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Board of Participating Countries of the Teaching and Learning International Survey

Summary Record of the 1st meeting of the TALIS Instrument Development Expert group

The 11th meeting of the Board of Participating Countries (BPC) to TALIS

6-7 June 2011

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Organisation for Economic Co-operation and Development (OECD)

Teaching and Learning International Survey (TALIS) 2013

Summary Record of the 1st Meeting of the TALIS 2013 Instrument Development Expert Group (IDEG)



Consortium:

International Association for the Evaluation of Educational Achievement (IEA, Amsterdam, The Netherlands)

IEA Data Processing and Research Center
(IEA DPC, Hamburg, Germany)

Statistics Canada (Ottawa, Canada)

1 SUMMARY RECORD OF THE 1ST TALIS INSTRUMENT DEVELOPMENT EXPERT GROUP (IDEG) MEETING, HELD ON 27-28 JANUARY 2011 IN HAMBURG, GERMANY

1.1 Abstract

1. The newly established Instrument Development Expert Group (IDEG) for TALIS 2013 met for a two day kick-off meeting at the TALIS International Study Center (ISC) in Hamburg, Germany. Dr Paulina Koršňáková from the IEA Secretariat in Amsterdam chaired the meeting. This document summarizes discussions and outcomes of the 1st IDEG meeting for TALIS 2013 and outlines the tasks of the IDEG for the remainder of 2011.

2. The aim of the meeting was to introduce the IDEG members and other experts to the context and design of TALIS 2008, the context of TALIS 2013 and the developmental work that needs to take place in its preparation. Consequently, the meeting was not aimed at taking decisions on all the issues and challenges on the IDEG's agenda (e.g., universal vs. level-adapted questionnaire), rather to present and discuss the constraints and needs that will require elaboration and closure in the time following the meeting.

3. In light of the BPC's priority rating, the IDEG reviewed and discussed the themes and items in the TALIS 2008 principal and teacher questionnaires and the conceptual underpinnings of the first round. Based on this review, the IDEG then discussed the framework development goals and process as well as the input required from experts, the sampling implications, and other issues and constraints with respect to (1) data consistency and reliability across countries and the international options, (2) analysis and (3) comparisons with the TALIS 2008 results.

4. For the main part, the IDEG focused on the ISCED Level 2 Core survey since the international options ISCED Level 1, ISCED Level 3 and the TALIS-PISA link were not yet confirmed by the time of the meeting. However, the design of instruments and implications for all three international options were also discussed and results of the discussions are presented in this paper¹.

1.2 Members of the IDEG and the framework development team

5. The IDEG members and their areas of expertise are:

- Dr Ben Jensen (Grattan Institute, Australia), teacher appraisal and feedback
- Dr Eckhard Klieme (DIPF, Germany), teaching practices and beliefs
- Dr Peter Kloosterman (Indiana University, USA), teaching practices (focus on mathematics)
- Dr Sang Wan Park (OECD, Korea), school leadership, teacher initial education
- Dr Eva Wirén (European Commission, Belgium), in-service professional development
- Dr Mara Westling Allodi (Stockholm University, Sweden), school climate, ethos and special education needs
- Mr Jean Dumais (Statistics Canada, Canada), TALIS 2013 Sampling Referee

¹ As of 8 February 2011, the OECD confirmed that all three options (ISCED level 1, level 3 and the TALIS-PISA link) are international options since 6 or more participants had signed up for each these.

6. The IDEG is supported by and collaborates with the framework development team that is chaired by Paulina Koršňáková (IEA). The other members of the framework team are:

- Dr Leslie Rutkowski (Indiana University), methodology expert
- Dr David Rutkowski (Indiana University), educational policy expert

7. The 1st IDEG meeting was attended by:

- the IDEG Chair and IDEG members: Paulina Korsnakova, Ben Jensen, Peter Kloosterman, Sang Wan Park and Eva Wiren;
- the framework development team: David Rutkowski and Leslie Rutkowski;
- the sampling referee: Jean Dumais;
- the OECD representatives: Julie Belanger, Dirk Van Damme and Jaana Puukka; and
- the ISC representatives: Alena Becker, Ralph Carstens, Mark Cockle, Dirk Hastedt, Steffen Knoll and Friederike Westphal.

8. Dr Eckhard Klieme attended agenda points II, VII and VIII via telephone conferencing while Dr Mara Westling Allodi was unable to attend the meeting on short notice. However, she was briefed on the meeting and the upcoming tasks via a telephone conference with the IDEG Chair, the ISC and the OECD on 3 February 2011.

1.3 TALIS 2008 questionnaire review

9. The IDEG has reviewed 43 questions and 191 items in the TALIS 2008 Teacher Questionnaire, as well as 37 questions and 175 items in the TALIS 2008 Principal Questionnaire, with the aim of deciding on their retention, possible improvement or exclusion.

10. The TALIS 2008 questions and items were assessed according to the BPC priority ratings and according to criteria including, but not limited to, poor item functioning from a statistical point of view, low response, low reliability, lack of explanatory power, limited usage of data in the 2008 reporting or low relevance for comparisons between the two consequent TALIS cycles.

11. The IDEG discussion was supported by oral and written contributions from IDEG members (e.g., the input from Ben Jensen on the appraisal and feedback theme) and members of the ISC (e.g., Ralph Carstens' input from the psychometric point of view on problematic items, scales and indices), but also by documents provided by the OECD (Jaap Scheerens & Rien Steen: Reflections on the current TALIS data regarding teachers' professional development).

12. The expert judgements resulted in the following outcome:

	Questions (items) to be <u>retained</u> (identical in TALIS 2008 and 2013 instruments)	Questions (items) to be <u>improved</u> (reworded)	Questions (items) to be <u>excluded</u> (not to appear in TALIS 2013 instruments)
Teacher Questionnaire	26 (116)	10 (30)	7 (45)
Principal Questionnaire	13 (51)	9 (46)	15 (78)

13. Thus, the IDEG has attained part of the BPC's goal of retaining about 60% of the TALIS 2008 items. Regarding the Teacher Questionnaire, about 60% questions (and items) could be retained, however only about 16% of questions (24% of items) were noted for exclusion. In the Principal Questionnaire about 41% of questions (45% of items) can be omitted, securing enough room for further development.

1.4 TALIS 2013 framework development and analysis plan

14. The IDEG has noted the BPC's wish that the framework should be sustainable; however the framework should allow for flexibility as themes may change over cycles. The IDEG noted that, while all ISCED levels 1, 2 and 3 shall be a part of the framework, the TALIS-PISA link will not be included in the framework.

15. The framework will be shaped around the two main dimensions of (1) information on teachers, their professional environment and conditions of teaching and (2) school and teacher effectiveness: pedagogical aspects of teachers' work. A support analysis will be provided. The goal of the TALIS 2013 analysis plan is to provide a scientific context for teacher and principal responses.

16. IDEG members were asked to submit their expert contributions and theoretical underpinnings to the conceptual framework along with relevant literature references and excerpts to the framework development team at the earliest convenience, latest by 18 February 2011. For each of the themes, a primary point of contact was attributed (see paragraph 5 above), i.e. the IDEG expert(s) who are primarily responsible for providing updated or initial literature to support their theme. The framework team will compile these references along with the overviews to develop the theoretical foundation for TALIS 2013.

17. The draft framework document and the draft analysis plan will be presented to BPC members at the 11th BPC meeting in June 2011.

1.5 TALIS 2013 instrument development

18. It is the task of the IDEG to develop draft pilot instruments in the first quarter of 2011. The draft pilot instruments will be presented to the National Project Managers at their first meeting on 4-7 April 2011, then revised and elaborated during the 2nd IDEG meeting in May 2011 and presented to BPC members in June 2011 at the 11th BPC meeting.

19. The development of the core instruments for ISCED Level 2 had the highest priority during the 1st IDEG meeting; however some questions and items were noted as to be adjusted to allow for their use throughout different ISCED levels.

20. The IDEG experts Peter Kloosterman and Eckhard Klieme have been asked to propose items suitable for the mathematics teaching module of the TALIS-PISA link by the end of February.

21. While developing new items the framework and the underlying indicators, scales and constructs will always be considered. The adherence to this target will be reviewed during the 2nd IDEG meeting.

22. It is the common understanding of the IDEG experts that questions and items that are retained from TALIS 2008 and that have proved to work well will not be rephrased, even if some of the wording may be perceived as being awkward. Identical wording is important to guarantee comparability of results across TALIS cycles.

23. The BPC has also asked the IDEG to consider special needs teaching and the IDEG agreed with the Consortium note to the BPC that population definitions should stay as they were in 2008.

24. The IDEG has agreed to pilot mainly the newly developed items. The advantage is that more items can be tested and analyzed within the constraints of 45 minutes. This procedure is one of the quality assurance steps that are intended to secure the high quality of the survey. Furthermore, the IDEG indicated the need to pilot the entire instruments at both optional ISCED levels (i.e., 1 and 3) in order to assess the feasibility of a universal (generic) instrument and learn about the distribution of responses at these levels.

25. During the IDEG meeting there was discussion about the issue of social desirability and how this might impact findings and cross-cultural validity. Experts realized this would add to an already crowded survey (it could at least be added during the pilot and the data analyzed with respect to this scale), but noted the social desirability scales potential contribution to explanations of cultural differences.

1.5.1 Universal vs. modular instruments

26. The IDEG has carefully discussed the advantages and disadvantages of using universal instruments across all 3 ISCED levels. Assuming analyses across levels are desired, it is recommended to use universal instruments across the ISCED levels from the analytical point of view. After careful consideration, the IDEG noted that the administration of a universal principal questionnaire among the three ISCED levels would also be manageable from a scientific point of view as well as beneficial from an operational point of view.

27. However, the related challenge would be to create items that are universal enough to cover all 3 ISCED levels. In countries such as the U.S., the teaching at ISCED level 1 and 2 might be markedly different and it was the common understanding of the IDEG that one universal instrument could only be used under well-defined conditions. The IDEG noted different views regarding the feasibility of administering the survey with universal or (partially) different instruments. A number of countries argued that the administration of ISCED levels with one universal instrument seems to be appropriate, whereas a few others, mostly Nordic countries, suggested preparing different questionnaires. It was agreed that the OECD would contact the representatives from the northern countries, asking them for specific feedback about where they see issues arising in their countries with respect to using universal instruments across all ISCED levels latest by the end of February 2011.

28. Special attention needs to be paid to ISCED Level 3, especially in countries with different tracks for academic (general) and vocational programmes. The IDEG felt it advisable to get some more expert knowledge on this issue. In particular, vocational schools appear to be a material challenge for the survey with respect to content as well as sampling. However the possibility of preparing separate questionnaires for the vocational track needs to be discussed in more detail since additional questionnaires at the ISCED Level 3 would certainly add a layer of complexity and might prove to be counterproductive, especially when administering the TALIS-PISA link.

29. There are several options for adjusting teacher questionnaires for different ISCED levels: from universal (generic) instruments, via a modular structure of instruments to completely different questionnaires. From the analytical and operational point of view, it is not recommended to create different questionnaires for the different ISCED levels given that the experts' review of the TALIS 2008 teacher questionnaire has shown that only a very limited number of questions/items (mostly on teaching practices and beliefs) refer explicitly to teaching at ISCED level 2. The IDEG experts were asked to draft items suitable for use across the various ISCED levels.

1.5.2 Sampling implications

30. If different instruments are used for each level, and if schools offer more than one ISCED level, sample overlap needs to be reduced in order to allow for multi-level analysis to be based on the largest number of schools possible. This implies distinct samples for different instruments. However, a multiple sample and multiple instruments will have severe cost implications that are not accounted for in the proposed budget. The BPC will need to review this issue carefully.

1.6 Next steps (2011)

- End of February: IDEG members are due to contribute to the framework, the item development for the pilot questionnaires and the draft analysis plan
- 4-8 April: draft framework document and draft pilot instruments to be presented at the NPM meeting
- 12-13 May: 2nd IDEG meeting in Paris, France
- 6-7 June: draft framework document and draft pilot instruments to be presented at the BPC meeting
- 1 August: content and structure of pilot instruments to be submitted to the ISC
- Starting in mid-September: analysis of pilot data
- 1 November: content and structure of field trial instruments to be submitted to the ISC