PISA 2003 MAIN STUDY
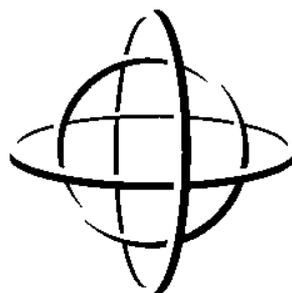# SCHOOL COORDINATOR'S MANUAL

October, 2002

OECD
PISA

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

Project Consortium:

Australian Council For Educational Research
(ACER)

Netherlands National Institute for
Educational Measurement (CITO group)

Educational Testing Services (ETS)

National Institute for Educational Policy
Research
(NIER, Japan)

Westat

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1. INTRODUCTION

1.1 Overview of the OECD Programme for International Student Assessment

1.2 The Role of the School Co-ordinator (SC)

Each school participating in PISA was asked to appoint a School Co-ordinator (SC) to be the liaison between the schools and study staff. As a SC you are responsible for PISA activities within your school. PISA relies on you to:

- Schedule the assessment and arrange for space for the sessions;
- Provide the list of eligible students to the National Project Centre (NPC) for the selection of the student sample;
- Receive the Student Tracking Form (which lists the students sampled to participate in the assessments) back from the NPC and complete a number of columns of this form related to each of the sampled students;
- Notify teachers, students, and parents about the PISA assessment according to the school's policies;
- Ensure that the School Questionnaire is filled in and returned to the Test Administrator (TA);
- Assist the TA during the assessment.

The rest of this manual describes these activities thoroughly. The Checklist of Activities in Section 1.3 summarises these activities and provides references to the more detailed sections of the manual. If, after reviewing the information in this manual, you have any questions or concerns, please contact your National Project Centre (NPC).

Note to NPMs
Insert appropriate contact information here. *Remove this box upon completion of this section.*

1.3 Checklist of Activities

Activity	SC Manual Reference	Suggested In-Country Schedule
☐ Select a date for the assessment	Section 2.1	As early as possible
☐ Prepare a list of all students eligible for PISA	Section 2.2	6 weeks before assessment
☐ Send the list of eligible students to the National Project Manager (NPM)	Section 2.2	6 weeks before assessment
☐ Receive and Update the Student Tracking Form (STF) list of selected students	Section 2.3	2 weeks before assessment
☐ Identify students who are to be excluded from the assessment	Section 2.45	1-2 weeks before assessment
☐ Notify teachers and other staff about the assessment	Section 2.56	1-2 weeks before assessment
☐ Notify students and parents (if necessary) about the assessment	Section 2.67	1 week before assessment
☐ Distribute and collect the School Questionnaire	Section 2.89	1-2 weeks before assessment
☐ Review plans for the assessment plans with TA	Section 2.910	1-2 weeks before assessment
☐ Notify NPM of any changes in the assessment schedule	Section 2.101	Prior to assessment
☐ Assist the TA on assessment day	Section 2.112	Assessment day
☐ Arrange for a follow-up session (if needed)	Section 2.123	Assessment day
☐ Store copies of assessment forms	Section 2.134	Until end of school year

2. SCHOOL CO-ORDINATOR RESPONSIBILITIES

2.1 Selecting a Date for the Assessment

<table>
<tr><td align="center">****Note to NPMs****</td></tr>
<tr><td>**Insert test window dates below.**

Also, choose the appropriate length of the Questionnaire session taking into account the inclusion of international and national options.

Remove this box upon completion of this section.</td></tr>
</table>

PISA assessments must be conducted during **[test window dates]**. The National Project Manager (NPM) may suggest particular dates during this period for the assessment in your school. You will then select the best date and alternative dates for your school. The following are guidelines for scheduling:

- The PISA assessment consists of a 2-hour Assessment Booklet and a **[3~~0~~5-minute or 45~~50~~-minute]** Questionnaire session;

- It is expected that it will take about 3 hours for the entire assessment including breaks. The cognitive parts should be administered on the same day with a short break between the two parts; and

- The Questionnaire session should also be administered on the same day if possible. However if this is not possible it may be given on a different day.

It is especially important that you inform the NPM of the preferred and alternative dates as soon as possible because he/she will be managing the schedules of the TAs.

2.2   Sending the NPM a List of Eligible Students

The Student Listing Form contains instructions for preparing a list of eligible students. The NPC will randomly select a sample of 35 students from this list. Please send this list to the NPC by **[due date]**. You will receive the list of students that have been chosen to participate in the assessment shortly thereafter. This will allow you to inform the sampled students and their parents well before the assessment date.

2.3   Updating the Student Tracking Form

After the NPC samples the students, the list of sampled students will be returned to you on a **Student Tracking Form (STF).** The STF is an essential document that is used to record session information, demographic and details and student participation.

All of the information at the top of the STF, including country and school information and sampling information in boxes A through F, will be completed by your NPM at the NPC. NPMs will also complete columns 1 through 7. These columns provide information about students included in the sample.

As the SC, you are responsible for reviewing and updating the information already completed, as well as for completing columns 8 and 9 of the STF:

- Identify and correct missing or incorrect information such as grade, gender, birth date and study programme from columns 1 to 7;

- For information about the study programmes and their codes, refer back to the instructions for preparing the list of students in Section 2.2 of this manual.

- Columns 8 and 9 are used to record the special needs and the inclusion status of all sampled students. You will complete these columns as discussed in detail in Section 2.~~4~~5.

The TA will complete columns 11 and 12 during the assessment session.

You may photocopy the STF and use it to notify teachers of the students selected. Please keep the original form to give to the TA on assessment day.

2.4 Completing Columns 8 and 9 of the Student Tracking Form

Information about the special education needs of students is recorded in column 8 of the STF. The codes to be used are defined below.

Note to NPMs

Guidelines for defining special education needs (SEN) are found in the NPM manual. Insert your approved national definitions here. Include the codes used for each SEN category.

Update the examples in appendix 1 so that they are consistent with your approved national definitions.

Remove this box upon completion of this section.

Most students will receive code "0" in column 8 meaning they have no special education needs.

Column 9 is not be confused with column 8. Information about the inclusion of students in the assessment is recorded in column 9 of the STF. The intent of PISA is to be as **inclusive** as possible. However, some students with limited proficiency in the language(s) of the assessment or those who have a physical, mental or emotional disability may not be able to participate. The codes to be used to identify students with special education needs who will not be included in PISA because of these special education needs are defined below.

In addition, some students cannot be included in the assessment because:

- They are no longer attending the school; or
- They are not age 15 as defined by PISA.

Follow these steps for recording information in column 9.

Step 1..   If a student with special needs or limited assessment language proficiency is to be excluded from the assessment, copy the same code recorded in column 8 for this student into column 9. Note that many of these students will be able to be **included** in the assessment and should receive a code of "0" in column 9.

Step 2.   The next step is to identify any students who are no longer at the school or who are not age 15 as defined by PISA. The following codes should be recorded in column 9 for these students:

Code	Meaning
5	Student transferred out of this school to another school
6	Student no longer in school, but it is not known if he or she is attending school elsewhere
7	Student is not age 15 as age 15 it is defined by the PISA

Step 3.   Finally, a "0" is recorded in column 9 for all other students, meaning that they are to be assessed in the PISA session. All students with a "0" in column 9 will be included in the PISA assessment.

It is important that these criteria be followed strictly for the study to be comparable within and across countries. WHEN IN DOUBT, INCLUDE THE STUDENT.

Examples of how to use columns 8 and 9 of the STF are included in Appendix 1 of this manual.

2.5   Notifying School Staff about the Assessment

It is your responsibility to inform all relevant school staff about the project, what their involvement will be, and when they will be involved. The NPC will send you informative materials to hand out to the staff to familiarise them with the project.

2.6   Notifying Students and Parents (If Necessary) About the Assessment

The information from the NPC about the project may also be given to students and parents. If parental permission is required, be sure that parents have enough time to receive the material and to respond before the day of the assessment. It is important that the student participation rate be as high as possible.

2.7   Maintaining Security

Because PISA materials may be used in the future, their security is important. You and other school staff members may look through unused booklets only after the assessment, and in the presence of the TA. Furthermore, Assessment Booklets must **NOT** be photocopied under any circumstances.

However, the Student Questionnaire is not secure and may be photocopied.

2.8   Distributing and collecting the School Questionnaire

Each school is asked to complete a School Questionnaire. The School Questionnaire collects information about school and class size, staffing patterns, instructional practices and school organisation.

You should give the questionnaire to the person most knowledgeable about staffing and policy issues. The questionnaire should be completed **before** the assessment date. This is so that the completed questionnaire can be given to the TA on the assessment day.

2.9   Reviewing the Assessment Plans with the Test Administrator

The TA assigned to your school should telephone or visit 1 or 2 weeks before the assessment date to:

- Confirm the time and location of the assessment session;
- Discuss how to handle emergencies or problem situations;
- Review the updated Student Tracking Form; and
- Resolve any remaining questions.

2.10   Communicating Schedule Changes

Everyone involved in the assessment should be informed about changes in the date or time of the assessment session.This includes school staff and students as well as your NPM. The NPM will then notify the TA.   Schedule changes should be communicated to all involved allowing sufficient time to make any necessary adjustments in arrangements.

2.11   Assisting the TA on the Assessment Day

Note to NPMs
NPMs should adapt some of the following instructions to reflect the country policy *Remove this box upon completion of this section.*

On the day of the assessment, it is your responsibility to help the TA with final arrangements. You are asked to:

- Provide calculators and rulers for students;
- Ensure that the students are ready to begin the assessment at the designated time. It is very important that as many of the sampled students as possible are assessed;
- Ensure that only sampled students are assessed; and
- Be present throughout the assessment to assist the TA if possible. If this is not possible, your presence at the beginning of the assessment session will help set the tone of the session and demonstrate the importance of the study.

2.12   Arranging for a Follow-up Session (If Needed)

Note to NPMs

The goal of holding follow-up sessions is to maximise the student participation rate. Adopt procedures to achieve this goal. If it is thought that the requirement that follow-ups be held will dissuade schools from participating, then it may be best to adapt or delete the requirement.

The value of 5 (absent students) assumes a within-school sample of 35 students. If the typical within-school sample is not 35 this number should be adjusted so that it is about 15% of the typical within-school sample size.

Remove this box upon completion of this section.

If more than 5 sampled students out of 35 are absent from the assessment session (not counting student or parent refusals, or excluded or ineligible students) a follow-up session should be scheduled. If a typical assessment session does not include 35 students, a follow-up session should be held if 15 percent or more of the students are absent.

Select a date and time that will maximise the number of students attending the session and that is convenient for the TA. Only one follow-up session will be held.

Notify the students who were absent from the original session and their teachers about the follow-up session. Make every attempt to ensure that absent students attend the session.

2.13   Storing the Copies of the Assessment Forms

Note to NPMs

Adapt the following as appropriate for their country.

Also insert the appropriate end date to store the STF and other PISA assessment documents. This date should be consistent with the Checklist in Section 1.3.

Remove this box upon completion of this section.

After completing the assessment, the TA will make a photocopy of the STF for you to keep at the school. The NPC may need to refer to this information should any questions arise during the coding of the assessment booklets.

Store the STF and other PISA assessment documents until **[end date]**. Destroy the documents after this date.

Your help with PISA is very important to its success.
The NPC and the International Project Team appreciate your willingness to help and thank you for your time.

APPENDIX 1. EXAMPLE STF COMPLETED WITH SEN AND INCLUSION STATUS

A.   Identifying Students with Special Education Needs (SEN)

The codes for special needs are:

> 0 = No special education needs
> 1 = Functional disability
> 2 = Intellectual disability
> 3 = Limited assessment language proficiency
> 4 = (Must be defined by NPM to be used)

Most students will receive a "0" in column 8, meaning they have no special education needs.

Examples:

- José Rodriguez has limited English proficiency and is coded as "3" in column 8.

- Sam Walker is blind and is coded as "1" in column 8.

- Fred Peters is physically disabled. He is coded as "1" in column 8.

- Lisa McCoy has been professionally assessed as cognitively delayed and is coded as "2" in column 8.

- All other students do not have any special education needs and are coded as "0" in column 8.

SAMPLE PISA STUDENT TRACKING FORM: COL. 8

Country Name: **United States** **Stratum ID: 01**
School Name: **Roosevelt High School** **School ID: 102**

SAMPLING INFORMATION					
(A) # Students Age 15	(B) # Students Listed for Sampling	(C) Sample Size	(D) Random Number	(E) Sampling Interval	(F) First Line # Selected [(Box D X Box E) + 1]
145	145	35	0.4576	4.1429	2.8958

(1) ID #	(2) Line # (Sample)	(3) Student Name	(4) Grade	(5) Gender F=1; M=2	(6) Birth Date (MM-YY)	(7) Study Programme	(8) (7) SEN Code	(9) Inclusion Code	(10) Booklet Number	Participation Status			
										(11) Original Session		(12) Follow-up Session	
										Booklet	SQ	Booklet	SQ
1	3	Ted Brooks	10	2	12/87	1	0		3				
2	8	Jeffrey Jenkins	10	2	11/87	1	0		4				
3	12	Rose Matthews	10	1	12/87	1	0		5				
4	16	José Rodriguez	10	2	05/87	1	3		6				
5	20	Jennifer Trader	9	1	04/87	1	0		7				
6	24	Roy Zastrow	9	2	09/87	1	0		8				
7	28	Sam Walker	10	2	07/87	1	1		9				
8	33	Julie Walters	10	1	04/87	1	0		10				
9	37	Suzanne Smith	10	1	07/87	1	0		1				
10	41	Fred Peters	10	2	10/87	1	1		2				
11	45	Tammy Alexander	10	1	12/86	1	0		3				
12	49	Lisa McCoy	10	1	08/87	1	2		4				
13	53	Melissa Holten	10	1	09/87	1	0		5				
14	57	Joshua Bensen	10	2	07/87	1	0		6				

B. Determining the Inclusion Code

The STF identifies all sampled students. After columns 8 and 9 have been filled in, it identifies the students that are expected to attend the session.

All students who are eligible and who can be assessed should have the code "0" in column 9, including students with special educational needs who can participate in PISA.

If a student with special needs is to be excluded from the assessment, the same special needs code recorded in column 8 for this student should be copied into column 9.

The codes to be used in column 9 are:

> 0 = Included; to be assessed
> 1 = Not included; functional disability
> 2 = Not included; intellectual disability
> 3 = Not included; limited assessment language proficiency
> 4 = Not included; defined by NPM
> 5 = Not included; transferred out of school
> 6 = Not included; no longer in school, but not a known transfer
> 7 = Not included, does not meet age definition

Examples:

- Jeffrey Jenkins has recently transferred out of school. He is coded as "5" in column 9.

- José Rodriguez has limited English proficiency and is coded as "3" in column 8. He has been taught in English for this year only and his teachers believe that he will not be able to participate in the assessment. Therefore, he is coded as "3" in column 9.

- Sam Walker is blind and is coded as "1" in column 8. PISA is not offered in Braille. Therefore, he is unable to participate in the assessment and is coded as "1" in column 9.

- Even though Fred Peters is functionally disabled, it does not affect his ability to participate. So, although he is coded as "1" in column 8, he is coded as "0" in column 9.

- Tammy Alexander does not meet the age definition and is coded as "7" in column 9.

- Lisa McCoy has been professionally assessed as cognitively delayed and is coded as "2" in column 8. She does not participate in other testing programs. Therefore, she will not participate in the assessment and is coded as "2" in column 9.

- All other students do not have any special needs and are eligible to participate. Therefore, they are coded "0" in both columns 8 and 9.

SAMPLE PISA STUDENT TRACKING FORM: COL. 9

Country Name: **United States**   **Stratum ID:** **01**
School Name: **Roosevelt High School**   **School ID:** **102**

SAMPLING INFORMATION					
(A) # Students Age 15	(B) # Students Listed for Sampling	(C) Sample Size	(D) Random Number	(E) Sampling Interval	(F) First Line # Selected [(Box D X Box E) + 1]
145	145	35	0.4576	4.1429	2.8958

(1) ID #	(2) Line # (Sample)	(3) Student Name	(4) Grade	(5) Gender F=1; M=2	(6) Birth Date (MM-YY)	(7) Study Programme	(8) (7) SEN Code	(9) Inclusion Code	(10) Booklet Number	Participation Status			
										(11) Original Session		(12) Follow-up Session	
										Booklet	SQ	Booklet	SQ
1	3	Ted Brooks	10	2	12/87	1	0	0	3				
2	8	Jeffrey Jenkins	10	2	11/87	1	0	5	4				
3	12	Rose Matthews	10	1	12/87	1	0	0	5				
4	16	José Rodriguez	10	2	05/87	1	3	3	6				
5	20	Jennifer Trader	9	1	04/87	1	0	0	7				
6	24	Roy Zastrow	9	2	09/87	1	0	0	8				
7	28	Sam Walker	10	2	07/87	1	1	1	9				
8	33	Julie Walters	10	1	04/87	1	0	0	10				
9	37	Suzanne Smith	10	1	07/87	1	0	0	1				
10	41	Fred Peters	10	2	10/87	1	1	0	2				
11	45	Tammy Alexander	10	1	12/86	1	0	7	3				
12	49	Lisa McCoy	10	1	08/87	1	2	2	4				
13	53	Melissa Holten	10	1	09/87	1	0	0	5				
14	57	Joshua Bensen	10	M	07/87	1	0	0	6				