**Change Request**

**Project: eVal Implementation**

**BRD Title: Observation lifecycle and reporting**

**BRD: #19**

**Development required by:**

***Washington State’s eVal Team***

**BACKGROUND**

This BRD refers to the set of Business Requirement Documents (BRD) that are part of the Seattle School District’s 2015 implementation of Washington State’s online evaluation tool, eVal. eVal is an online tool developed by the State to support teacher professional growth in alignment with Washington State’s mandates for TPEP (Teacher Principal Evaluation Process). The project goal is to successfully integrate this tool into the District’s TPEP activities, adhering to the District’s obligations of its CBA and to the spirit of the TPEP process which is aimed at fostering professional growth through collaborative, face-to-face discussions between teacher and evaluator.

BRDs related to eVal functionality have been submitted to the State’s eVal development team. BRDs related to back-office activities which require District development have been submitted to DOTs (the District’s development team). Where noted, several of these documents require review and collaboration from both teams.

Change Requests for this project refer to *new* or *modified* requirements that have arisen after the original BRDs were approved and which have received approval to be included in the project scope.

*For further information, please see Excel file “eVal Seattle - Enhancements and BRD Index” which contains listing of each enhancement that has been approved for development and the related BRD and assigned development team.*

| Version No. | Date | Name | Description of Change |
| --- | --- | --- | --- |
| 1 | 3/3/15 | Donna Schmidt | Baseline |
| 2 | 3/6/15 | Donna Schmidt | Changes per discussion with Anne |
|  |  |  |  |

# High Level Change Description

This BRD outlines suggested business flow of the observation process related to how it is presented in eVal and outlines requirements for observation reports.

# Business Objective

The objective is to find a straight forward method to match eVal functionality to Seattle’s TPEP process, particularly around observation reports which are a contractual obligation and for which we would like to leverage eVal and move to a paperless process. To that end, these requirements have the objective of (1) Allowing users to print anything they wish regarding an observation at any time; while still having the ability to (2) Define a specific report as the finished, final observation report which can not be altered in any way and which can be easily identified as the formal observation report by either party using the tool or when seeing it in printed format.

# Business processes impacted by the change

The following is how the observation process might flow using eVal:

1. Evaluator triggers an observation by clicking on either the informal or formal icon.
   1. The evaluator may or may not choose to add a date or a location to the observation within eVal.
   2. The evaluator will use Outlook as the official tool for scheduling the evaluation with the teacher.
   3. The evaluator will use Outlook and face-to-face communication to convey observation logistics to the teacher, including when the report is ready for them to view
   4. There is no substantive difference in functionality whether the evaluator chooses Informal or Formal (both are included in the number of observations; both are included as options for the Summative Evaluation Report)
2. The Evaluator will record the length of the observation (or the start and finish time) within their Notes Editor.
   1. The eVal tool is not expected enforce this; Seattle will provide business processes to the Evaluators with this expectation.
3. Once the observation activities are completed and information collected, the Evaluator will configure the formal Observation Report. Once the report is complete, they will lock the observation. At that point, the report is static and cannot change. It is also visible to the teacher from the teacher’s eVal session.
   1. This report will meet Seattle’s contract obligation that the Evaluator provide the Teacher written notes on the observation within X days of the observation. (It does not need to be signed, only provided)
4. Seattle will establish business processes for how soon the Evaluator can lock an observation after the observation session (for informal observations which do not require a post conference) and for formal observation sessions (which do require a post conference). There is a contractual timeline for supplying the teacher with an observation report, so the goal is to provide the teacher enough time to input comments while respecting the contract timeline for supplying the report.
5. The Evaluator and the Teacher will always have the ability to configure and print their own informal report of the observation information. These will be informational only and do not replace the formal observation report created in the step above.
6. The Evaluator will alert the teacher using Outlook and face-to-face communication that the formal Observation report is ready for them in eVal.
   1. As there is no signature required, we are not requesting a formal acknowledgement process in the way we are for the Summative Evaluation Report
7. All observation information, including the formal Observation Reports, will be part of the data purged from the system at year’s end (see separate BRD)
8. The formal Observation Reports will be part of the overall package the user can download when they run the new “Download All” report which will provide a zip file of all information in eVal related to them (and visible to them) for that school year. (See separate BRD)

# Requirement Details

| Related BRD | REQ ID | Requirement | Purpose or expected outcome |
| --- | --- | --- | --- |
| 19 | 19.1 | On the teacher’s Observation dashboard, the tool tip that displays when you hover over an observation should include the evaluator who performed the observation | (Similar to what occurs for the evalutor’s tool tip when evaluator is on their Summary panel).  This will be helpful when a teacher has observations across multiple evaluators. |
| 19 | 19.2 | There should be only one attribute – either “Complete” or “Locked”, not both. | (Done) |
| 19 | 19.3 | The formal Evaluation Report cannot be considered complete until the underlying observation is locked. By locking the observation, the following occurs: (1) all information entered by the evaluator for the teacher for that observation is now visible to the teacher and (2) the finalized report is now available to the teacher through the teacher’s eVal session. |  |
| 19 | 19.4 | The pop-up box that comes up explaining the impact of locking the observation should also mention that (1) locking the observation is a prerequisite for creating the observation report; (2) all observation information will now be visible to the teacher; (3) report settings will now become locked and can only be unlocked – or any changes made to the report – by asking teacher permission to unlock the observation; and (4) the Observation Report is now available to the teacher through the teacher’s eVal session. | [Should we also add the “Lock Observation” button to the Observation Report panel? That way when the Evaluator is working on the report, they understand that they need to lock it before it is final – and they can do it within that screen…. Let me know your thoughts… Donna] |
| 19 | 19.5 | The evaluator’s report settings for the Observation Report should only be configurable before the observation is locked. Once locked, the report settings should become read-only. | (Evaluator needs prompt to make sure they understand this before locking) |
| 19 | 19.6 | The report settings for the Evaluation Report should have two options buttons on the left (Instructional Framework or State Rubric, the latter including Student Growth). The report should default to Instructional framework. |  |
| 19 | 19.7 | The report settings on the the Evaluation Report should have all settings on the right pre-selected. The Evaluator can de-select whatever they choose. |  |
| 19 | 19.8 | The report should be titled “Seattle Public Schools Certificated Teacher Observation Form” and then, directly under that heading, the unique identifier, observation title and date of the observation | (We should add “Generated out of eVal” somewhere on the report, but do not include it in the actual report header) |
| 19 | 19.9 | Both the Evaluator and the Teacher will have available to them at all times their own informational report which will print to screen ALL observation information collected-to-date (that has been made visible to them) and which has no report settings. The report will print first the Instructional rubric and then the State rubric (the latter including Student Growth goals). The user will have an option to print to PDF. |  |
| 19 | 19.10 | The teacher’s informational observation report should be titled “Information for Observation” + [unique identifier] + “: ” + [Observation Title] + “ printed by “ + [Teacher Name] | If no observation title, then skip that data element from the report title.  Let’s add somewhere on the report “Generated from eVal” or “eVal Report” so that future readers know the system that generated it, but I suggest we not have it in the report title, since eventually all teachers will be on the tool, and all these reports will come out of eVal, and they are contracted reports, it does not seem like a critical data point. |
| 19 | 19.11 | The evaluator’s informational observation report should be titled “Information for Observation” + [unique identifier] + “: ” + [Observation Title] + “ printed by “ + [Evaluator’s name] | See above. |
| 19 | 19.12 | There should not be any signature blocks for the informational reports. |  |
| 19 | 19.13 | There should not be any signature blocks when the formal observation report is printed to screen, only when it is printed to PDF |  |
| 19 | 19.14 | None of the observation reports should not have a setting that prints the rubric itself, since the rubric includes scores (Unsat, Basic, etc.) and we don’t want any scores mentioned in the report. |  |

# Review and Approval

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| Team | Person | Organizational and Project Roles | Role | Date review/approval received |
| Project | Clover Codd | Exec Director Strategic Plan & Partnerships; **Project Sponsor** | Approve project deliverable |  |
| eVal Dev Team | Anne Chinn | Lead eVal Developer | Review and accept as milestone deliverable |  |
| eVal Dev Team | Dana Anderson | eVal Supervisor/ Project Manager | Review and accept as milestone deliverable |  |