _____ **Review period:** _____ **Date:** _____

A. PORTRAIT OF THE ORGANIZATION

DECLARED LEARNER CAPABILITY	ADULT ORGANIZATION MODELS IT WHEN...	CONTRADICTED WHEN...	EVIDENCE / DIRECTION
Communication	messages are complete, responsive, routed, and closed	signals stall, conflict, disappear, or require repeated pursuit	
Collaboration	departments share context, ownership, and consequences	coordination depends on personal favors or silo workarounds	
Critical thinking / judgment	people can question assumptions and surface contrary evidence	authority, habit, or urgency substitutes for examination	
Creativity / problem solving	people can originate, test, and improve alternatives	new ideas have no path, sponsor, or decision point	
Self-direction / responsibility	decision rights are clear and placed close to the work	people wait, over-escalate, or act without accountable ownership	
Adaptability / learning	evidence leads to revised practice and operating change	pilots, lessons, and knowledge disappear without adoption	

B. WHAT THE ORGANIZATION TEACHES THROUGH DAILY EXPERIENCE

☐ Questions are welcome	☐ Concerns receive substantive response
☐ Initiative is recognized	☐ Ownership includes authority
☐ Speaking up is safe and useful	☐ Decisions move at a responsible pace
☐ Cross-department problems find an owner	☐ People know when and how to escalate
☐ Mistakes generate learning and correction	☐ Completion includes communication back to the originator

C. AI-ERA ORGANIZATIONAL DESIGN

EXECUTIVE QUESTION	RESPONSE
What human work is becoming more valuable as AI assumes more retrieval, production, routing, analysis, or coordination?	
What work should never terminate with AI without named human accountability?	
Where should AI make the district more responsive, coherent, accessible, or capable, not merely faster at producing?	
What human capability should increase because AI is used?	
EXECUTIVE DETERMINATION	**SELECTION**
Organizational direction	☐ Preserve ☐ Clarify ☐ Connect ☐ Redesign ☐ Assign ownership ☐ Pilot AI support ☐ Monitor
Missing enterprise function	☐ Communication stewardship ☐ Cross-functional orchestration ☐ Institutional memory ☐ Decision routing ☐ Other: _____
First evidence of improvement	

[ATTACH SEPARATE PAGE RESPONSE]Executive reflection: What kind of human organization are we producing, and what most needs redesign?

DIRECTION REVIEW

District: _____	Leadership Group: _____	Reviewer: _____	Date: _____

Brand is used here as the district's organized statement of identity and public human promise. It includes the language that tells people who learners are expected to become, what the district will do, how energy will be focused, and where resources will be committed.

A. District Identity

What is the district's primary promise to learners?

What is the district's primary promise to families and the community?

What kind of graduate is the district trying to develop?

What kind of teacher is required to develop that graduate?

What is administration responsible for causing, not merely managing?

B. Define the Words We Have Promised

A word that has not been defined cannot be consistently developed, executed, observed, or defended. Select important words from the mission, vision, theme, strategic plan, or Portrait of a Graduate.

DISTRICT WORD	WHAT IT MEANS	WHAT IT LOOKS LIKE IN A LEARNER	HOW ADULT WORK CONTRIBUTES

C. Relevance in the Age of AI

What must remain distinctly human in the district's purpose and learner experience? Be specific.

What must change because AI is entering nearly every system and body of work?

D. Brand Penetration and Coherence

Which district statement or theme is best known by employees?

Which important statement is displayed or published but seldom used to guide work?

Where does daily experience contradict the district's stated promise?

What one identity or direction question requires Board and Superintendent clarity?

Reference

For deeper human-intelligence study see book by LeiLani Cauthen*, After AI: What Human Intelligence Actually Is.*

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	**Priority**	**Next Step**
☐ Clear	☐ Low	☐ Investigate
☐ Partial	☐ Moderate	☐ Plan
☐ Unknown	☐ High	☐ Approve
☐ Needs update	☐ Immediate	☐ Communicate

Capacity Opportunities Identified

Category	Finding
Curriculum assembly burdens	
Duplicate systems	
Workflow friction	
Human capacity issues	
Ownership gaps	
Missing functions	

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
☐ Maintain
☐ Reduce
☐ Replace
☐ Expand

Value Lens
☐ Learner impact
☐ Workflow reduction
☐ Human support
☐ Compliance

Risk Lens
☐ 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

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

Capacity Impact - Estimated weekly hours returned in categories:

Admin	**Lesson design**	**Feedback**	**Assessment**	**Intervention**	**Coordination**	**Reporting**	**Scheduling**	**Other:**
Hrs:								

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:** _____

SECTION 4 - LEADERSHIP

PAGE 1 of 4 VIABILITY REVIEW

HUMAN-CENTERED LEARNING ARCHITECTURE REVIEW FOR STRUCTURE, SYSTEMS, RESOURCES AND WORKFLOWS.

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	Viability	Human-Centered Fit
☐ Clear roles	☐ Sustainable	☐ Supports agency
☐ Clear systems	☐ Too complex	☐ Supports teachers
☐ Clear ownership	☐ Under-supported	☐ Reduces friction
☐ Clear outcomes	☐ Needs redesign	☐ Improves belonging

Evidences and/or Observations:

Component	What Is Invisible?	A Process? A Structure? Emerging? A new environment or population condition?	What Needs Leadership Attention?

Hidden Conditions	Structural Blind Spots	Emerging Risks & Opportunities
☐ Lack of recognition	☐ Missing process	☐ Growing friction
☐ Hidden workload	☐ Missing ownership	☐ Unrecognized strengths
☐ Unseen dependencies	☐ Missing capacity	☐ Untapped potential
☐ Unclear impacts	☐ Missing awareness	☐ Needs restructuring

Evidences and/or Observations:

HUMAN-CENTERED LEARNING ARCHITECTURE REVIEW FOR ACCESS, WORKFLOW, OPERATIONAL CLARITY & OUTSIDE PRESSURES.

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

Evidences and/or Observations:

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

Area	Current Pattern	Example	Impact	Improvement Opportunity

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

Evidences and/or Observations:

Reviewer(s):	**Date:**

Use this review to examine how the current model affects learner experiences and patterns.

Area	Current Pattern	Example	Impact	Improvement Opportunity

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

Evidences and/or Observations:

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

Area	Current Pattern	Example	Impact	Improvement Opportunity

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

Evidences/Observations:

HUMAN-CENTERED LEARNING ARCHITECTURE REVIEW FOR FUTURE .

Reviewer(s):	Date:

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

Area	Current Pattern	Example	Impact	Improvement Opportunity

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

Evidences and/or Observations:

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

Area	Current Pattern	Example	Impact	Improvement Opportunity

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

Evidences and/or Observations:

Organizational Architecture vs. Execution Architecture

Why strong strategic plans often fail

EXECUTION FAILURE IS OFTEN AN ARCHITECTURAL FAILURE, NOT A PEOPLE FAILURE.

The Hidden Problem

Most organizations build a strategic plan and assume the existing organization will naturally execute it. But a sound strategy can still fail when the organization was never structured to deliver the intended outcome.

Leaders may diagnose resistance, accountability, communication, or training. In many cases, the deeper problem is architectural: the organization is arranged around functions while expecting cross-functional outcomes.

ORGANIZATIONAL ARCHITECTURE	EXECUTION ARCHITECTURE
Central question: Who manages whom?	**Central question:** How are outcomes produced?
Contains: Superintendent, cabinet, departments, directors, managers, staff	**Contains:** Outcomes, strategies, programs, projects, routines, experiences, evidence
Manages: People, budgets, expertise, compliance, reporting relationships	**Manages:** Cross-functional contribution, dependencies, authority and feedback
Primary purpose: Resource stewardship and administration	**Primary purpose:** Value creation and strategic execution

The Mistake: Expecting Functional Excellence to Produce Shared Outcomes

FUNCTIONS HOLD EXPERTISE	OUTCOMES REQUIRE COORDINATION
Curriculum: instruction	Literacy growth
Technology: systems	Effective digital learning
Operations: logistics	Reliable learning environment
HR: talent	Staff capacity and retention
Communications: messaging	Family trust

An outcome can fail even when every department performs its own function well.

CLEAN UP THE THINKING

Programs Are the Missing Bridge

Departments do not become tactics, and tactics do not automatically become departments. These are different layers of the operating model.

LAYER	MEANING	WHAT IT OWNS	DISTRICT EXAMPLE
Strategy	The chosen path	A coherent way to achieve the goal	Personalize support while preserving instructional coherence
Tactic	A major execution approach	A directional method within the strategy	Use timely learner evidence to adjust support
Program	A sustained system of coordinated work	An outcome, operating model, measures and cross-functional contribution	MTSS or a districtwide literacy improvement program
Project	A temporary body of work	A defined deliverable, change or implementation	Adopt a universal screener or redesign intervention schedules
Department	A standing functional home	People, expertise, budget, compliance and service capacity	Curriculum, technology, HR, operations

The Correct Relationship

STRATEGY > TACTICS > PROGRAMS > PROJECTS > TEAM WORK > USER EXPERIENCE

Departments sit alongside this chain as capability and resource homes. They contribute people, expertise, systems and authority to the programs that own outcomes.

(continued)

Strategic Orphans

A strategic orphan is an important outcome for which no individual, program, or governance structure has true ownership. Everyone supports it, but nobody has sufficient authority and accountability to produce it.

- Student agency
- AI integration
- Staff retention
- Family trust
- Improvement culture
- Postsecondary readiness

What Leaders Can Change

IF THE GAP IS...	A POSSIBLE ARCHITECTURAL RESPONSE
No owner for an outcome	Establish a program owner with explicit outcome accountability.
Many contributors, weak coordination	Create a cross-functional program team with decision rights and a regular operating cadence.
Priority sits too low in the structure	Reassign sponsorship, authority, reporting access, or budget to match strategic importance.
Departments optimize separately	Set shared measures and dependencies around the user outcome, not only functional performance.
Strategy adds work without changing work	Stop, combine, redesign, or retire activities that do not support the chosen strategy.
Current structure blocks execution	Redesign roles, spans, reporting lines, or departmental boundaries after mapping required capabilities.

LEADERSHIP WORKSHEET

Test the Organization Against the Strategy

Do not ask only whether the strategic plan is sound. Ask whether the current organization can execute it.

1. Outcome ownership	Can every strategic priority be connected to one accountable program owner, not merely a list of contributors? YES / PARTLY / NO Evidence: _____
2. Program definition	Is there a sustained operating system that translates the strategy into coordinated work? YES / PARTLY / NO Evidence: _____
3. Cross-functional authority	Can the program owner make or escalate decisions across departmental boundaries? YES / PARTLY / NO Evidence: _____
4. Capability alignment	Do the current roles, expertise, systems, time and budget match what the strategy requires? YES / PARTLY / NO Evidence: _____
5. Reporting congruence	Do reporting relationships and leadership access reinforce the stated priority? YES / PARTLY / NO Evidence: _____
6. Work translation	Can teams and individuals explain what changes in daily or weekly work? YES / PARTLY / NO Evidence: _____
7. Evidence and redesign	Is evidence reviewed by the people who can authorize adjustments to the program and structure? YES / PARTLY / NO Evidence: _____

(continued)

Strategic Alignment Map

STRATEGIC PRIORITY	PROGRAM / OWNER	CONTRIBUTING FUNCTIONS	AUTHORITY GAP	STRUCTURAL CHANGE NEEDED

The Human Agency Design Test

CAN OUR CURRENT ORGANIZATIONAL ARCHITECTURE SUCCESSFULLY EXECUTE THIS STRATEGY?

If the answer is no, the organization may need new programs, ownership structures, cross-functional teams, decision rights, accountability systems, reporting relationships, or a redesigned org chart.

OLD QUESTION	BETTER QUESTION
How do we fit the strategy into our current organization?	***What organization is required to execute the strategy successfully?***

THE EXECUTION RESPONSIBILITY

Complete the top lines 1 and 2 once; duplicate the branching forms as often as needed.

Leadership is not complete when a goal is announced. A goal must be translated into strategic choices, tactics, coordinated programs, deliverable projects, assigned objectives, team and individual work, daily action, evidence, reporting, and adjustment. Each branch must be traceable downward into work and upward into purpose.

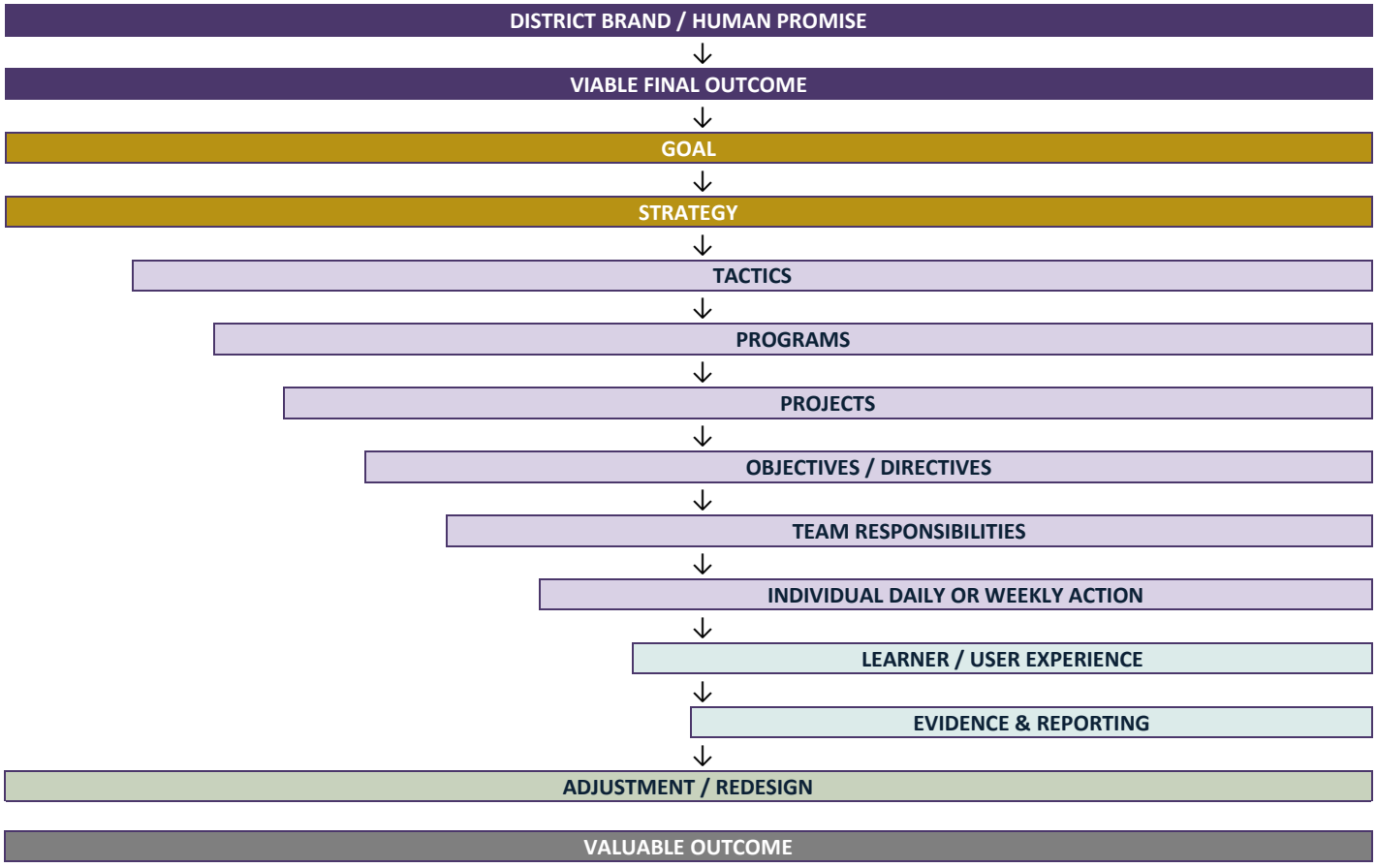
RECOMMENDED SEQUENCE

STEP	FORM	PRIMARY QUESTION
1	District Identity & Viable Final Outcome	What human result has leadership promised?
2	Goal & Strategy	What condition must change, and what approach will be used?
3	Tactic & Program	What coordinated methods and continuing bodies of work will carry the strategy?
4	Project & Objective	What finite products or conditions must be created, by whom, and by when?
5	Team & Individual Action	What must each role do daily or weekly?
6	Reporting & Adjustment	What evidence travels upward, and what changes when reality differs from intention?

CODE EACH BRANCH

Use a simple lineage code so every page retains its parent: G1 Goal; S1.1 Strategy; T1.1.1 Tactic; PG1.1.1-A Program; PJ1.1.1-A.1 Project; O1.1.1-A.1.1 Objective. The code matters less than preserving the parent-child relationship.

From Promise to Repeated Experience



BOARD & SUPERINTENDENT TOP-LINE FORM

District: _____	Planning Horizon: _____	Executive Owner: _____	Date: _____

District Brand or public human promise

Portrait of a Graduate or equivalent viable final human outcome

Define the most important words in that outcome

What will exist in learners if the district succeeds?

What repeated learner experiences must exist to produce that result?

What evidence, beyond a single aggregate score, would demonstrate the result?

GOAL STATEMENT

Repeat once for each major goal.

Goal ID: _____	Parent Promise / Outcome: _____	Executive Owner: _____	Date: _____

Goal statement

PRESENT CONDITION	DESIRED CONDITION	GAP TO CLOSE

Why this goal matters to the district's human promise

Defined terms that cannot remain ambiguous

Policies or non-negotiable boundaries

Measures and evidence of progress

Strategies required to reach this goal

STRATEGY STATEMENT

A Strategy is the chosen approach for reaching a Goal. It is above Tactics, Programs, Projects.

Goal ID: _____	Parent Promise / Outcome: _____	Executive Owner: _____	Date: _____

Strategic choice: How will the goal be reached?

What will be different if this strategy works?

What will deliberately not be pursued?

Human outcome protected or advanced

Where may AI or automation assist?

What human governance, judgment, or accountability remains?

Tactics required to carry this strategy

A TACTIC STATEMENT

A tactic is a specific method used to carry the strategy. There may be multiple tactics.

Tactic ID: _____	Parent Strategy: _____	Tactic Owner: _____	Date: _____

Tactical action or method

Problem or condition addressed

Immediate effect intended

DEPARTMENTS / GROUPS INVOLVED	DEPENDENCIES	RESOURCE OR TIME IMPLICATION

Programs needed to organize this tactic

Evidence that the tactic is working

A PROGRAM STATEMENT

A program is a coordinated, continuing series of steps that carries one or more tactics.

Program ID: _____	Parent Tactic(s): _____	Executive Sponsor: _____	Program Owner: _____

Program purpose and statement

District promise or human outcome supported

PARTICIPATING DEPARTMENT	DEFINED CONTRIBUTION	DECISION AUTHORITY	HANDOFF / DEPENDENCY

Program outputs and operating condition to be created

Projects required

Reporting cadence and review body

A PROJECT STATEMENT

A project is a finite sequence of work that creates a defined product or condition under a Program.

Project ID: _____	**Parent Program:** _____	**Project Lead:** _____	**Target Completion:** _____

Specific product, capability, or condition to be created

STARTING CONDITION	COMPLETION CONDITION

Milestones

DEPENDENCY	DECISION NEEDED	OWNER	DUE / TRIGGER

Evidence of completion and required handoff

PROJECT ASSIGNMENTS

Turn project requirements into assigned results with objectives.

Objective ID: _____	Parent Project: _____	Assigned Role / Team: _____	Due Condition: _____

Exact result required

Authority granted to complete it

Constraints, policies, or boundaries

Resources and information required

Evidence to submit

REVIEWER	RESPONSE OR APPROVAL REQUIRED	NEXT ACTION TRIGGERED

OBJECTIVES/DIRECTIVES

Divide an objective into owned work portions and handoffs for a team or individual.

Objective ID: _____	Team: _____	Team Lead: _____	Review Date: _____

Team product or condition owned

WORK PORTION	OWNER	INPUT NEEDED	OUTPUT / HANDOFF	DUE / TRIGGER

Decision points or likely breakdowns

Evidence the team returns upward

DAILY OR WEEKLY ACTIONS

Connect each person's work to the execution of the statements of objectives, the project, the program, the tactic and strategy.

Role / Person: _____	Parent Objective: _____	Supervisor / Lead: _____	Week of: _____

Product, decision, or condition I am responsible for

Alignment to objective, project, program, tactic and strategy statements.

ACTION	WHEN	DEPENDENCY	EVIDENCE / COMPLETION

Decisions I can make without escalation

Barriers or adjustments required above my level

District promise or human outcome this work ultimately serves

LEARNER/USER EXPERIENCE

Test whether execution reaches the people it is intended to serve.

Program / Project: _____	Population: _____	Owner: _____	Review Date: _____

What will the learner, employee, family, or other user experience differently?

What will the person do, rather than merely receive?

How often and under what conditions will the experience occur?

What must a teacher or employee notice, decide, or do?

What may AI or a system support?

What human responsibility remains?

Is access guaranteed by design or dependent on chance, location, schedule, or individual practice?

REPORTING LADDER

Report the condition owned at each level. Create multiple lines for multiple parts of tactics, programs, projects and actions.

LEVEL	REPORTING QUESTION	EVIDENCE / ANSWER	WHO RECEIVES IT
Daily / weekly Action	Was the action completed? What happened? What barrier appeared?		
Objective	Was the objective reached?		
Project	Was the required product or condition created?		
Program	Are projects and cross-department handoffs creating the intended operating condition?		
Tactic	Is the tactic working toward the strategy?		
Strategy	Is the chosen method moving the district toward the goal?		
Goal	Is the intended human outcome becoming more likely?		
Brand / promise	Does lived experience support or contradict the public promise?		

What must be reported upward that is currently invisible?

What report or statistic is collected now but does not support a useful decision?

MEASURES, EVIDENCE & ADJUSTMENT

Distinguish activity from human and organizational result.

MEASURES	EVIDENCE
Counts, percentages, deadlines, completions, usage, attendance, scores, costs	Observed capability, quality of reasoning, created products, transfer, changed experience, verified execution

What did we intend?

What actually occurred?

At what execution level did the difference originate?

☐ Definition ☐ Goal ☐ Strategy ☐ Tactic ☐ Program ☐ Project ☐ Role ☐ Resource ☐ Daily practice ☐ Experience

Which level has authority to correct it?

What should change, and what downstream work must be revised?

What evidence will show that the correction worked?

VALUABLE OUTCOME

Make handoffs, dependencies, and human burden visible.

Program: _____	Executive Sponsor: _____	Program Owner: _____	Review Date: _____

Where are people manually compensating for a missing process, connection, definition, or system function?

What could be simplified, automated, reassigned, or stopped?

What distinctly human work should the redesign protect or expand?

HUMAN > AI WORK ALLOCATION

Potentials

WORK OR DECISION	AI MAY ASSIST BY	HUMAN RETAINS	ACCOUNTABLE ROLE

Does AI hold promise to reduce human burden or create additional verification of completed work?

Could AI accelerate a poorly defined process or conceal a gap in understanding?

If considering AI orchestration for a workflow, what part may be a consequence-bearing decision and must remain visibly human?

STRATEGY REVIEW

Final leadership check before declaring a plan operational.

☐ District promise is defined ☐ Key terms are defined ☐ Viable final outcome is observable
☐ Goals state changed conditions ☐ Strategies are actual choices ☐ Tactics are identified
☐ Programs have owners ☐ Cross-department handoffs are explicit ☐ Projects have completion conditions
☐ Objectives are assigned ☐ Teams know their products ☐ Individuals can connect daily action upward
☐ Learner or user experience is described ☐ Evidence travels upward ☐ Adjustment authority is known

Where does the chain still break or become vague?

What work is assigned without sufficient time, authority, information, or resources?

What should leadership stop, defer, or redesign to preserve execution capacity?

First corrective action, owner, and review date

SECTION 5 - PROCUREMENT OFFICER

PAGE 1 OF 2 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:**

PROCUREMENT & VENDOR ASSESSMENT

Evaluation Area	1 (low)	2	3	4	5 (high)
Value for Cost	☐	☐	☐	☐	☐
Contract Renewal & Exit Terms	☐	☐	☐	☐	☐
Operational Benefit	☐	☐	☐	☐	☐
Strategic Alignment	☐	☐	☐	☐	☐
Vendor Stability	☐	☐	☐	☐	☐
Product Maturity & Roadmap Credibility	☐	☐	☐	☐	☐
Responsiveness	☐	☐	☐	☐	☐

Cost Summary:	Annual Cost:	Per User:	Notes:

B. COST AND OPERATING COMMITMENTS

COST / COMMITMENT	AMOUNT, TERM, OR REQUIREMENT	OWNER / EVIDENCE
License or subscription		
Implementation and configuration		
Training and change support		
Integration, migration, and data work		
Ongoing administration and vendor management		
Exit, replacement, or data-return obligation		

C. REQUIRED REVIEW PACKAGE *Procurement verifies completion; the responsible divisions perform the analysis*

REQUIRED SUBMISSION	RESPONSIBLE FUNCTION	SUBMITTED	FINDING / RECOMMENDATION
Primary Resource Record and academic recommendation	Academic / Instructional	☐ Yes ☐ No ☐ N/A	
Digital Curriculum Quality & Workflow Evaluation	Academic / Cross-role review	☐ Yes ☐ No ☐ N/A	
Course Blueprint / assembly burden evidence, when relevant	Academic / School teams	☐ Yes ☐ No ☐ N/A	
Major System, integration, security, and support review	Technology	☐ Yes ☐ No ☐ N/A	
Privacy, accessibility, AI, and contract review	Legal / Privacy	☐ Yes ☐ No ☐ N/A	
Forward Procurement Process Audit and demonstration record	Cross-functional review team	☐ Yes ☐ No ☐ N/A	

D. PAGE 1 PROCUREMENT FINDING

Primary procurement concern, condition, or unresolved evidence:

_____

SECTION 5 - PROCUREMENT OFFICER

A. CROSS-FUNCTIONAL FINDINGS RECEIVED *Do not duplicate academic, technical, or legal analysis here*

FINDING TO VERIFY	SOURCE FORM / OWNER	VERIFIED RESULT
Instructional value and standards/content determination		☐ Acceptable ☐ Conditional ☐ Not acceptable ☐ Unknown
Course completeness and missing instructional components		☐ Complete ☐ Gaps documented ☐ Unknown
Teacher workflow and recurring assembly burden		☐ Reduced ☐ Neutral ☐ Increased ☐ Unknown
Integration, data movement, and administrative burden		☐ Reduced ☐ Neutral ☐ Increased ☐ Unknown
Privacy, security, accessibility, AI, and legal conditions		☐ Cleared ☐ Conditional ☐ Not cleared ☐ Unknown

B. CAPACITY AND HIDDEN WORK VERIFICATION *Record submitted findings, not procurement guesses*

WORK / CAPACITY QUESTION	VERIFIED FINDING	EVIDENCE / RESPONSIBLE OWNER
What existing work will this purchase eliminate or materially reduce?		
What new setup, assembly, adaptation, monitoring, reporting, or coordination work will it create?		
Which roles absorb that work, how often, and at what estimated scale?		
Does burden shift from the vendor or system to teachers, specialists, technology, administration, or families?		
What capacity is expected to return to instruction, leadership, relationships, diagnosis, or learner support?		

C. AI AND AUTOMATION REVIEW *Confirm the alternative and offloading analysis occurred*

VERIFICATION ITEM	YES	NO	N/A	FINDING / CONDITION
The review identified workflow that AI or automation could offload.	☐	☐	☐	
The purchase was compared with a lower-burden AI or automation alternative.	☐	☐	☐	
AI reduces work rather than adding recurring verification, correction, or oversight burden.	☐	☐	☐	
Human judgment, accountability, escalation, and override remain explicit.	☐	☐	☐	
The vendor demonstrated AI-supported work in realistic, populated workflows.	☐	☐	☐	

D. OPERATING MODEL AND DEMONSTRATION CONFIRMATION

CONFIRMATION	SELECTION / FINDING
All finalists completed the same end-to-end scenarios.	☐ Yes ☐ No ☐ N/A
Review included populated courses, representative users, learner conditions, submissions, data, and reports.	☐ Yes ☐ No ☐ N/A
Residual human work, systems touched, elapsed time, exceptions, and handoffs were recorded.	☐ Yes ☐ No ☐ N/A
The district understands the operating model it will inherit.	☐ Yes ☐ Partly ☐ No
Overall capacity effect	☐ Returns capacity ☐ Neutral ☐ Consumes capacity ☐ Unknown

E. FINAL PROCUREMENT DETERMINATION

DECISION	CONDITIONS / OWNER / DUE DATE
☐ Purchase ☐ Pilot ☐ Renew ☐ Expand ☐ Renegotiate ☐ Replace ☐ Retire ☐ Pause for evidence	
☐ Proceed ☐ Proceed with conditions ☐ Repair review method ☐ Redesign before procurement	

Decision statement: Does the evidence show an instructionally acceptable, operationally viable purchase whose hidden work, AI alternatives, capacity effect, and inherited operating model are understood?

_____

Procurement Officer Signature: _____ **Date:** _____

SECTION 6 - 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 (high risk)**	
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: _____