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# SCHOOL QUALITY MONITOR MANUAL



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## Acronyms

ACER	Australian Council for Educational Research
IPC	International Project Centre
NCQM	National Centre Quality Monitor
NPM	National Project Manager
OECD	Organisation for Economic Co-operation and Development
PISA	Programme for International Student Assessment
SC	School Coordinator
SQM	School Quality Monitor
TA	Test Administrator

**Contacts at ACER:**

If you need to contact the International Project Centre you may do so either by contacting the person who trained you, or, you may contact ACER.

To contact ACER about your work as a School Quality Monitor:

Adrian Harvey-Beavis

Email: [hbeavis@acer.edu.au](mailto:hbeavis@acer.edu.au)

Fax: +61 3 9277 5500

Phone: +61 3 9277 5573

Mail: ACER  
Private Bag 55  
CAMBERWELL Victoria 3124  
Australia

To contact ACER about your payment:

Jacqui Tang

Email: [tang@acer.edu.au](mailto:tang@acer.edu.au)

Fax: +61 3 9277 5500

Phone: +61 3 9277 5703

Mail: ACER  
Private Bag 55  
CAMBERWELL Victoria 3124  
Australia



## ABOUT School Quality Monitors

### Overview

This manual is to be used by School Quality Monitors for the main data collection for the Programme for International Student Assessment (PISA) project in the year 2000.

### About PISA

- *Aims* PISA aims to measure the skills and knowledge of 15 year olds. In particular, it aims to assess the knowledge and skills essential for full participation in society of students approaching the end of their compulsory education.
- *Which countries are participating* Member countries of the OECD plus a number of others are participating in PISA. Thirty two countries will be involved in the main study conducted in the year 2000.
- *Data* Data will be collected from samples of 4,500 to 10,000 students in each country.
- *What is being assessed* Reading, Mathematical and Scientific literacy are being assessed by PISA. For the year 2000, the main focus is upon Reading literacy. In subsequent cycles of the study, the focus will be upon Mathematics and Science.
- *Reading Literacy* Reading literacy requires students to perform a range of tasks with different kinds of text. The tasks range from retrieving specific information to demonstrating a broad understanding, interpreting text and reflecting on its content and features. The texts that are used include not just standard prose passages but also various types of documents such as lists, forms, graphs and diagrams.

- *More information about PISA* | More information about PISA can be obtained from the PISA website: <http://www.pisa.oecd.org/>

### **About School Quality Monitors**

- *Independence of School Quality Monitors* |
  - The International Project Centre (the consortium represented by ACER) employs School Quality Monitors.
  - School Quality Monitors should conduct their work in such a way as to ensure that it is independent of the National Centres within the countries where they are working.
  - A School Quality Monitor should not be a member of the same institution where the National Project Manager works.
  - A School Quality Monitor should not report to the National Project Manager in their day-to-day work.
- *Attributes of a School Quality Monitor* | A School Quality Monitor should:
  1. Be knowledgeable about PISA procedures and materials;
  2. Speak fluently the test language and either English or French;
  3. Have a background in education or assessment;
  4. Be sensitive to the needs of schools and students and feel comfortable about being in a school environment;
  5. Be able to represent PISA in schools diplomatically and positively.

- *Main tasks of the School Quality Monitors*

The main task of the School Quality Monitors is to document the extent to which testing procedures are being followed in schools. Where procedures have not been followed, the School Quality Monitor should record where and why they were not followed.

To do this, School Quality Monitors will visit schools and observe testing sessions.
  
- *Materials required by School Quality Monitors*

All School Quality Monitors should have:

  1. One copy of the School Quality Monitor Manual;
  2. One copy of the Test Administrator Manual - including a local version of 'session script';
  3. One copy of the School Co-ordinator Manual;
  4. One set of test booklets (to be returned to the National Project Manager. Please note that test booklets are not to be copied as items may be used in the future. It is important, therefore, that security not be breached.);
  5. One copy of the student and school questionnaires;
  6. As many copies of the *School Quality Monitor Data Collection Sheet* as schools to be visited (for example, if the School Quality Monitor is to visit five schools, then five copies of the *Sheet* will be required);
  7. A system to record all expenses incurred during the conduct of visits to schools;
  8. A copy of the Honoraria and Confidentiality Agreement form with ACER.

### **Actions to be taken by School Quality Monitors**

- *Provide a Curriculum Vitae to ACER*

The National Project Managers nominate those people whom they think will make good School Quality Monitors in their country. Once nominated, a Curriculum Vitta should be forwarded to ACER. This Curriculum Vitta should be submitted in either English or French.

When ACER agrees that the nominated person will make a satisfactory and independent School Quality Monitor, approval will be given in writing to the person.

- *Sign Confidentiality Agreement*

Once approval has been received, the School Quality Monitor should sign the Honoraria and Confidentiality Agreement form. This Honoraria and Confidentiality Agreement specifies:

1. The amount of money paid per day to the School Quality Monitor. It also describes the currency in which payment will be made.
2. The costs that will be covered by ACER when School Quality Monitors visit schools (all reasonable travel meals costs will be reimbursed). Where applicable, although this will be the exception, accommodation costs will be reimbursed. It is not expected that the School Quality Monitor will require overnight accommodation to visit most schools.
3. That the School Quality Monitor will treat all PISA materials as confidential and act in a professional way when dealing with schools and while visiting them in their role as a School Quality Monitor.
4. General conditions of employment.

A copy of the Honoraria and Confidentiality Agreement is included in this manual.

The SQM must submit a copy of the Honoraria and Confidentiality Agreement to ACER as soon as they have been notified of their approval to act as a PISA SQM. Details of where to send the agreement appear on the Honoraria and Confidentiality form.

The purpose of the Honoraria and Confidentiality Agreement is to describe the conditions of employment that the SQM has with ACER, including rates of pay. It also broadly describes the responsibilities that the SQM has to ACER.

- *Receive training*

Representatives from the consortium will train School Quality Monitors. Prior to this training you will have received from the consortium the following documents:

1. One copy of the School Quality Monitor Manual;
2. One copy of the generic Test Administrator Manual;
3. One copy of the generic School Co-ordinator Manual;
4. One copy of the generic student and school questionnaires;

The School Quality Monitor will also receive (probably at the time of their training);

5. One set of test booklets (to be returned to the National Project Manager. Please note that test booklets are not to be copied as items may be used in the future. It is

important, therefore, that security not be breached.);

6. One copy of the local version of the Test Administrator Manual;
7. One copy of the local version of the School Co-ordinator Manual;
8. One copy of the local version of the student and school questionnaires.

School Quality Monitors are encouraged to attend Test Administrator training. The National Project Manager will run this training.

School Quality Monitors will be reimbursed for attending training session(s).

Prior to the School Quality Monitor training session, the School Quality Monitor should read and be familiar with:

1. The PISA Test Administrator Manual; (local and, if available before this training, the generic versions).
2. The PISA School Co-ordinator Manual (local and if available before this training, the generic versions).

The trainer at this session will be available to assist you in the future. You should make sure you obtain his or her name and how to contact them.

- *Organise visits to schools*

Organising visits to schools should be done in conjunction with the National Project Manager.

The National Project Manager will have a list of:

1. schools;
2. testing dates at the schools;
3. the location of the schools;
4. the names of the Test Administrators; and,
5. the names of the School Co-ordinators.

This information will be needed by the School Quality Monitor to conduct visits to schools.

It is the responsibility of the National Project Manager to provide the above information for the School Quality Monitor to use.

Typically, a School Quality Monitor will visit 12 schools.

In most countries, there will be three School Quality Monitors, although in some very large countries like Canada, Australia and the US, there may be up to five School Quality Monitors.

Within each country, 'SQM regions' will be defined such that the regions contain approximately equal numbers of schools and each school is assigned to a region. For example, if there are 150 schools in the sample, and three School Quality Monitors, each School Quality Monitor region will contain 50 schools. In some countries, these regions will be very different in size — those containing large metropolitan areas with a high concentration of schools will be small in area, while those in rural areas will be large.

Within each region, one school will be selected completely at random for a visit. Therefore, for this one school, an overnight trip might have to be made by the School Quality Monitor.

Once that school is selected in an School Quality Monitor region, the other schools will be selected by the National Centre Quality Monitor and the School Quality Monitor purposively — taking into consideration:

- location;
- schedule;
- ease of access;
- type (single sex versus co-educational, Catholic versus non Catholic, or whatever are the important tracks, sectors or other strata within the local educational system).

As one school will be selected at random from each School Quality Monitor region, all schools should have been told that they have a chance of being selected for a School Quality Monitor visit.

In summary, usually 32 of the 35 schools will be selected purposively, but the other three will be randomly selected. For these randomly selected schools, the consortium will pay to the School Quality Monitor accommodation costs for over night stays (if the travelling time to the schools is excessive).

The selection of schools to be visited will be made by the National Centre Quality Monitor and School Quality Monitor working together. The National Project Manager will not be involved except to let the School Quality Monitor and the National Centre Quality Monitor know about the schedule of the assessment and any particular concerns that she or he might have (for example, that some schools may require a visit

because of problems in previous studies).

It is preferred that selected schools not be told that a School Quality Monitor will visit them.

- *Prepare for the school visits*

In preparing for a school visit a School Quality Monitor should ensure that they have:

1. identification for admission to the school, indicating they are involved with the PISA project;
2. the name of the School Co-ordinator;
3. the location of the school and its telephone number;
4. a spare set of test booklets and a copy of the student questionnaire;
5. a copy of the local Test Administrator Manual, (with a local copy of the session script);
6. a copy of the School Quality Monitor Manual;
7. a watch to time to the nearest minute; and,
8. a pen.

- *Visit schools*

**When visiting a school, the School Quality Monitor is the human face of the PISA project. Please approach the schools diplomatically.**

The School Quality Monitor's main role is to be an observer of the testing.

If people express concern about the presence of a School Quality Monitor they should be reminded that the role is one of

observing and not one of policing the test.

The School Quality Monitor should aim to be at the school an hour before the testing starts. (This may not be appropriate sometimes, but having as much time as possible at the start is recommended.)

**At schools, School Quality Monitors will talk with the School Co-ordinator and the Test Administrator. They will observe the test administration.**

Once the School Quality Monitor has been introduced to the relevant people in the school, the first task is to talk with the School Co-ordinator and commence entry of information into the *School Quality Monitor Data Collection Sheet*.

This will involve reviewing activities prior to the test including:

1. Checking the supply of booklets;
2. Checking student exclusions; and,
3. Describing test conditions (place, time and materials).

Next the School Quality Monitor will observe the test administration, which will include observing:

4. Attendance;
5. Distribution of test materials to students;
6. The time taken for the test;
7. How well the administration 'script' was followed;
8. Collection of test materials;
9. Student behaviour; and

10. Unpredictable events.

As well, the School Quality Monitor will:

11. Verify the school Test Administrator's record keeping; and,

12. Interview the School Co-ordinator.

- *Return completed Data Collection Sheets to ACER*

Upon completion of a visit to a school, the School Quality Monitor should photocopy the completed *School Quality Monitor Data Collection Sheet*.

During the field trial a number of School Quality Monitor reports went astray in the mail. It is important therefore to keep these copies for six months after the visit.

Post via airmail, or courier, the original report to:

Jacqui Tang  
ACER  
Private Bag 55  
CAMBERWELL Victoria 3124  
Australia.

Post receipts for any expenses incurred to the same address. It is necessary that receipts for the cost of postage be included with an expenses claim. It is most important that receipts be supplied. Where there are no receipts, write a brief explanation of the costs. For example, for kilometres travelled in a car, write the number of kilometres travelled and where travelled.

- *Complete the School Quality Monitor General Observations report*

When a School Quality Monitor has finished their school visits, a short report giving an overview of their perceptions of the PISA testing in the schools should be completed.

A blank copy of the *School Quality Monitor General Observations Report* is included with this manual.

The completed *School Quality Monitor General Observations Report* should be forwarded to ACER with the last School Quality Monitor school visit report.

### **Payment of School Quality Monitors**

- *Two payments*

Two payments will be made to School Quality Monitors.

The first payment will be made upon receipt of the signed and fully completed Honoraria and Confidentiality Agreement. This will be for three days payment. This can be used to finance travel to training as an interim measure. All travel costs will be reimbursed in the second payment. (Note, if three days advance payment causes undue problems for School Quality Monitors, it may be possible to negotiate an extra payment in advance. Contact the Adrian Harvey-Beavis at ACER as soon as possible to describe the problems and your proposed solution.)

The second payment will be made after the completion of work for ACER and the submission of all reports. This payment will be for the balance of days worked and for all reasonable

expenses incurred by the School Quality Monitor. A total of all expenses should be made and one claim sent to ACER, addressed to Jacqui Tang.

The claim for the second payment should be made as soon as possible after completion of the work.

- *Conditions of payment*

The first payment will be made to School Quality Monitors on the conditions that they have:

- Been approved and notified in writing by ACER that they will act as School Quality Monitors; and,
- Signed and sent to ACER the Honoraria and Confidentiality Agreement.

The second payment will be made on the conditions that:

1. All reports from schools have been received. (Payment may also be made where there is a satisfactory explanation for why a report from a school could not be forwarded. Any difficulties should be reported to ACER as soon as they are known);
2. When a completed copy of *School Quality Monitor General Observations report* has been received at ACER; and,
3. All receipts for legitimate expenses, or explanations for expenses for which there were no receipts have been received.

**If these conditions are not met, then payment will not be made.**

While ACER will aim to ensure that all these procedures for payment of the School Quality Monitors are properly implemented, School Quality Monitors should also remember that they have the responsibility to follow these procedures. In particular, the provision of receipts is required.

### Other aspects of the School Quality Monitor role

The School Quality Monitor's role is to monitor the PISA procedures, noting where they are or are not followed.

- *The focus of the observations: likely impact of not following procedures*

Where procedures are not being followed it is important to identify:

  1. why they are not being followed, and
  2. what the consequences of this for the data are likely to be.

The major concern of the consortium is to ensure that the data collected are of high quality and in standard conditions.

- *Quality monitoring versus quality control*

The School Quality Monitor visit to a school is primarily a data gathering exercise.

**The School Quality Monitor is not policing the implementation of PISA procedures. However if serious errors are being made in a school, then it may be opportune to intervene and to ensure these do not occur. During the School Quality Monitor training this will be discussed in detail**

**Any intervention by a School Quality Monitor should always be done quietly. If there is resistance to any suggestions made by the School Quality Monitor, they**

**should not persist in their intervention but note the errors in their report of the testing session.**

The extent to which a School Quality Monitor intervenes should be a matter of judgement by the School Quality Monitor. Whatever decision is made, the event should be described in the School Quality Monitor's report.

- *Why visit schools*

Site visits to schools provide an assurance that testing is taking place using standardised procedures under similar conditions.

Site visits are essential for quality monitoring as they provide information about the extent to which each country is following an agreed set of procedures.

Visits help to ensure that the conditions for data collection are equitable, comparable and of the highest standard.

- *Why record the testing procedures*

Testing procedures are being recorded and documented to give confidence that the data are collected uniformly in accordance with the international study procedures. One of the main goals of the study is to produce internationally comparable results, and unless the data are collected uniformly they are not comparable. Quality Monitoring helps to establish high the reliability of the data as well as the good reputation of the project.

- *What will be done with the data collected by School*

Where student test data have not been collected in ways that are substantively in accord with the PISA procedures, they may be excluded from analysis and reports prepared by the OECD. This will mean that the effort put into testing by the

*Quality Monitors* | students, school and PISA personnel will have been wasted.

The consortium will prepare a report for the NPM describing the quality of the test conditions and the extent of adherence to the PISA procedures.

To encourage the independence of the School Quality Monitors, NPMs will not be shown the data collection sheets used by the School Quality Monitors.

### **Hypothetical Situations for considering when a School Quality Monitor might intervene in a testing session**

This section of the manual provides some examples of problems a School Quality Monitor may encounter at a school. Possible responses are proposed. These examples are designed as the basis for discussions during training. The responses proposed here may not always be the best. The School Quality Monitor will need to judge the costs and benefits of intervening.

Sometimes the School Quality Monitor will need to decide if a deviation from a procedure is a major or minor one. A major deviation should be seen as one where a fundamental condition of the testing is changed. For example, if students are given extra time to complete the test, or if the Test Administrator helps students to answer questions. Another example of a major deviation would be if Test Administrator omitted to read out a whole paragraph of their script. A minor deviation should be seen as one where the quality of the data are unlikely to be changed. Examples of a minor deviation might be when the Test Administrator substitutes some words in the script with colloquialisms, or repeats a sentence in the script to ensure students properly understand or hear it.

<b>Problem</b>	<b>Possible response by School Quality Monitor</b>
1. <i>SQM notices someone setting up a camera for photographing or videoing the testing session</i>	Quietly ask the School Co-ordinator to stop the testing . Speak to the person in possession of the equipment directly and explain that for reasons of confidentiality, it is definitely NOT appropriate to film or video the session. Resume testing after it is clear that filming has stopped.
2. <i>TA deviates from the script.</i>	If it is a major deviation from the script, make a note of it in the <i>School Quality Monitor Data Collection Sheet</i> .
3. <i>The assistant is answering</i>	If the assistant is answering questions about test items, ask the Test Administrator to have a quiet word to stop, and note

<i>student's questions.</i>	<p>it in the <i>School Quality Monitor Data Collection Sheet</i>. (However, remember if the assistant has received training as a Test Administrator, then it is acceptable for them to answer student questions).</p> <p>If a student question is about how to answer the questionnaire, do not intervene, but just mention it in the report.</p>
4. <i>A student appears to be getting upset.</i>	<p>Make sure the Test Administrator is aware of the problem. Do not attempt to assist beyond this. If you are sitting behind students, silently pointing at the student may be enough.</p> <p>If the Test Administrator cannot deal with the problem get the School Co-ordinator to assist.</p>
5. <i>The students are completely out of control and moving around the room.</i>	<p>Contact School Co-ordinator immediately. Do not intervene.</p>
6. <i>A student appears to the SQM that they should have been excluded</i>	<p>A student would appear to fit the exclusion criteria if they are functionally disabled, (physically or intellectually) or have limited proficiency in the test language.</p> <p>Privately discuss with the Test Administrator and School Co-ordinator.</p>
7. <i>Students are looking at each other's work.</i>	<p>Notify the Test Administrator and record it in the <i>School Quality Monitor Data Collection Sheet</i>.</p>
8. <i>A student takes 10 minutes or</i>	<p>Note it in the <i>School Quality Monitor Data Collection Sheet</i>. <i>You may want to check that the Test Administrator wrote</i></p>

<i>longer out of the room.</i>	<i>details on the Student's booklet cover.</i>
9. <i>The TA is sick and has to leave.</i>	Make sure the School Co-ordinator is available to take over. If they are the same person, you may have to assume Test Administrator responsibilities.
10. <i>The testing room is inappropriate (e.g., too small).</i>	Note it in the <i>School Quality Monitor Data Collection Sheet</i> . If you arrive early enough and the room is extremely inappropriate, you can ask whether another room is available.
11. <i>The SQM arrives at the school an hour before testing and the TA has already opened the bundles of booklets.</i>	Ask to find out why, and include the incident in the <i>School Quality Monitor Data Collection Sheet</i> .
12. <i>The TA delays the start of testing (by a couple of minutes) to wait for late students.</i>	Note it in the <i>School Quality Monitor Data Collection Sheet</i>
13. <i>The TA delays the start of testing (by 15 minutes) to wait</i>	Perhaps (diplomatically) mention after ten minutes the rules of testing to the Test Administrator and note it in the <i>School Quality Monitor Data Collection Sheet</i> .

*for late  
students.*

14. *The students  
have books and  
other materials  
on their desks  
at the start of  
testing.*

Remind the Test Administrator that the work areas should be clear and note it in the *School Quality Monitor Data Collection Sheet*.

<p>15. <i>TA or some other persons suggest that a non-sampled student could substitute for an absent student</i></p>	<p>Explain that this is not appropriate under any circumstances and record the details in the <i>School Quality Monitor Data Collection Sheet</i> if this does not stop the substitution.</p>
<p>16. <i>An hour is up and the Test Administrator has not asked students to complete the first Cognitive Block.</i></p>	<p>First try to establish eye contact with the Test Administrator and point at your watch. If that does not elicit a response, mention quietly to the Test Administrator that the time is up and the need to conform to the testing protocols. Note it in the <i>School Quality Monitor Data Collection Sheet</i>.</p>
<p>17. <i>A student turns up late and the TA allows the student to come in.</i></p>	<p>Record it on the <i>School Quality Monitor Data Collection Sheet</i> and endeavour to ensure that the student's booklet can be identified after the test (so that data from the student's booklet are not used).</p>
<p>18. <i>Fire alarm sounds or room is evacuated for any reason</i></p>	<p>Record it on the <i>School Quality Monitor Data Collection Sheet</i> and evacuate the room following the school procedures. The first priority is the safety of the students and staff. Leave the PISA test materials in the room. The School Quality Monitor should vacate the room with all other personnel.</p>

Australian Council for Educational Research

**Honoraria and confidentiality agreement**

**OECD PISA PROJECT**

**Honoraria Agreement**

This is to certify that I, \_\_\_\_\_, will receive \_\_\_\_\_ per day as honoraria/consultancy for my contribution as School Quality Monitor (SQM) to the OECD *Programme for International Student Assessment* (PISA) Project.

I understand that my status is that of a consultant to the PISA project and that tax will not be deducted from this payment. I also understand that payments I receive are for the provision of services as outlined above and that I shall not be deemed a member of the staff, or employee or representative of the Australian Council for Educational Research (ACER). I further understand that I have no entitlement to workers compensation or industry superannuation or insurance that might be required to cover any risk or loss that could arise out of the performance of these services and that I have no power to commit ACER in respect of any expenditure or financial commitment. Finally, in the event that I am unable to perform my duties as SQM, I agree to return all advance payments made to ACER.

**Confidentiality Agreement**

I understand that the signing of this form is an acknowledgment of my professional responsibility to maintain complete integrity of security for this project. I declare that I will not divulge any project information, trial materials, test materials, processes, contents or results, or any other materials, documents or information pertaining to the project, or its clients or suppliers, to any person or organisation as directed under the terms of the project unless I have prior written approval from ACER. I understand that the above does not apply to information that is in the public domain.

I have read and accept the conditions as outlined above.

**Name:** \_\_\_\_\_

**Signed:** \_\_\_\_\_

**Dated:** \_\_\_\_\_

**Postal address:** \_\_\_\_\_

\_\_\_\_\_

**Payment**

What currency do you wish to be paid in? .....

I understand that if this currency is not available to purchase in Australia, that I will be paid in United States dollars (\$US).

The amount of money that my bank will charge for accepting payment from ACER will be re-imbursed.

My bank will charge .....  
..... for accepting one payment from Australia in the  
currency I have nominated for payment as a School Quality Monitor.

**Bank details**

1. Bank Name: .....

2. Bank Address: .....  
.....

3. Country of Destination: (where is the bank ACER is making the payment  
to)  
.....

4. Bank BSB (Code): This is the number the banks assign to their branch.  
.....

5. Account Name: .....

6. Account Number: .....

Make three copies of this document.

Keep a copy of this document for yourself, forward one to your National Project Manager, and forward one copy to ACER. You may omit the banking information from the copy you send to the NPM if you wish.

**School Quality Monitor Data Collection Sheet**



## School Quality Monitor Data Collection Sheet

**Country:** .....

**Name of SQM:** .....

Telephone: .....

Fax: .....

Email: .....

**Name & ID of School:** .....

**Address of School:** .....

**Date of original visit:** ..... 2000  
*Day Month*

**Date of follow-up visit (if necessary):** ..... 2000  
*Day Month*

**Time SQM arrived at the school:** .....

Use this space to write notes on how to get to the school:

ONCE COMPLETED, PHOTOCOPY THIS FORM AND RETAIN FOR YOUR RECORDS. PLEASE MAIL THE ORIGINAL AS SOON AS PRACTICABLE TO:

Adrian Harvey-Beavis  
Australian Council for Educational Research  
Private Bag 55  
CAMBERWELL 3124  
Victoria  
Australia

Email: [hbeavis@acer.edu.au](mailto:hbeavis@acer.edu.au)

A word on the tense of questions in the *School Quality Monitor Data Collection Sheet* — the questions which the School Quality Monitor is asked to answer are mostly phrased in the past tense. Originally, it was written so that the tense matched the time at which the School Quality Monitor was expected to be entering their response but in doing this, two problems emerged:

1. Variations between countries meant that sometimes the tense was wrong.
2. The document read poorly.

The School Quality Monitor should endeavour to answer the questions at the appropriate time. For example, they should answer questions about the reading of the script immediately after the Test Administrator has finished reading them, while the School Quality Monitor is observing the session.

**1 Preparation for the Assessment**

In this section the School Quality Monitors will record observations of the condition of the testing materials, the level of preparation and the suitability of the room(s) where the tests are to be conducted.

**Q 1 Did the Test Administrator have the assessment material organised and ready for distribution prior to the arrival of the students?**

Yes n

No n

**If no, please explain**

.....  
.....  
.....  
.....

**Q 2 Was the test area suitable for the assessment, including but not limited to: noise levels, temperature, space, minimal distractions, and so on?**

Yes n

No n

**If no, please explain**

.....  
.....  
.....

**Q 3 Was it possible for the Test Administrator to move around the room without disrupting students?**

Yes

No

**Q 4 Did the Test Administrator have a stopwatch to time the assessment sessions accurately?**

Yes

No

**If no, how did the Test Administrator time the session?**

.....

**Q 5 Did the Test Administrator have an assistant at any time?**

Yes, one assistant only

Yes, more than one assistant

No

**If yes, who was the assistant to the Test Administrator?**

*(Tick one or more boxes as necessary)*

School Co-ordinator

Another teacher from the school

Other (*Specify .....*)

## 2 Test session activities

In this section the School Quality Monitor should record various aspects of the procedures used during the assessment session. Make sure that the time each section begins and finishes is noted. A clock graphic reminds you when and where to enter each time:



*This symbol means you should enter the time of day.*

You should have a copy of the script that the Test Administrator will use to read instructions to the class with you. A copy of this script can be found in Appendix 1 of the *Test Administrator Manual*.

If you are now observing an assessment session you should open the local Session Script.

**Introducing the study**

	Test Administrator introduces study to the students	<b>Time:</b>
---	---	--------------

**Q 6 Did the Test Administrator read the ‘Introducing the Study’ part of the Script for the Cognitive Blocks session exactly as it is written?**

Yes

No

**If no, did the Test Administrator make:**

*(Tick as many boxes as necessary)*

Minor additions

Major additions

Minor deletions

Major deletions

**If major additions or deletions were made, please describe:**

.....

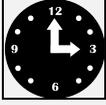
.....

.....

.....

.....

**Distributing the materials**

	Test Administrator begins to distribute booklets	<b>Time:</b>
---	--	--------------

**Q 7 How did the Test Administrator distribute the assessment booklets?**

.....  
.....  
.....

**Q 8 Did it appear that the Test Administrator confirmed that the student's name and the assessment booklet identification code on the Student Tracking Form matched those on the assessment booklet (or envelope)?**

Yes n

No n

**If no, what was done?**

.....  
.....

**Q 9 Did the Test Administrator record if students were present or absent?**

Yes n

No n

**Q 10 Did the Test Administrator ask the students if they all had an assessment booklet and a pen?**

Yes n

No n

**Q 11 Did the Test Administrator ensure that students did not open the booklets before instructed to do so?**

Yes n

No n

**Beginning the Cognitive Block session**

	Test Administrator begins the Cognitive Block session	<b>Time:</b>
---	---	--------------

**Q 12 Did the Test Administrator read the directions, the examples and the answer to the examples from the Script of the Cognitive Blocks exactly as it is written?**

Yes

No

**If no, did the Test Administrator make:**

*(Tick as many boxes as necessary)*

Minor additions

Major additions

Minor deletions

Major deletions

**If major additions or deletions were made, please describe:**

.....

.....

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.....

**Q 13 Do you think all students were able to hear the Test Administrator clearly?**

Yes n

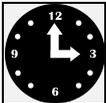
No n

**Q 14 After reading the directions, the examples and the answer to students from the Script of the Cognitive Blocks did the Test Administrator ask students if they had any questions?**

Yes n

No n

**Conducting the Cognitive Block session**

	Test Administrator begins the first one-hour block	<b>Time:</b>
---	--	--------------

**Q 15 Did the Test Administrator record the time the students commenced answering the assessment on the Session Report Form?**

Yes n

No n

**Q 16 Did the Test Administrator monitor the students making sure that they worked in Part 1 of the assessment booklet only?**

Yes

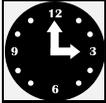
No

**If no, what was done?**

.....

.....

.....

	Test Administrator ends Part 1 of the Cognitive Block	<b>Time:</b>
--	---	--------------

**Q 17 At the end of the first one-hour block, did the Test Administrator ask students to stop, reading the script exactly as it was written?**

Yes

No

**If no, did the Test Administrator make:**

*(Tick as many boxes as necessary)*

Minor additions

Major additions

Minor deletions

Major deletions

**If major additions or deletions were made, please describe:**

.....

.....

.....

.....

.....

**Q 18 When the Test Administrator ended the first one-hour block of the test, how well did the students comply with the instructions?**

Well, all students stopped

Not well

	Test Administrator starts the second Cognitive Block	<b>Time:</b>
---	--	--------------

**Q 19 At the start of the second one-hour block of the assessment, did the Test Administrator read the script exactly as it was written?**

Yes

No

**If no, did the Test Administrator make:**

*(Tick as many boxes as necessary)*

Minor additions

Major additions

Minor deletions

Major deletions

**If major additions or deletions were made, please describe:**

.....

.....

.....

.....

.....

**Q 20 Did the Test Administrator record the time the students commenced answering the second part of the test on the Session Report Form ?**

Yes

No

**Q 21 During the second one-hour block of the test, did the Test Administrator monitor the students making sure that they worked in Part 2 only?**

Yes

No

**If no, what was done?**

.....

.....

.....

**Q 22 At the end of the second one-hour block, did the Test Administrator ask students to stop, reading the script exactly as it was written?**

Yes

No

**If no, did the Test Administrator make:**

*(Tick as many boxes as necessary)*

Minor additions

Major additions

Minor deletions

Major deletions

**If major additions or deletions were made, please describe:**

.....

.....

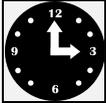
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**Q 23** When the Test Administrator ended the second one-hour block of the test, how well did the students comply with the instructions?

Well, all students stopped n

Not well n

	Test Administrator asks students to finish the second block	<b>Time:</b>
---	---	--------------

**Q 24** Did the students turn to the calculator use question at the end of their test booklets?

Yes n

No n

**Preparing for the Student Questionnaire session**

**Q 25 Did the students complete the student questionnaire immediately after the Cognitive session?**

Yes n            *If yes, go to Q 26*

No n

**If no, when will the student questionnaire be completed?**

Date: .....

Time: .....

Location: (if the same, just say so) .....

**If the questionnaire session is to be completed on another day, will you (the School Quality Monitor) be attending this questionnaire session?**

Yes n

No n

**Who will be conducting the student questionnaire session?**

Test Administrator n

School Co-ordinator n

Other (*Please specify* ..... ) n

**Administering the student questionnaire**

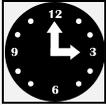
**Q 26** If the questionnaires were not bound with the test booklets, did the Test Administrator confirm that the student's name and the booklet identification code on the Student Tracking Form matched those on the questionnaire (or envelope)?

Yes n

No n

**If no, what was done?**

.....  
.....

	TA begins to read the script introducing the questionnaire	<b>Time:</b>
---	--	--------------

**Q 27 Did the Test Administrator read the script exactly as it was written to:**

- **Introduce the Student Background Questionnaire,**
- **Distribute the materials, and**
- **Begin the session?**

Yes

No

**If no, did the Test Administrator make:**

*(Tick as many boxes as necessary)*

Minor additions

Major additions

Minor deletions

Major deletions

**If major additions or deletions were made, please describe:**

.....

.....

.....

	Time students commence answering the questionnaire	<b>Time:</b>
---	--	--------------

	Time last student completes the questionnaire.	<b>Time:</b>
---	--	--------------

	Time last student exits the testing room.	<b>Time:</b>
---	---	--------------

**General questions concerning the assessment**

**Q 28** Were there any general disruptions to the session that lasted for more than one minute (e.g. alarms, announcements, changing of classes, etc.?)

Yes n

No n

**If yes, please specify**

.....

.....

.....

**Q 29** Generally, were the students orderly and co-operative?

Yes n

No n

**If no, did the Test Administrator make an effort to control the students?**

Yes n

No n

**Q 30** Generally, as far as you could tell, did the Test Administrator address students' questions appropriately during:

a) The directions?

Yes n

No n

Don't Know n

b) Cognitive sessions?

Yes n

No n

Don't Know n

c) Background Questionnaire?

Yes n

No n

Don't know n

**Please explain any 'No' responses.**

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.....

.....

.....

**Q 31 Did the Assistant, if there was one, answer any questions?**

Yes n

No n

No assistant n

**Q 32 Was there any evidence of students cheating during the assessment session?**

Yes n

No n

**If yes, describe this evidence.**

.....  
.....  
.....

**Q 33 Did any students leave the assessment area during the assessment?**

Yes n

No n

**If yes, did the Test Administrator record the incident on the Student's test booklet cover?**

Yes n

No n

**If no, please explain.**

.....  
.....  
.....

**Q 34 Were any defective test booklets detected?**

Yes n

No n

**If yes, how many? .....**

**If yes, did the Test Administrator replace them appropriately?**

Yes n

No n

**If no, please explain.**

.....  
.....

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**Q 35 Were any late students admitted to the assessment room?**

There were no late students n

Late students were not admitted n

Late students were admitted, but before the testing began n

Late students were admitted after the testing began n

**Q 36 Did any students refuse to participate in the assessment after the session had begun?**

Yes n

No n *If no, go to Q 38*

**If yes, how many before testing began? .....**

how many after testing began? .....

**If yes, why did the students refuse?**

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-----  
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**If yes, did the students refusing cause any disruption to the test session?**

Yes n

No n

**Q 37 If students did refuse to participate, did the Test Administrator collect the booklet and record the incident on the Student Tracking form?**

Yes n

No n

**If no, please explain.**

.....  
.....  
.....

**Q 38 At any point, did you feel it necessary to interrupt the Test Administrator to verify a procedure or intervene in some other way?**

Yes n

No n

**If yes, please explain.**

.....  
.....  
.....



**3 Interview with the school co-ordinator**

The purpose of the interview with the School Co-ordinator is to get his or her evaluation of the PISA assessment and obtain additional background information.

**Q 40 What is your position at this school?**

- Classroom teacher    n
- School Principal     n
- School Counsellor   n
- Other school staff   n
- Other                    n (Please Specify .....

**Q 41 In your opinion, how well did the PISA activities go at your school?**

- Well                    n
- Not well              n

**If not well, what were the main problems?**

- 1 .....
- 2 .....
- 3 .....

**Q 42 Did you receive the correct delivery of the following PISA materials?**

	Yes	No
Test Booklets	n	n
Test Administrator Manual	n	n
School Co-ordinator Manual	n	n
Student Tracking Form	n	n
Student questionnaires	n	n
School questionnaire	n	n
Envelopes and boxes addressed to the PISA National Centre for the purpose of returning materials after assessment	n	n

***If any 'No' responses, prior to the assessment day, did you have time to receive any missing materials from the PISA National Project Manager?***

Yes n

No n

**Q 43 If a make up session is required, who will conduct it?**

School Co-ordinator	n
Test Administrator	n
Other person	n
School refused to have Make-up	n
No Make-up needed	n

**Q 44 Were there any problems co-ordinating the schedule for the assessment?**

Yes n

No n

**If yes, please explain**

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**Q 45 Did you have any problems preparing an accurate list of age-eligible students?**

Yes n

No n

**If yes, please explain**

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**Q 46 Did you have any problems making exclusions after you received the list of sampled students?**

Yes n

No n

**If yes, please explain**

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**Q 47 Did the students receive any special incentives for participating in the PISA testing?**

Yes n

No n

**If yes, what were these incentives?**

1 .....

2 .....

3 .....

**Q 48 Did the students get any practice on questions like those in the PISA before assessment day?**

Yes n

No n

**If yes, please explain**

.....  
.....  
.....

**Q 49 Did any students refuse to take the test prior to the testing?**

Yes n

No n

**If yes, how many? .....**

**If yes, why did they refuse? .....**

.....  
.....



# School Quality Monitor General Observations sheet

This form is to be completed by School Quality Monitors after completing all their school visit(s).

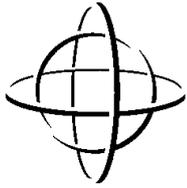
**Country:** .....

**Name of SQM:** .....

Telephone: .....

Fax: .....

Email: .....



OECD  
PISA  
OECD Programme for International Student Assessment  
Monitoring Knowledge and Skills in the New Millennium

Please describe your general impressions of the following aspects of the OECD-PISA procedures in the school(s) you visited:

**1 Security of PISA materials (student assessment booklets & questionnaires)**

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**2 Assessment conditions**

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**3 The contribution of the Test Administrator**

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**4 The contribution of the School Coordinator**

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**5 Attitude and response of the students to the Cognitive Block**

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**6 Attitude and response of students to the questionnaire**

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