DIRECTION DE L'ÉDUCATION ET DES COMPÉTENCES
PROGRAMME POUR L'ENQUÊTE INTERNATIONALE SUR L'ENSEIGNEMENT ET L'APPRENTISSAGE

Comité directeur

Perspectives d'avenir : Vers l'élaboration d'un cadre de référence pour TALIS 2024

Flanders Meeting and Convention Centre, Koningin Astridplein 20-26, 2018, Anvers, Belgique
Du jeudi 7 novembre au vendredi 8 novembre 2019

Le Comité directeur de TALIS est invité à :

- DISCUTER de l'orientation proposée et des options disponibles pour l'Enquête TALIS 2024
- INDIQUER son éventuel intérêt pour l'inclusion de populations et modules facultatifs
- PRENDRE NOTE du calendrier proposé et le COMMENTER.

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Perspectives d'avenir : Vers l'élaboration d'un cadre de référence pour TALIS 2024

1. Le présent document expose une proposition préliminaire de cadre de référence pour le quatrième cycle de l'Enquête internationale sur l’enseignement et l’apprentissage (TALIS) de l’OCDE, qui sera administrée en 2024.


3. Il convient de noter que deux des options proposées dans ce cadre de référence – l'option relative à l'EAJE de l'enquête « Petite enfance, grands défis » et le module d'évaluation de l'enquête sur les connaissances des enseignants – ne sont que provisoires à ce stade. Elles dépendent des décisions qui seront prises par le Comité des politiques d'éducation concernant l'enquête « Petite enfance, grands défis » de TALIS ainsi que par le Comité directeur du CERI concernant l'enquête ITEL sur les connaissances des enseignants lors de leurs réunions respectives les 19-20 et 21-22 novembre 2019.

4. De même, certaines des innovations proposées – telles que la mise en œuvre d'une conception alternée ou l'analyse de l'expérience des enseignants débutants durant leurs premières années d'enseignement – sont délibérément décrites de manière générale puisque la conception de ces études sera guidée par les propositions des soumissionnaires (conception alternée) ou par des discussions approfondies avec les pays intéressés sur les questions stratégiques et les priorités analytiques (étude sur l'expérience des enseignants débutants et module d'évaluation de l'enquête sur les connaissances des enseignants).

5. Le cadre de référence pour le TALIS 2024 sera révisé à l’aune des décisions du Comité des politiques d'éducation et du Comité directeur du CERI sur l'enquête « Petite enfance, grands défis » et l'enquête ITEL sur les connaissances des enseignants, ainsi que des discussions préalables du CDT et des travaux de développement futurs de l'OCDE, en vue de la publication d'un appel d'offres début 2020.

6. Le Comité directeur de TALIS est invité à :

   - DISCUTER de l'orientation proposée et des options disponibles pour l'Enquête TALIS 2024
   - INDICUER son éventuel intérêt pour l'inclusion de populations et modules facultatifs
   - PRENDRE NOTE du calendrier proposé et le COMMENTER.
Annexe A. TALIS 2024 draft terms of reference

Introduction

1. The OECD invites proposals for the implementation of the fourth cycle of the OECD Teaching and Learning International Survey (TALIS 2024). This document provides the terms of reference for the main international contractor (henceforth referred to as the Contractor) for TALIS 2024. As in previous TALIS cycles, the survey will sample school teachers and the principals of corresponding schools across a number of OECD countries and partner countries. A computer-based questionnaire (with a paper and pen version) would deliver information around up to five main policy issues. This tender focuses on the participation in the development of the framework, questionnaires, the sampling design, translation verification, the implementation of the survey, data collection and processes, quality assurance processes the construction of datasets and documentation of technical operations, and the review of the reporting plan and drafts of the final report prepared by the OECD Secretariat.

2. An overview of the development and objectives of the survey is detailed below in Section 1. This is followed by a discussion of the project design and proposed sampling framework. The statement of work, schedule of deliverables, and budget guidelines are then described in Sections 2 and 3 respectively, and should form the basis of bidder’s tender applications.

Section 1: Overview of TALIS and project design of TALIS 2024

3. This section sets out the main principles of the TALIS programme as well as the main features of the design of the project. The broad design parameters (guiding principles, target population, sampling design, survey operations and management structure) that have guided the survey since its first cycle in 2008 will be maintained in TALIS 2024. These are discussed in detail later in this section.

4. The cornerstone of TALIS remains international collaboration, and the role of the Contractor in ensuring the active engagement of all international and national stakeholders is central to the success of TALIS.

Project background

5. The OECD Teaching and Learning International Survey (TALIS) has been developed within the OECD’s indicators of education systems (INES) programme. The INES programme has, over the past 30 years or so, made considerable progress in developing statistics and indicators which assist policy makers and others to assess the performance and features of education systems, the results of which are published annually in Education at a Glance. The Programme for International Student Assessment (PISA) has also grown from the INES programme.

6. Providing information on teachers, teaching and learning is an essential component of the INES programme. The importance of teachers, including the need for better information on the quality of learning and how teaching influences learning has led to a data strategy, which seeks to increase the international information available to OECD countries on teachers, teaching, and the impact that teachers can have on student learning.
One component of this strategy developed into the Teaching and Learning International Survey (TALIS).

7. TALIS is the first international survey to focus on the working conditions of teachers and the learning environment in schools. Its overall aim is to help countries to review and develop policies that foster the conditions for effective schooling. The policy rationale for the survey has been developed in the context of the existing knowledge base and recognised information gaps. Policies impacting on teachers and teaching vary substantially across countries and regions. The international nature of the survey allows for international benchmarking of teacher characteristics. It extends and complements the system-level benchmarking of characteristics such as statutory wages and teaching time currently provided in Education at a Glance.

8. The first cycle of TALIS (TALIS 2008) was carried out in 17 OECD countries and 7 partner countries and economies in the 2007/08 school year. The initial international results were released in June 2009. The second cycle of TALIS (TALIS 2013) was carried out in 24 OECD countries and 10 partner countries and economies in the 2012/13 school year. The initial international results were released in June 2014. In 2014, 1 OECD country and 3 partner countries took part in a “delayed” version of TALIS 2013. The results were integrated into the TALIS 2013 database in 2015. The third cycle of TALIS (TALIS 2018) was carried out in 31 OECD countries and 17 partner countries and economies. The international results were released in two batches with Volume I data in June 2019 and Volume II data in March 2020.

9. Through a survey of teachers and school principals, TALIS investigates the learning environment and working conditions of schools and provides a barometer of teachers, teaching and learning environments in participating countries and economies. In each system, a representative sample of approximately 200 schools and 20 teachers within each school (along with their school principal) is randomly selected. The chosen target population of the first cycle of TALIS was teachers of lower secondary education (level 2 of ISCED 2011) and their school principals. In TALIS 2013 and 2018, countries were given the option to also implement the survey in primary and upper secondary schools (ISCED levels 1 and 3) and to implement the survey in schools that had been sampled in PISA 2012 and 2018 respectively.

10. The 2018 cycle of TALIS provided policy-relevant data and analysis on the following key aspects of schooling:

- Human resource issues and stakeholder relations
- School leadership
- School climate
- Teacher education and initial preparation
- Teacher job satisfaction and motivation
- Teacher feedback and development
- Teacher self-efficacy
- Teachers’ instructional practices
- Teachers’ professional practices
- Innovation
Equity and diversity

11. The TALIS 2008, 2013 and 2018 publications (including the technical reports) and fully documented international databases can be downloaded from the TALIS website: www.oecd.org/education/talis.

Survey objectives and guiding principles

12. In its work on education, the OECD is committed to assist Member countries in improving the effectiveness, efficiency, quality, inclusiveness and equity of education systems. As stated in the Medium-Term Strategy 2019-2024, the strategic ambition of OECD’s education work is to “provide international comparative data and analysis as well as policy advice based on evidence and international best practices to improve the effectiveness, efficiency, quality, inclusiveness and equity of education systems”. The TALIS survey is a core activity in the first MTS objective “Learning from data and evidence”. The overall goal of TALIS is to fill key international and national data gaps on teachers, their professional development, teaching, the learning environment and the impact that teachers can have on students. The general long-term purpose of the TALIS programme is to provide comparative data and analysis to help with the development of teaching as a profession, aimed at supporting the learning of students. In seeking to attain this goal, certain guiding principles must underpin any development of the TALIS programme. The guiding principles that have shaped the development of TALIS to date are:

- **Policy relevance.** Need to be clear about the policy issues and questions it is intended to address and should focus on those that are most relevant for OECD countries.

- **Value-added.** The international comparative aspects should provide significant benefit to the undertaking.

- **Indicator-oriented.** The strategy should yield information that can be used to develop indicators.

- **Validity, reliability, comparability and rigour.** The strategy should yield information that will be valid, comparable, and reliable across OECD countries and based on rigorous review of the existing knowledge base.

- **Interpretability.** The strategy should yield results that can be meaningfully interpreted across OECD countries.

- **Efficiency and cost-effectiveness.** The strategy should be able to be carried out in a timely and resource-conscious fashion.

13. In addition to the principles described above, data protection and confidentiality are essential, and bidders should describe how this will be assured. Contractors will be required to comply as a minimum with data privacy principles which are practiced by OECD, but must also comply with the national requirements of participating countries and economies, especially in the light of recent changes in the legislation on data protection in a number of TALIS participating countries.

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1 http://www.oecd.org/privacy/
14. The objectives of TALIS are, therefore, to provide policy relevant, robust international indicators and analysis on teachers and teaching in a timely and cost effective manner. The survey aims to provide indicators and analysis which have implications for policies ranging from teacher labour market policies to school effectiveness. In that sense, it is much broader and more complex than a survey simply examining human resource issues.

**Key survey deliverables**

15. In general terms, TALIS 2024 will deliver the following products which, collectively, seek to assist countries in the development of education policies in the domain of teachers, teaching, and learning:

**Indicators**

16. TALIS 2024 will provide indicators of four types:

- *Indicators of the characteristics of teachers and schools*: providing a description of the teaching force and the schools they work in;
- *Policy-focused indicators*: relevant to the chosen policy questions, themes and indicator foci of the survey, guided by the participating countries through a prioritisation process;
- *Practitioner-focused indicators*: relevant to teachers and school principals alike to inform their school and their own continuous improvement; and
- *Trend indicators*: relevant to the chosen indicators repeated from the first three cycles of the survey, also guided by the participating countries through a prioritisation process.

**Conceptual framework and survey instruments**

17. As with previous cycles of TALIS, the TALIS 2024 survey will be developed based on a research-informed conceptual framework and will consist of two questionnaires, one for teachers and one for school principals.

18. The TALIS core survey will target the ISCED 2 level of education. In addition to the ISCED 2 sample, countries will be given the option to survey additional populations, which may require adaptation to the questionnaires for these populations. The optional populations to be considered tentatively include:

- ISCED 1 and ISCED 3 teachers and school principals;
- Staff and centre leaders of Early Childhood Education and Care (ECEC)\(^2\) centres\(^3\);

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\(^2\) The definition of the populations and the sampling procedures for the ECEC centres are described in Annex B of the publication *Providing Quality Early Childhood Education and Care: Results from the Starting Strong Survey* [https://read.oecd-ilibrary.org/education/providing-quality-early-childhood-education-and-care_301005d1-en](https://read.oecd-ilibrary.org/education/providing-quality-early-childhood-education-and-care_301005d1-en).  

\(^3\) Note to the TALIS GB: This option would consist of formally embedding TALIS Starting Strong under the TALIS umbrella, as discussed by the Chairs’ Retreat and follow-up heat map note [EDU/EDPC/RD(2019)38] and [EDU/EDPC(2019)25] and the TALIS Long Term Strategy [EDU/TALIS/GB(2019)10]. This work being undertaken under the auspices of the Education Policy
(Over)samples of novice teachers in their first, third and fifth years of teaching – with either cross-sectional comparisons of these groups or the longitudinal follow-up of the same cohort of starting teachers; and

Teachers and principals in the schools administering PISA.

Policy analyses

19. Separate sets of reports will be produced using the TALIS 2024 data:

- Reports produced under the responsibility of the Contractor: A user guide
  - A technical report documenting the methods and procedures used in developing and implementing TALIS 2024.
  - A user guide setting out requirements for analysis, and providing examples of analyses for researchers who would like to understand and replicate the analyses conducted for the international report.

- Reports produced under the responsibility of the OECD:
  - A series of international reports to be delivered at the launch of the TALIS 2024 cycle in 2025 and the period immediately following in a staggered manner. They would include the core ISCED 2 report (in both English and French) and individual reports on the survey option results (ISCED 1, ISCED 3, novice teachers and TALIS-PISA link).
  - A series of thematic reports building on the analysis presented in the general report to be released in the year(s) after the initial launch. These would include more in-depth analysis of indicators and variables and draw on differences in institutional settings and public policies in discussions of variations identified in the data across countries.
  - A teacher’s guide to the core ISCED 2 international report and regular Teaching in Focus policy briefs and accompanying blog posts on the OECD Education blog will provide additional ways for countries to look at and distribute the TALIS data and analyses, with the aims of raising awareness about TALIS and disseminating its findings.

Survey database and user guide

20. As with the previous cycles of TALIS, a fully documented international database of teacher and school principal responses, together with the survey weights to allow published estimates to be reproduced and original analyses to be conducted, will be made available free of charge on the web, possibly in two batches depending on the reporting plan for TALIS 2024. To the extent that trend data will be included in TALIS 2024, the databases will need to be compatible and consistent with earlier TALIS databases in terms of format, variable labels, etc.

21. In addition, a user guide will be produced by the Contractor to provide detailed information on how to analyse the TALIS data (including across cycles, across ISCED levels and with PISA data through the TALIS-PISA link, for the novice teachers

Committee (EDPC) in the 2019-20 PWB, this option would depend on a decision by the EDPC to shift TALIS Starting Strong to TALIS in the 2021-22 PWB. Therefore, it is indicated here tentatively.
population), enabling researchers to both reproduce the initial results and to undertake further analyses. In addition to the inclusion of the necessary techniques, the user guide will also include a detailed account of the TALIS database and examples providing full syntax in SPSS and STATA. This will encourage further use of the TALIS data by researchers and is similar to what is already provided for PISA.4

Survey design

Population coverage, rotational design and international options

Population coverage

22. This tender is for the fourth cycle of the survey (TALIS 2024). The survey will be targeted at teachers and school principals working at the ISCED 2 level of education. In addition to the ISCED 2 sample, countries will be given the option to survey their ISCED 1, ISCED 3 teachers and school principals’ populations, ECEC staff and centre leaders, and novice teachers in the first, third and fifth years of their teaching career. Since the TALIS survey will be conducted in the same year as PISA, countries will also be given the option to link between TALIS and PISA, as was offered in the previous two cycles. Adaptation to the questionnaires may be needed for these optional populations.

Rotational design

23. As TALIS 2018 has reached the limits of the topics that can be covered with the current design, the introduction of a rotation design coupled with innovating item designs should be proposed. The design should aim to keep the trend items (equivalent to about 1/3 of total questionnaire) unchanged and administered in all cycles to all participants, and propose evolution for about 1/3 of the items and development of new items for about 1/3 of the questionnaire. The trend items will be selected in discussion with the OECD Secretariat and participating countries through the TALIS Governing Board.

24. A rotation design should be proposed that maintains the trend items and rotates the other themes. The design should decrease the individual response time while increasing the coverage of topics with limited or no increase in sample size. For example, the design of the PISA 2012 student questionnaire can be consulted.5 The rotation framework should be designed in such a way that rotation within and/or between cycles will possible in the following administration rounds, allowing as much flexibility as possible for adjusting in future cycles. The advantages, drawbacks, implications for analysis, extra costs, administrative burden and risk factors for the proposed rotation design should be detailed.

International options

25. As a result of these various coverage options, the survey includes international options with additional target populations and/or additional modules in which countries can choose to participate:

- Core survey: Core sample of ISCED Level 2 teachers and school principals.

4 See PISA manuals at: http://www.oecd.org/pisa/pisaproducts/pisadataanalysismanualspssandsassecondedition.htm
• International options – additional populations:
  o ECEC staff and centre leaders.
  o Primary school (ISCED Level 1) teachers and school principals.
  o Upper secondary (ISCED Level 3) teachers and school principals.
  o Novice (ISCED Level 2) teachers in their first, third and fifth years in the profession.
  o School-level TALIS-PISA link: Teachers eligible to teach 15-year-olds and principals in PISA 2024 schools.

• International options – additional module:
  o Teachers’ knowledge survey assessment module.  

26. The international options in the main survey provide countries with the option to expand the sample of teachers and school principals. The development and implementation of these options shall however require the same high-level technical, analytical and managerial rigor and expertise as for the core survey. However it should be acknowledged that the definition of the novice teacher and ECEC centres sampling framework will require adjustments, because of the specificities of these populations, namely the small population size of novice teachers in some countries, and the difference in the definition in ECEC centres across countries as provided by TALIS Starting Strong.

27. The international options will only be undertaken if a critical minimum number of countries decide to take part, it will thus be important for bidders to cost them separately – with a clear distinction between fixed costs and marginal costs for each additional country.

28. The international options for additional levels of education will need to draw upon the International Standard Classification of Education (ISCED) to distinguish teachers across levels.

29. The international option for the implementation of the school-level TALIS-PISA link provides countries with the option to sample teachers in PISA 2024 schools and will require co-ordination of the bidders with the PISA contractors for sampling, or subcontracting the PISA sampling contractor for this specific task.

Content focus of TALIS 2024

30. The general themes and indicators for TALIS 2018 were guided by participating countries through a priority-rating exercise. A conceptual framework was then developed.

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6 Note to the TALIS GB: This option would consist of formally embedding the ITEL Teacher Knowledge Survey under the TALIS umbrella, as discussed by the Chairs’ Retreat [###EDPC room doc###] and the TALIS Long Term Strategy [EDU/TALIS/GB(2019)10]. This work being undertaken under the auspices of the Centre for Education Research and Innovation Governing Board (CERI GB) in the 2019-20 PWB, this option would depend on a decision by the CERI GB to shift the ITEL Teacher Knowledge Survey to TALIS in the 2021-22 PWB, and further discussions with the TALIS GB on how to take this work forward. Therefore, it is indicated here tentatively.

7 The PISA Call for Tender documentation for the 2024 cycle is available at [URL to be made available when ready].

8 Available with the key background documents for bidders at [URL to be made available when ready].
by subject-matter experts, the international research consortium and the OECD Secretariat and was approved by TALIS participating countries and economies. The purpose of this conceptual framework is to steer the development of the TALIS instruments and serve as a guide for future TALIS cycles.

31. For TALIS 2018, the conceptual framework and main study analysis plan presented a number of research questions to guide instrument development. The main TALIS 2018 themes comprised:

- Human resource issues and stakeholder relations;
- School leadership, including indicators on distributed or team leadership;
- Teacher training, including professional development and initial teacher education, induction and mentoring;
- Appraisal of and feedback to teachers;
- School climate, including disciplinary climate and student-teacher relations as well as indicators on the relations between parents, schools and teachers;
- Innovative teaching practices including integration of ICT in teaching practices and fostering innovative educational outcomes such as creativity and critical thinking and school climate for innovativeness;
- New indicators on teachers capacity to respond to students cultural backgrounds and school practices in relation to equity and diversity;
- Teachers’ pedagogical beliefs, attitudes and their professional and instructional practices, including indicators on the profile of student assessment practices and on teachers’ working time; and
- Teachers’ job satisfaction and feelings of self-efficacy.

32. The factors, practices and conditions identified by participants through a prioritisation process, such as teacher professional development or appraisal and feedback systems, represent the elements that participants agree contribute to positive student learning. Of course, “effective” teaching and learning may include many other factors that cannot be examined through TALIS or any self-reported instrument.

33. For the 2024 cycle, prior to the development of the conceptual framework, the contractor shall develop a white paper:

- describing the vision for the framework, informed by a targeted literature review on what is effective teaching, as well as a forward-looking analysis of what the future of teaching entails and what are the key policy issues emerging across countries;
- identifying areas of improvement for current indicators; and
- proposing directions for the conceptual coverage of TALIS 2024.

34. The directions set out in the white paper shall be validated by external stakeholders such as subject-matter experts, education foresight experts, TALIS participating countries and economies, and the OECD Secretariat.

35. The following content innovations shall be considered:

- **Evolution.** Bidders are invited to propose updates to the items measuring:
o **Teaching practices** to move from measuring the time allocated to different activities to measuring instructional decision-making in the classroom (for example by using situational judgement tests). Bidders are also invited to suggest new ways of capturing teaching practices, including but not limited to observed practice. If so, the aim would be to propose an approach that yields comparable insights across countries (i.e. overcoming possible response biases of self-reported data), and is manageable in terms of implementation burden and cost. A description of the implications of different options for administration burden, response time duration and costs shall be provided.

o **Professional development** to develop new items measuring motivation for participating in CPD, together with narrowing/differentiating the definition of professional development to consider separately participation in school-provided or self-directed CPD.

o **Special needs education**, to consider ways to improve the identification question of special need education teachers (TQ-36), and allow these teachers to answer questions on teaching practices; distinguish among different types of special need students, at least in some questions (and with gifted students potentially considered as a category that also deserves special attention).

- **Innovation.** Bidders are invited to propose two innovative options for the consideration of TALIS participating countries:
  
  o The introduction of a questionnaire for novice teachers in their first, third and fifth years of teaching, with a set of items measuring for example their motivation to join the profession, their initial training, experience in their first years of teaching and plans to remain in the profession, etc. The proposal should contain separate pricing for:
    
    - (i) the initial survey of first year novice teachers (possibly by oversampling them in the main ISCED 2 survey);
    
    - (ii) a cross-sectional comparison of three cohorts of first year, third year and fifth year teachers; or
    
    - (iii) the longitudinal follow up on key indicators of first year teachers in their third and fifth years.

  o An optional formative assessment measuring teacher’s knowledge for ISCED 2 teachers or novice teachers, and how it relates to their initial education and in-service professional development. The assessment module shall be informed by the ITEL Teachers Knowledge Survey[^9] (and the Teacher Education and Development Study in Mathematics (TEDS-M)). The proposal should detail a description of the political context, strategies for ensuring acceptance of the teacher knowledge assessment by key stakeholders (teachers, principals, policy makers), and the most appropriate sequencing of the assessment in relation to the main TALIS survey to avoid a negative impact on TALIS response rates.

36. As in the course of the development of the first three cycles of TALIS, a prioritisation process will be conducted amongst TALIS 2024 participating countries to determine the focus of the survey. To inform this prioritisation, it will be the responsibility

of the Contractor to deliver a white paper based on a review of the literature and forward-looking analysis of what the future of teaching entails and what are the key policy issues emerging across countries, identifying areas of improvement for current indicators and proposing directions for the conceptual coverage of TALIS 2024.

37. Once the instruments and questionnaires will be finalised, it will also be the responsibility of the Contractor to develop a scaling procedure and a separate scale validation plan to guide the OECD Secretariat in the production of the international report.

**Framework, questionnaires and analysis plan**

38. The goals and priorities for the development of the teachers and principal questionnaires are guided by participating countries through a prioritisation process informed by the White paper prepared by the Consortium with input from multiple stakeholders.

39. It is then the responsibility of the Questionnaire Expert Group (QEG) to translate these goals into the conceptual framework and then the questionnaires, the scaling procedure and a separate scale validation plan. The QEG will be established by the Contractor.

**Instrument development**

40. The TALIS 2024 survey will be targeted at teachers and school principals working at the ISCED 2 level of education. In addition, countries will be given the option to survey their ECEC staff and centre leaders, ISCED 1 and ISCED 3 teachers and school principals populations, novice teachers (as described above) and to assess teacher’s knowledge for selected populations.

41. Adaptations to the questionnaires of the main survey may be needed for these optional populations, although it is expected that there would be an overlap in the themes and indicators to allow for analyses across levels.

42. There will be three components to this survey: the pilot, field trial (FT) and main survey (MS).

43. The main purposes of the pilot phase are to: i) trial new questionnaire items and new item formats (e.g. situational judgment items or anchoring vignettes); ii) collect information on the international applicability and equivalence of the items and targeted constructs; iii) gather information on how well the instruments perform in the field for all target populations (core survey and international options); and iv) fine-tune the questionnaires for the field trial based on analysis of the pilot outcomes.

44. In TALIS 2018, these goals were achieved by implementing a qualitative methodology (i.e. focus groups of teachers and school principals) rather than a quantitative methodology (i.e. administering the questionnaires to a larger group of teachers and school principals). Twenty-one countries volunteered to participate in the pilot. More details about the pilot used in TALIS 2018 can be found in the TALIS 2018 Technical Report. The 2024 pilot study could be expanded for example to insuring measurement invariance by for example translating the items to all languages, applying the pilot in all participating countries and performing an in-depth analysis of the data using methods borrowed from

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10 Available with the key background documents for bidders at [URL to be made available when ready].
cross cultural psychology or to selecting a more representative group of countries and spending more time on the analysis of the data. The bidders are invited to propose a strategy to maximise information gains while balancing burden, cost and analysis capacity considerations.

45. The objective of the field trial is to test the survey instruments, including new questionnaire items and item formats, comparing old and new items for the sake of revising items without losing trends and the operational procedures in all participating countries in preparation for the main survey. The field trial is mandatory for all participating countries and economies and helps ensure that the main study can be implemented successfully. For TALIS 2018, the field trial sample size per country and option was 600 teachers and 30 principals from 30 schools. Bidders will need to consider whether to revise these parameters in light of the proposed rotation design for TALIS 2024. More information about the field trial methodology used to date can be found in the TALIS 2018 Technical Report.11

46. The main survey represents the core data collection period for the project. It will use the instruments developed and revised in the previous pilot and field trial phases and will be implemented according to the guidelines and technical standards agreed by the TALIS Governing Board (TGB).

**Questionnaire mode**

47. In TALIS 2018, the default mode of data collection was online questionnaires. Of the 48 participating countries/economies, 37 used the online mode exclusively, 3 used only the paper mode exclusively, and 8 used a mix of both. Therefore, a mixed-mode design will be used for TALIS 2024, allowing countries to choose either computer-based data collection, paper administration, or a combination of both. This design will ensure that individual respondents who refuse to participate in the computer-based mode or who do not have access to the Internet will be provided with a paper instrument, thereby ruling out non-response as a result of a forced administration mode.

**Sampling**

48. There will be between one and six target populations for the survey (depending on country interest):

- Core sample: ISCED Level 2 teachers and school principals.
- International option (tbc by EDPC): ECEC (ISCED Level 0) staff and centre leaders.
- International option: Primary school (ISCED Level 1) teachers and school principals.
- International option: Upper secondary (ISCED Level 3) teachers and school principals.
- International option: Novice teachers in their first year of teaching with the possibility of a longitudinal follow up (ideally) or cross-sectional comparison with cohorts of novice teachers in their third or fifth years of teaching.

11 Available with the key background documents for bidders at [URL to be made available when ready].
International option: Additional sample of teachers of 15-year-old students and school principals in PISA 2024 schools.

49. The target populations are classroom teachers as defined in INES data collections. The formal definition of a classroom teacher is a person whose professional activity involves the planning, organising and conducting of group activities whereby students’ knowledge, skills and attitudes develop as stipulated by educational programmes. In short, it is one whose main activity is teaching. While TALIS defines who is considered a teacher, there is no established definition of school principals across countries. To increase cross country comparability of principal populations, bidders are invited to reflect on a common definition, taking into account that a new definition could break trends for principals’ reports.

50. It is the objective of the survey to obtain a representative sample of each of these target populations (core sample and international options). In case of the novice teachers sample a sampling framework will need to be developed that takes into account the smaller population size and the less consistent distribution across schools of this subgroup. A sampling framework is required that will deliver representative samples of the six populations. Samples must be designed to maximise sampling efficiency for teacher-level estimates. However, they should also:

- Permit the linkage of teacher data with school-level variables that are collected through the centre leader/principal questionnaire;
- In the case of the TALIS-PISA link option, permit the linkage of teacher data with the school-level variables collected by PISA; and
- Allow comparability across the different TALIS cycles for the core trend indicators.

51. The sampling design and methodology for TALIS 2018 can be found in the TALIS 2018 field trial and main study sampling manuals and the TALIS 2018 Technical Report.

52. The defined target population must yield sufficient data and indicators for policymakers at the classroom, school and system levels. The sample must be sufficiently broad so that labour market and system-wide indicators can be inferred and used for policy analysis but also contain the necessary detail so that school-level data and indicators would facilitate policy discussion. This is required for both the school principal and teacher questionnaires and for each target population (acknowledging that adaptations might be needed for the novice teacher population).

53. As in previous TALIS cycles, the sampling frame will need to be as close as possible to the international desired target population. That is, the sampling frame should

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12 As with the previous cycles of TALIS, it is proposed that teachers be excluded in exclusively special needs education schools from this survey in order to reduce the complexity of sampling procedures and to enhance comparability across countries. However, teachers of students with special needs in regular schools would be included in the survey, as in TALIS 2018.

13 It should be noted that there is no delineation between general and vocational teachers in the sampling of ISCED Level 3 teachers. However, for some countries, the sampling frame may be altered to reflect these differences.

14 All three available with the key background documents for bidders at [URL to be made available when ready].
only differ from the general school population to the extent that specific and limited exclusions allow.

54. Required sample sizes need to be determined in order to meet the analytical requirements of the survey. This is required of each of the target populations. The Contractor will have to identify the best method (including identifying the appropriate sampling framework with required sample parameters) for ensuring a representative and unbiased sample of each target population, taking into account the implications of the proposed rotation design on sample size. An effective sample shall be created of each target population that is representative of teachers and permits the analytical objectives of the project. This also requires participation rates to be set that provide an effective sample size for reliable estimates and commensurate analysis.

55. As for the previous cycles of TALIS, the sampling plan for the core TALIS 2024 survey will likely use a nominal stratified two-stage probabilistic sample, sampling first a representative sample of schools and second, a representative sample of teachers in those schools. For more information about the sampling design of TALIS 2018 see the TALIS 2018 field trial and main study sampling manuals and the TALIS 2018 Technical Report.15

56. In the first three cycles of TALIS the sample sizes were conservative based on an estimated Intra class correlation of 0.30 (i.e. 200 schools per ISCED level, and for those countries implementing the TALIS-PISA link, 150 schools from the PISA 2018 sample). However for most indicators the ICC is lower, which might make possible to use lower sample sizes to obtain reliable estimates. Bidders are invited to reflect on whether decreasing the sample size would be possible or how the current sample size can be better exploited using a rotational design including potential implications on trend indicators.

57. It is proposed that the participation rates for the second round of the survey be maintained at 75% for both teachers and schools (for an overall participation rate of 56%), while recognising the importance of measuring non-response bias for all country samples.

58. Given the difficulty of some countries of attaining the required response rates in the first three cycles of the survey, the Contractor will be required to develop a strategy aimed at assisting countries in attaining acceptable response rates and reducing non-response bias. Bidders should elaborate on their plans for developing a strategy for reducing non-response bias, including supporting countries with real time monitoring of response rates, as well as engagement strategies to secure school participation – which proved to be the key constraint in the first three cycles of TALIS.

59. The two-stage sampling procedure includes a representative sample of schools and a representative sample of teachers in those schools. For the main survey (including the core sample and the international options), a two-stage sampling procedure would therefore include:

- For the main survey, a representative sample of schools offering ISCED level 2 programmes For countries implementing the ISCED 0, ISCED 1 and/or 3 options, a representative sample of ECEC centres or schools offering programmes at the corresponding ISCED level.
- For countries implementing the school-level TALIS-PISA link option, a sample of schools from the PISA 2024 sample will also be used. Close co-ordination with the

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15 All three available with the key background documents for bidders at [URL to be made available when ready].
PISA Sampling contractor (or the sampling can be done by the PISA contractor for this specific sample) will be required to ensure that the TALIS-PISA link sample will be drawn from among schools that actually agreed to participate in PISA (i.e. after replacement), in order to avoid data losses resulting from non-participation in PISA.

- For the main survey, a representative sample of teachers who teach ISCED level 2 programmes in those schools (and the corresponding ISCED level for the international options).
- For the countries implementing the novice teachers in their first, third and fifth year of service a sampling plan that details how the specific challenges of sampling such a small population spread across schools should be addressed. In countries implementing the school-level TALIS-PISA link option, a representative sample of teachers eligible to teach 15-year-olds will be drawn from the schools sampled for PISA 2024.

60. It is expected that surveys of the ISCED 2 and 0, 1 and/or 3 target populations will be conducted in parallel. The TALIS-PISA link and the teacher knowledge survey assessment may be conducted separately. For the survey of teachers and principals in PISA 2024 schools, there will be no linking of teachers to students and therefore no analysis of teacher effectiveness.

61. For the target population of novice teachers, the idea would be to examine the experience of novice teachers in their first, third and fifth year of teaching, with a view to identify to what extent the characteristics of their entry in the profession, support received and professional learning experiences shape their outcomes and retention in the profession. Bidders are invited to discuss the relative merits of a cross-sectional approach contrasting three cohorts of teachers in their first, third and fifth year of teaching, vs a longitudinal approach following a cohort of new teachers in their first year of teaching over a duration of four years. Bidders should also discuss the analytical, sampling, operational and cost implications or privileging one design over the other.

62. Bidders may provide a sampling plan somewhat different from the outline provided in this document if it is considered to be more effective at meeting the objectives of the survey. Bidders must provide clear justifications for their proposed sampling plan.

Country participation

63. Countries participation will differ between involvement in the main survey that includes the core sample of ISCED level 2 teachers, participation in the international options (ISCED Level 0, 1 and/or 3 teachers), and participation in the novice teachers option and school-level TALIS-PISA link.

64. At the time of launching this Call for Tenders, it is expected that the vast majority of the 48 TALIS 2018 participating countries and economies will remain involved in the 2024 round of TALIS, and new participants are expected to join this survey. It is thus expected that a larger number of countries will take part in TALIS 2024 compared to the previous cycles.

TALIS technical standards

65. The strict adherence to strong technical standards ensures that the survey is carried out with a high degree of uniformity in all participating countries and economies, so that
TALIS results can be compared across countries. It is thus of utmost importance to the overall high-quality of the survey.

66. The technical standards for the implementation of TALIS specify the quality requirements in terms of sampling, translation and translation verification, survey administration, quality monitoring, data entry and submission, and release and exclusion of data. The technical standards are reviewed periodically by the OECD and the TALIS Governing Board (TGB) and improvements can be made with countries’ approval. In TALIS 2024, the Contractor will be responsible for leading the review and updating of the technical standards, based on the recommendations from the TALIS 2018 Technical Advisory Group and lessons learnt from the TALIS 2018 cycle. The TALIS 2018 technical standards are available from the tender section website with the other key documents for bidders.¹⁶

**Project structure and management**

**Roles and responsibilities of different parties**

67. The basic model for managing the project is a familiar and tested one used in OECD survey-based projects, having been used for instance for PISA, PIAAC and the first three cycles of TALIS. There will be three main players in the project: the participating countries and economies, the OECD Secretariat, and the Contractor who will operationalise the project.

68. Participating countries are responsible for the project at the policy level through membership of the TALIS Governing Board (TGB). The TGB is composed of delegates from each participating country or economy and meets approximately twice per year. As per its mandate, the TGB brings policy advice, reports and analysis to the attention of the Education Policy Committee (EDPC) – which co-ordinates all OECD work on Education.

69. The responsibilities of the TGB extend to setting, in the context of OECD objectives, the policy priorities for the project and overseeing the adherence to these priorities during its implementation. This includes setting priorities for indicator development and reporting as well as the determination of the scope of work that is translated into this tender for the Contractor.

70. The design and implementation of the survey, within the framework established by the TGB, is the responsibility of the Contractor selected through an approved and transparent tendering process, working closely with the OECD Secretariat.

71. Experts from participating countries serve on expert groups that provide input to the development of the instruments to ensure that the participants’ diverse cultural and curricular contexts are reflected in the survey.

72. The OECD Secretariat will take overall managerial responsibility for the project, monitoring the day-to-day implementation of the project and acting as the Secretariat to participating countries. The OECD Secretariat’s role includes building consensus between participating countries and serving as the main channel of communication with the Contractor.

¹⁶ Available with the key background documents for bidders at [URL to be made available when ready].
73. A more detailed description of the roles and responsibilities of the main actors in the project management framework are given in the following sections. It is important to note that the model described applies also to the optional school-level TALIS-PISA link, which will be carried out outside of the PISA management framework, albeit with synergies and co-ordination with the PISA teams at the Secretariat and Contractor levels.

Participating countries

74. Participating countries have three main roles in the project: (1) As members of the TGB, they will determine the policy objectives, and broad design parameters for TALIS; (2) Through experts represented in the expert groups, they will contribute to the development of the framework and instruments under the governance and auspices of the Contractor; and (3) Through National Project Managers, they will implement the project at the national level, subject to the agreed-upon administrative procedures.

The TALIS Governing Board (TGB)

75. Each country or economy that participates in the survey through the OECD is represented on the TGB. In consultation with the OECD Secretariat, the TGB:

- Establishes the specific priorities for indicators, analysis and instrument development in accordance with the policy objectives of the survey;
- Works with the OECD Secretariat to ensure compliance with the policy objectives and design parameters at milestones during the implementation of the project;
- Insofar as the survey implementation is covered nearly entirely by country contributions, draws up the budget and recommends budgetary allocations for participants;
- Defines the scope of the work to be covered by the Contractor;
- Guides the preparation, review and completion of all reports and analysis of the survey results; and
- Brings policy advice, reports and analysis to the attention of the Education Policy Committee (EDPC).

76. In addition to enabling participating countries to share substantively with one another the programme’s decision-making and policy direction, the TALIS TGB enables participating countries to be fully informed of all aspects of TALIS’ implementation. It is envisaged that approximately two TGB meetings will be held each year to ensure the effective operation of the survey, and that the Contractor will report on progress at each of these meetings.

National Project Managers (NPMs)

77. Participating countries shall appoint National Project Managers (NPMs) to implement the survey in their country. NPMs are the primary means of day-to-day contact between participating countries and the Contractor for the implementation of the survey and shall interact with and report to the Contractor on all issues related to the implementation of the survey in their country. NPMs play a vital role in ensuring that TALIS is a high-quality project with results that can be verified and evaluated. They can also play an important role in the development and review of TALIS reports and publications, in consultation with their respective TGB member.
78. The Contractor shall provide a detailed job profile for NPMs to assist participating countries in their appointment. The TALIS 2018 profile and role of NPMs is available on the TALIS tender website.17 At the national level, each country must decide how it can best facilitate the communication and co-ordination needed for implementing the national data collection responsibilities as well as for interacting with the Contractor.

79. A major risk in the implementation of TALIS is the possibility of deviations introduced at the national level during the course of the implementation. Seemingly unimportant decisions, taken alone or in combination, can undermine the integrity of the entire survey in a particular country. The Contractor shall seek an open and collegial process with the NPMs that stresses the role that key design parameters shall play in assuring final quality. The strict adherence to TALIS technical standards ensures that the survey is carried out with a high degree of uniformity in all participating countries and economies. The Contractor will also produce detailed manuals, documentation and guidelines for NPMs and other national centre staff (for example, the national data manager and/or national sampling manager) to guide them in the implementation of the different phases of the study. The TALIS 2018 NPM and NDM (national data manager) manuals, the pilot study, field trial manual and the main study manual are available on the TALIS tender website for bidders.18

80. The number of meetings for NPMs to attend each year will be determined by the Contractor in discussion with the TGB. This number may differ over years, particularly during the development stage to ensure consistency and that adequate training is provided. As a general guideline, in TALIS 2018, there were four NPM meetings throughout the duration of the project and one NPM workshop, each lasting between three and five days.

81. Considering the specific roles of NPMs, the activities which are under the responsibility of individual countries are as follows:

- Provide input for questionnaire development through the TGB member;
- Provide data/documentation to assist in constructing the national sampling frame;
- Attend NPM meetings;
- Co-operate with the Contractor to draw appropriate samples for all populations covered; and
- Prepare and participate in the pilot (optional), field trial and main study phases of the project:
  - Attend training sessions for NPMs;
  - Distribute materials to schools;
  - Obtain school and teacher co-operation;
  - Recruit and liaise with school co-ordinators in each school;
  - Submit data files to the Contractor;

17 Available with the key background documents for bidders at [URL to be made available when ready].
18 Available with the key background documents for bidders at [URL to be made available when ready].
The OECD Secretariat

82. The OECD Secretariat is responsible for the overall management of the project. This entails preparing the terms of reference for each survey under the guidance of participating countries, engaging an international Contractor to carry out the specified activities, monitoring the Contractor for quality assurance purposes, and acting as liaison between the TGB and the Education Policy Committee (EDPC). The Secretariat is also be responsible for building consensus among participating countries at the policy level – through the TGB – both during the preparation of the terms of references and at milestone points of the survey.

83. The OECD Secretariat acts as the Secretariat to the TGB and as the interface between the TGB and the Contractor charged with the implementation during all stages of the project. It is further a responsibility of the Secretariat to provide participating countries with a progress report on a biannual basis as well as with a report on financial and contractual management on an annual basis.

84. The Secretariat produces analyses, based on the statistical components provided by the Contractor, and prepares the international reports and publications in collaboration with the Contractor and in close consultation with participating countries both at the policy level (TGB) and at the level of implementation (National Project Managers). Consensus on indicators, analyses, reports and publications will be built through the TGB.

85. Participating countries and economies shall agree on a set of general rules for the inclusion/exclusion of country results in international reports. Any matter of dispute between countries and the Contractor on the application of these rules shall be arbitrated by the Secretariat, under guidelines established by participating countries.

86. Additionally, it is the OECD Secretariat’s role to participate actively during the development of all documents and reports to oversee the documentation process of the project including approval of all documents before they are provided to participating countries. This applies, in particular, to meeting documents, manuals and survey materials.

The Contractor

87. The international Contractor is charged with the responsibility of delivering a high quality product – namely a clean dataset – on time and within budget. As such, the Contractor has ultimate decision-making authority and responsibility for operationalising the overall project design agreed upon by the TGB; and for implementing the project within the terms of reference and on time. The Contractor develops and imposes rigorous quality assurance procedures for the operation of the survey and takes decisions on implementation on a day-to-day basis. Guidance and advice is sought, as necessary, from the OECD Secretariat, the TGB and NPMs.

88. The Contractor reports in the first instance to the OECD Secretariat, who acts as the main liaison with the TGB.

89. The Contractor is responsible for establishing, chairing and overseeing the Questionnaire Expert Group (QEG), for organising and hosting meetings for the QEG, and ensuring the alignment of the policy objectives as set by the TGB and the framework and instruments.
Questionnaire Expert Group (QEG)

90. It is the responsibility of the Questionnaire Expert Group (QEG) to translate the project goals into the framework, questionnaires and the analysis plan. The group shall be composed of at least one member from the OECD Secretariat, a member of the sampling team, experts with expertise in the levels of education needed (ISCED 0, 1, 2 and 3), and expert or consultant drawn from the PISA QEG to help ensure synergies across surveys, and experts with expertise in the main policy themes selected for TALIS 2024 as well as with experience in survey-based education policy research and instrument development in the international context. Experts of the QEG (or extended QEG for that matter) shall preferably originate from or have extensive knowledge of the diverse international contexts TALIS operates in.

91. The QEG is responsible for ensuring that the policy themes and priority indicators selected by the TGB are investigated sufficiently thoroughly to generate valuable policy insights while keeping the questionnaires to a manageable length (maximum 45 minutes to complete the English version). Particular attention shall therefore be paid to how the themes interrelate in order to maximise the analytical value of the survey.

92. It is the responsibility of the QEG to develop the White paper on TALIS 2024 and develop the framework and final list of questionnaire items and relevant instructions to the TGB for approval for the pilot, field trial and main study phases of the project, as well as to develop a scaling procedure and a separate scale validation plan to guide the OECD Secretariat in the production of the international report.

Technical Advisory Group (TAG)

93. The role of the Technical Advisory Group (TAG) is to advise both the Contractor and the OECD Secretariat on the operational and technical issues of TALIS, including the implications of modifications to instrument design and survey procedures, issues related to item definition and construction, issues concerning comparability, cross-cultural validity, sampling, and variance estimation for reporting. The TAG shall also be consulted on issues surrounding methodological advances and issues related to reporting and the dissemination of data products and online analysis systems.

94. The TAG is managed by the OECD Secretariat. The members of the group are appointed by the OECD Secretariat in consultation with the TGB. Some of the membership of the group has remained constant across the first three cycles of TALIS and new members have been appointed as required. The TAG may also recommend that the OECD Secretariat contracts additional experts for advice on particular issues on which they do not feel competent to advise.

Sampling and translation referees

95. To ensure the integrity of national samples and translated instruments, the TGB will appoint a sampling referee and a translation and adaptation referee in co-ordination with the Consortium.

96. The sampling and translation referees will review the evidence prepared by the Consortium on the national processes, and in consultation with the Consortium, the Technical Advisory Group (TAG) or other experts and with the OECD Secretariat, will provide recommendations for data adjudication.
The sampling referee will assess the quality of the samples for TALIS 2024 and the implications for the use of country results in the international and thematic reports and will make recommendations to the TALIS TGB regarding the use of individual countries’ data in the reporting process. In addition, the sampling referee shall inform participating countries and the TALIS TGB as early as possible of problems with sampling or response rates that may jeopardise countries’ compliance with sampling guidelines for TALIS 2024, providing an explanation for the problems or concerns and, when possible, suggesting remedies for them.

The translation and adaptation referee will be available to resolve and arbitrate any disagreement between the Consortium team and countries arising in the course of the translation and adaptation process, and assess the quality of the translations and adaptations for the purpose of the data adjudication decisions.

Section 2: Statement of work

97. The main objective of the survey is to deliver an internationally comparable data set that provides the indicators and key statistics for the policy analysis described in Section 1 of this document and enables a range of statistical and policy analyses. The indicators and policy analyses should give policy makers and practitioners the opportunity to examine and evaluate system- and school-level policies and practices relating to teachers and teaching.

98. The work of the Contractor mainly consists of implementing the TALIS 2024 survey. This includes the core survey, but also its optional components should they take place: the international ISCED 0 (ECEC), 1 (primary) and 3 (upper-secondary) options, the novice teacher samples, the school-level TALIS-PISA link option and the teacher knowledge survey assessment option. It also includes managing and chairing the Questionnaire Expert Group (QEG) and the group of National Project Managers (NPMs), the design of the sampling and scaling procedure and separate scale validation plans, the implementation and operationalisation of the survey, as well as support to reporting activities.

99. The Contractor shall deliver a high quality product on time and within budget and therefore needs sufficient authority to implement the survey for all six of the target samples and make decisions on a day-to-day basis concerning all aspects of implementation. The Contractor should budget for preparing all survey manuals and instruments in both English (British spelling) and French. Working documents and training manuals shall be prepared in English and NPMs will be required to have a sufficient knowledge of English to understand these documents. Moreover, the Contractor shall have sufficient budget and authority to develop and apply effective quality assurance procedures during the project.

100. The implementation of the survey can broadly be divided into ten main tasks that are listed and then detailed below.

- Task 1: Establish, manage and chair the Questionnaire Expert Group (QEG)
- Task 2: Production of the White paper on TALIS 2024 content and framework
- Task 3: Development and translation of the questionnaires
- Task 4: Sampling
- Task 5: Survey operations, quality control, liaison with national centres
- Task 6: Implementation and co-ordination of the six target populations within the survey
- Task 7: Data processing and scaling procedure and a separate scale validation plan. An option to consider is build fewer but more relevant scales.\(^{19}\)
- Task 8: Production of the technical report and user guide
- Task 9: Support for the preparation of international reports
- Task 10: Project management

**Task 1: Establish, manage and chair the Questionnaire Expert Group (QEG)**

101. The Contractor will establish, chair and manage the Questionnaire Expert Group (QEG), whose responsibility is to devise the framework and questionnaire items for the survey instruments. The Contractor will establish the expert group in consultation with the OECD Secretariat and the TGB. The Contractor will manage the meetings of this group during the development of the framework and instruments. Bidders should include in their proposals how this group will operate. Participating countries will also be asked to nominate experts for this group and the OECD Secretariat shall participate in this expert group and its meetings. As mentioned in Section 1 of this document, the QEG shall be composed of at least

- one member from the OECD Secretariat
- one member of the sampling team
- experts with expertise in the levels of education needed (ISCED 0, 1, 2 and 3)
- one expert with expertise in novice teachers’ induction to and retention in the profession
- one expert or consultant drawn from the PISA QEG to help ensure synergies across surveys
- one expert with expertise in teachers’ knowledge assessments
- experts with expertise in the main policy themes selected for TALIS 2024 as well as with experience in survey-based education policy research and instrument development in the international context.

102. The production of the framework and instruments is ultimately the responsibility of the Contractor. The Contractor should demonstrate that they have the capacity to attract high quality scientific and policy evaluation and design expertise. It is important that the contractor demonstrates that those developing the White paper on TALIS 2024 content, the framework and questionnaires have a sufficient understanding about schools and the social, cultural, and educational environments in which teachers teach, including the educational systems and the cultural contexts of participating countries as well as emerging themes and policy issues in a forward-looking perspective. Bidders are informed that the review of proposals for TALIS 2024 will place specific emphasis on this criterion, therefore bidders should describe how they will compensate for any under-representation of specific contexts/geographic areas.

\(^{19}\) For a discussion of scaling procedures see Avvisati, Le Donne, Paccagnella (2019)[1].
103. It will be the responsibility of the Contractor to specify and implement procedures that promote excellent communication among members of the QEG. The bidder should suggest how a good working relationship can be established and maintained from the beginning.

104. In TALIS 2018, five physical meetings were held during the framework and instrument development phases, with each meeting being 2-4 days’ duration. There were also shorter remote meetings via webinars or conference calls. The bidder is free either to follow this pattern or to propose an alternative method of working with the group. Bidders should describe the number of QEG meetings they have included in their budget, and should describe how they would call on the expertise of group members outside the formal meetings. Bidders are encouraged to submit proposals for making the most efficient and cost-effective use of remote meetings as an alternative to physical meetings.

105. Bidders should include in their cost proposal all expenses associated with the contributions of experts and for holding QEG meetings, such as travel, accommodation, subsistence and honorariums to expert group members. A few members of the OECD Secretariat team will generally attend meetings and the Secretariat will cover their own associated costs.

106. The key products from Task 1 will be:

- Establishment of the QEG;
- Advice and input to the Secretariat into the analysis and reporting phase;
- Effective management of the day-to-day running of the QEG and communication with relevant stakeholders; and
- Management and schedule of meetings.

**Task 2: Production of the White paper on TALIS 2024 content and framework**

107. The TALIS framework represents the conceptual underpinning of TALIS, and development of the TALIS 2024 framework is the foundation on which all subsequent work on the cycle will be based. It is therefore essential that the framework be based on sound theoretical principles and an understanding of the state of the art in the relevant areas, as well as a thorough understanding of emerging policy issues in the area of teaching and learning, to be outlined and detailed in a White paper (concept paper). The framework must also take account of the policy imperatives of the TALIS Governing Board (TGB) and the methodological demands of large scale international surveys. The first step of the framework development has to be the delivery of a White paper (concept paper) within the first six months of the contract highlighting the main directions proposed for the TALIS 2024 framework, that will form the basis of consultation with key stakeholders. Bidders shall outline their proposed approach to develop the White paper.

108. Following the approval of the white paper by the TGB, the Contractor shall work with the QEG to revise and redevelop the framework that was prepared for TALIS 2018\(^{20}\) to ensure it is up to date with major developments in the fields selected to be the focus of the TALIS 2024 questionnaires. The framework development should be informed by the TGB feedback on the White paper and the results of a prioritisation process with

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\(^{20}\) Available with the key background documents for bidders at [URL to be made available when ready].
participating countries to identify indicators to be retained as trend items over subsequent cycles. Bidders shall outline their proposed approach to undertake this prioritisation process. It is expected that the main themes covered in TALIS 2018 will be maintained subject to the rotation framework. The trend items (about 1/3 of the questionnaire) are expected to remain unchanged, while the other topics can undergo evolution and be rotated based on the proposed rotation design. The rotation design should be developed in such a way that after the 2024 implementation round the design can be adjusted to other rotation scenarios as well (for example rotation between cycles—in case the timeframe makes this possible). The TALIS 2018 framework is available on the TALIS website at www.oecd.org/education/talis.

109. The Contractor will be expected to present the White paper followed by draft framework to the OECD Secretariat and to the TGB (either in person at a TGB meeting, if timing permits, or via webinar and written procedure through the OECD Secretariat) and provide opportunities for countries and the Secretariat to provide feedback on the document. It is also expected that the draft framework be reviewed by the NPMs. The final framework will form the basis for questionnaire development. The Contractor will provide the draft and final versions of the framework in both English and French.

110. The key products from Task 2 will be:
- Development of the White paper on TALIS 2024 content in English;
- Draft and final versions of the framework in English and in French.

**Task 3: Development and translation of questionnaires**

111. The Contractor will work with the QEG to develop a survey design which will meet the requirements for valid measurement on the concepts targeted, provide a reliable estimation of trends over time, and lead to interesting insights in policy-relevant areas. Bidders are requested to look into ways of cross-nationally validating the data collected in the participating countries and economies. Bidders should describe how they would improve the cross-national comparability and validity of the questionnaire measures. The bid should also describe how response bias (including cultural biases and social desirability responding biases) will be addressed and controlled for.

112. The Contractor shall ensure that the overall length of the Questionnaire(s) in all languages is shorter than in the current TALIS 2018 design, making optimal use of the proposed rotation design.

113. The Contractor will work with the QEG to prepare and, after receipt of comments from the TGB and the OECD Secretariat, revise and complete the teacher and principal survey instruments for the core target population of ISCED level 2 for the pilot phase, the field trial and the main study.

114. Should the international optional target populations be undertaken by the TGB, the Contractor shall also develop the survey instruments for these populations (the preparation for all populations should include the 3 main phases: pilot, trial and main study). Although some questionnaire items will likely remain constant across populations, it is likely that adaptations will be needed for the different target populations. This will be determined during the pilot phase. Bidders should budget the development of these optional instruments separately in the costing proposal.

115. Should the optional teacher knowledge assessment module be undertaken by the TGB, the Contractor shall also develop a new formative assessment module. To do so, the
Contractor could build upon the item bank developed as part of the ITEL Teacher Knowledge Survey, and re-use or revise them in light of participating countries’ interests, priorities and feedback on the ITEL instruments.

116. The Contractor will use the data gathered in the pilot and field trial phases to revise and improve the various questionnaires and the teacher knowledge assessment module. Bidders should describe the methodology they propose using for designing a pilot phase that will yield the data needed to prepare the questionnaires for the mandatory field trial phase. Bidders are asked to describe how they will use the data from the pilot and field trial phases to inform the further development of the questionnaires and the teacher knowledge assessment module for the next phase of the project.

117. The Contractor will provide stakeholders with sufficient opportunities and time to provide feedback on the draft versions of the instruments for the pilot, field trial and main study phases of development. Stakeholders include participating countries, the European Commission and the Teacher Union Advisory Committee (TUAC/Education International). Bidders should describe how they will manage this feedback process and ensure that all stakeholders have an opportunity to be engaged in this process.

118. The Contractor shall improve the cross-cultural validity of existing questionnaire measures through the exploration and application of novel techniques, e.g., variations in the number of response options, variations in the wording of response options, scale anchoring, situational judgement tests, anchoring vignettes, forced choice items, etc. Proposed innovations should be balanced against their potential effect on the measurement of trends. The TGB has already identified some areas for which evolutions and updates to the items are seen as desirable, which bidders are invited to consider. These include the measurement of:

- **Teaching practices**, to move from measuring the time allocated to different activities to measuring instructional decision-making in the classroom (for example by using situational judgement tests). Bidders are also invited to suggest new ways of capturing teaching practices, including but not limited to observed practice using video study or voice recognition. If so, the aim would be to propose an approach that yields comparable insights across countries (i.e. overcoming possible response biases of self-reported data), and is manageable in terms of implementation burden and cost. A description of the implications for administration burden, response time duration and costs of different options shall be provided.

- **Professional development**, to develop new items measuring motivation for participating in CPD, together with narrowing/differentiating the definition of professional development to consider separately participation in school-provided or self-directed CPD.

- **Special needs education**, to consider ways to improve the identification question of special need education teachers (TQ-36), and allow these teachers to answer questions on teaching practices; distinguish among different types of special need students, at least in some questions (and with gifted students potentially considered as a category that also deserves special attention).

119. In TALIS 2024, the primary mode of administration will be by computer. There will continue to be a paper-based alternative for countries that do not have the necessary facilities for computer-based administration in their schools. Therefore, the production of the instruments must be possible in both computer and paper versions.
120. Once the QEG has completed the task of developing the instruments and a list of questions to be included in the survey, the Contractor will need to transform the instruments into a usable survey. The document should be designed in a manner as to facilitate participation of sampled school principals and teachers. The Contractor will be required to arrange the layout of data collection materials, for each of the target populations, if applicable. Bidders should demonstrate their capability and experience in producing survey documents and data collection materials. The data collection materials should include a school co-ordinator manual to be used in each school to ensure consistent data collection across schools. The TALIS 2018 school co-ordinator manuals (field trial and main study) are available on the TALIS tender website for bidders. Bidders should budget for these activities separately for the international options.

121. Cross-national comparability of the data-collection instruments used in international surveys is an essential element of ensuring the validity of measurement, and linguistic and translation quality control is a vital task in the achievement of this comparability. Different from previous cycles of TALIS, an independent translation referee will be tasked to arbitrate any disagreement arising between countries and the Consortium on issues of translation and adaptation.

122. The Contractor will need to ensure the high quality and comparability of all translated materials for the data collection materials (e.g. the questionnaire document, related training materials). Translation will be managed by the national centres, under the responsibility of NPMs. The national centre will not only be responsible for translating but also for covering all expenses associated with this task.

123. The Contractor will prepare all data collection materials for each of the target samples in English and French, and then distribute these materials to national centres. Countries will then translate the data-collection instruments and materials into their national language(s), following the technical guidelines provided by the Contractor and explained in their proposals. The Contractor will provide NPMs with appropriate training to ensure that national centres follow the same quality procedures in the translation and national adaptations of their materials.

124. Translation and national adaptations will be required for the teacher and principal questionnaires for the pilot, field trial and main study phases. Moreover, translation will be needed for supporting materials such as cover letters for schools and consent forms for principals and teachers. These documents will be required for the core target population (ISCED level 2) and optional target populations (ISCED levels 0, 1 and 3, school-level link to PISA 2024 schools, and novice teachers) if these options are undertaken by the TGB. Translation and national adaptations will also be required for the teacher knowledge assessment instruments. Bidders should provide separate costing for the optional tasks in their budget.

125. The Contractor shall ensure that the translation of the proposed data-collection instruments reflects the language as used in each participating country (e.g., the Spanish-language version developed for Spain will require modification before it is suitable for use in other countries in which Spanish is also used). Depending on the number of languages in which TALIS 2024 is administered in each country, one or more national versions of all

21 Available with the key background documents for bidders at [URL to be made available when ready].
data-collection instruments must be developed. In all instances, the Contractor must ensure the cross-national comparability of all instruments in different languages.

126. In TALIS 2018, among the 48 participating countries and economies and including the optional target populations, 9 administered the questionnaires in more than one language (ranging from 2 to 5 languages). Bidders are asked to include one national language adaptation per country in their budget. In some cases, countries may wish to produce more than one nationally adapted and translated set of instruments and documents in which case additional contracts may be required. If so, the additional work should be negotiated and contracted directly with countries. However, bidders must provide an indication of their costs for such additional national adaptations and translations. More information about the procedures followed in TALIS 2018 can be found in the TALIS 2018 Technical Report.²²

127. The Contractor will have the ultimate responsibility to ensure the accurate translation of data collection materials but should ensure with the QEG that the intended meaning of the items is maintained after translations. The pilot study has a key role to play in testing the translatability of question items and the quality of translations, possible violations of measurement invariance due to translation issues such as different length of questions per language, difficulty to translate concepts, etc. The Contractor will produce a detailed glossary of terms used in the instruments and manuals to help ensure a homogeneous understanding and consistent use of the terminology to be translated by national centres. The Contractor will also prepare an annotated version of the instruments to advise national centres of any specific issues to be considered in particular questionnaire items or in the interpretation of particular terms or phrases. Furthermore, the Contractor will develop manuals and training materials for national translators and to train National Project Managers (NPMs) in the processes and procedures for translation and national adaptation. The TALIS 2018 field trial and main study translation and adaptation guidelines are available on the TALIS tender website.²³

128. Bidders should describe their approach to those training and advisory tasks, and should outline how they would plan to train and support both experienced and less experienced national TALIS teams. During NPM meetings, the Contractor will conduct training sessions in translation and verification procedures and to carry out individual consultations with NPMs as required.

129. Bidders should describe in detail the approach they will take to manage the national translation and adaptation process. This may include for example, the use of adaptation, translation and verification forms, or use of a portal which can track and monitor different versions and workflow throughout the process in such a way that construction of the national versions of instruments is as smooth and seamless as possible. Bidders are encouraged in particular to consider how technology could be used to enhance the quality of translations and adaptations, e.g. in fostering the consistency of translations over time (i.e. with previous TALIS cycles), across instruments (for the different survey populations, but also with the PISA teacher questionnaire and the teacher knowledge survey assessment materials), or across questions within instruments.

²² Available with the key background documents for bidders at [URL to be made available when ready].

²³ Available with the key background documents for bidders at [URL to be made available when ready].
130. The Contractor will also review and propose updates to the technical standards regarding the translation and adaptation of questionnaires and manuals, to be considered and adopted by the TGB.

131. Bidders should identify how they will ensure that the translation of data collection materials is in accordance with the objectives of the design of survey instruments and questionnaire items. The proposals from bidders must specify their recommended method of translation (e.g. double translation followed by reconciliation, back translation, etc.) as well as the procedures they will apply to ensure: *i*) comparability; *ii*) quality control; and, *iii*) resolution of possible disagreements with participating countries about the accuracy and acceptability of the translations in co-operation with the translation and adaptation referee. The main role of the translation and adaptation referee is to resolve and arbitrate any disagreement between the Consortium team and countries arising in the course of the translation and adaptation process, and assess the quality of the translations and adaptations for the purpose of the data adjudication decisions.

132. The key products from Task 3 will be:

- In collaboration with the QEG, develop and revise items for the teacher and principal questionnaires following feedback from stakeholders and analyses of pilot and field trial data;
- Laid-out and formatted versions of the teacher and school principal questionnaires for each target population in English and in French and available in both computer and paper versions for the pilot, field trial and main study phases of data collection;
- Glossary, annotated questionnaires, training manuals and translators’ guide to guide national centres in their translation tasks (these documents to be available in English only);
- Management of relationship with NPMs to deliver timely, efficient and accurate translation of data collection materials; and
- Quality control measures, technical standards and management of translation processes.
- Translation report to support translation refereeing and data adjudication

**Task 4: Sampling**

133. A key aspect of the validity of TALIS data depends on the development of robust sampling procedures which can both take account of the varied demographic profiles of TALIS countries and economies and ensure that each sample adequately represents the underlying population.

134. The success of TALIS also rests on the creation of an internationally comparable dataset that is also comparable across each of the target populations and comparable to the datasets from the previous TALIS cycles. This requires the development and implementation of a sampling methodology and set of procedures that are completed on-time and implemented with high-quality precision.

135. The Contractor shall devise and implement a sampling methodology that should cover the issues discussed in Section 1 of the terms of reference. To this end, the Contractor will be required to prepare draft and final versions of the sampling plans for the field trial and main study. Sampling plans should specify methods and standards for decisions regarding inclusion/exclusion; incorporate improvements to existing practices where
appropriate, including the mechanisms for assessing the adequacy of participating countries’ sample frames and for assuring the adequate demographic and geographic representation of teachers and schools; include procedures that would be used in drawing robust country samples from the sampling frames; and ensure adherence to sampling standards ensuring that a 95% population coverage is obtained in all participating countries. The bidders can consult the proposed changes to the sampling design provided by the Third face-to-face TAG meeting.24

136. The sampling method should allow for meaningful linkages of teacher responses with those of the school principal and with school and other teacher characteristics. The methodology should identify: the sample size of schools, school principals, and teachers; the target population; the survey procedures (including the rationale for choice of survey procedures); the requirements regarding participation rates of schools and school principals and teachers; and other issues such as the sampling requirements for smaller countries/economies and the smaller population of novice teachers. This will need to be undertaken for each of the six target populations. This plan shall be completed and provided to the OECD Secretariat in draft format by the date indicated in the agreed timeline.

137. Bidders should outline how they will approach the task of developing the sampling plans and should describe in particular how they propose to develop a rotation design, that will be new to TALIS 2024. All significant changes in the sample from the previous cycles should be assessed with respect to the impact on measures of trend in variables and indicators.

138. The Contractor must ensure the integrity of national samples. For this purpose the OECD will assign a sampling referee whom the contractor shall consult with. As such, the Contractor shall develop sampling standards and develop quality control procedures for assessing and ensuring that the TALIS sampling standards are met and to gain approval from the sampling referee for these procedures. The Contractor shall establish procedures (that the sampling referee would validate) for dealing with samples that do not meet the predetermined sampling standards and this may include, for example, evaluation of the outcomes of national or regional non-response bias analysis. This activity will be carried out as part of the broader data adjudication process, which will be managed by the Contractor. The contractor shall provide a sampling adjudication report with evidence about the quality of the samples for each participating country/economy and for each of the five target samples, as well as the implications of sample quality for the use of country results in the international and thematic reports for the validation of the sampling referee. This adjudication report will be submitted to the OECD Secretariat after validation by the sampling referee according to the agreed-upon timelines.

139. Bidders should describe how they will monitor observations of quality control procedures in such a way that early notice can be given to the TGB (through the OECD Secretariat) of problems with sampling or response rates that may or will jeopardise countries’ compliance with the agreed sampling guidelines and technical standards. If such notice shall be required, the sampling referee should provide an explanation for the problems or concerns and, when possible, suggest remedies for them. The OECD Secretariat shall arbitrate disagreements between participating countries and the sampling referee under guidelines established by the TGB.

24 Available with key background materials for bidders at [URL to be made available when ready].
140. The Contractor will develop sampling weights for each participating country or economy, to be used in the preparation of the international database. Sampling weights must be prepared and included in the field trial and main study datasets. Bidders should consult the information on sample weighing in the TALIS 2018 Technical Report\(^{25}\) and describe their approach to this task, outlining any innovation or improvement they would suggest especially in light of using a rotation design.

141. The Contractor shall consult with the participating countries and economies as they develop their sampling frames. To this end, the Contractor will develop sampling manuals and training material for national centres. Bidders should review the sampling materials which are on the website\(^{26}\), and should outline in detail how they would plan to improve and add value to the procedures used in TALIS 2018 which are outlined in these documents. This should include both any changes which may improve the quality of sampling and any revisions in procedures which would improve efficiency and reduce costs for national centres.

142. The Contractor will conduct training sessions at National Project Managers (NPM) meetings in sampling procedures and to carry out individual consultations with NPMs as required. Bidders should describe what their priorities would be in arranging consultations and how they would support NPMs whom they have not been able to meet individually. Bidders should also describe how they would use alternative methods such as webinars or online training materials to support national centres.

143. The bidder should describe how they would work with countries to ensure that each country’s sample fits both their national requirements and the needs of the TALIS survey. This may include, for example, taking steps to maximise or minimise overlap with other national or international samples, including PISA 2024, which will be held during a similar timeframe. The bidder should give details of any software which will be used for sampling at either the national or international levels.

144. Bidders should describe strategies that might be considered for the TALIS-PISA link (should this option be undertaken by countries) to ensure that the final sample will include sufficient numbers of schools with PISA data to perform meaningful analyses. This will require close co-ordination with the sampling contractor for PISA and will need to take into account the sampling timelines for PISA.\(^{27}\)

145. The Contractor shall consider countries’ national interests when drawing the school and teacher samples, and should assist those who have additional requirements to maximise the policy relevance of their participation in TALIS. National variations in the sample may include, but not necessarily be limited to, the following:

- Over-sampling of particular groups (e.g. to provide additional reporting for particular groups of teachers, or reporting at regional level);

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\(^{25}\) Available with the key background documents for bidders at [URL to be made available when ready].

\(^{26}\) Available with the key background documents for bidders at [URL to be made available when ready].

\(^{27}\) The PISA 2024 Call for tender documentation is available at [URL to be made available when ready].
• Sampling of an “adjudicated region”, which is a region in which a sample is drawn and adjudicated independently of the main national entity.

146. The Contractor will also be expected to accommodate small variations which do not entail a large number of additional procedures or extensive additional weighting steps within the procedures already included in these Terms of Reference, without additional cost. Bidders are asked to describe their approach to such national variations and, in particular the extent of sampling variations which they can offer to countries within the budget proposed in their response to this Call for Tender. In some cases, national variations may involve a substantial amount of additional work from the Contractor and additional contracts may be required. If so, the additional work should be negotiated and contracted directly with countries. However, bidders are asked to give an indication of their costs – if any – for commonly required additional national sampling options such as drawing of samples to enable regional comparisons or adjudicating data for specific subnational regions.

147. The Contractor should provide input to the Questionnaire Expert Group (QEG) in developing the questionnaire and in pertinent aspects of the development of survey instruments and questionnaire items as they relate to sampling issues. This shall ensure that: i) the QEG receives sufficient sampling advice when required for instrument and item development so that items can be successfully implemented under the sampling framework developed by the Contractor; and ii) the Contractor is aware of the sampling requirements under which items were developed for both the principal and teacher questionnaires. It is envisaged this would require a member of staff of the Contractor with the required sampling expertise to attend face-to-face meetings of the QEG. Attendance at these meetings should be identified separately in the budget.

148. The sampling component of the work will thus include: i) the development of the sampling plans for the field trial and main study based on a rotation design; ii) the development of sampling standards; iii) consulting with countries in the development of their sampling frames and the drawing of their samples, for the field trial and main study in adherence to the sampling standards; iv) the development of a strategy and tools for the real time monitoring of response rates to support countries in their school engagement strategies; v) the monitoring of non response bias\(^2\); vi) the preparation of sampling weights; vii) the preparation of sampling-related quality control procedures and adjudication report to support sample refereeing; viii) advising the QEG on questionnaire development issues as they relate to sampling; and ix) advising the Secretariat on issues of analysis and reporting as they relate to sampling.

149. Background information on TALIS sampling in previous cycles can be obtained from the sampling manual for TALIS 2018 field trial and the sampling manual for the TALIS 2018 main study.\(^2\) Furthermore, the TALIS 2013 Technical Standards and the

\(^{28}\) Bidders can consult the recommendations provided at the third face-to-face meeting of the TAG on the topic. Available with the key background documents for bidders at [URL to be made available when ready].

\(^{29}\) Available with the key background documents for bidders at [URL to be made available when ready].
TALIS 2008, TALIS 2013 and TALIS 2018 Technical Reports give details on the sampling approaches used in previous cycles of TALIS.  

150. The key products from Task 4 will be:

- Sampling plans for the field trial and the main study for all target populations;
- Sampling manuals (in English and French) and training manuals (in English only) for national centres;
- Sampling standards, quality control procedures, and preparation of materials to support sample refereeing and adjudication process;
- Sampling weights for the field trial and the main study;
- Input in the instrument and item development to ensure they shall be achieved within the sampling framework;
- Strategy to reduce non-response bias and to measure its impact on survey results (this task could be under the responsibility of the Contractor or of the national teams with guidance provided by the Contractor, hence needs to be costed separately);
- Input into analysis and reporting, especially in relation to the implications of the rotation design on analysis; and
- Sampling report to support sampling refereeing and adjudication (in English only).

**Task 5: Survey operations and quality control**

151. The contractor shall plan and then implement survey operations and procedures aligned to the survey methodology for both paper-based and computer-based instruments. This includes the related aspects of quality control and the training of country representatives in these procedures (e.g. NPMs, school co-ordinators, etc.). This shall be required for each of the target populations, should they be undertaken. All training materials shall be developed in English.

152. In any international survey, agreed standards are essential to ensure validity, reliability, and comparability across countries and over time. This requires the agreement of all participants on an international refereeing process and on procedures for quality control. The Contractor, in conjunction with the OECD Secretariat, shall review and prepare a proposal for the TALIS 2024 technical standards. This document shall be prepared in both English and French. The proposal will be presented to the TGB in order to seek consensus among participants on the standards. The current technical standards are available from the TALIS tender website.

153. The Contractor will be responsible for monitoring that all national centres are following the TALIS technical standards. Bidders should describe in detail how they would do this. In particular, they should describe how such monitoring would be done and how any necessary support would be given in the case of newly participating countries or new national centres.

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30 Available with the key background documents for bidders at [URL to be made available when ready].

31 Available with the key background documents for bidders at [URL to be made available when ready].
154. The Contractor shall establish plans for monitoring adherence to the technical standards during field operations in all countries. This will include national centre procedures and survey operations in the schools that participate. These plans shall include a requirement that the Contractor shall appoint and pay quality monitors to visit a number of schools in each of the participating countries to assess their compliance with the project’s guidelines for sampling, data collection, etc. Bidders’ discussion of quality assurance should specify how this requirement will be achieved, including, the criteria for selecting schools to be visited, and how the findings will be used to ensure the projects’ overall integrity. The number of schools to be monitored, methods of identifying and training quality monitors and the proposed costs for such monitoring should be distinctly identified in the bidder’s cost proposal. The Contractor shall produce a national quality control monitor manual specifying the procedures to be followed (in English).

155. The Contractor will produce a quality monitoring report outlining countries’ compliance with quality standards throughout the project and which will be taken into consideration for the data adjudication and in decisions about data inclusion for the final reporting. Details about the quality control and monitoring procedures used in TALIS 2018 can be found in the TALIS 2018 Technical Report. 

156. Data capture software shall also be delivered to facilitate data collection in the implementation of the survey. Bidders should describe the data collection software they would deliver and the provision of training to NPMs.

157. Given the difficulty of some countries of attaining the required response rates in past cycles of the survey, the Contractor will be required to develop a strategy aimed at assisting countries in attaining acceptable response rates and reducing non-response bias. The Contractor shall therefore assign each participating country a set of follow-up procedures aimed at achieving the required response rates. These should be included in the sampling manual. Bidders should identify the procedures to be undertaken to ensure high response rates, and develop tools to support national centres in the real time monitoring of response rates during survey implementation.

158. The key products from Task 5 will be:

- TALIS 2024 technical standards;
- A strategy aimed at assisting countries in attaining acceptable response rates and reducing non-response bias;
- A strategy aimed at measuring the impact of non-response on survey results.
- Data capture software (with accompanying documents), including tools to support national centres in the real time monitoring of response rates during survey implementation;
- Quality assurance procedures and management;
- National quality control monitor manual (in English);
- Quality monitoring reports on survey procedures and quality assurance procedures for the pilot, the field trial and the main study (in English only).

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32 Available with the key background documents for bidders at [URL to be made available when ready].
**Task 6: Implementation and co-ordination of the six target populations within the survey**

159. The Contractor shall manage and implement all tasks associated with the school principal and teacher questionnaires in the main survey, including both of the ISCED 0, 1 and 3 international options, the school-level TALIS-PISA link option, the population of novice teachers and the teacher knowledge survey assessment module should the TGB choose to implement these options. This includes accommodating countries that are participating in each and/or all of the target samples and ensuring that the deliverables from each target population are directly comparable. The task of implementation and co-ordination of tasks shall follow those detailed in the sampling plan and sampling manual. This task highlights the importance of effective management and co-ordination in successfully implementing the survey. In the case of the TALIS-PISA link, this task will also require co-ordination with the PISA sampling contractor and with the group responsible for the development of the PISA teacher questionnaire (should this option be undertaken by the PISA Governing Board).

160. Consideration should be taken of quality control measures and the proposed management structure and techniques. This may include the identification of pertinent sampling and methodological issues and a proposal to overcome such issues, and a strategy for collecting the data, while ensuring the comparability of surveys implemented for each target sample and following the timeline detailed in the sampling plan. Bidders are required to identify how they will efficiently implement and co-ordinate surveys for each of the six target populations and manage critical issues during the implementation phase.

161. The key product from Task 6 will be:

- Implementation and co-ordination of surveys for each of the six target populations, as applicable.

**Task 7: Data processing, scaling procedure and a separate scale validation plan**

162. The key product of the TALIS 2024 survey is an international database containing all the data collected through the survey instruments. The Contractor shall ensure the data is cleaned and weights and variance estimations are computed. Datasets should be prepared containing the relevant sampling and variance estimation information. Bidders should also outline the quality control procedures to ensure an error-free, reliable dataset and identify mechanisms to ensure the direct comparability of datasets of all target populations and all survey cycles.

163. The Contractor shall clean all data collected through each of the target samples for the preparation of an international database, as applicable. This task is necessary for the field trial and the main study. Bidders are asked to indicate the types of checks that will be carried out on the data, and the mechanisms which will be put in place to ensure that checks are carried out by national centres as required.

164. With the data collected during the field trial, the Contractor shall conduct analyses to identify problems in the implementation of the administration procedures; investigate methodologies of data analyses (particularly consequences of the rotation design for data analysis and the methodology of scaling the data); investigate the properties of questionnaire items; and carry out other necessary analyses which may be required to inform and improve the preparation of the final TALIS 2024 database. The Contractor shall work with the QEG to develop proposals for the TGB for the development of the main study instruments, based on field trial data. Bidders should identify their capabilities and
experience in data management at the international level and which member(s) of their management structure would assume responsibility for this task.

165. Bidders are invited to review the scaling stages and procedures done in previous cycles and suggest proposals on how to be improved. The proposal should take into account two key aspects: 1) the consequences of the of the rotation design for scaling data 2) a communication strategy plan with the Secretariat to align the scale development process with the analytical needs of the organisation.

166. Data processing shall include the merging of national datasets from individual countries into an international dataset. It will also require the merging of the international dataset for each of the six target samples, as applicable.

167. Descriptive statistics should be calculated from the merged datasets and appropriate investigations of statistical anomalies undertaken. Anomalies shall be identified and corrected and notification given to the relevant NPM if considered appropriate. The Contractor shall undertake and ensure that high-quality data verification and processing is undertaken for all stages of the survey. Bidders should describe the data verification procedures they will follow.

168. The Contractor shall provide user friendly data files for each sample, including a clear mechanism for merging and analysing the data files of each of the six target samples and a separate dataset for the teacher knowledge assessment module that can be linked to the respondents TALIS responses to ensure that teachers across both datasets can be matched for analyses. For the school-level TALIS-PISA link dataset, the Contractor will ensure that identifiers common to both the TALIS and PISA datasets are included to ensure that schools across both datasets can be matched for analyses.

169. The Contractor shall provide a fully documented data product (including a compendia providing the distribution of responses according to the variables collected in the questionnaire) that shall be delivered to the OECD Secretariat in preliminary form and then in a final form by the dates specified in the agreed timeline. This data product shall provide a set of basic indicators (and their components) and allow the OECD Secretariat, the TGB, and any relevant contractors to conduct their own further analyses. Accompanying documents shall be provided to facilitate such analysis, specifically the reproduction of the main indicators.

170. The Contractor shall also provide all products accompanying the dataset. These include file descriptions, codebooks, and any indicators and indices formulae. These may be provided in the format of a user’s guide for the international database.

171. The Contractor should develop and implement a plan to ensure the data are readily accessible and user friendly for a wide range of potential users, including researchers, NPMs, policy makers, and others who would benefit from access to the data.

172. The Contractor shall submit a draft scaling procedure and a separate scale validation plan to the OECD Secretariat for its review and approval. The plan should include details of the composition of the scales and indices that are planned to be derived from the questionnaire items, in accordance to the reporting plan developed by the OECD Secretariat paying special attention to ensuring measurement invariance of scales.

33 For addressing measurement invariance, Aavisati, Le Donné and Paccagnella (2019[1]) and the OECD Education Working Paper by van de Vijver (2019[2]) can be consulted.
173. The contractor shall also submit a proposal that describes the type of multivariate analysis that are possible/not possible as a consequence of the rotation design.

174. The key products from Task 7 will be:

- Data verification rules and procedures;
- The cleaned databases for data collected through both the teacher and school principal questionnaires for each of the six target samples and for the teacher knowledge assessment module, with appropriate sampling weights, and methods for merging the datasets identified;
- Scaling procedure and a separate scale validation plan to be developed in close consultation with the QEG and OECD Secretariat to meet reporting needs; and

**Task 8: Production of the technical report and user guide**

175. A technical report will be developed and published covering all aspects of the survey (including each of the six target samples and the teacher knowledge assessment module). The Contractor shall provide the OECD Secretariat with a copy of a comprehensive technical report by the date indicated in the agreed timeline. This report shall summarise and clearly describe all data and statistical conventions or approaches applied in each of the targets samples and for the teacher knowledge assessment module, should these options be undertaken. The technical report should serve the needs and address the likely questions of the most sophisticated users of the dataset. It should also provide guidance for future waves of the survey if particular issues and/or difficulties were encountered or identified.

176. Bidders should also consider how the approach taken to the TALIS Technical Report in previous cycles could be improved and developed to ensure greater transparency, better understanding of TALIS methodology and more complete information for all stakeholders, including the general public and the media. Previous TALIS technical reports are publically available on the TALIS website. Bidders should consider the extent to which technical information could be made more fully and flexibly available, for example by supplementing the published report with web-based material. The technical report should be written in such a way that it ensures reproducibility of data manipulations.

177. The Contractor will ensure that the technical report has been thoroughly edited and written according to the OECD Style Guide. All tables to be included in the technical report shall be provided in Excel format. The OECD Secretariat will be responsible for final formatting and copy-editing of the report for publication.

178. The Secretariat also wishes to consider the production of a user guide. It is foreseen that the user guide would be produced to provide detailed information on how to analyse the TALIS data (including across cycles, across ISCED levels, across populations of novice vs more experienced teachers, with PISA data through the TALIS-PISA link and with data from the teacher knowledge assessment module), enabling researchers to both reproduce the initial results and to undertake further analyses. In addition to the inclusion of the necessary techniques, the manuals will also include a detailed account of the TALIS database and examples providing full syntax in SPSS and STATA. This will encourage...
further use of the TALIS data by researchers and is similar to what is already provided for PISA. Bidders are asked to budget for the production of these manuals separately.

179. The key product from Task 8 will be:

- TALIS 2024 technical report (in English only)
- User guide for the international database.

**Task 9: Support for the preparation of international report**

180. The OECD Secretariat is responsible for the preparation of the report that will summarise the results of the survey that includes results from each of the six main samples. The purpose of this report will be to:

- Provide the descriptive statistics of the teacher and school principals’ populations surveyed, including the main indicators and associated statistics relevant to the policy and research objectives described in Section 1;
- Examine how these indicators and relevant statistics interact within and between specified policy issues; and
- Identify the implications for policy and practice.

181. To support the preparation of the report, the Contractor shall:

- Develop a scaling procedure and a separate scale validation plan, as mentioned above;
- Develop a proposal that highlights the type of analysis that can and cannot be performed as a consequence of the rotation design;
- Provide statistical and technical support for the OECD Secretariat during the development of the report;
- Provide feedback and verify tables of results designed and developed by the OECD secretariat; and
- Review the report, tables and drafts of the report for technical consistency and coherence.

182. Responsibility for the production of tables from the international database will be shared between the Contractor and the OECD Secretariat. The Secretariat will be responsible for specifying the number of tables, developing their design and estimating the values. The bidder will be responsible for providing feedback to the table shell designs and verify the estimations. The bidder should specify the approximate number of tables for table verification within the core budget.

183. Given the level of co-ordination that will be necessary between the OECD Secretariat, participating countries and economies and the Contractor, bidders are reminded of the need to discuss how such co-ordination will be facilitated and managed successfully. One issue that should be addressed in this discussion is the consistency of results in the international and national reports (should countries wish to undertake them). The Contractor cannot guarantee such consistency but should be available to assist those

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34 See PISA manuals at: [http://www.oecd.org/pisa/pisaproducts/pisadataanalysismanualspsandsassecondedition.htm](http://www.oecd.org/pisa/pisaproducts/pisadataanalysismanualspsandsassecondedition.htm)
preparing national reports should questions arise about procedures for data analysis, scaling procedures, weighting, software, etc.

184. The key product from Task 9 will be:

- Technical support and advice to national centres for the production of their initial reports from the survey in form of a data analysis workshop for example; and
- Checking of all analyses and tables produced for the initial report.

**Task 10: Project management**

185. The OECD Secretariat will have a significant role in the oversight and management function for TALIS 2024, working together with the Contractor. The Contractor will be required to appoint a senior person to act as the International Survey Director. This person will work closely with the OECD Secretariat to ensure the success of TALIS 2024. He or she will provide leadership for NPMs and the QEG, and to this end should have strong management and team-building skills. The person in this role should also have the academic credibility and experience to provide the intellectual leadership of TALIS among experts, and to work with the Secretariat on identifying technical issues to be discussed by the Technical Advisory Group (TAG). Bidders should name the person who will be carrying out this role, who should be expected to spend the majority of his or her time working on TALIS. Bidders should specify the percentage of time to be spent on the project by the International Survey Director.

186. The Contractor shall deliver a high quality product on time and within budget and therefore needs sufficient authority to implement the survey (that includes each of the six target populations and the optional teacher knowledge assessment module) and make decisions on a day-to-day basis concerning all aspects of implementation. The role of the Contractor shall not only be to implement the sampling plan they have developed but also to manage and co-ordinate all parts of the process during implementation. The Contractor shall have sufficient budget and authority to develop and apply effective quality assurance procedures during the project. Bidders should specify such procedures in their proposals and indicate how they will monitor the effectiveness of these procedures during the life of the contract.

187. Other positions/titles should be described in bidders’ proposals. Additionally, the structure and procedures for working with subcontractors and experts should be discussed; including overseeing subcontractors’ work, ensuring accountability and control from a financial as well as a technical perspective, and interactions with them on a more routine basis should be described. Bidders should ensure that subcontractors, in addition to being highly qualified, are drawn from different OECD countries as much as possible.

188. In close collaboration with the Contractor, the Secretariat will be responsible for the following aspects of management and co-ordination of the project:

- Ensuring that the TGB is regularly updated on the progress of the project;
- Providing advice to the TGB on the feasibility and impact of changes to the scope of TALIS 2024 or its implementation, taking into account the issues involved for the Contractor;
- Ensuring that the decisions of the TGB are implemented; liaising with and advising the Contractor accordingly; ensuring that the Contractor is kept fully informed of any decisions which impact on project structure or timelines;
• Ensuring that a project management approach is agreed with the Contractor and is applied to managing the work throughout the project;
• Oversight of risks, issues and deviation from timelines; ensuring that risks and issues are regularly monitored and appropriately mitigated and managed;
• Monitoring the budgets and milestones and resolving budgetary or contractual issues;
• Establishing and maintaining an archive of all project resources, documents, materials and databases; and
• Providing additional support to National Centres by attending NPM meetings; obtaining regular feedback from NPMs; dealing with any queries or problems which cannot be resolved by liaison with the Contractor.

189. The Contractor will be responsible for facilitating the implementation of the agreed project management approach and for ensuring that the Secretariat is kept fully informed on the progress of the project. This will involve the following:
• Establishing tools and mechanisms for effective communication with the Secretariat and with national centres;
• Developing and maintaining an integrated project plan and timeline;
• Negotiating and resolving timeline amendments, for example those which might arise from TGB requirements, unavoidable operational delays or other unforeseen project changes; keeping the Secretariat fully updated on amendments; informing the Secretariat promptly of any timeline issues which cannot be resolved which may have implications for achievement of project milestones;
• Informing the Secretariat promptly of any urgent issues or disputes which may arise;
• Organising regular progress meetings with the Secretariat either face-to-face or online, at agreed intervals; circulating any papers required for meetings; keeping and circulating minutes of all meetings, including agreed action points;
• Putting in place procedures for monitoring risks; maintenance of a regularly updated risk register and issues log; providing regular updates and heads up on risks, issues and deviations from timelines to the Secretariat that might arise;
• Collecting and collating information on the feasibility and impact of changes to the scope of TALIS 2024 or its implementation (e.g. countries joining the cycle late), to assist the Secretariat in giving advice to the TGB;
• Establishing a mechanism for submission of all TALIS resources, documents, materials and databases to the OECD archive, and ensuring that this is kept up-to-date;
• Discussing additional requests from participating countries with the OECD Secretariat; negotiating and co-ordinating additional national requirements or requests with national centres or TGB members as appropriate. This may in some cases require the identification of additional costs and the establishment of corresponding additional contractual arrangements with countries; and
• Providing regular reports to the Secretariat and the TGB. The nature and frequency of such reports will be agreed between the Contractor and the Secretariat.

190. The Contractor shall also: i) liaise with the OECD Secretariat to ensure the overall success of the survey; ii) advise the OECD Secretariat about the effects on the international costs of countries that join later, withdraw, or cause delays to the project; and iii) develop a schedule and procedures for the review of national data to ensure their accuracy before these data are provided to participating countries.

191. Bidders should discuss how they will: i) facilitate interaction and ensure effective collaboration among participating countries, the QEG, and other contractors; and ii) ensure effective collaboration with and demonstrate responsiveness to the OECD Secretariat.

192. The potential use of multiple contractors heightens the need for effective co-ordination among all those involved with the survey, including contractors. Accordingly, bidders must discuss: i) their experience that demonstrates relevant and successful co-ordination of large-scale survey projects and/or projects involving multiple countries and contractors; and ii) how their efforts during the period of contract implementation will promote and achieve the co-ordination required to ensure the success of the survey.

193. The Contractor shall be further responsible for recommending to the OECD Secretariat: i) the frequency and location of meetings for the NPMs (see the description for this group below); and, ii) criteria for determining the quality of the samples and their implications on the use of country results in the international reports on advice from the sampling referee.

194. Meetings of the NPMs shall operate in English. The Contractor should also budget for preparing all instruments in both English (British spelling) and French. Working documents and manuals targeted at NPMs shall be prepared in English.

National Project Managers (NPMs)

195. The Contractor shall develop a description of the role and profile of NPMs who will facilitate the translation and implementation of the data collection instruments in their country. Although this may be a component of the sampling manual, NPMs may need instruction to start their work prior to the date of completion of the sampling manual. The Contractor will have to identify how to best manage the timing of such work. Bidders should specify their intended working relationships with NPMs and how they will best ensure efficient and high-standards in the work of NPMs. In their proposals, bidders must also propose a timeline for the national implementation of the survey for each of the target samples including a proposed meeting schedule.

196. In liaison with the OECD Secretariat, the Contractor shall call, organise, and host meetings of NPMs. Four to six such meetings are anticipated during the life of the contract, including two training sessions before the pilot and the main study which the Contractor will be responsible for running. Provisions for meeting facilities as well as for travel and compensation of experts, as required, should be included in bidders’ proposals. No compensation and travel costs for NPMs or representatives from the OECD Secretariat should be included in the cost proposals. Participating countries will bear the costs of their NPMs’ participation in these meetings.

197. The key products from Task 10 will be:

• Effective management of the day-to-day running of the project and communication with relevant stakeholders;
• Effective short-term and long-term stakeholder management;
• National Project Manager manual and description of role; and
• Management and training of NPMs including a schedule of meetings/training sessions.

Section 3: Schedule, deliverables and budget guidelines

198. A general timeline has been included in this document. It is aligned to the proposal upon which countries decided their participation in the survey. Although the fourth cycle of the survey is bound by certain predetermined milestones (e.g., field trial in 2023, main study around March-April 2024 in the Northern Hemisphere), the bidders’ expert judgement is sought on the planning, organisation and management of the work they are bidding for. Bidders’ expert judgement is also sought for the timing of the Southern Hemisphere data collection. In previous cycles of TALIS, this data collection occurred between September and December preceding the Northern Hemisphere data collection. However, in PISA, the Southern Hemisphere data collection takes place after the Northern Hemisphere data collection. The timeframe for the project implementation increases with 1 year in the current cycle that makes adjustments possible.

199. Careful consideration should be given to the timing of the data collection. One of the lessons learned from the first three cycles of TALIS was that consideration should be given to building flexibility in the survey windows, especially in cases where periods of data collection are close to school breaks or the end of the school year, which can have a negative impact on participation rates. Bidders should consider this issue and propose viable solutions to facilitate incorporating a certain level of flexibility in the survey window.

200. Bidders should include in their proposal a detailed schedule of deliverables. This should include a schedule of activities and milestones that describes when materials would be completed, including the drafts of relevant materials. It is allowed that bidders propose an alternative timeline to that presented here. If this occurs, bidders should specify and provide a rationale for deviations in their schedule. Consideration should also be given to the time required by NPMs to complete required tasks. The following indicative timeline contains only selected major milestones, whereas the project plans submitted by bidders should cover the totality of the activities that relate to the terms of reference.

**TALIS 2024 indicative timeline**

201. The following table indicates a timeline of the TALIS milestones that will occur during the 2024 cycle. For reference, the abbreviations in the table are as follows:

<table>
<thead>
<tr>
<th>Quarter</th>
<th>Events</th>
<th>TGB and NPM Meetings</th>
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<tbody>
<tr>
<td>Q1</td>
<td>Call for tender for international contractor</td>
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<tr>
<td>Q2</td>
<td>Review of tenders</td>
<td>7th Meeting of TGB</td>
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<tr>
<td>Q2</td>
<td>Review of tenders</td>
<td>7th Meeting of TGB</td>
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</tbody>
</table>
**Quarter** | **Events** | **TGB and NPM Meetings**
---|---|---
Q3 | Selection of Contractor | 8th Meeting of TGB
Q4 | White paper on TALIS 2024 content | 2021
Q1 | Conceptual framework | 9th Meeting of TGB
Q2 | Conceptual framework | 10th Meeting of TGB
Q3 | White paper on TALIS 2024 content | 1st Meeting of TALIS 2024 NPMs
Q4 | Questionnaire Development | 1st Meeting of TGB
Q4 | Agreement on Pilot instruments | 11th Meeting of TGB

**2022**
Q1 | Pilot Study | 22nd Meeting of TGB
Q2 | Conceptual framework | 2nd Meeting of TALIS 2024 NPMs
Q3 | Questionnaire Development | 3rd Meeting of TALIS NPMs
Q4 | Agreement on Field Trial instruments | 12th Meeting of TGB

**2023**
Q1 | Field Trial | 13th Meeting of TGB
Q2 | Agreement on Main Study instruments | 3rd Meeting of TALIS NPMs
Q3 | Main Study S. Hemisphere | 14th Meeting of TGB
Q4 | Main Study N. Hemisphere | 4th Meeting of TALIS NPMs

**2024**
Q1 | Field Trial | 15th Meeting of TGB
Q2 | Agreement on Main Study instruments | 5th Meeting of TALIS NPMs (workshop)
Q3 | Main Study S. Hemisphere | 16th Meeting of TGB
Q4 | Main Study N. Hemisphere |

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**Work task deliverables**

202. This section summarises the deliverables that the Contractor shall prepare. These documents are to be submitted to the OECD Secretariat within the agreed timelines, which, in turn, shall report on these to the TGB with the necessary documents and information. All final documents related to the project and delivered to the countries are to be given to the OECD Secretariat in electronic form for archiving and documentation purposes.

203. The Contractor shall prepare draft and final versions of the following and indicate their proposed delivery dates in their proposed timelines:

- White paper on TALIS 2024 proposed content
- Conceptual framework;
- Technical standards;
- Questionnaire glossary, annotated and clean questionnaires, teacher knowledge assessment module, translation manual and training material for NPMs;
- Translated data collection materials for each stage of the survey (pilot, field trial and main study);
- Translation report to support translation refereeing and data adjudication;
- Laid-out and formatted versions of the data collection instruments in computer-based and paper versions for the teacher and school principal questionnaires for the pilot, field trial and main study phases. Separate instruments for each target population and for the teacher knowledge assessment module shall be developed should these international options go ahead;
- The sampling plans and data requirements for the field study and main study including the provision of advice and then approval of national samples;
- Sampling standards, manuals and related training materials for NPMs, bearing in mind the proposed move to a rotation design;
- Documented strategy for increasing participation rates and reducing non-response bias;
- Sampling report to support sampling refereeing and data adjudication;
- Survey operations manuals and training materials for NPMs and school coordinators;
- Data capture software with accompanying documentation and tools to support national centres with real time monitoring of response rates;
- Quality monitoring reports on survey procedures and quality assurance procedures for each stage of the survey (pilot, field trial and main study);
- Cleaned databases for data collected through both the teacher and school principal questionnaires for each of the six target samples and the teacher knowledge assessment module (if applicable) with appropriate sampling weights identified and a user guide for the database, along with derived variables and complex scales and indices;
- Scaling procedure and a separate scale validation plan;
- A proposal for the analysis that can and cannot be performed as a consequence of the rotation design;
- Descriptive analyses for the field trial and main study;
- Table verification for the initial report;
- The technical report of the survey and sampling methodology and a fully documented data product;
- User guide; and
- Management deliverables (including progress reports).
204. The Contractor shall submit a tri-monthly report describing the progress made during the quarter, work to be undertaken during the next quarter, and any problems or difficulties encountered. These reports are to be submitted to the OECD Secretariat by 15 January, 15 April, 15 July and 15 October of each year. These reports shall also include the management requirements described in Task 10 of this document.

**Budget guidelines and assumptions**

205. Budgets should be presented in EURO.

206. The budget should encompass all activities up to and including the dissemination activities. In preparing the budget, bidders should assume that 40 countries will participate (representing a combination of both OECD and Partner countries and economies. Bidders should specify the marginal cost for each additional country beyond the 40 countries and economies. Bidders should be aware that the Secretariat expects that a total of 55-60 countries and economies are likely to take part in the core ISCED 2 survey for TALIS 2024.

207. Bidders should also evaluate the costs of the relevant components of their proposal. If bidders include various alternatives in their proposal then the costs of these should also be evaluated especially with regards to different rotated design scenarios. Bidders should also identify if they consider specific alternatives or aspects of their proposal would lead to specific increases in the national costs incurred by countries (e.g. increased work for schools or national project managers).

208. In evaluating the costs of the relevant components of their proposal, bidders should identify the fixed cost and marginal costs of undertaking each of the international options (ISCED 0, ISCED 1, ISCED 3, the samples of novice teachers and teachers of 15 year old students in PISA 2024 schools, and the optional teacher knowledge assessment module).

209. Bidders must complete the budgetary worksheet included at the end of these Terms of Reference. Bidders are asked to provide a cost per task described within this document. The budgetary worksheet must be submitted in a separate paper file from the rest of the response to the Call for Tender and as a separate electronic file on the USB key or CD. For the electronic file, it must be submitted in .xls format. A .pdf of the budgetary worksheet will not be accepted.

**Section 5: Guidelines for proposals and evaluation criteria**

210. Specific evaluation criteria shall be used to select the Contractor for TALIS 2024. The review will be judged through the allocation of points to the three main technical evaluation criteria.

**Technical quality (40 points)**

211. The extent to which the proposal demonstrates an understanding of the project design is a main consideration. The proposal should describe in detail how the work, from a technical perspective, will be implemented successfully and in a timely manner. Proposals shall elaborate and improve on the work statements and project design. This section shall be evaluated on the quality of the bidder’s plan, particularly their i) proposed sampling plan and ii) data collection and preparation. The following elements will be particularly important:

- Extent to which the proposal demonstrates an understanding of the project design and survey themes;
• Clear, convincing and feasible proposals for each of the tasks in the Statement of work;
• Proposals for a survey design of TALIS 2024 that are innovative and yet in keeping with TALIS’ aims and philosophy;
• Extent to which the proposal can improve the existing questionnaire measures – including their validity and international comparability – or by developing new ones;
• Clear and convincing proposals for a sampling plan for TALIS 2024, which identifies possible improvements on current TALIS practices through the introduction of a rotation design, and sound proposals for assessing the adequacy of the sampling frames of participating countries and the representativeness of their samples;
• Clear indications of how each of the target samples will be comparable and allow analysis across each sample;
• Evidence of a good understanding of the issues to be taken into account in ensuring comparable and valid translations of questionnaires, while also ensuring that these have appropriate local adaptations; sound and clear proposals of how the bidder would aim to achieve this;
• Sound proposals for training materials and training activities;
• Sound and innovative procedures to be undertaken to ensure high response rates and limited non-response bias;
• Sound quality control procedures for data verification and processing to ensure an error-free, reliable dataset and identify mechanisms to ensure the direct comparability of datasets of all target populations; and
• Should proposals of equal technical quality be submitted, the proposal offering more innovation and efficiency gains shall be rewarded.

Organisational and management capabilities (30 points)

212. The proposal should describe the bidder’s organisational capacity. This section shall be evaluated on i) evidence that the bidder is able to develop a collaborative working relationship with the other actors of this project, including any other contractors involved throughout the process and ii) evidence that the bidder has the ability and the financial controls to manage a project of this size and scope. The following aspects will be particularly considered:
• Proven capacity to develop a collaborative working relationship with the other actors and to promote consensus-building activities through effective communication and management. Proven ability to put effective management and financing structures in place;
• Clear and convincing proposals for how the Contractor will work with the National Project Managers and the Expert Groups, including how they will ensure a balanced coverage of expertise areas and geographic regions in the core or extended QEG, how they will manage the QEG and the work to develop the framework and questionnaires;
- Clear indications of how the Contractor will efficiently implement and co-ordinate surveys for each of the six target populations and manage critical issues during the implementation phase;
- Detailed schedule of deliverables which includes a schedule of activities and milestones that describe when materials would be completed, including the drafts of relevant materials; and
- A commitment to work within a fixed price envelope and to work flexibly and in partnership with the OECD Secretariat and the TGB.

**Staff qualifications and previous experience (30 points)**

213. Special emphasis will be placed on staff members’ experience and ability. Bidders’ past experience in conducting international studies and large-scale surveys should be described in the proposal. Evidence of effective performance in implementing relevant work should also be addressed. For each professional-level person bid, the proposal should contain the expected position and responsibilities, qualifications for working on the project, and résumé. The following elements should be in the bids:

- Past experience and track record in the tasks specific to the work, preferably in an international context and in a timely manner.
- Capacity to enlist the best expertise in providing the deliverables required under the terms of reference.
- The qualifications and experience of the proposed International Survey Director.
- Experience that demonstrates relevant and successful project management and co-ordination of large-scale surveys and/or projects involving multiple countries and contractors; a strong partnership ethos and a commitment to work within a fixed price envelope, whilst seeking innovation and improvement in TALIS’ methods and operations.

**Budgetary worksheet**

*(to be produced for the core survey and each optional component)*

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<thead>
<tr>
<th>TASK</th>
<th>Type of cost</th>
<th>2020 Costs</th>
<th>2021 Costs</th>
<th>2022 Costs</th>
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<th>2025 Costs</th>
<th>TOTAL</th>
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<tbody>
<tr>
<td>Task 1: Establish, manage and chair the Questionnaire Expert Group (QEG)</td>
<td>Fixed cost</td>
<td>Marginal cost for each additional country</td>
<td>Extra costs for specific tasks (please specify)</td>
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<td>Task 3: Development and translation of the questionnaires</td>
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<td>Task 5: Survey operations, quality control, liaison with national centres</td>
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<td>Task 8: Production of the technical report and user guide</td>
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References
