SYNERGIES BETWEEN TALIS AND PISA

OECD Conference Centre, 2 rue Andre Pascal, 75016 Paris, from Tuesday, 23 October to Wednesday, 24 October 2012

JT03331796

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Introduction

1. In the context of discussing the strategic direction of PISA and TALIS, both the TALIS Board of Participating Countries (BPC) and the PISA Governing Board (PGB) considered the benefits and challenges of building greater synergies between PISA and TALIS at their most recent meetings. The discussions explored the potential benefits and challenges in aligning the cycles of PISA and TALIS and in seeking greater coherence in the questionnaire content across the two studies.

2. Concluding its discussions, The PISA Governing Board:
   - **AGREED** to seek greater coherence between the measurement of constructs common to PISA and TALIS, wherever appropriate to foster the analytical aims of either study; **AGREED** with the establishment of a common expert group for questionnaire development; and **SUPPORTED** the co-ordination of the PISA and TALIS cycles to enrich the data analysis at least at the system level, noting that countries will have the choice between carrying out either survey, both or none; and that this assumes that there will be no changes to the frequency of successive PISA assessments.

3. Following its discussions, the TALIS Board of Participating Countries:
   - **NOTED** that a decision on the longer-term frequency of TALIS cycles would be discussed further, and **ASKED** the Secretariat to develop further the proposal for future alignment with PISA cycle, **ASKED** for more information on the sampling implications for future alignment between PISA and TALIS and **ASKED** to commission a paper examining the benefits and challenges of aligning both studies (including clarifying the language used to describe the linkage).

4. This paper provides an opportunity for the Education Policy Committee to provide its guidance on these strategic issues and to help identify the issues that the paper requested by the TALIS Board of Participating Countries should address.

5. The paper is intended as a discussion document and throughout poses questions on which the EDPC’s discussion might focus.

Action required

6. The Committee is invited to **NOTE** the outcomes of the discussions to date on synergies between PISA and TALIS and **PROVIDE** guidance on establishing a strategy on this.

The current situation

7. While each programme rightly has its own project-specific aims, they both contribute towards the same Medium Term Strategic Objective for the OECD education work, namely “Raising teaching and
learning effectiveness”. To this point, co-ordination between PISA and TALIS has been facilitated by the Secretariat, while the programmes have separate governing boards and the survey materials are independently developed.

8. PISA includes questionnaires addressed to students, school principals, parents (optional) and for the first time in PISA 2015, teachers (optional). The purpose of these context questionnaires is to help understand differences between and within countries in the performance of 15-year olds in the PISA assessments.

9. TALIS includes questionnaires to teachers and their school principals, targeted at lower secondary education but with optional surveys of primary and upper secondary schools. The questionnaire responses provide insights into the conditions in schools - practices and working environments- that can support effective teaching and learning.

10. With the introduction of an optional teacher questionnaire in PISA, the TALIS Board clarified at its latest meeting that after TALIS 2013, the opportunity to connect teacher data to PISA data would be achieved through a teacher questionnaire in PISA. In other words, the current PISA-TALIS link that is being offered as an option in TALIS 2013 will not be offered in future TALIS rounds.

11. PISA is conducted on a three year cycle, while TALIS has yet to establish its cycle frequency.

12. Both studies seek to maximise the validity of responses to the questionnaires. In short, they both seek to ensure that questions are directed at the respondent who is best able to make a reliable response.

13. All countries that are participating in TALIS 2013 are also PISA participants.

Over-arching questions

14. The key overarching questions that are being raised in this paper are:

- Could the combined analytical and policy value of PISA and TALIS be strengthened if there was greater synergy between the two programmes in terms of content, design and operations?
- What policy questions would we be able to answer more effectively if there were greater synergies between PISA and TALIS?
- What are the challenges in achieving this and how might they be overcome?

What could be gained from having more coherence in content between the surveys?

15. In order to facilitate basic comparisons or linkages across the two surveys at any level, it is self-evident that where the same constructs/variables are being measured by both surveys, then the underlying questionnaire items should be identical unless there is good reason for them to differ. For example, questions to the school principal about decision-making responsibility that are currently asked in PISA and TALIS should be aligned so that at least at the system level, it would be more feasible to compare TALIS and PISA data for systems with similar decision-making profiles.

16. As noted above, this was readily acknowledged in the discussions of the TALIS and PISA Boards and the suggestion was in fact made that a common expert group should be used to develop the common questionnaire content for both surveys.
17. Moving beyond the benefit of consistency at the questionnaire item level, there is a question about whether more strategic planning of the survey content across PISA and TALIS would help strengthen the combined analytical strength of the surveys. This perhaps becomes particularly relevant in relation to teacher and teaching related content now that a teacher questionnaire has been introduced to PISA. If there were greater planning of content, that planning would seek to make clear the policy questions that PISA and TALIS can each legitimately address, given their design, and therefore would guide the content of the questionnaires in the respective programmes. It could therefore help ensure that the analytical and policy questions that are investigated in each round of PISA and TALIS are complementary. In short:

• Would there be benefit in developing a joint TALIS and PISA analytical framework that speaks to the over-arching aim of raising teaching and learning effectiveness, but clarifies what and how each survey can contribute to that aim?

18. This issue of strategically planning the content of the surveys is related to the question of the alignment of the cycles of TALIS and PISA. Would exploiting any benefits from the joint planning be enhanced through alignment of the cycles?

Aligning the PISA and TALIS cycles

19. As noted above PISA follows a three year cycle, while TALIS has yet to establish its cycle frequency. TALIS was first conducted in 2008 and then in 2013 and at its latest meeting, the TALIS Board agreed that the next full cycle of TALIS will be in 2018 (which of course is a PISA year). One of the options also considered by the TALIS Board was to adopt a cycle that would, after 2018, follow the PISA cycle (EDU/INES/TALIS(2012)42). Annex A reproduces one view of how such alignment could present opportunities for strategically managing the content of the surveys.

20. If the TALIS and PISA cycles are aligned, countries would have an option every three years of participating in PISA alone, in TALIS alone, in just the PISA teacher questionnaire, or of participating in all three.

• What would be the analytical benefits (for individual countries and collectively) of aligning the cycles and content of the PISA and TALIS surveys in this way?

21. Clearly there are technical, analytic and operational considerations to address when judging the benefits of such alignment. These include:

• What technical procedural issues need to be considered? Specifically, what sampling issues will arise (survey fatigue, participation issues, oversampling) and what benefits might appear based on better alignment of the samples? Are there privacy issues or problems that small countries might experience?

• What data analytic issues need to be considered?

• What survey coordination issues will arise or be resolved? For example, are there any risks associated with the surveys getting too closely coordinated (staffing overlaps in national research centres, for example)? Are there any benefits, such as cost efficiencies, that might be realised?

22. To fully consider these issues and seek solutions to them, the Secretariat will commission an expert review paper or papers and also seek the advice of the current international contractors for PISA and TALIS. The EDPC’s discussion will help define these questions and add to them.
ANNEX A: POSSIBLE VIEW OF PISA AND TALIS CYCLE ALIGNMENT

This Annex provides a suggestion of some details on the content and cycle alignment that were proposed to the PISA and TALIS governing boards in spring 2012.

Full cycle alignment could have TALIS adopting the same three-year cycle that PISA has. But as a full TALIS every three years may be considered unmanageable or unnecessary, the Secretariat proposed a full TALIS every six years and an ‘interim’ TALIS in the intervening PISA years, starting in 2018 as full TALIS year.

The development of a TALIS cycle that includes options every three and six years provides perfect alignment to PISA and would give countries an option of a school-level link to PISA though the PISA teacher questionnaire.

The full version of the TALIS survey would be similar to the current TALIS 2013, with a few additional content options based on country priorities. It would contain the following:

- ISCED level 2 teacher and principal survey
- ISCED level 1 and ISCED level 3 options

The model below depicts how the questionnaire content might be organised for the teacher questionnaire in PISA and the teacher questionnaire in TALIS, distinguishing between:

- A set of common ‘core’ items.
- Items that speak to the conditions associated with effective teaching, which would mainly feature in the TALIS questionnaire, though with some coverage in the PISA teacher questionnaire.
- Items that speak to specific teacher policy priorities, in the TALIS teacher.
- Domain specific content that would feature in the PISA teacher questionnaire corresponding to the PISA major domain in that year.

It could be recommended that there be a core set of content that remains the same both for the full and smaller interim versions of TALIS. The core set of content should contain the background information for teachers, school leaders and schools, as well as topics for which the data might change more quickly or topics that have become current government priorities.

In between the full TALIS cycles, an interim cycle of TALIS could provide additional data points measuring aspects of the teaching workforce and school environments that governments feel might change more rapidly. The interim round of TALIS would be open to any countries who participate in the full version of TALIS as well as any new countries. It would consist of the core content module of the teacher and principal survey.
TALIS and PISA teacher data in a FULL TALIS year

Edmonton and PISA Teacher Questionnaires

Common Items

Conditions associated with effective teaching

Policy Priorities

Domain-specific content

TALIS Teacher Questionnaire

TALIS Principal Questionnaire

ISCED 1 Option

ISCED 3 Option

Optional content modules