Hi Chris,

Here's some quick notes on some of the requirements for the different evaluation scenarios we need to support for the full release this July. It's not complete, but I thought I'd get something to you so you can get started and then we can meet and discuss further once you get a better feel for some of the issues.

Currently the task of performing evaluations, or being evaluated, is tied to the specific roles of teacher, principal, and district evaluator, which are further associated with a type of building (school or district),. We need a more flexible model of allowing staff to be in the role of an evaluator or an evaluatee as their primary role that determines the types of tasks they can perform, and then using their more specific roles of teacher, principal and superintendent, and their association to buildings (schools and districts) to inform where they can perform the evaluations, who they can evaluate, and what type of access they have to information.

**Standard Evaluation Scenarios - supported in the current pilot**

* Principal and teacher reside in same school.
  + There can be multiple principals in the school.
  + Each principal can perform observations, view teacher data that goes into their final evaluation and view their final evaluation report.
  + There is a single principal that is designated as the assigned principal and is the only evaluator that can score the summative scores on the Final Evaluation Summary screen and is responsible for the final summative score sent to the district.
  + The principal and teacher perform all of the work at this single school.
  + The principal can switch between the tasks of evaluating teachers and preparing for their own evaluation through a dropdown on the screen which then changes their main navigation to be appropriate to the task.
  + A teacher has only a single interface in the application: preparing for their evaluation.
* District evaluator (usually the superintendent) evaluates principals in their district
  + This scenario is similar to the principal/teacher scenario above, just for principal evaluations instead of teacher evaluations.

**Less Common Scenarios - must support for full release in July**

* Principals are sometimes evaluated by other principals instead of district evaluators. This breaks the current architecture that ties a principal's evaluator to a district-level person in the DistrictEvaluator role.
  + A school has a head principal and assistant principals. The head principal evaluates the assistant principals.
  + Principals do peer evaluations.
* Teachers are sometimes evaluated by a district-level person other than a principal. This breaks the current architecture that ties a teacher's evaluator to a principal in the same school. An example of this scenario is a special education director often is required to go to all schools and do the evaluations on special education teachers. The CTE director may go to all secondary schools to do evaluations on teachers who teach in the CTE programs. A more flexible model would be to allow an individual to be a guest evaluator in any school in a district and then the district administrator (or maybe the school administrator) can further configure which teachers the guest evaluator is able to evaluate and view.
  + These guest evaluators will want a view where they can see all the staff that they are responsible for from a single login. They will not want to have to switch schools to gain access to each teacher or see status information across all of their reports.
  + These special evaluators also need to have restricted access, limiting their view to only the staff they are responsible for evaluating. This is in contrast to the current model where a school principal can view the observations, final evaluation data for any teacher in the school. They only restriction they have is that only the assigned principal can score the final evaluation summative scores.
* There has been some discussion of expanding the ability to use the tool for all types of personnel, such as maintenance, counselors, nurses, etc...
* In very small districts the district evaluator (superintendent) may also be the principal. Or the principal may also be a teacher. Need to be flexible in allowing staff to be both an evaluator and an evaluatee and not tie it to their role as a principal, teacher, or district evaluator.
* But there is some relation of a role to a building. For example, the most common case of a principal evaluating a teacher is that they both reside in the same building. We have an administrative screen that allows a district administrator to configure the relationship between principals and teachers at each of the schools in the district. Each teacher must be assigned a single evaluator that will score their final summative score that will be submitted to the district. In this case it is helpful to know the relationship between principals and teachers and a school building. Additionally, in the current release, a principal at a school can perform an observation, and view all data about any teacher at the school, even if they are not the assigned evaluator for the final score. We know how to support this due to the understanding of them both residing in the same school and their roles of principal and teacher.
* There are evaluators who are outside the district, that is they need to perform evaluations across districts. They are a board designee. Very odd cases, but exist. The challenge will be to limit their view to only the teachers they are assigned to based on their specific supervisory relationships. For example, a special education director should only see those staff members she is responsible for evaluating in the school . . . which might mean only 3 or 4 teachers in each school. The vocational director or CTE director might only be connected to the school district high school CTE instructors. They shouldn’t be able to see the English teachers. Another challenge is that some of the regular classroom teachers are CTE teachers for two or three periods. The district will need to make a decision regarding who is the primary evaluator . . . the principal or the CTE director.
* Another challenge is to support evaluatees that reside in more than one school. A music teacher is a good example. He may teach in all the schools in a district and we need to support evaluations by evaluators in each of the schools where he teachers. But also needs to be assigned a single evaluator that is responsible for final score. The teacher will want to have a single interface for preparing for their evaluation independent of the number of schools where they teacher. The teacher should not have to "switch schools" to see data contributed from evaluators from different schools.