

**PISA 2015 MATERIALS PREPARATION:
FIELD TRIAL – COGNITIVE PART
UPDATE**

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Produced by cApStAn and Béatrice Halleux under the supervision of ETS, Core 3 Contractor



PISA 2015 Contractors



INTRODUCTION

1. This document sets out instructions for NPMs and National Centre staff responsible for national translations and adaptations of the PISA 2015 Field Trial version of paper-based and computer-based Cognitive tests. Instructions for the preparation of questionnaires are set out in a separate document ¹, because these fall under the responsibility of the Core 6 Contractor, while cognitive tests fall under the responsibility of the Core 3 Contractor.
2. Please refer to Chapter 5 of the *NPM manual* for a full description of the PISA standards, the testing languages, the Translation Plan and the recruitment of translators; and to the *PISA 2015 Translation and Adaptation Guidelines* for detailed explanations on the double translation and reconciliation procedure.
3. The table below shows the key documents that are essential for the translation, adaptation and preparation of the PISA 2015 cognitive tests.

Table 1. Key documents

Reference	Document Title
<CY6_GEN_PISA2015_TrAd_GDL.docx>	PISA 2015 Translation and Adaptation Guidelines
<CY6_TST_PISA2015_Materials_Preparation_FT_Cognitive_part>	<i>This Materials Preparation document</i>
<CY6_GEN_NPM_Manual_Chapter5.docx>	PISA 2015 NPM Manual Chapter 5
<PISA 2015 Portal User Guide Modules.pdf>	PISA 2015 Portal Users' Guide
<PISA2015-Materials-Preparation.docx>	PISA 2015 Translator's Guide
<PISA2015-Materials-Preparation.docx>	PISA 2015 Reconciler's and National Reviewer's Guide
<CY6_TST_CBA_Recurring_Directions_Prompts>	List of all recurring directions and prompts, in ENG and FRA, for PISA2015 item types.
<CY6_TST_Checklist_for_reviewing_TT_in_CBA>	Checklist for Countries' Review of Trend Units transferred to CBA format by Core 3
<CY6_TST_Cognitive_Units_PISA_2015_Field_Trial>	List of Cognitive Units for the PISA 2015 Field Trial
<CY6_CBA_PISA2015_FT_Workflows_Manual>	Manual providing step-by-step instructions for using the workflows for translation and adaptation of the cognitive instruments and questionnaires.

Internationally equivalent PISA materials

4. The equivalence of test materials with the international source versions and the policy of using unchanged trend items are the subject of PISA Standards 4.1, 4.2 and 5.1 displayed in the NPM manual.

¹ CY6_QST_PISA2015_Materials_Preparation_FT_QQ_part.docx

Document languages to be used

5. The PISA Standard that relates to the test languages used in PISA is displayed in the NPM manual.
6. The NPM should develop as many versions of the test instruments as there are languages of instruction used in the schools included in the national sample. The test languages identification was part of the Sampling Task 0 (ST0), which should be completed by the time the present document is circulated.

Amount of material to translate/adapt/review

The updated translation kit contains a document listing all units to be translated and their word count in the English source version (see CY6_TST_Cognitive_Units_PISA_2015_Field Trial). Note that most of the units listed in this document will have gone through extensive review after the feedback from country reviews (last feedback received on January 25, 2013) and the Translatability Assessment. Draft units that were circulated for review should not be considered as being ready for translation. However, trend materials dispatched on April 5 (CB), and new materials that will be dispatched on April 5, April 30, and May 15 will be reliable and should be used as a basis for translation/adaptation.

Dispatches

7. Four important features in the PISA 2015 survey cycle are:
 - The shift towards computer-based materials.
 - The increase in the proportion of trend materials.
 - The centralized management of national versions of trend materials.
 - The mode effect study at Field Trial stage, whereby all countries administering computer-based materials will administer trend materials in both delivery modes i.e. computer-based (CB) and paper-based (PB).
8. Although there are some minor wording differences between the CB and PB versions of trend materials, particularly at the level of prompts and instructions, the stimuli and items are, for the most part identical. Any part of the trend material that needs to be translated/adapted will be processed only once; the starting point will be the computer-based version (except for countries administering paper-based assessments only). The wording of centrally assembled PB versions will be aligned to finalized CB versions at a later stage, because it is necessary to have all final CB national versions in September 2013, while printed PB booklets will only be needed in early 2014.
9. The dispatch for the CB versions of trend materials will consist of:
 - XLIFF files (one file per unit – this only applies to units for which there are no imported, existing translations). Units for which you do not receive XLIFF files are available in preview mode only.
 - Test Adaptation Spreadsheets (TAS) in Excel format, containing item-per-item guidelines (one TAS per cluster). Differences between CB and PB versions are listed in the TAS.

- Links to the PISA Portal to allow previews of the English source and the national version. Previews of the French source version should be available soon thereafter.
 - A list of recurring directions and prompts in ENG and FRA, with illustrative examples. Countries are encouraged to use this list to fill in their own consensual translation of these prompts and directions in the boxes provided: if all players work with the same list of recurring prompts and directions; across-units consistency will be ensured. It would be very efficient to prepare the national version of this list during the translator and reconciler training.
10. The dispatch for the PB versions of trend materials will consist of:
- Source paper-based clusters in MS Word format (6 files per domain).
 - PDF versions of centrally assembled national versions of trend clusters.
 - Test Adaptation Spreadsheets (TAS) in Excel format, containing item-per-item guidelines (one TAS per cluster).
 - Note that the booklet shell which consists of all parts that are common to each booklet (including formulae table, general directions, sources etc.) will be dispatched in June when work on identifying any errors in the paper clusters will begin.
11. The dispatches of new Science Literacy and Collaborative Problem Solving materials, which exist in CB mode only, will consist of:
- XLIFF files (organized per unit).
 - Test Adaptation Spreadsheets (TAS) in Excel format, containing item-per-item guidelines. Countries will receive one TAS per unit for CPS. New Science materials will be released in batches as they are ready for national translation work, with one TAS for each batch of released materials. (As mentioned in paragraph 10, countries are invited to use the recurring directions document for those directions and prompts that are used consistently throughout the new Science units.) Links to the PISA Portal to allow previews of the English source, the French source (except for Financial Literacy units) and the national version.
12. There will also be a dispatch of General and domain-specific orientations, error messages, rollover text (button labels, etc.) and “Help” content. These files will be part of the last dispatch, scheduled for May 15.
- The general orientation will introduce the screen design (location and meaning of the progress bar, unit and item identification, etc.), and general navigation (clicking on Next and Back).
 - Domain-specific orientations will include information about domain-specific functionalities (e.g., the equation editor for math, paging interface for reading, simulations for science, etc.)
13. Table 2 shows the foreseen dispatch dates of source versions of PISA 2015 cognitive tests, and key dates for translation, adaptation and verification at Field Trial stage.

Table 2. Dispatch dates and key dates in the Translation, Adaptation and Verification Timeline

Domain	Action	Date
Trend Mathematics (PB)	Dispatch ENG/FRA source	April 5, 2013
Trend Reading (PB)	Dispatch ENG/FRA source	April 5, 2013
Trend Science (PB)	Dispatch ENG/FRA source	April 5, 2013
Trend Mathematics (CB)	Dispatch ENG/FRA source	April 5, 2013
Trend Reading (CB)	Dispatch ENG/FRA source	April 5, 2013
Trend Science (CB)	Dispatch ENG/FRA source	April 5, 2013
Trend Materials listed above	Beginning of Translation/adaptation of trend materials	Right after dispatch
CB Trend Materials listed above	Existing national versions of CB trend items made available to countries for review and translation of CB directions and prompts	April 5, 2013
PB Trend Materials listed above	PDF files of existing national versions of PB trend items made available to countries for reference during their work on CB trend items (for CBA countries)	On a rolling basis with email notification to countries beginning beginning April 4
	WORD files of existing national versions of PB trend items made available to PBA countries	On a rolling basis with email notification to countries beginning April 12
Financial Literacy (CB+PB)	Dispatch ENG source	April 15, 2013
New cognitive items, batch 1	Dispatch ENG + FRA source (batch 1)	April 5, 2013
	Beginning of Translation/adaptation of new materials	April 5, 2013
New cognitive items, batch 2	Dispatch ENG + FRA source (batch 2)	April 30, 2013
New cognitive items, batch 3a (including orientations and “help” content)	Dispatch ENG (batch 3) + FRA source for part of these units	May 15, 2013
New cognitive items, batch 3b	Dispatch FRA source (batch 3) of remaining units	May 25, 2013
	End of Translation/adaptation window for new materials	June 30, 2013
	End of Verification window for new materials	August 30, 2013
All domains	Locking of Final National versions in Authoring Platform	Oct 1-10, 2013
Trend materials, paper-based	Common Booklet Parts	June 1, 2013
All domains	Coding Guides (Trend – CB+PB)	April 30, 2013
New Science	Coding Guides (CB) (Batch 1)	April 30, 2013
	Coding Guides (CB) (Batch 2)	May 15, 2013

CHAPTER 1 – GETTING STARTED

Countries administering computer-based assessments

14. Centrally imported trend items need to be reviewed, not translated. This section is for those trend items that need to be translated, not reviewed. The Translation Kit for trainers of translators and reconcilers was made available before the NPM Meeting in Bangkok, so that countries could begin the translation adaptation of new materials as soon as these are dispatched. This Translation Kit contains all files, instructions and examples needed to get started.

15. New countries may want to begin by translating trend material – which is new material to them. Likewise, countries that participated in some but not all previous PISA cycles may need to translate/adapt part of the trend material, as it will be new for them. Finally, yet importantly, trend materials from countries for which archives from previous PISA cycles could not be located will be regarded as new materials, too. Individual emails will be sent to each country from Core 3 to clarify and confirm the status of all trend materials following the April 5 release date for trend materials.

16. To begin working on the CB version of trend materials that are regarded as new materials for your country, the NPM or the person in charge of translation and adaptation in the National Centre needs to:

- a. Read the PISA2015FT Translation and Adaptation Guidelines a first time thoroughly, and keep this document at hand for consultation.
- b. Appoint translators and reconciler(s), have them sign a confidentiality agreement and ensure that they have appropriate access to the PISA Portal.
- c. Customize and distribute to translators and reconcilers their user guides: translators will refer to the *PISA 2015 Translator’s Guide*. The reconciler will refer to the *PISA 2015 Reconciler’s and National Reviewer’s Guide*
- d. Ensure that translators and reconciler(s) install the PISA 2015 version of the Open Language Tool (OLT). If one or several of your assessment languages are right-to-left languages, you can use the same OLT package as for left-to-right languages: the current PISA OLT is a smart version, and it will automatically switch the direction to right-to-left if you select a right-to-left language as target language when you create your project in OLT.

Countries administering paper-based assessments

17. Countries administering paper-based assessments will not have any new materials (materials developed for PISA 2015) to translate/adapt. Only trend items will be administered.

18. The Translation Kit for trainers of translators and reconcilers was made available before the NPM Meeting in Bangkok, so that countries could begin the translation/adaptation of new materials as soon as these are dispatched. This Translation Kit contains all files, instructions and examples needed to get started.

19. New countries may want to begin by translating trend material – which is new material to them. Likewise, countries that participated in some but not all previous PISA cycles may need to translate/adapt

part of the trend material, as it will be new for them. Finally, yet importantly, trend materials from countries for which archives from previous PISA cycles could not be located will be regarded as new materials, too.

20. To begin working on the PB version of trend materials, the NPM or the person in charge of translation and adaptation in the National Centre needs to:
- a. Read the PISA2015FT Translation and Adaptation Guidelines a first time thoroughly, and keep this document at hand for consultation.
 - b. Appoint translators and reconciler(s), have them sign a confidentiality agreement and ensure that they have appropriate access to the PISA Portal.

CHAPTER 2 – TRANSLATION

21. Countries should organise for the translation of material using the “*double translation and reconciliation*” procedures described in the NPM manual and following the advice provided in *PISA Translation/Adaptation Guidelines*. National translation procedures must have been agreed through the Translation Plan before starting the translation.

22. One of the roles of the *reconciler* of the translations is to document all national adaptations in the test material that the translation team deemed necessary. S/he will do this by completing the *Test Adaptation Spreadsheets (TAS)*.

23. For countries administering units in computer-based delivery mode (CB) and, for trend items, in both CB and paper-based mode (PB), the starting point of the translation is the CB version. The Trend TAS is designed to document adaptations to the CB version, but already lists differences between CB and PB and segments for which national centres are required to provide translations.

24. The Trend TAS are arranged per cluster: for Mathematics and Science trend clusters, there is one worksheet (or sometimes two worksheets) per cluster, with a differentiation between NEW and TREND. For Reading Trend clusters, there is, in each cluster TAS, one worksheet per Reading unit, also with a differentiation between NEW and TREND. ‘NEW’ is for trend material that needs to be regarded as new material for a given country.

25. It is important to carefully read the TAS Instructions (in a separate worksheet of the TAS) *before* using them. The TAS also contain useful time-saving tips. Figure 1 below shows a Trend Reading TAS.

Figure 1. Screenshot from a Reading Trend TAS

PISA2015FT TEST ADAPTATION SPREADSHEET						
Country: <input type="text"/>		TREND ITEMS - READING CLUSTER 1				
Language: <input type="text"/>		R220SOUTHPOLE - LAST USED FULLY IN PISA2009MS (CLUSTER R1, BKLT S B1,B2,B9,B13,B21,B22) 3 ITEMS (Q01, Q02B AND Q04) WERE USED IN PISA2012MS (CLUSTER PR3, BKLT S B2,B3,B11,B13,B22,B23)				
FILL IN THIS WORKSHEET IF YOU NEED TO TRANSLATE THIS UNIT, OTHERWISE USE THE WORKSHEET R220SOUTHPOLE-TREND						
LOCATION	SEGMENT ID	ENGLISH SOURCE VERSION	ITEM-SPECIFIC TRANSLATION/ADAPTATION GUIDELINE	COUNTRY COMMENT (ADAPTATIONS, DOUBTS, DIFFICULTIES)	VERIFIER INTERVENTION	VERIFIER COMMENT
ATTENTION: WORK-SAVING TIP	94-160 161-243 244-312	The stimulus text is replicated twice to allow highlighting of sentences in Q3 & Q4	Translate segs 94-160. Then use the Translation Memory to populate segs 161-243 and 244-312 (2nd and 3rd occurrence of stimulus). Only a few segments will need to be copy/pasted manually from segs 94-160 (the texts are the same but need to be split into separate parts)			
Stimulus - Document 1 (Text)						
	96-106	Terra Nova, Scott, Amundsen, 14 January 1911, Bay of Whales, etc.	Do not adapt any of the names of persons and places, or any of the dates			

26. If there is an existing national version of a trend unit, you will use the TREND worksheet of the TAS. In that worksheet, note that every time there is a new or changed prompt or instruction in the CB version of the trend unit, you are asked to provide a translation in the TAS. These translations should be entered in the light yellow cells (new texts) or light mauve cells (modified texts), as indicated in Figure 2 below.

Figure 2. Screenshot from a Science Trend TAS showing CB-specific instructions

PISA2015FT TEST ADAPTATION SPREADSHEET						
Country: <input type="text"/>		TREND ITEMS - SCIENCE CLUSTER 1				
Language: <input type="text"/>		LAST USED IN PISA2012MS (CLUSTER PS1, BKLT S B3,B5,B8,B12,B23,B25)				
FILL IN THIS WORKSHEET IF THIS UNIT HAS BEEN RETRIEVED FOR YOU FROM ARCHIVES, OTHERWISE USE THE						
LOCATION	SEGMENT ID	ENGLISH SOURCE VERSION	ITEM-SPECIFIC TRANSLATION/ADAPTATION GUIDELINE	REQUEST FOR CHANGE VERSUS ARCHIVE VERSION: Description of desired change (in target language) and justification (in English)	TRANSLATION	TEST ID
S269 EARTH4 TEMPERATURE						
Stimulus						
Directions (same for Q1 and Q2)	4 10	Refer to "Earth's Temperature" on the right. Type your answer to the question.	New directions for computer-based. Maintain across-units consistency	[NC please delete this note and enter a translation here - this text is new and does not exist in archives]		
Q1						
Q2						
Directions	16	Refer to "Earth's Temperature" on the right. Click on the choices in the table to answer the question.	New directions for computer-based. Maintain across-units consistency	[NC please delete this note and enter a translation here - this text is new and does not exist in archives]		
Q3	17	Click on either Yes or No for each.	Revised instruction for computer-based	[NC please delete this note and enter a translation here - this text differs vs. pb and does not exist in archives in this form]		
Table heading	18	Does this energy source cause carbon dioxide production?	Revised table heading for computer-based	[NC please delete this note and enter a translation here - this text differs vs. pb and does not exist in archives in this form]		

27. The Core 3 Contractor will then enter your translation in the appropriate location in the XLIFF file.

28. You will need to perform a careful review of units imported into the CB format by Core 3. A support document is provided for this purpose, in which a number of issues that require the national reviewer's attention are listed: <CY6_TST_Checklist_for_reviewing_transferred_Trend_Units.docx>.
29. The verifier will implement corrections for errors that you point out in the TAS (copy/paste errors, or residual errors carried over from a previous cycle), and verify the translations you provide for new computer-specific prompts and instructions.
30. If there is no existing national version of a given trend unit, you need to translate it fully (or adapt a national version from another country), and document your adaptations (i.e. intentional deviations from the source version, made to conform to local usage and/or to avoid putting your students at an advantage or disadvantage) in the TAS.
31. All item-per-item translation and adaptation guidelines are listed in the TAS and need to be considered carefully.
32. It is recommended to translate the segments in the order presented in the TAS rather than the order of the segments in the XLIFF. In the XLIFF file, the questions may come first and be followed by the stimulus. It makes good sense to always translate the stimulus first, and then the items.
33. Once you will have produced two translations; once your reconciler will have merged the two translations, selecting the best elements from each; and once feedback from experts of your National Committee have been implemented in your reconciled version, the final national version and related *Test Adaptation Spreadsheets* should be submitted for international verification.
34. The submission dates for this material should be between July 1st and August 12th, so that the entire verification process can be completed by August 31. Please fill in the Verification Timeline Form, which is the last document in the Translation Kit. This form should have been sent to pisa.verif@capstan.be by e-mail before the NPM meeting in Bangkok, if this was not done, please fill-in the form and send it to cApStAn as soon as possible.
35. Note that the double translation and reconciliation process is the same for trend units that are regarded as new for your country, for new computer-based science units (Standard Science and Interactive Science) and for Collaborative Problem Solving units. The TAS is a monitoring tool in which:
- item-specific guidelines are listed;
 - reconcilers document national adaptations;
 - verifiers describe their interventions;
 - the translation referee comments on some verifier interventions and labels some as requiring follow-up
 - national reviewers react to verification feedback
 - final check reviewers document resolution of corrections requiring follow-up.

CHAPTER 3 – CODING GUIDES

36. There will be paper-based coding guides for all open-ended items of all domains. Master versions of these guides will be provided as templates by Core 3 and made available on the PISA Portal.
37. For new CB Science units, the coding guides (in Word format) will include the item text and scoring instructions for constructed response items only. The actual stimuli will not be reproduced in the coding guides.
38. For Collaborative Problem Solving, coding is entirely automated i.e. there are no coding guides for this domain.
39. For trend Mathematics, trend Reading and trend Science items, there will be a single coding guide for both PB and CB, organised by cluster. This coding guide will contain both selected- and constructed-response items. Coders working on paper booklets will need all that information; coders working on the computer-based items will just need the latter.
40. Existing versions of coding guides will be used to populate the templates Core 3 will provide. You will receive instructions for the review of national coding guides at a later stage.
41. Verification of Coding Guides will take place once all national versions of CBA assessments are locked in the authoring platform i.e. the verification window for coding guides will run from November 2013 to February 2014.

CHAPTER 4 – VERIFICATION AND FINAL CHECK

42. The verification process will be quite different for countries administering paper-based assessments (PB) versus countries administering computer-based assessments (CB). Therefore, the two processes are discussed in separate sections. Note that countries doing CB will need to follow PB verification processes for specific components: the PB Booklet Shell (common booklet parts including general directions, credits and acknowledgements, one-page mode effect student questionnaire) and the Coding Guides.

Countries administering computer-based assessments

43. The workflow per cluster (or per batch of units) followed for translation continues to apply for the verification process: you will upload XLIFF files, TAS and FLC (Format and Layout Check Form) for each cluster or batch of units at the exact location in the PISA Portal's DocMgr where you downloaded it. Once the complete set of files belonging to a cluster or batch is uploaded, the verification can begin. For PISA 2015, cApStAn will be the verification co-ordinator for all translated/adapted test materials.
44. Please refer to the PISA 2015 Reconciler's and National Reviewer's Guide for a step-by-step description of the CBA verification processes.

- The verifier compares each segment to the source (for equivalence) and verifies linguistic correctness. S/he will enter edits in the XLIFF files and document these interventions in the TAS, using an updated set of *Verifier Intervention Categories*.
- The Translation Referee will review the verifier comments in the annotated TAS, comment on some interventions and label some of them as requiring follow-up. The Translation Referee does not edit the XLIFF files. If the verifier proposes to fix a purely linguistic issue, the Translation Referee may not label this as requiring follow-up. This means that the issue will not be checked again at final check. It does not necessarily mean that the correction is less important.
- You will then be notified, and you will download verified XLIFF files, the annotated TAS, and the Differences Report. The Differences Report is an automatically generated Excel file that shows all segments in which the verifier has made an edit next to the original reconciler's version.
- You will review the verifier interventions and the Translation Referee's comments. If your National Centre (NC) disagrees with a correction requiring follow-up, this should be discussed with the Referee until agreement is reached.
- You can edit the XLIFF files at that stage. You are also responsible for reporting residual format and layout issues in Format and Layout Check Form (FLC form).
- The Core 2 Contractor will take care of layout and format check based on entries in FLC form.
- cApStAn checks whether all "corrections requiring follow-up" are addressed correctly and consistently.
- The final, verified CB national version is imported into the PB Trend clusters for the Mode Effect Study. Since booklets are centrally assembled, there is an in-house optical check of PB.

Countries administering paper-based assessments

45. The workflow per cluster followed for translation and review of trend items continues to apply for the verification process: you will upload MS Word files and TAS for each cluster at the exact location in the PISA Portal's DocMgr where you downloaded it. Once the complete set of files belonging to a cluster is uploaded, the verification can begin.

46. For trend items for which there are existing translations that have been imported into the clusters by the Core 3 Contractor, you will have a chance to review the materials. Possible changes (only to correct outright errors that may have been carried over from a previous cycle or introduced during the copy-pasting operation) will be documented in the TAS and, if agreed by the Translation Referee, implemented in track changes.

47. For trend items that are new for you, either because you did not participate in one or several earlier PISA cycles, or because your materials were not available on the PISA Archive from these cycles, the verification process will take place as follows:

- cApStAn’s verifier compares each sentence to the source (for equivalence) and verifies linguistic correctness. S/he will enter interventions in the MS Word cluster, in track changes, and document the interventions in the TAS, using an updated set of *Verifier Intervention Categories*;
- The Translation Referee will review the verifier comments in the annotated TAS, comment on some interventions and label some of them as requiring follow-up. If the verifier proposes to fix a purely linguistic issue, the Translation Referee may not label this as requiring follow-up. This means that the issue will not be checked again at final check. It does not mean that the correction is less important.
- You will then be notified, and you will download the verified clusters and the annotated TAS from the Portal. The TAS contains comments from both the verifier and the Translation Referee. If your NC disagrees with a correction requiring follow-up, this should be discussed with the Translation Referee until agreement is reached.
- cApStAn will then check whether all “corrections requiring follow-up” are addressed correctly and consistently.
- Since booklets are centrally assembled, there is an in-house optical check of PB at Core 3.