

**For Official Use****English text only**

6 December 2023

**DIRECTORATE FOR EDUCATION AND SKILLS  
PROGRAMME FOR TEACHING AND LEARNING INTERNATIONAL SURVEY****Cancels & replaces the same document of 15 November 2023****Governing Board****TALIS 2024 Technical Standards**

*This cancel and replace is to correct a spelling mistake in Footnote 6.*

*Please note that the complete document is only available in PDF format.*

*Following the initial approval period by written procedure up to Wednesday, 6 December 2023, these technical standards are considered approved.*

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## TALIS 2024 Technical Standards

### Summary of revisions

1. The technical standards have been revised since the version shared at the 10th TALIS Governing Board meeting in October 2021 [[EDU/TALIS/GB\(2021\)14](#)]. The revisions mainly include minor clarifications and correction of typos. In addition, the quality assurance and control sub-section of Section 3 was moved to the end of the section.
2. The standards that were revised more substantively include:
  - Standard 5.3 (i.e. recently added standard on the use of incentives)
  - Standard 9.14
  - Standard 9.16
  - Standard 10.4.
3. The TALIS Governing Board is invited to:
  - NOTE the revisions made in the TALIS 2024 Technical Standards
  - APPROVE the final version of the TALIS 2024 Technical Standards.



## Organisation for Economic Co-operation and Development (OECD)

### Teaching and Learning International Survey (TALIS) 2024

#### Technical Standards

Final Version (13 November 2023)

#### Consortium



International Association for the Evaluation of Educational Achievement  
(Amsterdam, The Netherlands; Hamburg, Germany)



RAND Europe  
(Cambridge, United Kingdom)



Australian Council for Educational Research  
(ACER, Melbourne, Australia)




cApStAn Linguistic Quality Control  
(Brussels, Belgium)

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## Introduction

The Teaching and Learning International Survey (TALIS) 2024 establishes technical standards and guidelines in a concise, dedicated document, which apply to key planning and operational tasks. As such, the National Project Managers and data users are the two main target audience groups for these standards. The objectives are to:

- explicitly indicate the data quality expectations, survey implementation and best practices endorsed by the Consortium, the Technical Advisory Group (TAG), the OECD Secretariat, and eventually the ECEC Network and TALIS Governing Board (TGB)
- establish a collective agreement on quality among the Participants<sup>1</sup> and the international actors stated above
- ensure that all Participants collect data using consistent and sound methodology and that the national survey design and implementation yield high-quality, i.e. precise, generalisable and internationally comparable, data.

The standards presented in this document are generally agreed-upon best practices in survey research to be adhered to in the conduct of the project (see for example: IEA 1999, Biemer and Lyberg 2003, Statistics Canada 2009, TALIS 2013 Technical Standards OECD, 2012a, TALIS 2018 Technical Standards OECD, 2018). Further, aspects of the specific implementation by the current Consortium are stated. In addition to the standards themselves, the document may provide notes, guidelines, clarifications, or recommendations, which are designed to further improve the quality of the survey implementation and results. The standards are produced for both the Field Trial and the Main Survey, yet deviations for the Field Trial are indicated where necessary.

The standards described in this document for TALIS 2024 are based on those that were in place for TALIS 2008, TALIS 2013, and TALIS 2018 and are extended and adapted to the design of TALIS 2024 as necessary.

The primary responsibility for the drafting of the Technical Standards lies with the Consortium. Standards developed for similar surveys were reviewed and taken into consideration. The standards are grouped by content area and numbered within each area to make references clear and easily accessible (e.g. Standard x.x - Standard description). Each section includes the rationale and purpose of the standards, the standards themselves, and a list of quality assurance and control measures. When standards for optional modules (Starting Strong Survey, Teacher Knowledge Survey) deviate from the TALIS core survey a sub-section has been added to the main section as appropriate.

The primary responsibilities for areas are allocated as follows:

- IEA Hamburg: survey planning, sampling, weighting and analysis, communication; instrument adaptation, data collection/field operations, data capture and verification, confidentiality and security, reporting and analysis
- IEA Amsterdam and cApStAn: instrument translation and verification, and international quality control.

The Consortium develops the proposed set of standards in consultation with the OECD Secretariat and the Technical Advisory Group (TAG). Drafts are provided for comments to the TALIS Governing

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<sup>1</sup> "Participant" in TALIS 2024 is defined as an OECD or partner country, economy, province, region or similar sub-national entity.

Board (TGB) and the National Project Managers (NPM). The Consortium then incorporates comments and determines if any standards present foreseeable difficulties or obstacles for Participants. The Technical Standards will then finally be adopted by the TGB. Following the Field Trial, revisions to the standards will be implemented as necessary.

Once the standards are adopted, it is essential that all Participants follow them. Where this is not possible, Participants may apply for derogations from the standards by contacting the Consortium in writing. Likewise, where the standards stipulate that variations from them require agreement or pre-approval between the Participant and the Consortium, National Project Managers are asked to initiate the process and to undertake everything possible to facilitate an agreement. Where agreement between Participants and the Consortium cannot be reached, the OECD Secretariat will be asked to contribute to a resolution.

Where standards have been fully met, data will be recommended for inclusion in the datasets and reports. Where standards have not been fully met, the adjudication process implemented by the Consortium in consultation with the sampling referee and the translation and adaptation referee, the OECD Secretariat and TAG determines the extent to which the data quality has been affected. During the adjudication process the Consortium will share and discuss input and feedback from all survey areas including instrument preparation, field operations, sampling, data collection, data processing and analysis. The results determine whether data can (or cannot) be recommended for unconditional inclusion in the datasets and consequently reporting.

Inquiries pertaining to the standards should be addressed to the OECD Secretariat at [edutaliscontact@oecd.org](mailto:edutaliscontact@oecd.org) and the Consortium at [talis@iea-hamburg.de](mailto:talis@iea-hamburg.de).

# 1 Survey Ethics and Planning

## Rationale and Purpose

TALIS 2024 with its varieties of international options and modules and its growing number of participating countries and economies since the first TALIS cycle is a demanding project that requires careful survey planning at the international as well as at the national level. Similarly, all countries/economies and organisations participating in the conduct of TALIS must adhere to recognised standards of ethical research practices.

## Survey ethics and general practice

**Standard 1.1** Researchers<sup>2</sup> and NPMs adhere to professional standards for scientifically rigorous research at all stages of the survey.

- Researchers and NPMs follow best practices in survey design, data collection and post-survey processing according, but not limited to, these TALIS standards and guidelines.
- Researchers clearly and objectively describe TALIS' major research questions and data collection needs (e.g. in the framework).
- Researchers ensure that each question in the survey addresses a specific measurement goal, do not collect new data unnecessarily and balance the need for information against the effort that is required to complete additional survey questions.
- NPMs submit research plans to the applicable national/local institutional review boards and/or ethics committees for approval and document the correspondence and outcome.
- NPMs hire or equip staff involved in design, data collection and analysis with appropriate skills to perform scientifically rigorous research.
- NPMs train staff on the importance of ethics and scientific rigor in research involving human subjects.

**Standard 1.2** Researchers and NPMs have a responsibility to survey respondents and protect their data privacy.

- Researchers and NPMs avoid using practices or methods that may harm, humiliate, or intentionally mislead survey respondents.
- Researchers and NPMs are sensitive to social and cultural differences as well as local customs when contacting respondents and administering the survey.
- The collection of personal information should be limited, should be obtained by lawful and fair means, and, where appropriate, with the knowledge or the consent of the individual.
- Researchers and NPMs administer the survey in such a way that it is easy and comfortable for a respondent to answer and make every effort to facilitate the data collection process for the respondent.

**Standard 1.3** Researchers and NPMs respect the free will and privacy of respondents.

- Participation in the survey is voluntary for all respondents.

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<sup>2</sup> The term "researcher(s)" in this document refers to all persons involved in the preparation, implementation, analysis and reporting of the TALIS 2024 project. This includes Consortium staff, OECD staff, expert group members, national centres' and survey organisations' staff contributing to the project.

- Respondents have the right to withdraw their participation at any time in the course of the survey.
- NPMs ensure that each respondent receives sufficient information and, where required, opportunity to give informed consent prior to participation in the survey.
- While NPMs and data collectors should attempt to avoid and convert respondent refusals, they do not allow these practices to approach harassment.
- Respondents have the right to lodge a complaint with a supervisory authority.
- Researchers and Participants take into account the OECD's personal data protection rules at all times: <https://www.oecd.org/general/OECD-Decision-Processing-Personal-Data.pdf>

## National Project Managers and national centres

**Standard 1.4** Each Participant nominates one (1) National Project Manager (NPM) by no later than 01 September 2021. The NPM has overall responsibility for implementing TALIS and its options, where applicable, at the national level according to the standards, guidelines, procedures, and timelines set by the Consortium.

- In case an NPM cannot be appointed by the stated date, the concerned Participant ensures that they are represented adequately in communication with the Consortium and at scheduled NPM meetings. Accordingly, the concerned Participant will communicate all standards, guidelines, procedures, and timelines set by the Consortium to the NPM, once appointed.
- The roles, responsibilities and resources of NPMs as well as an indicative list of tasks is described in document Item 6a - EDU-TALIS-GB(2021)3-ENG - Role of NPMs.pdf prepared for the 9<sup>th</sup> Meeting of the TALIS Governing Board (TGB) on 25-26 March 2021. The document is considered an integral part of the technical standards presented here.
- For those Participants that have implemented either TALIS 2013 or TALIS 2018, it is recommended to reappoint the previous NPM for the sake of continuity. Where this is not possible or desired, new NPMs should liaise at least initially with the previous NPM and team to maximise the use of materials, experiences and strategies gained in the previous round(s).

**Standard 1.5** To ensure continuity of activities over time, the NPM position is desirably full-time under stable contract conditions, at a minimum until the release of the initial international report by OECD, scheduled by October 2025.

- Depending on the availability of administrative assistants and senior staff for data management, sampling activities and/or field operations, NPMs time commitment could be less, but desirably not less than 50% of their time.

**Standard 1.6** Participants implement a systematic and comprehensive knowledge transfer if the NPM is replaced before October 2025 to prevent the national centre from losing information or falling behind with respect to the survey's timeline and tasks.

**Standard 1.7** The NPM establishes a national study centre and ensures that qualified staff is allocated to the project.

- Since data-related tasks tend to be highly technical and require specialist skills, each Participant should appoint a National Data Manager (NDM) to provide support for the NPM with respect to data-related and technical tasks and responsibilities.
- Participants may consider appointing a National Sampling Manager (NSM) to take responsibility for all sampling-related activities, including national sample planning and

stratification, frame preparation, sample selection, non-response bias analysis and communication with the Consortium's sampling team. This strong recommendation applies specifically to Participants taking up options or modules (TALIS Starting Strong, Teacher Knowledge Survey) that need a more complex sample implementation.

**Standard 1.8** NPMs inform the Consortium about key staff at the national centre. The NPM also informs the Consortium if key national centre staff leaves the project.

- NPMs take note of the confidentiality and security requirements detailed in section 9, specifically with respect to the required signed confidentiality agreements.

**Standard 1.9** If a third-party survey organisation is contracted for all or parts of the data collection work, NPMs inform the Consortium of the name, qualifications, and scope of work of the survey organisation.

## Technology and Infrastructure

**Standard 1.10** Since the materials and tools provided by the Consortium are designed to work on Microsoft Windows PCs, International and national centres work with PCs running under Microsoft Windows operating systems.

- Microsoft Windows 10 or higher are supported.
- The above versions of Windows should work without problems inside a virtual environment on a non-Windows host system (e.g. inside VMWare or VirtualBox), yet such setups have not been explicitly tested and are not actively supported.
- Older Windows versions, Apple Macintosh or Linux systems are not recommended or supported.

**Standard 1.11** National centres have a reliably working Internet connection to communicate with the Consortium and exchange files and documents.

**Standard 1.12** National centres have PCs with Microsoft Office 2010 or higher installed, minimally including Word (.docx format) and Excel (.xlsx format), preferably also PowerPoint (.pptx format).

## Piloting, Field Trial and Main Survey participation

**Standard 1.13** Participants who have opted for one or more of the optional modules (i.e. ISCED Level 1 and ISCED Level 3 modules, the TALIS Starting Strong Module, or the Teacher Knowledge Survey Module) make themselves available to participate in the pilot data collection.

- The pilot data collection requires the contribution of all Participants and should be representative of all educational levels, all major regions, and key language contexts. In case a Participant opts for two or more international options or modules, the pilot will be conducted for max. two of the international options/modules. Ideally, all countries will contribute to the pilot; in case the Teacher Knowledge Survey was opted for, the Participant is asked to primarily pilot the Teacher Knowledge Survey, ideally also to contribute to the TALIS survey.

**Standard 1.14** At the appropriate stages, national centres provide feedback to the Consortium on the development of the framework, instruments and other content-related matters that represent the perspectives of the relevant national stakeholders.

**Standard 1.15** Field Trial participation is mandatory for all Participants and all international survey options.

- To allow sufficient time for preparing the tasks for the pilot studies and sampling processes, 31 October 2021 is the ultimate deadline for late joining Participants and that joining past this date may only be accepted if this does not jeopardise the overall schedule and standards.

**Standard 1.16** The Main Survey data collection takes place from February to April 2024 for northern hemisphere Participants and from June to August 2024 for the southern hemisphere Participants.

**Standard 1.17** Following the Main Survey data collection, Participants are involved in the production and verification of the tables, exhibits and narrative produced for the international reports.

**Standard 1.18** The Field Trial is implemented to i) validate the instruments and derived measures and to ii) trial the operational procedures only. Data or results from the Field Trial are not disclosed to the general public, participating schools or respondents and are similarly not used for any other reporting or output purposes.

## National Options

**Standard 1.19** National options do not jeopardise or endanger the completion of the international part(s) of the survey.

**Standard 1.20** Only national options that are agreed upon between the national centre and the Consortium are implemented.

**Standard 1.21** National options are field trialled.

**Standard 1.22** Participation in national options are agreed upon before 31 August 2022 for the Field Trial and before 30 September 2023 for the Main Survey.

- National options that have a bearing on international tools and methodologies (e.g. the Within-school Sampling Software) are discussed at the earliest possible convenience. National Project Managers are asked to initiate such discussions with the Consortium.

## Quality Assurance and Control

The following list includes measures intended to ensure quality standards are met regarding survey ethics and planning.

- NPM and national centre staff nomination forms
- documented staff changes and systematic knowledge transfers
- documented participation in international options
- documented and agreed-upon national options.

## 2 Communication

### Rational and Purpose

The TALIS 2024 project requires high communication standards to enable smooth and transparent communication throughout its lifecycle. NPMs must ensure that there are no communication gaps arising during absences or staff changes.

### Communication and Meetings

**Standard 2.1** NPMs are the primary contact persons for the Consortium regarding all TALIS related issues.

**Standard 2.2** The Consortium generally responds to any written request (i.e. e-mail) within one working day, if at all possible or, if processing takes longer, acknowledges the receipt of a national centre request, indicating the amount of time required to respond.

**Standard 2.3** Conversely, national centres respond to any written requests from the Consortium within one working day, if at all possible or, if processing takes longer, acknowledge the receipt of a request, indicating the amount of time required to respond.

**Standard 2.4** The main means of communication is e-mail and the main contacts are as follows:

- All e-mails to the sampling team at IEA Hamburg, Germany are addressed to [sampling@iea-hamburg.de](mailto:sampling@iea-hamburg.de).
- All e-mails regarding translation verification, and national and international quality control during data collection should be addressed to the IEA Amsterdam, The Netherlands: [talis@iea.nl](mailto:talis@iea.nl).
- All other communication – or in case of doubt – should be addressed to the International Study Centre (ISC) account [talis@iea-hamburg.de](mailto:talis@iea-hamburg.de) that is accessible to all TALIS-related staff working at the ISC in Hamburg, Germany.

**Standard 2.5** The [talis@iea-hamburg.de](mailto:talis@iea-hamburg.de) account at the ISC is copied in on any direct NPM correspondence with Consortium partners (other than the ISC).

**Standard 2.6** E-mail subject lines to the Consortium include the appropriate 3-digit ISO (alpha-3) code as well as a meaningful subject line.

- Examples of meaningful e-mail subject lines are: “XXX - Question on TALIS 2024 sampling frame”.
- E-mails with highly generic subject lines such as “question” or “urgent clarification” or no subject line at all should be avoided to allow for proper processing and retrieval.

**Standard 2.7** NPMs ensure that all key staff at the national centre has access to the TALIS e-mails relevant to their area of work.

- Where possible, the Consortium recommends to set-up a central, national/sub-national TALIS e-mail project account that includes the 3-digit ISO (alpha-3) code (xxx) or the Participant name, such as [talis\\_xxx@institute.yy\(y\)](mailto:talis_xxx@institute.yy(y)).
- If this is not possible, the NPM is responsible for organising smooth communication within the national centre, for example during absences.

**Standard 2.8** NPMs as well as key staff members that are authorised to communicate with the Consortium are proficient in English.

**Standard 2.9** NPMs inform the Consortium without delay of any unforeseen issues that arise during the performance of the tasks and that may have operational implications for the Participant and/or the Consortium (e.g. delays) or on the outcomes and success of the Core ISCED Level 2 survey or the optional modules (ISCED Level 1 and ISCED Level 3 modules, the TALIS Starting Strong Module, or the Teacher Knowledge Survey Module). The national centre should not take decisions on substantial issues without consulting with the Consortium first.

**Standard 2.10** NPMs (and other key centre staff, as applicable) attend all international NPM meetings and training sessions convened by the Consortium during the survey period as indicated in the overall survey schedule.

**Standard 2.11** If necessary, webinars, on-screen meetings and phone conferences can be arranged at the Consortium's discretion to clarify and discuss issues.

**Standard 2.12** National centres develop appropriate mechanisms to promote participation, effective implementation of the data collection and dissemination of results amongst all relevant stakeholders.

## Document and Data Exchange

**Standard 2.13** TALIS uses a secure, password protected SharePoint site as the main platform for document and data exchange.

- The site is organised in a "Home" site, which is accessible to all groups and actors, as well as a general "NPM" site. The general site contains Participant sites/folders, which are only accessible to the respective Participant, the Consortium, and the OECD Secretariat.
- Materials such as data files, instruments and manuals are exchanged via SharePoint.

**Standard 2.14** NPMs indicate to the Consortium if key staffs, other than the NPM, need access to SharePoint. Conversely, if national centre staff leaves the project, the NPM informs the Consortium immediately.

**Standard 2.15** All documents uploaded on SharePoint should follow an effective naming convention, including, where applicable, the revision date in reverse order and the survey phase at the beginning.

- The following are examples:
  - for the pilot: 20211014\_TALIS2024\_PI\_document\_name
  - for the Field Trial: 20220708\_TALIS2024\_FT\_document\_name
  - for the Main Survey: 20231219\_TALIS2024\_MS\_document\_name

## Quality Assurance and Control

The following list includes measures intended to ensure quality standards are met regarding communication.

- timely and effective virtual and face-to-face communication
- early indications of unforeseen problems or issues
- use of SharePoint as a document exchange platform to ensure proper management of documents and materials
- document access to SharePoint.

## 3 Sampling Design, Weighting and Adjudication

### Rationale and Purpose

High quality, reliable and comparable data and estimates require sound field procedures and unbiased probabilistic sampling plans.

### Core Survey ISCED Level 2

#### *Populations*

**Standard 3.1** The 2011 edition of the International Standard Classification of Education (ISCED 2011)<sup>3</sup> is the reference for TALIS 2024.

**Standard 3.2** The population covered by the core survey ISCED Level 2 encompasses as many ISCED Level 2 teachers as possible (as defined in the Survey Operations Procedures (SOP) Unit 1: Sampling of Schools) and is as comparable as possible across Participants.

- In-scope: All teachers teaching at least one ISCED Level 2 class of any subject matter, and their school principals. A “principal” is defined as the person with the most responsibility for the administrative, managerial and/or pedagogical leadership at the school. As part of the leadership role, principals may be responsible for the monitoring of students, the supervision of teachers, contact with parents and guardians, and/or the planning, preparation and carrying out of the pedagogical work in the school. Principals may also spend part of their time teaching.
- Out-of-scope: Teachers in schools for students with special education needs and their principals, teachers in adult education schools and their principals, teachers in regular schools who teach classes entirely composed of adults, teachers on long-term leave (e.g. disability, sabbatical) who are not expected to be back teaching at the time of data collection, and substitute and emergency teachers are not part of the target population. Non-teaching staff (nurses, school psychologists, teachers’ aides, etc.) are also out of the TALIS 2024 scope.
- Principals are not considered as teachers for TALIS and will only be surveyed with respect to their principal duties, regardless of whether they also have teaching obligations.

**Standard 3.3** The national survey population is as close as practically possible to the international target population.

- Inclusions: To maintain comparability, the national survey population must not include any teachers who are not part of the international target population.
- Exclusions: For reasons of practicality, safety or economy (e.g. remote schools, unique demographic groups, school types, areas under civil unrest, natural catastrophe), the national survey population may be reduced. The exclusions are fully documented and do not account for more than 5% of the international target population of ISCED Level 2 teachers. If exclusions are different from earlier cycles, measures are implemented to ensure comparability over time.

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<sup>3</sup> <http://uis.unesco.org/sites/default/files/documents/international-standard-classification-of-education-isced-2011-en.pdf>

### ***Sampling Frames***

**Standard 3.4** To ensure the entire coverage of the national survey population, the most recent list of all schools offering at least one regular class of ISCED Level 2 education is obtained and used as the school sampling frame. Similarly, the lists of teachers are created at the latest possible time prior to the survey administration.

- All listings of teachers must comprise all in-scope teachers as indicated in the SOP Unit 1 and must not be limited to the selected or participating teachers.

**Standard 3.5** To ensure that efficient sampling can be implemented, the sampling frame at each stage of sampling must contain all data fields specified in the TALIS 2024 SOP Unit 1.

**Standard 3.6** Information contained in the sampling frame(s) is used not only to select efficient samples, but also for quality assurance and quality control of school- and within-school sampling and data collection.

### ***Sample Selection***

**Standard 3.7** TALIS relies on a two-stage sampling approach. At the first stage, schools are sampled and at the second stage, a sample of eligible teachers within these schools is selected.

**Standard 3.8** If a comprehensive school list is not available or cannot be obtained, a third preceding sampling stage may need to be applied. E.g. a selection of zip-code areas from a comprehensive list of these areas will be conducted first, followed by a full compilation of eligible schools within the selected areas. In such a case, the same rigorous approach applies to this sampling stage, i.e. each eligible school and teacher in a participating country must have a positive (and known) selection probability.

**Standard 3.9** To ensure that the results of TALIS 2024 are based on samples representing the populations from which they are drawn, all samples must be drawn according to recognised probability sampling theory and practices. Non-probability sampling (e.g. quota sampling, convenience sampling) is not allowed.

**Standard 3.10** In order to simplify the assessment of how well the sampling frames cover their respective target populations, to ensure timely delivery of school samples to national teams, and to standardise the transmission of information between the various within-school sampling, collection monitoring and data processing systems, all school samples are drawn by the Consortium.

**Standard 3.11** For the reasons given in Standard 3.10, all teacher samples are selected using the IEA Within-School Sampling Software (WinW3S)<sup>4</sup> provided by the Consortium.

**Standard 3.12** All school samples are drawn with probability proportional to size whenever an appropriate measure of size is available on the school sampling frame, as indicated in the TALIS 2024 SOP Unit 1.

**Standard 3.13** All teacher samples are drawn with equal probability using WinW3S.

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<sup>4</sup> The IEA Windows Within-School Sampling Software (WinW3S) is a software program originally developed by the IEA for international large-scale assessments administered in the school context (e.g. to sample students or teachers within schools).

- Exception: To reduce excessive response burden, teachers who participate in the Field Trial may be excused from the Main Survey data collection as indicated in the TALIS 2024 SOP Unit 1.

**Standard 3.14** While recognising the potential for replacement bias, non-responding schools may be replaced by an alternative selection, in order to maintain the sample size at its highest level. Replacement schools are assigned at the same time as the selection of the main school sample. Each sampled school has (up to) two designated replacement schools. To minimize the risk of replacement bias, replacement schools belong to the same stratum and are of similar size to their sampled school. To minimise the risks of inflating sampling error, replacement schools are weighted as if they had been selected in the main sample.

**Standard 3.15** Only non-responding schools may be replaced; closed or out-of-scope schools erroneously present on the frame and selected as part of the sample must not be replaced.

**Standard 3.16** Non-responding teachers must not be replaced.

### ***Sample Size***

**Standard 3.17** The sample size of the Field Trial is set at a minimum of 30 schools.

- The Field Trial sample size is intended to yield approximately 150 to 200 responses per item (not considering non-response), even under a form design that presents some items or alternatives to only one third of respondents.

**Standard 3.18** The sample size for the Main Survey is set at a minimum of 200 schools and 4 000 teachers in total.

- Exception: After discussion with the Consortium and upon agreement, the sample sizes may be modified for a given Participant to accommodate particular national conditions.
- In any case, the resulting effective sample sizes should be equivalent to those of any other Participants following the general sampling design.

**Standard 3.19** In schools with 20 or more eligible teachers, at least 20 teachers will be selected; in schools with fewer eligible teachers, all of them will be asked to participate.

### ***Weighting and Estimation***

**Standard 3.20** The Consortium computes first stage (i.e. school) design weights and non-response adjustment factors, second stage (i.e. teacher) design weights, non-response adjustment factors and multiplicity adjustment factors, and final estimation weights for each participating teacher. For principals, there is only one stage; design weights, non-response adjustment factors and final weights will be computed independently from the teacher population.

**Standard 3.21** The Consortium computes coverage indices (i.e. the ratio of the estimated population to official or frame statistics) for each Participant. Important discrepancies between frame and survey results indicated by unexpectedly large or unexpectedly small ratios are investigated.

**Standard 3.22** The Consortium computes replication weights based on Fay's variant of McCarthy's Balanced Repeated Replication (McCarthy 1966, 1969; Fay 1989; Judkins 1990).

- One hundred (100) replicates are created for each Participant with a Fay factor of 0.5.

**Standard 3.23** To ensure the unbiasedness of the estimates and to reflect the complex structure of the TALIS 2024 samples and data, all estimates are weighted and accompanied by the appropriate measure of their sampling error.

**Responses Rates, Participation and Adjudication**

**Standard 3.24** The Consortium computes weighted and un-weighted participation rates for teachers and principals.

**Standard 3.25** The aim of any survey is to reach 100% response of the selected respondents. The minimum expected in TALIS 2024 is 75% of schools and 75% of teachers across all participating schools.<sup>5</sup>

**Standard 3.26** For the purposes of the adjudication of principal-level data (see Table 1):

- A “participating principal” is one who is administered the entire questionnaire and provides at least one response.

PRINCIPAL PARTICIPATION		RISK OF NON-RESPONSE BIAS	RATING
before replacement	after replacement		
≥75%	≥75%		GOOD
≥50% but <75%	≥75%		FAIR
	≥50% but <75%	LOW	FAIR
		HIGH	POOR
<50%	INSUFFICIENT		

Table 1: Adjudication rules for principal-level data in TALIS 2024

**Standard 3.27** For the purposes of adjudication of teacher-level data (see Table 2):

- A participating “teacher” is one who is administered the entire questionnaire and provides at least one response.
- A “participating school” is one where at least 50% of the selected teachers participate.

SCHOOL PARTICIPATION		TEACHER PARTICIPATION AFTER SCHOOL REPLACEMENT	RISK OF TEACHER NON-RESPONSE BIAS	RATING
before replacement	after replacement			
≥75%	≥75%	≥75%		GOOD
		≥50% but <75%		FAIR
≥50% but <75%	≥75%	≥75%		FAIR
		≥50% but <75%	LOW	FAIR
			HIGH	POOR
	≥50% but <75%			POOR
<50%	≥75%			POOR
	<75%	INSUFFICIENT		

Table 2: Adjudication rules for teacher-level data in TALIS 2024

<sup>5</sup> The Consortium will consider either the unweighted or the weighted participation rates, whichever is more in favour of the Participant.

**Standard 3.28** The Consortium, in consultation with the OECD Secretariat, formulates a recommendation for the adjudication of the national samples based on the rules on sample returns and participation rates displayed in the tables above.

**Standard 3.29** All Participants with a preliminary rating below “Good” are expected to submit a “Non-response bias analysis” to the Consortium. Final sample adjudication ratings depend on the conclusions reached by the non-response bias analysis, and on the assessment made by the Sampling Referee.

### **Optional modules ISCED Level 1 and ISCED Level 3**

**Standard 3.30** The standards given above for the core survey ISCED Level 2 are also applied to the optional modules ISCED Level 1 and ISCED Level 3.

**Standard 3.31** The results from the core survey ISCED Level 2, the optional module ISCED Level 1 and the optional module ISCED Level 3 are adjudicated independently.

### **Optional module Starting Strong Survey**

#### ***Populations***

**Standard 3.32** The standards given above for the core survey ISCED Level 2 are also applied to TALIS Starting Strong, with changes as necessary (stated below).

**Standard 3.33** The population covered by the ISCED Level 02 target population of TALIS Starting Strong encompasses as many ISCED Level 02 staff as possible (as defined in SOP Unit 1) and is as comparable as possible across Participants.

- In-scope: All persons working regularly in a pedagogical way, providing learning opportunities or care, with children of ISCED Level 02 within officially registered centre-based early childhood education and care (ECEC) settings and their leaders are included. A “leader” is defined as the person with the most responsibility for the administrative, managerial and/or pedagogical leadership at the ECEC setting. As part of the leadership role, leaders may be responsible for the monitoring of children, the supervision of other staff, contact with parents and guardians, and/or the planning, preparation and carrying out of the pedagogical work in the ECEC setting. Leaders may also spend part of their time working with the children.
- Out-of-scope: Settings that are not officially registered, staff and leaders of ECEC settings entirely devoted to children with special needs (cognitive, emotional, physical impairment or limitation), temporary substitute educators (to replace staff on sick leave), staff on long term leave (e.g. disability, sabbatical) who are not expected to be back working at the time of data collection, persons working as nannies or in informal arrangements, services provided exclusively within a child’s home (e.g. home visiting), volunteer persons who would occasionally come in for a special activity, and auxiliary staff (e.g. cleaners, cooking staff, etc.) who do not interact regularly in a pedagogical manner with the children are not in scope for TALIS Starting Strong.
- For the ISCED Level 02 target population, home-based settings (i.e. settings that are officially registered in some capacity and that are located within the homes of staff) are not considered to be part of the target population.
- Leaders who fulfil the definition of a staff member are to be considered as part of both (staff and leader) populations.

### **Sample Sizes**

**Standard 3.34** The sample size for the Field Trial is set at a minimum of 30 ECEC settings.

**Standard 3.35** The sample size for the Main Survey is set at a minimum of 180 ECEC settings and 1 200 staff members in total.

**Standard 3.36** In ECEC settings with eight or more eligible staff members, at least eight staff members will be selected; in settings with fewer eligible staff members, all of them will be asked to participate.

**Standard 3.37** National circumstances may necessitate larger setting or staff sample sizes. E.g. if there are fewer than 180 settings in a country, all staff members may need to be asked to participate; or, if the average setting size is significantly smaller than eight staff members, larger setting samples may be needed.

- Exception: After discussion with the Consortium and upon agreement, the sample sizes may be modified for a given Participant to accommodate particular national conditions.
- In any case, the resulting effective sample sizes should be equivalent to those of any other Participants following the general sampling design.

### **Weighting and Estimation**

**Standard 3.38** The Consortium computes replication weights based on Fay's variant of McCarthy's Balanced Repeated Replication (McCarthy 1966, 1969; Fay 1989; Judkins 1990).

- Ninety-two (92) replicates are created for each Participant with a Fay factor of 0.5.

### **Target Population: Services for Children under the Age of 3 Years (U3)**

**Standard 3.39** The standards given above for the ISCED Level 02 target population are also applied to the U3 target population, with changes as necessary (stated below).

**Standard 3.40** The population covered by U3 encompasses as many staff as possible working in the ECEC settings defined in SOP Unit 1 and is as comparable as possible across Participants.

- In-scope: All persons working regularly in a pedagogical way, providing learning opportunities or care, with children under the age of 3 years within officially registered early childhood education and care settings and their leaders are included.
- Out-of-scope: identical to Standard 3.33.
- In contrast to ISCED Level 02, registered home-based settings are in scope of the U3 target population.

**Standard 3.41** The results from U3 are adjudicated independently from those of ISCED Level 02.

### **Optional Module Teacher Knowledge Survey**

**Standard 3.42** The standards given above for the core survey ISCED Level 2 are also applied to the Teacher Knowledge Survey (TKS), with changes as necessary (stated below).

### **Populations**

**Standard 3.43** The TKS target population is equivalent to the ISCED Level 2 teacher target population described in Standard 3.2. Principals are not part of the optional module TKS.

### **Sample Selection**

**Standard 3.44** The same schools are selected for the core survey ISCED Level 2 and the optional module TKS. Within the selected schools, teachers are selected for either ISCED Level 2 or TKS.

### **Sample Size**

**Standard 3.45** In schools with 35 or more eligible teachers, at least 20 teachers will be selected for ISCED Level 2 and at least 15 teachers will be selected for TKS. In schools with fewer eligible teachers, all of them will be asked to participate, and they will be assigned to either ISCED Level 2 or TKS in a ratio of 4:3.

**Standard 3.46** The minimum sample sizes of 4 000 teachers for ISCED Level 2 and 3 000 teachers for TKS shall be maintained by increasing the school sample size when necessary.

### **Weighting and Estimation**

**Standard 3.47** The results from TKS are weighted and adjudicated independently from those of ISCED Level 2.

## **Quality Assurance and Control**

The following list includes measures intended to ensure that quality standards are met regarding sampling design, weighting and adjudication:

- SOP Unit 1 and sampling forms
- face-to-face consultations
- monitoring of sample implementation
- adjudication process
- report on sampling and weighting for each Participant, given to the respective Participant and to the OECD Secretariat and prepared independently for the core survey and each optional module.

## **4 Instrument Adaptation, Translation and Verification**

### **Rational and Purpose**

These standards ensure that national translations are consistent with the international versions of the TALIS instruments, while allowing for cultural adaptations where necessary. The TALIS questionnaires are subject to a stringent translation, adaptation, and verification procedure prior to both the Field Trial and the Main Survey, to assure that each Participants' principals and teachers receive equivalent questions and that the data collected is internationally comparable. The external verification of adaptations, translation and layout are part of the survey quality assurance procedures. Although the questionnaires will be administered online, due to expansion rates and differences of word counts of languages, the layout will need to be checked for issues with visibility of text in menu options, buttons, amongst others.

### **Languages**

**Standard 4.1** The TALIS questionnaires are administered in an official (state) language.

**Standard 4.2** If there is more than one official (state) language, Participants are encouraged to use all of them. The NPMs are responsible in selecting the language(s) for use in the questionnaires. In

making this decision, the NPMs should take into consideration the following: languages used for instruction, size of language groups in the country/sub-national entity, and political sensitivities. The decision of which language(s) the questionnaires will be administered in will be made prior to the Field Trial and agreed upon by the Consortium.

**Standard 4.3** Unless otherwise agreed upon, all relevant language versions of instruments are developed according to the following standards for both the Field Trial and the Main Survey.

### **National Adaptation of Instruments and Manuals**

**Standard 4.4** Regardless of method of data collection (online or paper), all adaptations are documented using the online translation system of the IEA StudyExpert.

**Standard 4.5** Paper instruments must be structurally equivalent and linguistically identical to the online instruments. All adaptations and extensions made for the online instruments must be reflected in the paper version as well. → Translation of Instruments and Manuals

**Standard 4.6** Each Participant's questionnaires include all introduction texts and questions in the international source version as well as the corresponding notes, instructions, response categories and coding schemes.

- Although the default data collection mode is electronic (online), corresponding paper versions should contain the above information.
- This implies that raw data imputation from sources external to TALIS is not permitted.

**Standard 4.7** Questionnaire items administered in previous TALIS cycles (2013, 2018) that are used for trend comparisons are to be administered unchanged from their previous administration.

- Some parts of the TALIS 2024 instruments are identical to those used in the TALIS 2013 and/or 2018 survey. All these parts and correspondent translations (instructions, question stems, items) should be used exactly as they appeared in the TALIS 2013 and/or TALIS 2018 instruments to ensure comparability of the data between the three cycles.
- Exceptions to this standard are limited to substantial translation and/or adaptation errors or inconsistencies in TALIS 2013 or TALIS 2018 that must be previously discussed and agreed upon with the Consortium.

**Standard 4.8** The questionnaires are to be equivalent to the international source version. If adaptations to the national context are needed, these have to be documented and agreed upon between the national centre and Consortium.

**Standard 4.9** Adaptations to the introduction text of the questionnaires or to the Cover Letters for online participation are to be properly documented in the online translation system of the IEA StudyExpert for Consortium review and approval.

**Standard 4.10** Needed adaptations to the questionnaires for optional modules ISCED Level 1 and ISCED Level 3, as well as TALIS Starting Strong and the Teacher Knowledge Survey are carried out, documented and approved, if necessary, simultaneously.

**Standard 4.11** National Adaptations must be documented in the online translation system only once for all administered languages.

- Structural adaptation across different language versions must be identical.

**Standard 4.12** Questions or adaptations unique to any of the optional modules ISCED Level 1 and ISCED Level 3, TALIS Starting Strong and the Teacher Knowledge Survey also require documentation in the online translation system for Consortium review and approval.

**Standard 4.13** Disagreements on national adaptations between the NPMs and Consortium will be reviewed and mediated by the translation and adaptation referee, an external independent expert.

**Standard 4.14** The School Coordinator Manual is equivalent to the source version. Agreed-upon adaptations to the national context are made if needed.

- The key aspects (i.e. the criteria for teacher eligibility, the number of teachers to be sampled from each school, the definitions, codes, and instructions related to the coding of the Teacher Listing and Tracking Forms, including examples to illustrate these codes) should follow procedures set by the Consortium and will be checked by International Quality Observers (IQOs).

## National Extensions of Instruments

**Standard 4.15** National extensions to the instruments are kept to a strict minimum and require review and pre-approval by the Consortium.

**Standard 4.16** National extensions do not jeopardise or endanger the completion of the international part of the instruments.

**Standard 4.17** National extensions are generally included at the end of the questionnaires to ensure the comparability of the international items. If a single national item belongs conceptually to an international question of the source instrument, this item can only be added at the end of the item list of that question (e.g. question 11 includes items a) to e), then the national item should be added as item f) at the end of question 11).

## Translation of Instruments and Manuals

**Standard 4.18** Regardless of method of data collection (online or paper), all translations are entered in the online translation system.

**Standard 4.19** All questionnaires translated into the language(s) of administration are to be linguistically equivalent to the international source versions.

- The Teacher and Principal Questionnaires are provided by the Consortium in English and French (if applicable) prior to the Field Trial and the Main Survey.

**Standard 4.20** National centres are responsible for converting international questionnaires to the national version, which includes adaptations/extensions as well as translation of text passages from the international questionnaires in the online translation system.

**Standard 4.21** Participants are responsible for conducting translations and documenting the process as well as any deviations from the English or French (if applicable) language source versions.

- The decentralised translation requires translation and translation review at the national level using the English or French (if applicable) source language versions.
- The NPM selects a minimum of two persons (at least one translator and one reviewer) for preparing a national version of each survey instrument, supervises the process of national

adaptation and translation, and the documentation of these in the National Adaptation Forms.

- English speaking Participants follow the same guidelines and verification procedures as Participants producing instruments in other languages, focusing on the national adaptations of the instruments. The same procedures of focusing on the national adaptations of the instruments applies to French speaking Participants, if a French source version is available.

**Standard 4.22** National centres are responsible for translating and verifying text passages exclusively used in the online mode (e.g. the text on a “Next” button).

**Standard 4.23** National centres are responsible for translating and verifying text passages exclusively used in the paper mode (e.g. the skip instructions for filter questions).

**Standard 4.24** Unless otherwise agreed-upon, the School Coordinator Manual is translated into the common (state) language(s) and is consistent with the international English source version.

**Standard 4.25** National centres translate all the Field Trial and Main Survey TALIS 2024 materials in the online translation system within the agreed upon timeline and sequence.

- For the Main Survey, the Consortium will pre-populate the Field Trial national translations in the IEA StudyExpert translation system. This will be the starting point for the national centres in preparing and revising their materials.

## Translation Verification

**Standard 4.26** Translation verification commences only after all adaptations have been agreed upon and after translation is completed.

**Standard 4.27** National centres implement the translation verifiers’ comments as necessary and appropriate or, in case of disagreement, document the reasons and rationale for not following the verifiers’ advice.

**Standard 4.28** Disagreements between the translation verifiers’ comments and the NPM will be reviewed and mediated by the translation and adaptation referee.

**Standard 4.29** The outcomes of the translation verification and national adaptation processes including input from the translation and adaptation referee (when applicable) are reported by the Consortium to the OECD Secretariat after the Field Trial and the Main Survey.

**Standard 4.30** Translations of the School Coordinator Manual or any other materials are not subject to translation verification.

## Layout Verification of Online Questionnaires

**Standard 4.31** National centres are responsible for the completion of the layout of the online questionnaires.

**Standard 4.32** Participants administering paper questionnaires create their paper questionnaires through the export in the IEA StudyExpert and perform the layout verification prior to submission of the questionnaires for further checks to the ISC.

**Standard 4.33** National centres submit the verified national/sub-national online questionnaires, and the Consortium will perform the layout verification check of the online questionnaires.

- National centres are responsible for the verification of the online questionnaires that are created and set online by the ISC.

**Standard 4.34** The layout and formatting of all questionnaire material is the same as in the source version.

**Standard 4.35** National centres submit all national versions of questionnaire materials for online layout verification (optical check) and correct discrepancies, mistakes and errors identified by the Consortium.

**Standard 4.36** Online layout verification commences only after the translation verification process is completed.

**Standard 4.37** National versions of the School Coordinator Manual and other materials are not subject to layout verification.

### **Quality Assurance and Control**

The following list includes measures intended to ensure quality standards are met regarding instrument adaptation, translation, and verification.

- documentation of national adaptations in the online translation system
- Consortium pre-approval of proposed adaptations and extensions
- translation verification and follow-up
- online and paper layout verification and follow-up
- submitted questionnaires (paper and electronic) as used in the data collection
- International Quality Observers' documentation of the utilisation of the Main Survey translation verification results (for a more complete description of IQO tasks see section 7)
- Outcomes from adaptation and translation verification and input from the translation and adaptation referee (when applicable) are reviewed during the data adjudication process.

## 5 School Co-operation and Within-School Sampling

### Rationale and Purpose

Obtaining school co-operation, preparing schools, principals, teachers, and School Coordinators for their involvement in the TALIS 2024 survey is the key to obtaining high participation rates, fully completed instruments and high-quality data, which are necessary to embark on meaningful analysis. Standardised procedures for contacting schools and preparing the within-school sampling, in co-operation with trained School Coordinators, assure appropriate and accurate administration across Participants.

### Obtaining School Co-operation and Ethics

**Standard 5.1** National centres obtain permission for surveying principals and teachers in sampled schools from applicable national and/or regional school authorities and bodies.

**Standard 5.2** National centres establish a written plan/strategy for reaching school co-operation and participation and obtain support from school authorities and officials, teacher unions, and any other organisations or individuals who are likely to encourage or foster the participation of schools.

**Standard 5.3** Each participating country may opt to provide a “modest” incentive to obtain school and respondent co-operation, such as a monetary or non-monetary incentives (e.g. pen, notepad, candy, mug, voucher, gift certificate). However, the Consortium must be informed about planned incentives in advance of their use.

**Standard 5.4** National centres submit and discuss their plan/strategy to gain/raise participation of schools, principals, and teachers with the Consortium.

**Standard 5.5** National centres establish the first contact with schools in writing by sending an initial school contact letter that provides all the necessary information about the TALIS 2024 project to the head of school (in most cases the school principal or the school governing authorities), requesting the school’s participation.

- The initial contact letter to the school should contain the following documents/information:
  - a comprehensive document or brochure that outlines the purpose and goals of the project, the intended use of the data, the confidentiality policy and, in case a Participant implements one or more options in that school, a description of the intended use of the combined dataset at the international and national levels
  - key administration information including dates, tasks, expected response burden (i.e. the number of involved teachers and time required to complete the questionnaires) and the required deliverables
  - the National Data Protection Notice
  - the School Coordinator Manual, if available at this stage
- The initial contact letter should indicate endorsement of the research by applicable international and national authorities, unions, and organisations.

**Standard 5.6** If, after all persuasion strategies and communication channels have been used to obtain participation, the sampled school still refuses to participate, the national centre contacts the first designated replacement school. If that school also refuses to participate, the national centre contacts the second replacement school. National centres are asked to keep track and document the efforts made to convince schools and teachers to participate in TALIS.

Only refusing schools may be replaced. Schools found to be out of scope during data collection are not to be replaced.

**Standard 5.7** National centres document the participation status of each school in the IEA WinW3S software as described in the operational manuals.

## School Coordinators

**Standard 5.8** National centres, in consultation with the school principal or the school authorities, identify a suitable School Coordinator for each school in the sample.

- School Coordinators, for example, may be active or retired teachers, guidance counsellors or administrative or management personnel in the school who, ideally, do not actually participate in the survey.
- For reasons of confidentiality, and to maximise endorsement by teachers, school principals may be unsuitable for the role of School Coordinator.
- As an alternative, a member of the national centre or a person from an external agency who is experienced in working with schools, principals, and teachers, may fill the role of the School Coordinator.

**Standard 5.9** School Coordinators have overall responsibility for liaising with the national centre, liaising with all applicable individuals within the schools, coordinating the accurate listing of teachers and their characteristics, verifying that the materials received from the national centre are complete, ensuring the correct distribution of materials, and ensuring/monitoring the timely completion of questionnaires (to all extents possible).

**Standard 5.10** National centres provide the School Coordinator Manual and training to School Coordinators.

- Training is predominantly provided to avoid listing errors and incorrect data collection that may eventually result in the need to drop data.
- Training can be organised in different ways, but the organisation of face-to-face training for all School Coordinators is the most preferable way. Details are to be found in the operational manuals.
- The training should include a discussion of all survey-related aspects relevant to School Coordinators as outlined in the NPM Guidelines and hands-on exercises in preparing Teacher Listing Forms, in completing Teacher Tracking Forms, and in any other applicable procedures.
- If a face-to-face training is not manageable, the preferred alternative for training School Coordinators is an interactive online training.

## Within-School Listing and Sampling

**Standard 5.11** National centres request the number of eligible teachers from participating schools to prepare a sufficient number of Teacher Listing Forms unless listing happens electronically.

**Standard 5.12** School Coordinators are responsible for listing all eligible teachers on the Teacher Listing Forms following the definition and guidelines given in the School Coordinator Manual.

**Standard 5.13** National centres thoroughly scrutinise all returned Teacher Listing Forms for completeness and plausibility, re-contact School Coordinators in cases of possible errors or flaws (most importantly, but not limited to, under-coverage)

- All listings of teachers must comprise all in-scope teachers as indicated in SOP Unit 1 and not be limited to the selected or participating teachers unless all are selected.

**Standard 5.14** National centres use the IEA WinW3S software to sample teachers in accordance with the defined international sample design.

**Standard 5.15** All schools and teachers are identified using a hierarchical ID numbering system defined by the Consortium.

## **Quality assurance and control**

The following list includes measures intended to ensure quality standards are met regarding school cooperation and within-school sampling.

- documented national school outreach strategies and endorsement/support of the research by relevant organisations and individuals
- comprehensive initial contact to schools
- trained School Coordinators
- IEA WinW3S software, which assists the national centres in sampling teachers, produces all necessary forms and labels to identify and track teachers, stores all relevant tracking information of teachers, and suppresses teacher names before submission of data to Consortium
- review and scrutiny of returned Teacher Listing Forms by national centres
- International Quality Observers' documentation of the listing activities for the Main Survey.

## 6 Data Collection and Participation Monitoring

### Rationale and Purpose

The standards in this section describe the online and paper data collection, the adaptation and translation processes, rules for material printing, packaging, and shipping as well as how to continuously monitor the participation rates as instruments are returned to the national centres.

To ensure comparability between the paper and online questionnaires, it is of importance that the questionnaires across administration modes are identical in content and as similar as possible in layout and presentation.

Closely following the survey schedule and providing sufficient time for principals and teachers to complete the questionnaires contributes to achieving high participation rates. Actively monitoring the participation of schools and teachers during data collection is the only way of detecting reluctant participation early and consequently prompting further efforts to raise participation.

### Material Printing, Packaging and Shipping of Cover Letters

**Standard 6.1** For the data collection, cover letters for teachers and the principal are provided in sealed envelopes if confidentiality rules or concerns dictate this.

**Standard 6.2** For the collection of data, cover letters can only be sent out to schools once the questionnaires are finalised.

**Standard 6.3** Once the translated, verified and laid-out version of the cover letters are produced and approved by the Consortium, national centres produce the necessary amount of cover letters and use the labels provided by the IEA WinW3S software or equivalent means to personalise questionnaires (i.e. add names, IDs, and passwords).

**Standard 6.4** Material send-out packages to schools, addressed to the School Coordinator, contain a copy of the Teacher Tracking Form, one personalised cover letter for each teacher listed on the Teacher Tracking Form, one personalised cover letter for the principal, and a list of the contents of the package to check the completeness of the materials.

**Standard 6.5** Cover letters are sent at the appropriate time before the data collection period and national centres request a confirmation of the receipt and completeness of the materials from the School Coordinator.

### Data Collection and Participation Monitoring

**Standard 6.6** Where prerequisites and agreement of schools and individuals permits, the default method of data collection is by self-administered online questionnaire.

**Standard 6.7** National centres actively inquire whether schools and respondents within schools can respond to the questionnaires over the Internet before sending materials.

**Standard 6.8** To ensure consistency and smooth operations, national centres use the IEA StudyExpert to administer the online data collection. The system is hosted on servers operated by the Consortium.

- No other software products are permissible.

**Standard 6.9** The Consortium is responsible for hosting questionnaires, storing data, maintaining data security, backing up data, and ensuring service availability to the extent reasonably possible.

**Standard 6.10** For paper questionnaires, national centres monitor and track the return status of the completed instruments as they arrive from schools and individuals in WinW3S, minimally weekly, and review the WinW3S participation information and estimates.

**Standard 6.11** In addition to monitoring the return of paper questionnaires, national centres monitor the participation in the online data collection closely, minimally weekly, and follow-up to non-responding Participants.

**Standard 6.12** During the administration of the Field Trial and the Main Survey, national centres submit weekly status reports on survey participation to the Consortium.

**Standard 6.13** School Coordinators distribute questionnaires and/or online data collection cover letters to sampled teachers and principals, collect returned paper questionnaires (unless these are returned directly to the national centre); and record the actual or reported participation on Teacher Tracking Forms.

**Standard 6.14** During the data collection phase, national centres are available to answer School Coordinators' respondents' (principals and teachers) questions when they are in doubt about any aspect of the questionnaire or if they would like more information about the questionnaire or the study in general.

- In person support is provided minimally by phone (as indicated in the questionnaire introductions) during normal office hours.
- Ideally, additional support is provided via e-mail for respondents to be answered within one working day.

**Standard 6.15** School Coordinators specifically ensure that the cover letters are only distributed to the designated sampled teacher, according to the information on the label of the cover letter.


**Standard 6.16** Non-responding or refusing teachers are not to be replaced by any other teacher, sampled or not.

**Standard 6.17** National centres implement effective follow-up and non-response conversion efforts to improve response, utilising support from pertinent authorities, organisations and individuals as needed.

## **Quality Assurance and Control**

The following list includes measures intended to ensure quality standards are met regarding data collection and participation monitoring.

- adaptation and translation of the questionnaires within one system
- full optical check between the online and paper instruments before printing the paper questionnaires
- labelled questionnaires or cover letters
- accurate and confirmed material preparations and dispatch
- appropriate measures to ensure the confidentiality of responses
- regular participation monitoring by the national centre to spot issues with reluctant participation as early as possible
- weekly reporting of the data collection progress to the Consortium

- 
- participation monitoring in real-time by the national centres using the Data Monitor
  - fall-back paper questionnaires.

## 7 Observing the Quality of Data Collection

### Rationale and Purpose

The TALIS 2024 quality control programme is implemented during survey administration to i) ensure the high quality of the data collection (National Data Collection Quality Observation), and ii) provide documentation on how the standardised international data collection procedures were followed (International Data Collection Quality Observation and a Survey Activities Questionnaire).

Quality control in TALIS is composed of three main parts: organisation and oversight by the Consortium of an international programme comprising school and national centre interviews (visits) conducted by International Quality Observers (IQOs); quality control at the national level; and a follow-up online Survey Activities Questionnaire seeking experiential information from the NPMs.

The Consortium will also prepare (two to three) extra quality control questions to be translated and administered to a sample of TALIS teacher respondents during both the Field Trial and Main Survey. The key area of consideration relates to administration, data security, confidentiality, and protection to help the Consortium assess the practical use of the standards.

### International Data Collection Quality Observation

**Standard 7.1** The Consortium conducts an independent International Quality Control programme based on standardised materials and procedures to document Main Survey data collection activities.

**Standard 7.2** NPMs will assist in the nomination process for IQOs. After nomination, candidates are selected by, contracted by and report exclusively to IEA Amsterdam.

**Standard 7.3** The IEA conducts one international online (in person) training session for Southern Hemisphere IQOs and one international online (in person) training session for Northern Hemisphere IQOs, providing relevant support materials for both meetings.

**Standard 7.4** The IQOs will collect information on the implementation of the survey within schools by interviewing the School Coordinator.

**Standard 7.5** NPMs will support and collaborate with IQOs for the school selection process and will provide the necessary information required for IQO task completion (e.g. final translated instruments and manuals). Schools will be selected using a semi-random procedure, excluding only those schools that cannot be visited due to practical constraints.

**Standard 7.6** For each Participant, 20 schools sampled for the Main Survey are selected for inclusion in the International Quality Control programme.

- International Data Collection Quality Observation is not conducted for the Field Trial.
- A failure to meet the international quality control standards during the Main Survey may lead to a corresponding recommendation for annotations in publications.
- In cooperation with the national centre, the IQO should select a list of 20 schools for international quality observations. This selection should be reviewed and approved by staff at IEA Amsterdam.
- Irrespective of the optional ISCED Levels (ISCED Level 1, ISCED Level 3); a total of 20 schools will need to be visited by the IQO during the Main Survey. The Consortium will advise on appropriate and proportional allocation of school levels. For countries

participating in the Starting Strong Survey, 20 additional ECEC centres will be selected independent of the sample for Core Survey using similar procedures to select the centres.

## **National Data Collection Quality Observation**

**Standard 7.7** Participants are required to appoint one or more National Quality Observers (NQOs) and implement National Data Collection Quality Observation during both the Field Trial (50% of the sampled schools or at least 10), and the Main Survey (10% of the sampled schools or at least 20). The design of the National Quality Control programme is at the discretion of each Participant. NPMs must summarise and report salient findings to the Consortium within the relevant section of the Survey Activities Questionnaire.

## **Survey Activities Questionnaire**

**Standard 7.8** NPMs complete the Survey Activities Questionnaire (in consultation with the National Data Manager, key national centre staff, or if appropriate, the NQO) after the Field Trial and the Main Survey. This will help document survey activities at the national level.

## **Quality assurance and control**

The following list includes measures intended to ensure quality standards are met regarding monitoring the quality of data collection.

- Survey Activities Questionnaire (Field Trial and Main Survey)
- International Quality Observer Manual and forms (Main Survey)
- Online training sessions for International Quality Observers (Main Survey)
- Report based on the data collected by IQOs to be reviewed during the data adjudication process (after the Main Survey).

## 8 Data Capture, Verification, Submission and Management

### Rationale and purpose

To ensure the comparability of the data, uniform methods of data editing need to be applied in all participating countries. The data needs to be properly verified and edited to ensure it is free of capture errors, so that a reliable database is available for international analysis. All data files including documentation must be sent to the Consortium on time.

### Data Verification

**Standard 8.1** National centres verify the data constantly while capturing, minimally weekly, and again before submission using the available checks in the software provided by the Consortium and following the instructions in the operational manuals.

- Minimally, the data are verified using the built-in checks in the IEA Survey System software; these are i) a unique ID check, ii) a valid value check for nominal/ordinal variables and iii) a valid range check for continuous variables.

**Standard 8.2** Data verification is made by referring to the original instruments if necessary.

**Standard 8.3** National centres do not otherwise “clean” or “edit” their sample and response data unless instructed to do so in the operational manuals or as explicitly agreed with the Consortium.

### Data Submission, Processing and Archiving

**Standard 8.4** National centres submit all data and all required documentation according to the data management manual and following the file formats described there.

**Standard 8.5** National centres submit Field Trial data and documentation within three (3) weeks after the scheduled end of the data collection, i.e. on or before 31 March 2023.

**Standard 8.6** National centres submit Main Survey data and documentation within six (6) weeks after the scheduled end of the data collection, i.e.

- On or before 31 May 2024 for all Northern Hemisphere countries participating in the core and any of the international options
- On or before 30 September 2024 for all Southern Hemisphere countries participating in the core and ISCED Level 1 and ISCED Level 3

**Standard 8.7** The Consortium maps the nationally adapted variables and recodes these into the international variables, where applicable and possible, during the processing at the international level. National extensions remain as they are and are included in national datasets which are sent back to countries.

**Standard 8.8** After data and document submission, national centres (more specifically the National Data Manager) are available for a minimum of three months to respond to the Consortiums’ data queries and to resolve data discrepancies.

**Standard 8.9** National centres scrutinise their own processed draft data products as received from the Consortium with respect to processing errors, plausibility, and correct mapping of national adaptations to international variables.

**Standard 8.10** National centres securely store all Field Trial original listing and tracking forms minimally until 31 October 2023.

**Standard 8.11** National centres securely store all Main Survey original listing and tracking forms minimally until 31 December 2025.

- The Consortium, at its discretion, may request scanned or hard copies of some or all these materials as necessary for the purpose of quality control.

## **Quality Assurance and Control**

The following list includes measures intended to ensure quality standards are met regarding data capture of instruments, verification, submission, and management.

- review of national adaptations from a data perspective prior to implementation
- national centre review of check reports on a regular basis and correction of data before submission
- material receipt checks for completeness of data and documentation
- Consortium monitoring the data capture accuracy achieved by Participants
- Consortium processing and checks to identify residual issues not previously addressed by the national centre
- additional data checks and cleaning logic at the international level with reports to Participants for commenting and/or correction.

## 9 Data Protection, Confidentiality, Security and Preparation of the International Database

### Rationale and Purpose

To ensure high participation rates for TALIS 2024, the confidentiality and personal information of the respondents must be protected. This affects the distribution and collection of questionnaires, data capture at the national centre, data submission to the Consortium and some additional disclosure avoidance measures before publication of the international database. Additionally, each National Centre may have to meet certain confidentiality criteria posed by national laws and regulations. The Consortium needs to be made aware of these where they affect the sharing of the TALIS 2024 data, so that they can be addressed accordingly.

### Confidentiality

**Standard 9.1** To ensure confidentiality, all teacher lists or any other lists including direct identifiers such as names or other individual identifying information such as birth dates etc. are to be always treated securely and as strictly confidential.

- Over and beyond this requirement, NPMs are responsible for ensuring that all storage, confidentiality, and privacy issues comply with GDPR and national legislation.

**Standard 9.2** All approved project staff working on TALIS at the national centre or a sub-contracted survey organisation must understand and obey confidentiality rules and practices in survey research and, regardless of their organisational affiliation, sign a confidentiality agreement or affidavit of nondisclosure in which they agree that they will not i) reveal the content of any confidential, secured or embargoed material or data, ii) make any disclosure whereby a survey respondent or his/her related data could be identified, iii) permit anyone other than the individuals under the same confidentiality agreement to access TALIS materials, data or reports.

- A confidentiality agreement template is included in the NPM manual and available on SharePoint.
- The Consortium requests hard copies or scans of signed confidentiality agreements.

**Standard 9.3** The national centre exports the WinW3S database before its submission to the Consortium to suppress direct identifiers (i.e. first and last names) collected and used during the within-school sampling and collection.

**Standard 9.4** Before submission to the Consortium, the national centre suppresses direct identifiers (i.e. first and last names) from the tracking and listing forms.

### Security and Integrity

**Standard 9.5** Data capture and management is carried out on the premises of the NPM's organisation or contracted survey organisation to minimise the number of, or even rule out the existence of, paper materials and data records outside of the NPM's reach and control.

**Standard 9.6** All TALIS data and materials, regardless of whether they are designated as secure/embargoed or not, are kept confidential and stored securely at all times.

**Standard 9.7** Access to physical materials and electronic files is restricted to approved project staff under the above confidentiality agreements.

**Standard 9.8** Databases and reports labelled “confidential” or “under embargo” are kept confidential until their public release by the OECD. Participants are directly liable for the security of the data and reports during that period.

**Standard 9.9** Transfers of data on portable media or via electronic means between national organisations and between the Participant and the Consortium must be made through secure and encrypted channels.

- In particular, national centres use the secure SharePoint site to upload and download data, documents and reports.

**Standard 9.10** Data and materials outside of the NPMs secure premises (e.g. data on laptops or USB sticks) must be encrypted and protected in case said devices are lost or stolen.

## Data Protection

**Standard 9.11** Data protection information must be made available to participants before or at the time of the data collection, that at least includes:

- contact details of the national centre
- contact details of the OECD’s Data Protection Officer and Data Protection Commissioner
- the purpose of the processing of the data
- recipients of the data, including any international organisations or third party
  - including TALIS contractors and any national contractors
- the storage and retention period of data
- the existence of the rights of data subjects, including the timeline for facilitating these requests.

National Centres may communicate data protection information to participants in the most effective way for their national context. The information may be provided in several ways, e.g. a video, an information sheet, a data protection notice, on a National Centre website or a link to the TALIS data protection notice.

**Standard 9.12** Each national centre will process the additional information related to a data subject (e.g. link files with records of respondent names) securely and separately from the datasets during data processing and archiving (i.e. the data collected during the survey will be categorised and treated as pseudonymised).<sup>6</sup>

After the archiving period for the Field Trial and Main Survey materials, National Centres are encouraged to anonymise the data by breaking the link between the name of the participant and the data from the questionnaire sessions. Anonymisation of the data requires deleting and/or confidentially shredding all files and records that connect the random ID number to identifying information (name, date of birth, national ID, etc.). Once anonymisation is complete and all records of a participant’s name are removed, it will be no longer possible to facilitate access and erasure requests.

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<sup>6</sup> The data collected from data subjects as part of TALIS is categorised as pseudonymised, as identifying characteristics in the data have been replaced with a number or value that does not allow the data subject to be directly identified. Pseudonymisation means that the data collected remains personal data, but can no longer be assigned to a natural person without additional information (e.g. record of a name and random ID number).

**Standard 9.13** National centres must inform schools or other holders of TALIS forms that include respondent names or other confidential material to return these materials to the national centre once data collection in the school is finalised. If, due to confidentiality regulations, School Coordinators must retain linkages between respondent IDs and names but not disclose this information to the national centre, such linkages should be kept until the below-stipulated date by the School Coordinator.

**Standard 9.14** All TALIS Field Trial materials that include respondent names or other confidential material must be deleted/shredded, starting on 01 November 2023 unless the data is needed by the country to ensure that teachers are not selected for both the Field Trial and the Main Survey; in this case, they can be kept until the end of the Main Survey administration period.

**Standard 9.15** All TALIS Main Survey materials that include respondent names or other confidential material must be deleted/shredded, starting on 01 January 2026.

**Standard 9.16** Materials to be returned and deleted/shredded include:

- listing forms
- tracking forms
- questionnaires.

It is the responsibility of the national centre to delete/shred TALIS materials. If School Coordinators are to delete/shred materials, it is the responsibility of the national centre to inform them accordingly.

**Standard 9.17** Each national centre must facilitate requests from participants to exercise their data rights.

- Data access requests will be possible using the raw data from the assessment.
- Data erasure requests will be possible for a limited period before submission to the Contractors according to each country's submission timeline. This is to be decided by each national centre.
- Each national centre will retain and update a log of completed data requests for data erasure, to facilitate quality control processes. This information must be submitted to the TALIS contractors in a timely manner to comply with the requests and for the purpose of data management and sampling processes.

## Availability

**Standard 9.18** NPMs and/or subcontracted survey organisations ensure the continued availability of all data and materials, preventing service disruptions for example due to power outages and hardware failures, by means of appropriate failover and backup systems.

## Preparation of the International Database

**Standard 9.19** Each Participant provides the Consortium with early notification of any rules affecting the disclosure and sharing of TALIS response data and its derived variables or codes.

- Participants carefully review the information collected through the instruments and survey operations and provide a description of the affected variables to the Consortium.

**Standard 9.20** Based on confidentiality regulations, each Participant is responsible for either i) implementing any agreed confidentiality measures in its micro-data file before submission to the

Consortium or ii) instructing the Consortium on how to implement the methods and modifications in the Participant database, where complexity permits this, before release to other Participants or to the public.

- National data are not released to other Participants or the public until Participants have been given an opportunity to review and comment on their own national data and until the release of such data has been approved by the national authorities, where applicable.

**Standard 9.21** All confidentiality measures implemented in the micro-data prior to the submission to the Consortium are fully and properly documented for Consortium review and commenting.

**Standard 9.22** One of the fundamental objectives of TALIS is to provide data for comparative analysis. Therefore, the TALIS public-use data file contains micro-data from all Participants in the project, provided data quality standards are met.

**Standard 9.23** Participants who decide to withdraw data must inform the Consortium before 31 December 2024 and only prior to obtaining access to data from other Participants.

- A deadline and procedures for withdrawing national data from the international micro-level database (the “international database”) is agreed upon by the Consortium and the OECD Secretariat. The indicative date (to be confirmed) is 31 December 2024.
- Withdrawn data is not made available to other Participants or the public.
- Should the Participant decide later to make the data available again, the Consortium needs to be notified at the earliest possible point in time and will decide at its discretion whether data can still be included in data products.

## Quality Assurance and Control

The following list includes measures intended to ensure quality standards are met regarding confidentiality, security, and preparation of the international database.

- documented confidentiality agreements signed by national centre staff
- security of confidential, secure, and embargoed data and materials
- protection of personally identifying data
- documented confidentiality rules and sharing limitations.

## 10 Data Analysis and Reporting

### Rationale and Purpose

Standards on data analysis and reporting ensure the application of proper techniques of analysis when using TALIS data, accounting for its complex sampling design. They aim for consistency and appropriateness of the computational routines and use of language that avoids causal interpretation of results. The following standards apply to the teams computing and assembling the tables as well as the narrative and interpretations for the TALIS international report, to the national staff preparing their national report, or any other individual conducting secondary analysis with TALIS data later.

### Data Dissemination and Reporting

**Standard 10.1** The OECD is responsible for reporting primary analysis results and releasing the data to the public. Embargoes apply to the reporting by parties other than the OECD.

- For each TALIS cycle, the OECD prepares and publishes the international report prior to the release of data for public use.
- No national teams or individuals shall have the right to publish, share with third parties or otherwise announce and disseminate the results from TALIS prior the official release of the international report and data by the OECD.
- The release of international reports by the OECD may be staggered at different points in time, e.g. with respect to international options or modules. Standards on embargoed use of the data hence apply to each of these releases individually.

### Data Analysis and Estimation

**Standard 10.2** All data analysis (primary, by the OECD and secondary, by the national teams) shall apply generally agreed upon scientific practices in the field of education and respect the TALIS design parameters.

- The international reporting can be considered guidance in this respect.

**Standard 10.3** The Consortium provides with the data the design variables needed for estimation and analysis (i.e. estimation weights and replication weights), analysis training and software to the national centres to ease the production of the national reports.

- The Consortium computes estimation and replication weights that accompany the national and the international data files. The resampling technique in use is Balanced Repeated Replication (BRR) with Fay's modification (factor 0.5).
- The Consortium provides the national centres with the IEA IDB Analyzer to assist the production of the national reports. The IEA IDB Analyzer is a user interface for use with SPSS (IBM Corporation, 2022), SAS (SAS Institute Inc., 2023) or R (R Core Team, 2023) that can be used to conduct basic statistical analysis, while accounting for the complex survey design.
- The Consortium provides training on the use of the IEA IDB Analyzer and the proper estimation methods as well as an analysis manual.

**Standard 10.4** Because the probabilities of selection assigned to the various schools and teachers are different and because non-response patterns vary from school to school, schools and teachers do not have equal estimation weights; therefore, all estimates of school and teacher characteristics

must be computed using the appropriate estimation weights through specialised software (e.g. the IEA IDB Analyzer) or general-purpose statistical software that support the estimation required by TALIS (e.g. R (R Core Team, 2023), SAS (SAS Institute Inc., 2023), Stata (StataCorp LLC, 2023)).

- The recommended software, IEA IDB Analyzer, accounts automatically for the TALIS complex sampling when estimating population features and standard errors.
- Other software, such as R, SAS and Stata, can be used as well, when the design and replicate weights are properly specified.

**Standard 10.5** Comparisons of estimates and testing for the significance of any differences shall account for the appropriate sampling errors, as indicated in the analysis manual.

**Standard 10.6** TALIS data are collected to support aggregated reporting at the level of a Participant, sub-national entities, or other major sub-groups as appropriate and supported by the sample design. In agreement with the confidentiality pledge to respondents, the TALIS data are not intended to be used for reporting at the level of individual schools, or individual teachers within schools.

**Standard 10.7** The structure of the TALIS instruments and the design of the survey do not support causal interpretations and inferences.

- Given that TALIS is a cross-sectional survey of teachers and does not rely on a longitudinal sample, results must be interpreted as observation of co-existence of phenomena or changes over time rather than as observation of causalities.
- If a theoretical model is used that allows for causal interpretation, that model (hypotheses and limitations) must be specified clearly to the reader.

**Standard 10.8** National centres are invited to reproduce findings from the international report respecting their national context.

- Reproduction of the findings in the international report by national centres is an additional verification step that ascertains the accuracy of the obtained results.
- Conversely, the results in the international report will serve the national centres to verify their computations when preparing their national reports, accounting for the national context.
- When contradiction occurs between the estimates prepared by the OECD and the estimates computed by the national team, the NPMs must alert the OECD and the Consortium for a resolution prior to the release of the initial international reports.

## Publication of Results

**Standard 10.9** The results published in the international report will be subjected to quality control and verification procedures.

- The results in the international report are verified by a part of the TALIS consortium (partner and/or unit) other than the part and/or unit that originally produced the results to ensure correct computation of population estimates and their standard errors.
- The verifier reports the results from the verification directly to the Consortium. When a discrepancy is detected, the Consortium computes the affected statistics once again and corrects the errors, if found.
- When contradiction occurs between the results reported in the international report and the results computed by the verifier, the Consortium must alert the OECD for a resolution before results in the international report are published.

## Quality Assurance and Control

The following list includes measures intended to ensure quality standards are met regarding data analysis and reporting.

- publication and release of analysis results, international reports, and a public-use database
- the use of design variables and appropriate estimation weights for estimation and analysis
- the use of the IEA IDB Analyzer or other software handling TALIS sampling design for data analysis
- review of the international report for causal interpretations and inferences
- reproduction of data analysis in the international report.

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