OECD STUDY ON SOCIAL AND EMOTIONAL SKILLS

STUDY PROJECT MANAGERS – ROLES, RESPONSIBILITIES AND RESOURCES

Table of contents
Introduction .................................................................................................................................................. 1
Profile of Study Project Managers ........................................................................................................ 2
Indicative timeline ..................................................................................................................................... 3
Responsibilities of the Study Project Manager and optional resources .................................................. 3
Facilities .................................................................................................................................................. 7
Dissemination .......................................................................................................................................... 7
Meeting and training attendance ............................................................................................................. 7

Introduction

Each participating city and country will be asked to appoint a Study Project Manager (SPM). The role of the SPM is to implement the Study at the city/country level, following the procedures and requirements established by the International Contractor.

SPMs will be the primary point of contact between participating cities and countries and the International Contractor in implementing the Study. SPMs will play a vital role in ensuring that the Study produces robust, reliable information.

SPMs will have the opportunity to provide input to the Study as it is designed and developed. They will provide advice to the International Contractor on the applicability of instruments, including questionnaires, to their local context. They will advise if local adaptations are needed and will be responsible for ensuring all translations are undertaken in a timely manner.

SPMs also have a key role in recruiting sampled schools to participate in the Study. This means they will communicate and liaise with schools and will assist with whatever approval processes are needed at a school level, such as parental consent.

Each SPM will be provided with training, through face-to-face training and through webinars. Detailed manuals will be provided to SPMs that will cover each stage of the Study. SPMs will also have access to ongoing support from the International Contractor, to ensure they are well prepared and well equipped to carry out their role.

Each city or country will establish a centralised study centre, which will carry out the Study at the national or city level. The centralised study centre will be managed by the SPM. Depending on the city or country’s resources the SPM may be assisted by a sampling manager (SM), a data
manager (DM), and/or other support staff as described below. The experience and expertise of the SPM and the staff in her/his institution will influence how the range of tasks is apportioned at the centralised study centre. Multiple tasks can also be allocated to one single individual depending on his/her expertise, experience and availability.

The OECD Secretariat acknowledges that some cities participating in the Study may not have had direct experience in international studies of this nature. Some may be supported by their national administrations and others may not. Additional support such as technical infrastructure, operational support in training and preparing for administering the Study in the field can be provided. Cities and countries are encouraged to discuss their needs with the OECD Secretariat to ensure technical and operational barriers do not stop participation in the Study or undermine the smooth implementation of the Study in each city or country.

This document describes the role and responsibilities of the SPM, and discusses how the work involved might be allocated to clerical/administrative support staff as well as to staff or sub-contractors assisting with translations, sample selection, field operations, data capture or data management.

The paper discusses the following:

- The desirable profile of Study Project Managers
- The key activities and indicative timeline for the Study
- Responsibilities of the Study Project Manager and optional resources
- The facilities recommended for the Study Project Manager and staff
- The dissemination of promotional material and reporting back the results of the Study
- Expected meeting and training attendance.

**Profile of Study Project Managers**

The position of a SPM will desirably be full-time over the course of the project, i.e. end of 2020. The SPM position’s time commitment could be less than full-time, depending on the availability of administrative assistants and other staff to cover, for example, data management, sampling activities and/or field operations. However, it is recommended that a SPM commits at least half his or her time to the project, year round, to ensure the continuity of activities.

It is desirable that a person appointed as SPM has as many of the following skills and experiences as possible:

- A high level of oral and written communication skills in English as all meetings, working documents, manuals for SPM use, and communications within the International Contractor are in English
- A university degree in education, educational psychology, assessment and measurement (psychometrics, quantitative analyses or research methodology), or equivalent qualification/experience
- In-depth knowledge of the city or country’s educational system
- Previous experience in planning, organising and conducting large-scale studies and assessments in education
- The ability to recruit and manage a team to carry out project tasks such as study planning, preparing local study instruments, managing school contacts, cooperation with stakeholders etc., often needing simultaneous attention
• Knowledge of and the confidence to liaise with government agencies, trade unions, school coordinators and school staff as applicable, most importantly to obtain the co-operation of schools in the Study.

• ability to oversee translation, adaptation and verification activities

• familiarity with standard Microsoft applications such as Word, Excel and PowerPoint.

In the case that the SPM will be responsible for the development and production of an overall city or country study report, the SPM should also desirably possess advanced statistical knowledge and knowledge about the city or country’s education policies and context. The purpose of a city or country report is to inform all relevant stakeholders about the Study results focussing on themes of special interest with respect to their educational system.

If a qualified candidate has familiarity with only some of these areas, members of the local team collectively should possess the required expertise as described under point 11.

**Indicative timeline**

The Study will be administered within three and a half years. This involves assessment instrument and questionnaire development, three key milestones of data collection (an item trial, a field test and the actual study), analysis and dissemination.

Key activities during the study are set out in the indicative timeline below:

<table>
<thead>
<tr>
<th>Date</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Third quarter 2017</td>
<td>Attending webinars to get an overview of tasks; prepare the item trial</td>
</tr>
<tr>
<td>Fourth quarter of 2017 or first quarter of 2018</td>
<td>Item trial data collection</td>
</tr>
<tr>
<td>First and second quarter of 2018</td>
<td>Analysis of item trial data; preparation of field test data collection: sampling</td>
</tr>
<tr>
<td>Second or third quarter of 2018</td>
<td>Preparation of field test data collection: translation, adaptation, verification, training of school coordinators</td>
</tr>
<tr>
<td>Third and fourth quarters 2018</td>
<td>Field test data collection according to international standards</td>
</tr>
<tr>
<td>Fourth quarter 2018 and first quarter 2019</td>
<td>Analysis of field test data, preparation for main study data collection: drawing of adjusted pilot samples</td>
</tr>
<tr>
<td>Second and third quarter 2019</td>
<td>Preparation of main study data collection: translation, adaptation, verification, training of school coordinators</td>
</tr>
<tr>
<td>Third and fourth quarter 2019</td>
<td>Main study data collection</td>
</tr>
<tr>
<td>First and second quarter 2020</td>
<td>Analysis of main study results, review of national databases</td>
</tr>
<tr>
<td>Second and third quarter 2020</td>
<td>Preparation of reports and dissemination of products</td>
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</table>

**Responsibilities of the Study Project Manager and optional resources**

The SPM will undertake or supervise all tasks related to the development and implementation of the Study at the local level. The SPM is expected to prepare reports to the International Contractor on the preparation and implementation of the item trial, field test and the main study, including, but not limited to: detailed reports of sampling plans; adaptation and translation of assessment instruments and questionnaires, data collection procedures and manuals; quality control
measures; the overall conduct and progress of the data collection; as well as cleaning and verification steps according to the international standards and guidelines.

SPMs are expected to have appropriate levels of financial and human resources to be able to perform their tasks according to the Technical Standards and the guidelines released by the International Contractor. The following illustrates indicative human and material resources that may vary considerably under local conditions.

**Centralised study centres and staff**

As stated earlier, each city or country will establish a centralised study centre. If the SPM is working full time on the project and has expertise with study design, data management and analysis, a second full-time equivalent staff member could be a combination of an administrative officer and a data manager.

Administrative support will be needed during specific, busy phases of the project, such as school contact or the dispatch and receipt of materials (including lists, tracking forms, cover letters in electronic or paper form etc.). This is especially important in the field test phase and main study phase (i.e. data collection phases). This can be expected to vary by city or country, depending mainly on the effort required to complete each task.

**Translation and adaptation tasks and experts**

The international source version of the assessment instruments and questionnaires for the field test and the actual study are to be released in English. The preparation of local assessment instruments and questionnaires needs to follow technical standards and the operational manuals and guidelines provided by the International Contractor.

The SPM is responsible for the following translation and adaptation activities:

- coordinate and monitor the translation of assessment instruments and questionnaires – including the employment of translators and reviewers according to international specifications
- prepare and document the local adaptation of instruments and supporting materials according to international specifications
- communicate with the International Contractor on translation and adaptation issues
- finalise the local versions of instruments on the basis of the agreed adaptations and international translation verification outputs
- organise the adaptation and translation of operational manuals, mainly the School Coordinator Manual and the Test Administrator Manual, as needed
- If applicable, organise and monitor the conversion and verification of questionnaire translations to the paper mode.

In addition, the SPM is responsible for the following sampling activities:

- coordinating and monitoring the sample design, frame preparation, and selection process according to detailed specifications provided by the International Contractor (school sampling)
- carrying out quality control and plausibility checks on sampling lists of schools and students in order to detect incomplete or inaccurate information/procedures
- coordinating and monitoring the listing of students in the target population in the sampled schools, selection of a random sample of students from these lists, and assignment of assessment instruments and questionnaires to sampled students
• coordinating and monitoring the listing of schools in the sampling frame and the selection of the random sample of schools from the frame
• discussion and agreement on the specifics of the sample design and selection with the International Contractor, especially with respect to sampling frame alignment.

**Sampling Manager (SM)**

We advise that cities and countries consider appointing a Sampling Manager (SM) to provide assistance for all sampling-related activities, including local sample planning and stratification, frame preparation, sample selection, non-response bias analysis and communication with the International Contractor. The expertise of the SM would be required at the beginning of the project until the time all pilot study samples have been drawn and – if at all necessary – towards the end of the Study if a city or country needs to perform non-response bias analysis. However, the latter is only required if a city or country fails to meet the requested participation rate as defined in the technical standards.

If a city or country opts for nominating a SM, it is recommended that the role of the SM is filled by a person with a statistical background. In this way, the SM can provide support to the SPM. It is further recommended that the SM will be able to attend the sampling related webinar and parts of early SPM meetings held by the International Contractor.

It is desirable that the SM has the following qualifications:

• experience in probability sample design, stratification and selection
• familiarity with weighting procedures
• understanding non-response bias analysis procedures
• proficiency in English to reliably engage in sampling related communication with the International Contractor
• knowledge of the city and country’s educational system.

**Data Manager (DM) and staff for data capture**

Since data related tasks tend to be highly technical and require special skills, we recommend each city or country nominates a Data Manager (DM) who will be responsible for the day-to-day data management tasks.

The DM will be responsible for carrying out and overseeing all data-related activities during the field test and the main study. Data management training will be provided prior to the field test for performing the following activities:

• communication of data capture procedures
• organisation and monitoring of data capture operations
• carrying out validation checks of data from the assessments instruments and questionnaires following guidelines and specifications
• organisation of the dispatch of sampling and instrument data files
• responding to data queries from the International Contractor
• conducting overall analyses, both for data checking purposes and for preparation of international reports
• participation in the review and validation of results generated by data products, most importantly the draft international report(s)
• where commissioned by the city or country’s representative, coordination of the preparation of city/country results reporting.

It is desirable that the DM should possess:

• knowledge and skills with respect to study research in general, and specifically the study sample design, instruments and variables

• the required technical skills with respect to (relational) databases

• experience in planning, conducting and supervising the data capture and management in large-scale studies of this kind

• good statistical knowledge

• familiarity with standard statistical packages such as SPSS, STRATA, SAS etc.

• proficiency in English to reliably engage in data related communication with the International Contractor.

School Coordinators

A staff member in each sampled school will need to be nominated as a School Coordinator. The work of the School Coordinator involves collecting and recording information about the target population within the school, disseminating information to the school community and liaising with the national school staff regarding all other issues. School coordinators will also be responsible for administration of the assessment within the sampled schools according to the guidelines and manuals provided by the International Contractor.

The SPM and his/her staff are responsible for the following tasks:

• recruitment of a staff member from each sampled school, the School Coordinator, whose work shall involve the collection and recording of information about the target population within the school, dissemination of information to the school community, and assisting in the distribution and collection of assessment instruments and questionnaires

• carrying out of training sessions for School Coordinators on target population definitions, listing procedures, assessment and questionnaire administration, and the confidentiality of the information provided by respondents. It is under the auspices of the SPM to develop training sessions that are based on the standards and guidelines prepared by the International Contractor

• coordination and monitoring of the production, dispatch and receipt of materials to and from participating schools, and ensuring that the procedures for administering the assessment instruments and questionnaires are thoroughly understood and implemented by the School Coordinators

• Monitoring of the data collection progress and initiation of appropriate counteractive measures as needed.

Quality Assurance Monitors

Quality controls are crucial for the successful implementation of the Study at the local level. Key tasks for the SPM are to:

• Provide and ensure quality assurance/control, throughout the implementation of the study, through prescribed monitoring, verification, and reporting activities

• Design and implement a local quality control monitoring programme based on a template strategy provided by the International Contractor.
Advisory committees and groups

An option some cities or countries may wish to set up is a local advisory committee composed of experts in the field of social and emotional skills study research, the purpose of such a group would be to offer advice to the project with respect to adapting materials to the local context as well as operational matters such as contact strategies or maximising response rates.

Facilities

The below facilities are recommended for the SPM and staff when establishing the centralised study centre:

- Availability of required hardware/software and necessary equipment, resources and materials, namely PCs running Microsoft Windows 7 or above with Office 2010 or above versions of the Excel, Word and PowerPoint applications
- Reliable high-bandwidth Internet connection to monitor and utilise the secure Study’s website for material release and communication on all project related activities
- Reliable email facilities, as the bulk of the communication between the centralised study centre and the International Contractor will be via email
- Secure space for the storage of equipment and materials.

Dissemination

An important strategy in raising the awareness of the project is the dissemination of promotional material and reporting back the results of the Study. This could involve:

- Communicating the city or country’s position on aspects pertaining to the project’s local implementation
- Preparing and/or tailoring a centre/school contact/outreach strategy and related materials in an effort to promote the project and maximum participation; liaison with local media, trade unions or other stakeholders, if appropriate
- Producing local promotional and publicity materials
- Producing local reports of the study results. We recommend that a local dissemination strategy be developed that takes the international reporting timeline into account. City and countries might aim to release their local reports at the same time as the international report.

Meeting and training attendance

SPMs (and other key staff, as applicable) are expected to attend three international SPM meetings and a few webinars during the study period as will be indicated in the overall study schedule. SPM meetings/webinars are convened for three main purposes: (1) to provide a forum for SPMs to receive overall status reports and review as well as comment on proposals presented by the International Contractor and the OECD Secretariat relating to the instruments, sampling requirements, field operations and data management; (2) to provide training for SPMs and DMs on sampling, translation procedures, field operations, quality control monitoring, data capture, verification and delivery; and, (3) to brief SPMs on data analyses and report preparation at the international and local levels as well as to provide SPMs with the required analytical knowledge to conduct statistical estimations on their own.

Further webinars may be provided in addition upon request throughout the study cycle to cover specific issues related to the project. SPMs and other key centralised study centre staff are expected to participate in these webinars.