

PISA QUALITY MONITOR MANUAL
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Project Consortium:

Australian Council For Educational
Research (ACER)

Netherlands National Institute for
Educational Measurement (CITO
group)

Educational Testing Service (ETS)

National Institute for Educational
Policy Research (NIER, Japan)

Westat

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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
PQM	PISA Quality Monitor
TA	Test Administrator

Notes:

1) **The consortium** mentioned in this manual refers to the consortium that implements PISA on behalf of the OECD. The consortium includes ACER (Australia), Cito-group (The Netherlands), NIER (Japan), Westat (USA) and ETS (USA). ACER leads this consortium. The consortium acts through the International Project Centre (IPC)

2) The **consortium representative** who will be the **trainer** for the PISA Quality Monitors will also act as the **National Centre Quality Monitor**. Therefore the consortium representative, National Centre Quality Monitor (NCQM), and PQM trainer all refer to the same person in this manual.

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 PISA Quality Monitor or about payment:

Person: Marten Koomen

Email: pisa@acer.edu.au

Fax: +61 3 9277 5500

Phone: +61 3 9277 5708

Mail: ACER
Private Bag 55
CAMBERWELL Victoria 3124
Australia

All Queries can be directed to pisa@acer.edu.au

ABOUT PISA QUALITY MONITORS

Overview

This manual is to be used by PISA Quality Monitors for the main study data collection for the Programme for International Student Assessment (PISA) project in the year 2003.

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. Forty-four countries will be involved in the main study conducted in the year 2003.
- *Data* Data will be collected from samples of 4,500 to 10,000 students in each country.
- *What is being assessed* Mathematical, Reading, and Scientific literacy as well as Problem Solving are being assessed by PISA. For the year 2003, the main focus is upon Mathematics literacy. In the year 2000, the main focus was upon Reading Literacy. In a subsequent cycle of the study, the focus will be upon Science.
- *Mathematics Literacy* Mathematics literacy is an individual's capacity to identify and understand the role that mathematics plays in the world, to make well-founded mathematical judgements and to engage in mathematics, in ways that meet the needs of that individual's current and future life as a constructive, concerned and reflective citizen.
- *More information about PISA* More information about PISA can be obtained from the PISA website: <http://www.pisa.oecd.org/>

About PISA Quality Monitors

- *Independence of PISA Quality Monitors*

The International Project Centre (the consortium represented by ACER) employs PISA Quality Monitors.

PISA 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 PISA Quality Monitor should not be a member of the same institution where the National Project Manager works or where the national project is based.

A PISA Quality Monitor should not report to the National Project Manager in their day-to-day work.
- *Attributes of a PISA Quality Monitor*

A PISA 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 PISA Quality Monitors*

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

To do this, PISA Quality Monitors will visit schools and observe testing sessions.

- *Materials required by PISA Quality Monitors*

All PISA Quality Monitors should have:

1. One copy of the PISA Quality Monitor Manual;
2. One copy of the Test Administrator Manual - including a local version of the '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 *PISA Quality Monitor Data Collection Sheet* as schools to be visited (for example, if the PISA Quality Monitor is to visit seven schools, then seven copies of the *Sheet* will be required); these copies may need to be photocopied by the PQM from the copy in this manual.
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 PISA Quality Monitors

- *Provide a Curriculum Vitae to ACER*

The National Project Managers nominate those people whom they think will make good PISA Quality Monitors in their country. National Project Managers make the nomination by forwarding Curriculum Vitae to ACER in either English or French.

When ACER agrees that the nominated person will make a satisfactory and independent PISA Quality Monitor then ACER will send a letter of appointment to the person.

- *Sign Confidentiality Agreement*

The PISA Quality Monitor should sign the Honoraria and Confidentiality Agreement form after being appointed as a PQM by ACER. This Honoraria and Confidentiality Agreement specifies:

1. The amount of money paid per day to the PISA Quality Monitor. It also describes the currency in which payment will be made.
2. The costs that will be covered by ACER when PISA Quality Monitors visit schools (all reasonable travel and meal costs will be reimbursed). It is not expected that the PISA Quality Monitor will require overnight accommodation to visit most schools.
3. That the PISA 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 PISA Quality Monitor.
4. That the PISA Quality Monitor is independent of the national centre.
5. General conditions of employment.

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

The PQM must submit a copy of the Honoraria and Confidentiality Agreement to ACER as soon as they have been notified of their appointment as a PQM. 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 PQM has with ACER, including rates of pay. It also broadly describes the responsibilities that the PQM has to ACER.

- *Receive training*

Representatives from the consortium will train PISA Quality Monitors. Prior to this training the PQM will receive from the consortium the following documents:

1. One copy of the PISA 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 PISA Quality Monitor will also receive from either the consortium representative or the National Project Manager, at the time of their training or before;

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.

PISA Quality Monitors are encouraged to attend Test Administrator training in order to gain familiarity with the PISA test administration procedures, and to meet the key personnel involved. The National Project Manager will run this training.

The consortium will reimburse PISA Quality Monitor for attending training session(s).

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

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

The PQM trainer, who will be a consortium representative, will be available to assist you in the future. You should make sure you obtain his or her name and how to contact them. PQMs who are not able to readily contact their trainer can also forward their queries to pisa@acer.edu.au.

- *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 PISA Quality Monitor to

conduct visits to schools.

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

Typically, a PISA Quality Monitor will visit up to eight schools.

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

Within each country, 'PQM 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 two PISA Quality Monitors, each PISA Quality Monitor region will contain 75 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 larger.

Every school in a region will have a chance of being selected for monitoring by a PQM. The consortium's National Centre Quality Monitor will work with the PISA Quality Monitor to select the schedule of schools to be visited taking into consideration:

- location;
- schedule;
- ease of access;
- type (single sex versus co-educational, religious secular, or other important sectors or strata within the local educational system).

All schools will have been told that they have a chance of being selected for a PISA Quality Monitor visit.

If the travelling time to the schools is excessive the PISA Quality

Monitor should consult with the National Centre Quality Monitor or contact ACER.

The selection of schools to be visited will be made by the National Centre Quality Monitor and PISA Quality Monitor working together. The National Project Manager will not be involved except to let the PISA 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.

It is preferred that selected schools not be told that a PISA Quality Monitor will visit them until being contacted by the PISA Quality Monitor a reasonable time before the testing session to be observed. The PQM may need to establish with the NPM the protocols for approaching schools.

- *Prepare for the school visits*

In preparing for a school visit a PISA 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 PISA Quality Monitor Manual;
7. a data collection sheet;
8. a watch to time to the nearest minute; and,
9. a pen.

- *Visit schools*

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

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

If people express concern about the presence of a PISA Quality Monitor they should be reminded that the role is one of observing and not one of policing the test.

The PISA 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, PISA Quality Monitors will talk with the School Co-ordinator and the Test Administrator. They will observe the test administration.

Once the PISA 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 *PISA Quality Monitor Data Collection Sheet*.

This will involve observing activities prior to the test including:

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

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

4. Attendance;
5. The distribution of test materials to students;

6. The time taken for the test;
7. How well the administrator followed the 'script' ;
8. Collection of test materials;
9. Student behaviour; and
10. Unpredictable events.

As well, the PISA 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 PISA Quality Monitor should photocopy the completed *PISA Quality Monitor Data Collection Sheet*.

In previous cycles some PISA Quality Monitor reports went missing 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:

Marten Koomen
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.

- *Complete the PISA Quality Monitor General Observations report*

When a PISA 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 in the *PISA Quality Monitor General Observations Report*. A blank copy of the *PISA Quality Monitor General Observations Report* is included with this manual.

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

Payment of PISA Quality Monitors

- *Two payments*

Two payments will be made to PISA 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 PISA Quality Monitors, it may be possible to negotiate an extra payment in advance. Contact Marten Koomen (pisa@acer.edu.au) 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 PISA Quality Monitor. A total of all expenses should be made and one claim sent to ACER, addressed to Marten Koomen.

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 PISA Quality Monitors on the conditions that they have:

- Been appointed and notified in writing by ACER that they will act as PISA 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. (Any difficulties with this requirement should be reported to ACER as soon as they are known);
2. When a completed copy of the *PISA Quality Monitor General Observations report* has been received at ACER; and,
3. All receipts for legitimate expenses 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 PISA Quality Monitors are properly implemented, PISA 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 PISA Quality Monitor role

The PISA 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 that testing occurred in standard conditions.

- *Quality monitoring versus quality control*

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

The PISA 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 PISA Quality Monitor training this will be discussed in detail.

Any intervention by a PISA Quality Monitor should always be done quietly. If there is resistance to any suggestions made by the PISA 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 PISA Quality Monitor intervenes should be a matter of judgement by the PISA Quality Monitor. Whatever decision is made, the event should be described in the PISA 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 reliability of the data as well as the good reputation of the project.

- *What will be done with the data collected by PISA Quality Monitors?*

The information collected by the PISA Quality Monitors in all the participating countries will be aggregated into one report. This report will not identify countries, schools or PQMs. The report will be useful to people using the PISA 2003 data for decision making as it will be an independent report on the testing conditions and adherence to procedures for PISA 2003.

The PQM data will also be reviewed by the International Project Centre to identify areas for improvement in the procedures for future cycles of PISA.

Where the PQM identifies that student test data have not been collected in ways that are substantively in accord with the PISA procedures, the test data may be excluded from analysis and reports prepared by the OECD.

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 for their country.

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

HYPOTHETICAL SITUATIONS FOR CONSIDERING WHEN A PISA QUALITY MONITOR MIGHT INTERVENE IN A TESTING SESSION

This section of the manual provides some examples of problems a PISA 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 PISA Quality Monitor will need to judge the costs and benefits of intervening.

Sometimes the PISA 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 the 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.

Problem	Possible response by PISA Quality Monitor
1. <i>PQM notices someone setting up a camera for photographing or videoing the testing session.</i>	Quietly ask the School Co-coordinator 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>	Make a note of it in the <i>PISA Quality Monitor Data Collection Sheet</i> and describe any major deviations on the sheet.
3. <i>A student appears to be getting upset.</i>	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. If the Test Administrator cannot deal with the problem get the School Co-coordinator to assist.

- | | |
|--|--|
| 4. <i>The students are completely out of control and moving around the room.</i> | Contact School Co-coordinator immediately. Do not intervene. |
| 5. <i>A student appears to the PQM that they should have been excluded</i> | 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. (see local <i>School Coordinator Manual</i> for guidelines on exclusions.

Privately discuss with the Test Administrator and School Co-coordinator. |
| 6. <i>Students are looking at each other's work.</i> | Notify the Test Administrator and record it in the <i>PISA Quality Monitor Data Collection Sheet</i> . |
| 7. <i>A student takes 5 minutes or longer out of the room.</i> | Note it in the <i>PISA Quality Monitor Data Collection Sheet</i> . You may want to check that the Test Administrator wrote details on the Student's booklet cover. |
| 8. <i>The TA is sick and has to leave.</i> | Make sure the School Co-coordinator is available to take over. If they are the same person, you may have to assume Test Administrator responsibilities. |
| 9. <i>The testing room is inappropriate (e.g., too small).</i> | Note it in the <i>PISA 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. |
| 10. <i>The PQM arrives at the school an hour before testing and the TA has already opened the bundles of</i> | Ask to find out why, and include the incident in the <i>PISA Quality Monitor Data Collection Sheet</i> . |

<i>booklets.</i>	
11. <i>The students have books and other materials on their desks at the start of testing.</i>	Remind the Test Administrator that the work areas should be clear and note it in the <i>PISA Quality Monitor Data Collection Sheet</i> .
12. <i>TA or some other persons suggest that a non-sampled student could substitute for an absent student.</i>	Explain that this is not appropriate under any circumstances and record the details in the <i>PISA Quality Monitor Data Collection Sheet</i> if this does not stop the substitution.
13. <i>An hour is up and the Test Administrator has not commenced reading the script announcing a break.</i>	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>PISA Quality Monitor Data Collection Sheet</i> .
14. <i>A student turns up late and the TA allows the student to come in.</i>	Record it on the <i>PISA Quality Monitor Data Collection Sheet</i> and endeavor to ensure that the student's booklet can be identified after the test (so that data from the student's booklet are not used).
15. <i>Fire alarm sounds or room is evacuated for any reason.</i>	Record it on the <i>PISA 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 PISA Quality Monitor should vacate the room with all other personnel.

[complete Page 25 – 26 and send to ACER, address on bottom of page 26]

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 PISA Quality Monitor (PQM) 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 PQM, 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 declare that: I am independent of the PISA National Project Centre in the country for which I am a PQM; I am not an employee of the institution that manages PISA in the country for which I am a PQM; and that I do not report to the PISA National Project Manager in the country for which I am a PQM.

I have read and accept the conditions 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 PISA 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:

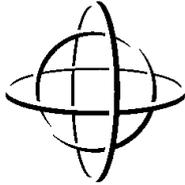
6. Account Number:

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.

Mail ACER copy to
Marten Koomen
ACER
Private Bag 55
CAMBERWELL
Victoria 3124
Australia

PISA QUALITY MONITOR DATA COLLECTION SHEET



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

PISA Quality Monitor Data Collection Sheet

*The pages 29 to 61 of this manual constitute the PISA Quality Monitor Data Collection Sheet.
The PQM should make one copy of these pages for each school the PQM is to visit*

Country:

Name of PQM:

Telephone:

Fax:

Email:

**Name & PISA ID
of School:**

**Address of
School:**

Date of original visit: 2003
Day Month

Date of follow-up visit (if necessary): 2003
Day Month

Time PQM 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:

Marten Koomen
Australian Council for Educational Research
Private Bag 55
CAMBERWELL 3124
Victoria
Australia

Email: pisa@acer.edu.au

A word on the tense of questions in the *PISA Quality Monitor Data Collection Sheet* — the questions which the PISA 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 PISA 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 PISA 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 PISA Quality Monitor is observing the session.

If there is insufficient space for comments on certain aspects or if the PISA Quality Monitor deems it necessary to make comments not covered by the set questions the PQM can make comments on the space provided on page 51

1 Preparation for the Assessment

In this section the PISA Quality Monitor 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 ₁

No ₂

If no, please explain.

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

Q 2. When did the Test Administrator distribute the assessment booklets?

a) Before the students arrived ₁

b) At the beginning of session ₂

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

Yes ₁

No ₂

Q 4. Was the test area suitable for the assessment by providing the following:

- | | Yes | No |
|---------------------------------------|---------------------------------------|---------------------------------------|
| a) a reasonable amount of space | <input type="checkbox"/> ₁ | <input type="checkbox"/> ₂ |
| b) sufficient light | <input type="checkbox"/> ₁ | <input type="checkbox"/> ₂ |
| c) a quiet testing environment | <input type="checkbox"/> ₁ | <input type="checkbox"/> ₂ |
| d) isolation from school distractions | <input type="checkbox"/> ₁ | <input type="checkbox"/> ₂ |
| e) a comfortable temperature to work | <input type="checkbox"/> ₁ | <input type="checkbox"/> ₂ |

If no, or if there were other reasons for the test area being unsuitable, please explain

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

Q 5. Did the Test Administrator have a stopwatch to time the assessment sessions accurately?

Yes ₁

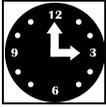
No ₂

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

.....

2 Test session activities

In this section the PISA 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:

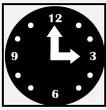


This symbol means you should enter the time of day.

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	Time: ____:____ T01
---	---	-------------------------------

Q 6. Did the Test Administrator read the 'Introducing the Study' part of the Script exactly as it is written?

Yes ₁

No ₂

6b) if no, did the Test Administrator make:

(Tick as many boxes as necessary)

Minor additions ₁

Major additions ₂

Minor deletions ₃

Major deletions ₄

If major additions or deletions were made, please describe:

.....

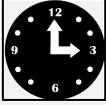
.....

.....

.....

.....

Distributing the materials

	Test Administrator begins to distribute booklets	Time: ____:____ T02
---	--	-------------------------------

Q 7. Did it appear that the Test Administrator confirmed that the student's name and the Student Identification Number on the Student Tracking Form matched those on the assessment booklet (or envelope

Yes ₁

No ₂

If no, what was done?

.....

.....

Q 8. Did the Test Administrator record if students were present or absent?

Yes ₁

No ₂

Q 9. Did the Test Administrator ensure that the students all had the following equipment:

	Yes	No
a) an assessment booklet	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂
b) a calculator ¹	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂
c) a ruler ¹	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂
d) a pen or pencil	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂

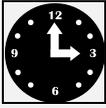
¹ Simply Record the action by the Administrator. The requirements for this will vary between countries

Q 10. Did the Test Administrator ensure that students did not open the booklets before instructed to do so?

Yes _1

No _2

Beginning the Test Session

	Test Administrator begins the Test Session	Time: ____:____ T03
---	--	-------------------------------

Q 11. Did the Test Administrator read the 'Beginning the Test Session', part of the Script, with the examples and answer to the examples, exactly as it is written?

Yes ₁

No ₂

11b) if no, did the Test Administrator make:

(Tick as many boxes as necessary)

Minor additions ₁

Major additions ₂

Minor deletions ₃

Major deletions ₄

If major additions or deletions were made, please describe:

.....

.....

.....

.....

.....

Q 12. Do you think all students were able to hear the Test Administrator clearly?

Yes ₁

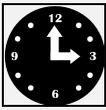
No ₂

Q 13. After reading the directions, the examples and the answer to students from the Script for the Cognitive Session did the Test Administrator ask students if they had any questions?

Yes ₁

No ₂

The Cognitive Session

	Test Administrator begins First Hour of Cognitive Session	Time: ____:____ T04
---	---	-------------------------------

Q 14. Did the Test Administrator read the 'First Hour of Cognitive Session' part of the Script exactly as it was written?

Yes ₁

No ₂

14 b) if no, did the Test Administrator make:

(Tick as many boxes as necessary)

Minor additions ₁

Major additions ₂

Minor deletions ₃

Major deletions ₄

If major additions or deletions were made, please describe:

.....

.....

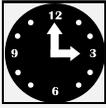
.....

.....

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

Yes ₁

No ₂



Test Administrator ends First Hour of the Cognitive Session

Time:

____:____ T05

Q 16. To end the First Hour, did the Test Administrator read the 'First Hour of Cognitive Session' part of the Script exactly as it was written?

Yes ₁

No ₂

16 b) if no, did the Test Administrator make:

(Tick as many boxes as necessary)

Minor additions ₁

Major additions ₂

Minor deletions ₃

Major deletions ₄

If major additions or deletions were made, please describe:

.....

.....

.....

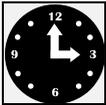
.....

.....

Q 17. When the Test Administrator ended the First Hour of the Cognitive Session, how well did the students comply with the instructions?

Well, all students stopped ₁

Not well ₂



Test Administrator starts Second Hour of Cognitive Session

Time:

____:____ T06

Q 18. Did the Test Administrator read the 'Second Hour of Cognitive Session' part of the Script exactly as it was written?

Yes ₁

No ₂

18b) if no, did the Test Administrator make:

(Tick as many boxes as necessary)

Minor additions ₁

Major additions ₂

Minor deletions ₃

Major deletions ₄

If major additions or deletions were made, please describe:

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

Q 19. Did the Test Administrator record the time the students commenced answering the Second Hour of the Cognitive Session on the Session Report Form?

Yes ₁

No ₂



Test Administrator ends Second Hour of Cognitive Session

Time:

____:____ T07

Q 20. To end the Second Hour of the Cognitive Session, did the Test Administrator read the 'Second Hour of Cognitive Session' part of the Script exactly as it was written?

Yes _1

No _2

20b) if no, did the Test Administrator make:

(Tick as many boxes as necessary)

Minor additions _1

Major additions _2

Minor deletions _3

Major deletions _4

If major additions or deletions were made, please describe:

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

Q 21. When the Test Administrator ended the Second Hour of the Cognitive Session, how well did the students comply with the instructions?

Well, all students stopped ₁

Not well ₂

Q 22. Did all the students turn to the last page with the questions on effort (and calculator use)?

Yes ₁

No ₂

¹ Not applicable in all countries



Test Administrator concludes Cognitive Session

Time:

____:____ T08

Q 23. At the conclusion of the Cognitive Session, did the Test Administrator read the 'Concluding the Cognitive Session' part of the Script exactly as it was written?

Yes _1

No _2

23b) if no, did the Test Administrator make:

(Tick as many boxes as necessary)

Minor additions _1

Major additions _2

Minor deletions _3

Major deletions _4

If major additions or deletions were made, please describe:

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

Q 24. When the Test Administrator concluded the cognitive session, did all students stay in their seats until the Test Administrator said they could leave?

All students remained seated

_1

Most students remained seated

_2

Some students remained seated

_3

No student remained seated

_4

Preparing for the Student Questionnaire Session

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

Yes ₁ *If yes, go to Q 26*

No ₂

25 b) If No and the questionnaire session is to be completed on another day, will you (the PISA Quality Monitor) be attending this questionnaire session?

Yes ₁

No ₂, *go to Q 30*

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 Student identification number on the Student Tracking Form matched those on the questionnaire (or envelope)?.

Yes

No

If no, what was done?

.....
.....



TA begins to read the Script introducing the questionnaire

Time:

____:____ T09

Q 27. Did the Test Administrator read the 'Introducing the Student Questionnaire' part of the Script exactly as it was written?

Yes ₁

No ₂

27b) If no, did the Test Administrator make:

(Tick as many boxes as necessary)

Minor additions ₁

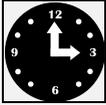
Major additions ₂

Minor deletions ₃

Major deletions ₄

If major additions or deletions were made, please describe:

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



Time students begin answering the questionnaire

Time:

____:____ T10

Q 28. Did the Test Administrator read the 'Beginning the Student Questionnaire Session' part of the Script exactly as it was written

Yes ₁

No ₂

28b) if no, did the Test Administrator make:

(Tick as many boxes as necessary)

Minor additions ₁

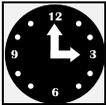
Major additions ₂

Minor deletions ₃

Major deletions ₄

If major additions or deletions were made, please describe:

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



Time last student completes the questionnaire.

Time:

____:____ T11

Q 29. Did the Test Administrator follow the procedures (checking for students still working and allowing extra time if needed) and read the 'Ending the Student Questionnaire Session' part of the Script exactly as it was written,

Yes ₁

No ₂

29b) If no, did the Test Administrator make?

(Tick as many boxes as necessary)

Minor additions ₁

Major additions ₂

Minor deletions ₃

Major deletions ₄

If major additions or deletions were made, please describe:

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



Time last student exits the testing room.

Time:

____:____ T12

Other Comments

Please include other relevant observations or comments here:

3 General questions concerning the assessment

Q 30. Were there any general disruptions to the session that lasted for more than one minute (e.g. alarms, announcements, changing of classes, etc.?)

Yes ₁

No ₂

If yes, please specify

.....
.....

Q 31. Generally, were the students orderly and co-operative?

Yes ₁

No ₂

31b) if no, did the Test Administrator make an effort to control the students?

Yes ₁

No ₂

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

Yes ₁

No ₂

If yes, describe this evidence.

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

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

Yes ₁

No ₂

33b) if yes, did the Test Administrator record the incident on the Student's test booklet cover?

Yes ₁

No ₂

Q 34. Were any defective test booklets detected?

Yes ₁

No ₂

34b) if yes, did the Test Administrator replace them appropriately?

Yes ₁

No ₂

Q 35. Were any students admitted to the assessment room after the reading of the Script had begun?

Yes ₁

No ₂

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

Yes ₁

No ₂ *if no, go to Q 38*

36b) if yes,

how many before testing began?1

how many after testing began?2

36c) if yes, did the students refusing cause any disruption to the test session?

Yes ₁

No ₂

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 ₁

No ₂

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 _1

No _2

If yes, please explain.

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4 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 39. What is your position at this school?

- Classroom teacher ₁

- School Principal ₂

- School Counsellor ₃

- Other school staff ₄

- Other ₅ (Please Specify)

Q 40. Were any of the following difficult for you?

	Not Difficult	Some Difficulties	Very Difficult	Not Applicable
a) Securing parental permission	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₇
b) Obtaining student cooperation	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₇
c) Obtaining support from teachers	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₇
d) Organising a suitable testing area	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₇

If any were difficult, what were the main difficulties?

- 1
-
- 2
-
- 3
-

Q 41. How would you rate the support you obtained for the PISA test from

	Low	Medium	High	Not Applicable
a) Parents	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₇
b) Teachers	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₇
c) Students	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₇

Q 42. For your school, is there another time in the school year more suitable for an assessment such as PISA?

Yes ₁

No ₂

If Yes, what other time in the school year would be better and why?

.....

.....

.....

Q 43. Will a follow-up session be required?

Yes ₁

No ₂

43b) if yes, who will conduct it.

School Coordinator ₁

Test Administrator ₂

Other person ₃(Please Specify

School refused to have follow-up ₄

Q 44. Did you receive the correct delivery of the following PISA materials?

- | | Yes | No |
|--|---------------------------------------|---------------------------------------|
| a) Test Booklets | <input type="checkbox"/> ₁ | <input type="checkbox"/> ₂ |
| b) Test Administrator Manual | <input type="checkbox"/> ₁ | <input type="checkbox"/> ₂ |
| c) School Co-ordinator Manual | <input type="checkbox"/> ₁ | <input type="checkbox"/> ₂ |
| d) Student Tracking Form | <input type="checkbox"/> ₁ | <input type="checkbox"/> ₂ |
| e) Student questionnaires | <input type="checkbox"/> ₁ | <input type="checkbox"/> ₂ |
| f) School questionnaire | <input type="checkbox"/> ₁ | <input type="checkbox"/> ₂ |
| g) Envelopes and boxes addressed to the PISA National Centre for the purpose of returning materials after assessment | <input type="checkbox"/> ₁ | <input type="checkbox"/> ₂ |

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 ₁

No ₂

Q 45. Did you have any problems preparing an accurate list of age-eligible students for the Student Listing Form?

Yes ₁

No ₂

If yes, please explain.

.....

.....

.....

.....

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

Yes ₁

No ₂

If yes, please explain.

.....

.....

.....

Q 47. Did your school have the facilities to readily provide a suitable testing space for the PISA test?

Yes ₁

No ₂

PISA QUALITY MONITOR GENERAL OBSERVATIONS SHEET

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

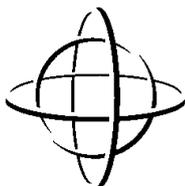
Country:

Name of PQM:

Telephone:

Fax:

Email:



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

This section is for you to describe your general impressions of the OECD-PISA procedures in the school(s) you visited. The information you provide will be valuable and will help the PISA project to determine how suitable and effective the PISA procedures were for collecting data in your country.

Security of PISA materials
(student assessment booklets)

1. From your observations, how would you rate the following in relation to the security of the materials?

	Not Secure	Secure	Very Secure	Not Applicable
a) The management of test materials by the Test Administrators observed	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	
b) The management of test materials by the School Coordinators observed	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₇
c) The areas used for storing test materials in schools	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₇
d) The methods used to package materials for dispatch to the testing session.	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	
e) The methods used to package materials for dispatch back to the National Project Centre after the test.	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	

2. Did you at any time observe a situation where the security of test materials was breached?

Yes ₁

No ₂

If Yes, please describe.

.....

.....

.....

.....

3. Did you at any time observe a situation where security of materials potentially could have been breached?

Yes ₁

No ₂

If Yes, please describe the situation and how the situation was managed.

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.....
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.....

4. Other comments or feedback related to security of materials.

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.....
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.....

The contribution of Test Administrators
--

5. The Test Administrators you observed were:

	Some times	Most Times	All Times
a) competent in managing the test materials	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃
b) confident in interpreting and using the Student Tracking Form	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃
c) knowledgeable of the test procedures	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃
d) confident when applying the procedures described in the manual during the test sessions	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃
e) confident when dealing with students	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃
f) positive towards PISA in schools	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃

6. Other comments or feedback on the contribution of the Test Administrators or their training:

.....

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The contribution of School Coordinators
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7. The School Coordinators you interviewed were:

	Sometimes	Most Times	All Times
a) enthusiastic about their school's participation in PISA	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃
b) competent in managing the PISA materials	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃
c) confident in interpreting and using the Student Tracking Form	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃
d) suitable for the role	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃

8. Did you detect any dissatisfaction amongst school coordinators with the communications they received from the PISA project?

Yes ₁

No ₂

If Yes, please describe the problems you detected.

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.....

9. Other comments or feedback relating to the School Coordinators and their role:

.....

.....

.....

.....

.....

Attitude and Response of Students To Cognitive Session

10. The students in the Cognitive Sessions you observed:

	Sometimes	Often	Always or Nearly Always
a) were engaged by the test material presented	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃
b) were enthusiastic about their participation in PISA	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃
c) appeared to do their best	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃
d) behaved appropriately for a test	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃
e) were able to maintain test conditions for the two-hour session	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃

11. Other comments or feedback about the students doing the cognitive session:

.....

.....

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.....

Attitude and response of students to the questionnaire

12. The students you observed completing the questionnaire appeared to be:

	Sometimes	Often	Always or Nearly Always
f) genuine when completing the questionnaire	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃
g) confident in answering questions	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃
h) willing to ask the Test Administrator for for assistance when necessary	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃
i) given sufficient time to complete the questionnaire	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃

13. Other comments or feedback about the students completing the questionnaire:

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.....

Your Suggestions for Improvement

PISA Procedures and PISA Quality Monitoring

14. During your monitoring activities, were you able to identify any aspect of the PISA testing procedures that could be improved?

Yes ₁

No ₂

If Yes, Please describe how the PISA testing procedures could be improved:

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

15. Are you able to suggest any improvements to the PISA Quality Monitoring procedures?

Yes ₁

No ₂

If Yes, Please describe how the PISA Quality Monitoring procedures could be improved:

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.....
.....

Thank You