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DIRECTORATE FOR EDUCATION
EDUCATION POLICY COMMITTEE

Board of Participating Countries of the Teaching and Learning International Survey

Summary Record of the 2nd Meeting of the TALIS 2013 Instrument Development Expert Group

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

6-7 June 2011

CC10, OECD Headquarters, 2 rue André Pascal, 75016 Paris

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Organisation for Economic Co-operation and Development (OECD)

Teaching and Learning International Survey (TALIS) 2013

Summary Record of the 2nd Meeting of the TALIS 2013 Instrument Development Expert Group (IDEG)

12-13 May 2011 – Paris, France

FOR OFFICIAL USE



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)

SUMMARY RECORD OF THE 2ND TALIS INSTRUMENT DEVELOPMENT EXPERT GROUP (IDEG) MEETING, HELD ON 12-13 MAY 2011 IN PARIS, FRANCE

Abstract

1. This document summarises the important discussions of the 2nd IDEG meeting for TALIS 2013.
2. The goals of the meeting were to:
 - DISCUSS and AGREE on the 2nd drafts of the TALIS 2013 teacher and principal questionnaires (to be presented to the TALIS Board of Participating Countries at its meeting on 6-7 June 2011);
 - DISCUSS and ADVISE on the development of the 1st draft of the mathematics module (to be presented to the TALIS Board of Participating Countries at its meeting on 6-7 June 2011);
 - DISCUSS the conceptual framework document and the contributions needed from each expert (to be presented to the TALIS Board of Participating Countries at its meeting on 6-7 June 2011);
 - DISCUSS the issue of having multiple questionnaires or a single questionnaire for all ISCED levels, including the sampling implications of this choice, and PROPOSE a recommendation for the BPC to consider;
 - DISCUSS issues of social desirability and response bias issues and PROPOSE possible ways of addressing these issues; and
 - DISCUSS the planning for the piloting stage, as well as the planning of post-pilot data and material distribution and analysis.
3. Due to the intensive work on the TALIS instruments, the sequence and time allocated to all other agenda items were adjusted. This document follows the order in which the items were discussed.

Attendance

4. The 2nd IDEG meeting was attended by IDEG members and other invited experts, the OECD representatives and the representatives of the TALIS 2013 Consortium:
 - IDEG members: Paulina Korsnakova (chair, IEA Secretariat, the Netherlands), Ben Jensen (Grattan Institute, Australia), Eckhard Klieme (DIPF, Germany), Peter Kloosterman (Indiana University, USA), Sang-wan Park (OECD, Korea), Eva Wirén (European Commission, Belgium) and Mara Westling Allodi (Stockholm University, Sweden)
 - IDEG invited experts: Svenja Vieluf (DIPF, Germany) and Susan Seeber (University Goettingen, Germany)
 - OECD representatives: Dirk Van Damme, Jaana Puukka, and Julie Bélanger
 - Consortium representatives: Dirk Hastedt, Steffen Knoll and Ralph Carstens (IEA DPC, Germany), Jean Dumais (Statistics Canada, Canada)
 - Framework Team: Leslie and David Rutkowski (Indiana University, USA)
5. Apologies were received from Mareike Kunter (University Frankfurt, Germany), an IDEG invited expert.

Proposal for the Core (ISCED 2) instruments

6. The IDEG work on the proposal of the core (ISCED 2) instruments for the TALIS 2013 was based on the extensive review of the 1st draft of the instruments (Teacher Questionnaire – TQ, and Principal Questionnaire – PQ). The review incorporated feedback by IDEG members and other invited experts, National Project Managers (during and after the 1st TALIS 2013 NPM meeting), participating countries (Chile, Czech Republic, Denmark, France, Iceland, Japan, Norway, Portugal, Sweden, United Kingdom (England), and the United States) as well as other stakeholders (European Commission, TUAC). All reviews were considered and informed the selection of questions/items and/or drafting process (rewording, changes in response categories).
7. With respect to teacher population definition(s), the IDEG considered the feedback received from countries and stakeholders with respect to the inclusion of teachers of special education needs students in regular schools and implications for population coverage. While schools entirely devoted to special education needs students remain excluded as in 2008, the IDEG decided to propose to the TALIS BPC that the population definition include teachers teaching exclusively to special educational needs students in regular schools, along with an additional question¹ on the teacher questionnaire to identify them (to allow for comparative analysis with TALIS 2008). The IDEG clarified their understanding that the purpose of the survey is not to investigate and report on this part of the population, rather to increase the coverage of the teacher workforce. In addition, the IDEG noted that, while the OECD INES's definition of "special educational needs" is referenced in the Sampling Manual, national definitions and understanding may still be somewhat divergent.
8. The review was done by theme-by-theme within both instruments. The background sections were introduced and will be finalised by the chair (and the Consortium team). Other sections were lead by their relevant IDEG members who are responsible for their finalisation: Eva Wirén (Teacher Professional Development), Ben Jensen (Teacher Appraisal and Feedback), Sang-wan Park (School Leadership and Initial Teacher Education), Mara Westling Allodi (School Climate and Special Educational Needs) and Eckhard Klieme (Teaching Beliefs and Practices).
9. The priorities of the IDEG review were the following: shorten the instruments significantly while reflecting on the feedback received and advise on actions leading towards improved instruments to be proposed in the 2nd drafts for the piloting stage. The review process included all items and focused on a number of aspects such as the rationale and value of inclusion, reading load for the respondents, repetitive and long questions/items, inconsistent or unclear terminology, etc.
10. The in-depth discussion on the core survey instruments made up approximately three quarters of the meeting time and considered the feedback received, including concerns related to the functionality of questions/items regarding the expected outcomes (indicators and policy informing analysis).
11. The IDEG considered two options for the Teaching Practices and Beliefs section of the Teacher Questionnaire: one that uses a target class approach to contextualise the questions (B version) and another generic option without reference to a target class (A version). Because of the BPC interest in teaching practices and the prevailing opinion that the context of teaching (and students) influences teachers' teaching practices, the IDEG opted to pursue the target class option and present the B version to the TALIS BPC.
12. In 2008, scales measuring teachers' and principals' beliefs and practices showed considerable cross-cultural bias. Even scales that were similar to those used in the PISA student questionnaire showed lower levels of cross-cultural equivalence than the PISA scales. It remains an open question, why teacher scales are less comparable than student responses but a possible explanation is that the teacher population is considerably more diverse. One promising approach for improving cross-cultural comparability is the development of different item types² and TALIS 2013 items for measuring teacher beliefs and classroom teaching practices drew on research in cross-cultural psychology generally and for PISA more specifically for improving scales.

¹ TQ5 in the 23 May 2011 drafts submitted to the OECD Secretariat.

² Similar items have been suggested and implemented for the PISA 2012 Field Test.

13. For the Teaching Practices and Beliefs section of the Teacher Questionnaire, the respective IDEG experts (Klieme and Vieluf) suggested to try parallel versions in the Field Trial to examine whether these refinements in fact improve cross-cultural comparability. It would be sufficient to develop two parallel Field Trial questionnaires and no complex rotation design would be required as it is not fundamental to examine correlations between the parallel versions. Only one of the two scales – the one that shows higher cross-cultural validity - would be selected for the Main Survey. Consequently, the current pilot version of the Teacher Questionnaire includes ONLY the newly proposed items yet the Field Trial may in addition feature the items previously used in TALIS 2008.³

14. On the basis of decisions taken during the discussion at the meeting, the leading experts have been tasked with finalising their respective section(s). The chair and the Consortium will then assemble and format the 2nd draft of the instruments for the BPC and NPM review.

Mathematics Teacher Module for the TALIS-PISA link

15. The proposal for the TALIS 2013 Mathematics Teacher Module along with the rationale for the included questions and items was presented by Peter Kloosterman.

16. The IDEG noted that a more detailed analytical framework and research questions were needed (including regarding their relation to PISA) and noted the experimental nature of the school-level TALIS-PISA link and that a main purpose of the mathematics module is to further an overall goal of TALIS 2013, namely to gather more detailed information on teaching practices. It was noted that school-level data (including student data) from the PISA 2012 will be used to contextualise findings from TALIS 2013 rather than vice-versa.

17. The IDEG discussed the issue of which reference group should be used to contextualise the items of the mathematics module. The IDEG agreed that the reference group should be a specific class consisting predominantly of PISA students (*i.e.* the student population as defined in PISA) in contrast to classes predominantly composed of students not under focus in PISA. The mathematics module should include questions that facilitate the identification of such a class, similar to the target class mechanisms in the general teacher questionnaires, and the respective questions that follow should then focus on the specific mathematics class taught in which the majority of students are 15 years old. The IDEG acknowledged the fact that such a class may include students that would not be eligible in PISA but believes that this does not adversely affect the analytical utility of the link.

18. The IDEG agreed that piloting the mathematics module is essential and noted that it will be necessary to shorten it to keep the average response time within a 15-minute time frame (and to less than one hour when combined with the general Teacher Questionnaire). The Pilot feedback and the Field Trial data will be used for this purpose.

Review of the proposed Core (ISCED 2) instruments for additional ISCED levels

Advice on vocational education and training (VET)

19. Susan Seeber presented her expert view on the applicability of the TALIS instruments, as discussed during the first part of the IDEG meeting, for ISCED 3 vocational education and training (VET) institutions and teachers and focused on practical advice to the IDEG. She reviewed the instruments question by question and recommended some modifications (from rewording to additional items), taking into account country feedback that had been received by the OECD Secretariat and the IDEG.

20. Susan Seeber will incorporate her recommended changes to the 2nd draft of the instruments and summarise her recommendations for the questionnaires in an expert note to be shared with the BPC at its meeting on 6-7 June 2011.

³ Applies to current questions TQ 26 (constructivist beliefs), 28 (self-efficacy), 37/38/39/40/41 (classroom teaching practices), and Q42 (disciplinary climate).

Sampling implications

21. Jean Dumais presented the information from an expert paper that he has written and which will be shared with the BPC at its meeting on 6-7 June. It lays out the sampling and analytical consequences of using universal instruments across ISCED levels. The meeting participants agreed that the Teaching Beliefs and Practices section of the Teacher Questionnaire will need to be ISCED-level-specific since it is proposed that a “target class” be used to contextualise the questions.

22. The main consequence of this instrument design is that teacher responses can only be used for one series of estimates and that sample overlap needs to be minimized in order to allow for comparisons to be uncorrelated and multivariate/level analysis to use a sufficient number of within-school records. The Consortium then recommended that 1) the schools where more than one level is taught should be randomly assigned to represent one of the levels before sample size allocation to strata and sample selection, and 2) all participating teachers within a given selected school should be answering with respect to the ISCED level to which their school is assigned at sampling.

23. The meeting participants agreed that it would be possible to produce instruments that are otherwise universal with minor adaptations to wording, therefore allowing for the collection of an inclusive database (allowing for wide analysis and comparisons among ISCED levels and tracks).

Conclusions

24. The meeting participants reviewed the instruments after these presentations and agreed upon some item inclusions in the generic instruments to facilitate the VET teacher responses. Outcomes of this review will be included in the 2nd draft of the TALIS 2013 instruments that will be presented at the BPC meeting on 6-7 June. It was presumed that further modification might be done at the national levels for countries participating in the ISCED 3 option.

Framework development, review and remaining tasks for the IDEG members

25. In an effort to develop a relevant conceptual framework for TALIS that incorporates the current knowledge base in the relevant fields and to respond to feedback on the initial draft of the framework which was shared at the 1st NPM meeting, the framework team (Leslie and David Rutkowski) asked the IDEG members for further contributions to Sections III and V of the TALIS framework. The IDEG also noted that further work will be required for Section IV given that the design of TALIS 2013 in regards to the sample selection and instrument structure is yet to be finalised.

26. The framework team presented the relevant materials and explained the tasks that needed their input, namely: 1) to insert potential research questions in each content section, 2) to provide some information on how each content section relates to other content sections, 3) to provide some links between their themes and possible dependent variables, and 4) to provide advice on suggested improvement requiring their expertise.

27. IDEG members were asked to provide this information by the 1st June (higher priority was given to the finalisation of the 2nd drafts of the questionnaires and the pilot design).

28. The draft conceptual framework will be presented to the BPC at its meeting on 6-7 June. It will be expected that feedback to be received from the BPC is to be incorporated in the conceptual framework document.

Planning and timelines for the piloting stage

29. The major purpose of this agenda item (introduced by the Steffen Knoll from the Consortium) was to discuss the timeline for the questionnaire development within the overall project schedule. The main challenges noted were: 1) the coincidence of the piloting stage with the school holidays in many countries, which hinders country interest in participation and preparation of the instruments for the Field Trial, and 2) the tight timelines remaining for further development of the instruments while incorporating sufficient time to allow NPMs and the BPC to provide constructive feedback.

30. The IDEG noted that focussed and structured group discussions would be helpful in obtaining meaningful feedback and suggested that this approach be used instead of the previously planned quantitative pilot data collection. With this new proposed approach, one or more groups of teachers and principals would first complete the questionnaires and then discuss them in a structured discussion. The IDEG stressed the importance of involving reviewers from all ISCED levels, as applicable given the international options used in each country, 1 and 3 (especially VET teachers at ISCED level 3, and of ensuring the participation of mathematics teachers).

31. To facilitate the preparation of this procedure, the IDEG members will provide the Consortium with key questions they would consider to be needed to evaluate the quality of the items in their content section for the structured group reviews of the instruments. This task is due by the end of May. The chair and Consortium will incorporate these key questions into detailed annotated questionnaires to be used by group discussion moderators.

32. The Consortium will develop guidelines for this new proposed piloting approach and review the timeline to reflect this change. This change and accompanying changes to the timeline will allow more time to gather feedback from teachers and principals as well as assure time for a further instrument review by the NPMs and BPC.

33. The OECD Secretariat (Dirk Van Damme) indicated its support for the revised piloting strategy. The IDEG as well as the Consortium assumed that the BPC will also agree with the change during its June 6-7 meeting given the obvious merits.

Post-pilot data and material distribution and analysis

34. Ralph Carstens from the Consortium provided the IDEG with an overview of the expected outcomes of the pilot. The IDEG members are aware of their responsibility to use the pilot results in shaping the instruments for the Field Trial.

Social desirability, response style and other issues potentially affecting the quality of data

35. Ralph Carstens from the Consortium presented an overview of the methods that may be used to lessen the impact of social desirability and response styles biases. Some of the practical advice (received from Fons van de Vijver) had already been incorporated in the instrument wording while other advice was assessed as not feasible within the context of TALIS (*e.g.* lack of comparability and severe translation problems of extended response categories).

36. The discussion of options for measuring social desirability that may be considered for the Field Trial instruments was postponed to the 3rd IDEG meeting due to the lack of time.

37. Jean Dumais raised the issue related to the definition of a participating teacher, *i.e. what should be the minimum response in a questionnaire to be respondent considered as participating?* Due to a lack of time, this was not discussed further at the meeting, but will be discussed further by the BPC and by the TALIS Technical Advisory Group.

Next steps and key dates

- 18 May: Revised 2nd version of the draft pilot instruments to be submitted to the chair / Consortium for finalisation.
- 19 May: Revised draft framework document with comments pointing out any directions for future extensions and/or elaboration to be submitted to the Consortium for finalisation.
- 06-07 June: Draft framework document and draft pilot instruments to be presented at the BPC meeting.

- By the end of June: Draft framework document and instruments to be revised by the IDEG and finalised by the Consortium according the feedback received by the BPC.⁴
- August: structured focus group reviews in countries
- Early to end of September: analysis/review of pilot data by IDEG and proposals for Field Trial questionnaire revisions and reductions
- End of September/beginning of October (dates TBD, depending on the date of the BPC meeting): Outputs of the pilot to be presented to the 3rd IDEG meeting and Field Trial instruments finalised.
- October (dates TBD): Field Trial instrument proposals to be presented at the BPC meeting.
- 01 November: Content and structure of Field Trial instruments to be submitted to the Consortium.

⁴ Likely facilitated by a scheduled virtual meeting (on-screen/phone)