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Group of National Experts on the AHELO Feasibility Study

SUMMARY OF PROGRESS: AHELO GENERIC SKILLS STRAND

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This document was prepared by the Council for Aid to Education.

The GNE is invited to :

- *TAKE NOTE of the progress report*
- *COMMENT on progress as necessary*

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SUMMARY OF PROGRESS: AHELO GENERIC SKILLS STRAND

Overview

1. This summary of progress discusses phases three and four¹ of the AHELO Generic Skills Strand – performance task adaptation and translation. Please refer to GNE [2010]2 – Progress Report on Generic Skills Strand, presented at the March, 2010 GNE meeting, for a discussion of phases one and two. Additionally, a brief status update of the AHELO Generic Skills Strand pre-implementation phase is also provided.

2. The GNE is invited to :

- TAKE NOTE of the progress report
- COMMENT on progress as necessary

Phase 3: Performance Task Adaptation

Status: Complete

Activity 1: Country Team Members return to their respective countries after the Generic Skills Strand February, 2010 meeting and begin the task of reviewing the contents of the selected and agreed upon two PTs and provide recommended modifications to each [PT] to fit within their country's context following agreed upon procedures.

3. During the Generic Skills Strand meeting (15-18 February), it was discovered that all of the Generic Strand countries would be participating in the GNE meeting taking place in Paris, 15-16 March. Therefore, it was agreed that this would be a valuable opportunity to meet face-to-face and review recommended country adaptations to the two performance tasks. The country teams returned to their respective countries and began reviewing the contents of the selected performance tasks, with the understanding that on 17 March, in Paris, recommendations for adaptation would be presented to CAE principal investigator Rich Shavelson.

Activity 2: Telecommunication meetings: 1) Present each county's recommended modifications of selected CLA PTs for discussion/review (AAG member takes lead). 2) Gain consensus on the two PTs based on CAE and Country Teams' evaluations and recommendations for final development.

4. Originally, CAE recommended that a second face-to-face meeting take place for countries to present, discuss, review, and agree upon modifications to the two performance tasks. Due to budgetary restrictions, this recommendation was changed to a telecommunication meeting. However, synergy between the AHELO GNE meeting and Module A progress allowed for a face-to-face meeting to occur on 17 March. During this meeting, country representatives presented and discussed recommended

¹ As outlined in the AHELO Generic Skills adaptation and translation work plan.

modifications to the two performance tasks selected during the New York meeting in February. Generally, adaptations recommended by the countries involved contextualizing proper and geographic names. Additionally, procedures for translation were outlined, including the following recommendations to:

- have a “lead scorer” participate in the translation phase (suggested by country teams). This participation would give the lead scorer(s) first-hand knowledge of the performance tasks, scoring rubric translation and pilot-study students’ responses. Moreover, this participation would be particularly useful when translating the scoring rubric so that there is full understanding and comprehension of the nuances of the rubric. Lead scorer(s) could also collaborate in scorer training with CAE.
- recruit a graduate student linguist to provide feedback and recommendations during the translation phase (by CAE).

5. Lastly, it was agreed that:

- countries should have access to individual level data (AHELO reporting guidelines),
- countries should have access and the opportunity to coordinate and host CLA faculty academies, and
- research project proposals are welcomed and upon successful review by the countries would be approved. Two such proposals were reviewed in Paris on 17 March and approved: Magda Chia (CAE) and Jani Ursin (Finland).

6. Country representatives left the meeting with the understanding that specific modifications in the form of track changes on each performance task document would be sent to CAE on 26 March. CAE staff would then integrate and benchmark these recommendations against the original performance task(s) and between country recommendations.

Activity 3: CAE fully modifies two PTs (tasks, scoring rubrics and IT instructions) following modifications agreed upon at telecom meetings and sends draft PTs for review, comment, and revision as they are completed.

7. CAE reviewed the adaptations provided by the countries; with items that could not be integrated because they might change the construct measures or substantively change the information provided in the PT, and thereby require pilot testing (e.g. changing fresh-water to salt-water), CAE contacted each country individually and explained the rationale behind why that adaptation would not be in the final English versions. Adaptations were integrated into a single PDF whereby items that would be adapted were highlighted and a drop-down with a listing of alternatives was provided. CAE asked countries to again review these PDFs and make any additional suggestions and/or changes. Based on this additional review, English versions of the performance tasks, performance task templates², the scoring rubric, and a translation guide were developed and delivered to the respective countries on 11 May, 2010. The translation guide provided guidelines intended to: (a) support the translation of the wide variety of AHELO Generic Strand documents, (b) guide the process of translation, and (c) guide the translation review for some of the materials. Ultimately, the document was developed to ensure that the translated AHELO tasks and other materials:

² Templates of the performance tasks were developed so that the visual and graphical elements of the tasks (e.g. pictures, charts, graphs) could be adapted by the countries to their own language and context, while still maintaining the same look and feel as the original English versions.

1. measure the same constructs measured by the original version in English;
2. are interpreted by the students in the ways originally intended; and
3. are not more difficult for the country's students to read and understand than it would be if the tasks had been originally written in the country's language.

8. Supplemental charts that highlighted the most relevant information, per question, within the performance tasks were also supplied to the countries so that the translation and translation review teams had the necessary knowledge and understanding of the underlying constructs to properly carry out the translation process and avoid unintentional changes.

9. During the February team meeting, country representatives expressed concern over whether their respective students would understand the expectations involved in a performance assessment (versus multiple choice, for example). It was agreed that a shortened task that countries could universally provide to students in advance of respective assessment dates would greatly mitigate this concern. To this end, CAE staff developed a "mini performance task." The mini-PT is intended to "tune" or familiarize students as to the nature of a CLA performance task, response format, and "good" answer. It is made up of: a) an overview of what is a performance task, b) a shortened task scenario, c) a reduced document library (2 documents), d) an answer sheet, e) an example answer, and f) rationale as to why the example answer is considered a good one. The mini-PT was provided to the countries for initial review and adaptation.

10. Lastly, a document that described the goals, rationale, and step-by-step process for conducting the cognitive labs (also called talk/think-aloud and/or mini student pilots) was developed and distributed to the countries on 21 May, 2010. The document included: a) an overview and description of how and why cognitive labs are used in research; b) why they are specifically being used in the AHELO study; c) recommendations for selecting students; and d) descriptions of and instructions and scripts for the different stages of the cognitive lab.

Phase 4: Translation of Performance Tasks

Status: Complete

Activity 1: Participating countries, in collaboration with CAE, will be responsible for recruiting a (a) Translation Team comprised of two (or more if country desires) members who will translate the CLA following agreed upon translation protocol, and (b) Translation Review Team comprised of a translator, a university professor knowledgeable in content area, and an assessment expert (or more if country desires) that will review and resolve differences with the Translation Team.

11. CAE provided guidelines for and answered questions about the recruitment of translation team members during the February, 2010 meeting in New York (a conceptual framework was disseminated as well as a presentation on adaptation and translation guidelines). Additionally, CAE provided a listing of items to be translated for the AHELO Generic Skills Strand so that NPMs may discuss expectations on level of effort for potential translators. Lastly, CAE developed document GS.36 AHELO Translation Guidelines, a protocol that not only reminded country teams of desired translation team qualifications, but also provided a step-by-step process for the translation and reconciliation processes.

Activity 2: Each Participating country’s translation team creates first version in home language, circulates it to the respective translation review team. Feedback is provided and necessary modifications are made. This same cycle is repeated for the revised version. Once these two cycles are completed, the tasks are pilot tested.

12. CAE team members developed a number of documents to help facilitate this translation and translation review process. Additionally, CAE team members conducted site visits in each of the countries to provide further training and collaboration during this translation and reconciliation phase of the AHELO study.

Documents GS.33b, GS.34b.

13. CAE team members developed “templates” for Lake-to-River and Catfish performance tasks. The purpose of these templates was three-fold:

1. They were formatted to reflect the original performance task so that when country teams entered their translated text, it will mirror the original;
2. it included all the tables and graphs within the performance task in editable form; and
3. the formatting included paragraph numbers (in a table form) that are likewise on final English versions of the two performance tasks. The purpose of these paragraph numbers are to facilitate comparison between the English and translated texts. Additionally, these paragraph numbers will help for reference purposes during the translation process and student pilot-testing (also called Cognitive Lab). Documents GS.36 Translation Guide and GS.37 Cognitive Lab utilized these paragraph numbers within the forms provided for their respective purposes.

GS.36 Translation Guidelines.

14. This document provided country team guidelines intended to: (a) support the translation of the wide variety of AHELO Generic Strand documents, (b) guide the process of translation, and (c) guide the translation review for some of the materials. For example, the document provided step-by-step translation review procedures:

1. Reviewers are handed hard copies of the translated version of the document³ and are encouraged to make comments and edits on the document.
2. Once all reviewers have finished reading the translated document, the original English version of the document is projected on a screen so that reviewers can compare the two language versions, using paragraph numbering to benchmark specific sections.
3. Reviewers look for errors on all of the error dimensions (e.g. style and spelling, format, conventions, grammar and syntax, register). However, they should focus on specific dimensions according to their professional backgrounds. Which individuals should focus on which dimensions should be determined based on the set of professionals available and their specific formal backgrounds (e.g., if a linguist and a specialist in the country’s language and literature are participating in the translation review team).

³ Teams were provided templates of the performance tasks with graphics, images, and formatting available for translated text.

4. Based on comparing the two language versions of the document, reviewers record, on the coding form (provided by CAE), the kinds of translation errors identified.
 5. Each reviewer shares with the other members of the translation review team the errors he/she identifies and justifies their coding decisions.
 6. The translation review leader facilitates a discussion to resolve any disagreement until a consensus is reached about the nature of the errors and the way in which they should be coded.
15. Ultimately, the document was intended to help ensure that the translated AHELO tasks and other materials:
1. measure the same constructs measured by the original version in English;
 2. are interpreted by the students in the ways originally intended; and
 3. are not more difficult for the country's students to read and understand than it would be if the tasks had been originally written in the country's language.

Site Visits

Overview

16. The site visits have been extremely beneficial since there was some concern over whether the country adaptations and modifications were sufficient enough to adequately contextualize the performance tasks (PTs). Once country teams began the translation phase, issues surrounding adaptation did, indeed, arise. CAE representatives also used the site visit as an opportunity to review and work through Cognitive Lab ("think-alouds" or mini student pilots) procedures. Document GS.37 Cognitive Lab Guidelines was distributed to country teams prior to site visits. The Guidelines outlined the rationale for the labs, procedures for conducting the mini student pilots, scripts for the student think-aloud, and analytical tools for evaluation of the think-aloud data. Feedback from this portion of the meeting was positive in all the countries. Below is a summary of each country site visit meeting with some examples of progress and issues.

Finland (1-2 July, 2010)

17. An initial portion of the site visit meetings focused on a simplified review of AHELO Generic Strand translation error dimensions using PISA and TIMSS items. During this review, the Finnish translation team was a bit surprised to realize that the translation error dimensions and the translation review procedures allowed them to identify errors they were not able to see. In fact, the PISA items that colleagues at the institute had translated had errors. During the site visit they began utilizing this same method on the AHELO performance tasks - independent translations of each PT had already been done by this time. Not surprisingly, a number of cultural adaptation and equivalence issues emerged that had not been identified in the "adaptation" process. The collaborative nature of this discussion, and its results, came as a bit of a surprise to the Finnish team; while Finnish translators are familiar with reconciliation and some forms of review procedures, they were not as used to discussing translations in a group. Finally, the team found the overview of the Cognitive Lab procedures very helpful; in particular a video that the CAE team developed to model the process provided much insight.

Korea (16-17 June, 2010)

18. Korea was the first CAE site visit. As a result, two CAE representatives—Willy Solano-Flores and Richard Shavelson—participated to ensure the agenda topics were in line with translation progress. The Korean country team had made fair progress in translating both performance tasks. In so doing, there was a realization that the word-by-word structural nature of English did not “mesh” with that of Korean. Therefore, the translation team would need to agree on a general understanding or intent of each English sentence and express it in a way that was more natural to the Korean language. Additionally, the *register* translation error dimension required extra attention during the English—Korean translation process. For example, Korean culture and word usage tends to be more formal than that of the United States. The translated text, grammar, and syntax should, as a result, reflect this difference. Overall, the Korean team was pleased with the progress made during the meeting, and acknowledged that the amount of content involved in a performance task (versus, say, multiple choice questions) was much greater than anticipated.

Kuwait (28-29 September, 2010)

19. The Kuwait site visit was a bit delayed due to summer and religious holidays. However, when the CAE representative did visit with the Kuwait team, he found them to be rapidly catching up to the rest of the countries. In fact, the team had already reconciled the two translations of each performance task by the visit. As a result, the CAE representative worked through the sample questions (from PISA and TIMSS), demonstrating the translation error dimensions and translation review procedures, and then quickly moved to applying this process to one of the reconciled performance tasks. This review was particularly helpful in clarifying questions that had arisen while the Kuwait team had been working independently through the reconciliation phase. As a result of this discussion, the Kuwait team was able to establish a style for the way in which the translation review should be conducted. Some issues were raised with respect to the scoring rubric. For example, punctuation is not an issue in Arabic, whereas in English, this is a very important aspect. CAE will need to consider issues such as these during scorer training in the implementation phase. The Kuwait team was not too familiar with the theory and process of Cognitive Workshops, so a fair amount of time was spent providing historical context and background, some examples, and then discussing the AHELO-related cognitive lab materials. While this topic was new to the Kuwait team, they did not have much problem understanding its value with respect to translation validity.

Mexico (28-29 July, 2010)

20. As with some of the other countries, the translators were not very familiar with a translation review approach based on identifying errors. So, a good amount of time was dedicated to discussing the categories and errors identified in the PISA translated items. Interestingly, the two independent translations of the performance tasks varied considerably in style. Also, certain errors emerged with a fair amount of frequency; mainly, inaccurate translation of terms, spelling mistakes, literal translation, and alteration of meaning. The translators did not have much problem recognizing these errors and seemed to work very nicely as a team, combining their contributions to create the reconciled version of the translation. An important lesson learned here and within other countries is that, to a great extent, the reconciliation phase is (and should be) also a review phase. In other words, discussion on reconciliation led to not only exchanges about translation differences, but also about translation errors. Roughly four hours was spent discussing the Cognitive Labs (mini student pilot-testing). They were quite pleased with this discussion and felt fairly confident about this next phase of the study.

Norway (29-30 June, 2010)

21. The Norwegian team had worked through independent translation and reconciliation of both performance tasks prior to the CAE site visit. As a result, the CAE representative and Norwegian team had

the opportunity to discuss these translations in length. During this review, it became apparent that the typical analytical unit of a paragraph presented some difficulties when trying to incorporate the translation error dimensions as outlined in GS.4 Conceptual Framework and GS.36 Translation Guidelines. The CAE team representatives encountered this difficulty in other countries as well (Finland, Korea, Kuwait). As a result, CAE has modified the suggested analytical unit from a paragraph to a document (e.g. a news article, an email versus a paragraph in the news article or a paragraph in the email), and has provided an addendum with this change—among others—to the countries. Although the Norwegian teams’ translators were not professionals as designated by a professional translation organization, they were individuals who had extensive experience translating PISA and TIMSS tests. Additionally, the Norwegian AHELO team and translation team worked on reconciliation as a group, providing a more thorough, collaborative review. The Cognitive Lab portion of the meeting seemed to provide the greatest benefit. There was some concern over student compensation for participating in the mini pilots.

United States

22. The US team does not require a site visit in translation and translation review since the Lake-to-River and Catfish performance tasks originated in the United States. However, there has been some discussion between CAE and US team members about conducting the Cognitive Lab portion of the AHELO study. Although both performance tasks have been utilized in the US higher education field for a number of years and have proven track records, the US team thought it might be a teaching and learning opportunity for the participating institutions to work through the Cognitive Lab. Once the US team decides whether they want to pursue this opportunity, a CAE team member will provide support with facilitation and training.

Activity 3: CAE will conduct, as needed, telecom meetings with the Translation Teams to support the translation process and the sharing of translations for review and finalization.

Overview

23. During the week of 27 September, CAE spoke with all the countries with the exception of the Kuwait team. Generally, the calls covered the following:

- Country team status on project
- Questions/concerns about next steps (i.e. Cognitive Labs)
- Reflections on the AHELO Generic Skills Strand feasibility, to date
 - What improvements might be made?
 - What did you find satisfying?
- Pre-implementation phase overview
 - Expectations in the next few months
 - Questions/concerns

24. What follows is a brief description of each of the calls. Also note that CAE has scheduled a Generic Skills team meeting 27 October in Paris so that country teams have an opportunity to not only ask

CAE pertinent questions and raise any additional issues, but also have an opportunity to share progress and findings with other Generic Skills teams.

Finland

25. Finland just recently completed the Cognitive Workshops with 12 students. They found the process very informative. In fact, Jani Ursin provided CAE with a set of recommendations regarding the performance tasks and instructions that were discussed in detail during the teleconference. CAE determined it would be beneficial to collect Cognitive Workshop feedback from all of the Generic Skills teams and provide a set of collated changes to be integrated during the final reconciliation phase of the feasibility study as a result of Mr. Ursin's findings.

Korea

26. The Korean team has reconciled the two translations of one performance task—Catfish—and is in the final stages of reconciling the other. The team is preparing to begin the Cognitive Workshops in late October/early November. The Korean team expressed some hesitation about the actual process of the Cognitive Workshops, as this procedure is one that they have not yet encountered. CAE suggested that the Korean team speak with Jani Ursin (Finland) since he had recently completed the workshops. To that end, CAE has been in contact with both teams to facilitate this call. Additionally, CAE encouraged the Korean team to contact them to help out in any way that they could. When asked if the team would change anything with the feasibility study, they expressed their wish for more collaboration across the participating countries. They recognized that face-to-face meetings were challenging due to time and budget constraints; however, they felt there could have been more outreach across the countries, even via email exchanges. Lastly, CAE, OECD (Diane Lalancette), and the Korean team discussed implementation phase timing; specifically, it was reiterated that a spring 2012 testing window would make great sense. This is due to concerns over outgoing senior motivation if the testing window was in the fall (November).

Kuwait

27. Kuwait's site visit occurred during the teleconference meetings; therefore, CAE felt it would be prudent to allow the Kuwait team some time to progress in translation and reconciliation of the performance tasks before scheduling a teleconference call. It is anticipated that a call similar to those conducted with other countries will take place in late October or early November.

Mexico

28. The Mexican team has finished reconciling both performance tasks and is ready to begin the Cognitive Workshops. Originally, they planned to conduct the think-alouds (Cognitive Workshops) with up to 20 students. However, CAE advised the team that this would entail too much work, and that five students per task would sufficiently provide the team with enough feedback to learn whether the translations are working as intended. This was supported by the Finnish teams' findings. The Mexican team expressed some confusion with respect to timing. Specifically, they were unclear as to when they needed to conduct the Cognitive Workshops, when final versions of the performance tasks, instructions, and scoring rubric would need to be submitted to CAE and OECD, and how pre-implementation phase materials relate to translation phase materials. To help avoid this confusion, CAE is in the process of developing a document that will generally provide all the country teams some guidelines and expectations of deliverables over the next six months (combining translation and pre-implementation phase expectations).

Norway

29. The Norwegian team has completed the reconciliation process with both performance tasks and is gearing up for the Cognitive Workshops, which they plan to conduct in November. Many of the experts on the Norwegian team have also played key roles in PISA. This international assessment expertise helped inform the team during the translation phase of the AHELO feasibility study. The team expressed the importance of scheduling another meeting similar to the February Generic Skills Strand meeting when the study begins to focus more closely on implementation phase items (i.e. contextual survey, sampling plan, data collection plan).

United States

30. A brief teleconference with the USA NPM (Charlie Lenth) was conducted; a follow-up call touching on the above-mentioned topics will take place with Dr. Lenth and the larger USA team in mid-October.

Conclusions

31. Generally, all the countries felt the AHELO Generic Skills Strand translation process was quite satisfying. A number of representatives conveyed that they had originally felt the translation process was a bit too rigorous; however, after working through the different phases, they acknowledged that the Generic Skills Strand protocol identified a number of translation errors that would not have been found otherwise. The teams were quite pleased that in the pre-implementation phase their role would be a bit more limited: the teams will be responsible for reviewing and reconciling translations from a CAE-contracted translation company. This mitigates the general time constraints that all the country teams seem to be encountering. A number of the representatives asked about the implementation phase and reiterated how important it will be for each of the countries to have input on sampling and data collection plans. Mexico and the United States, in particular, asked about the contextual strand and its status.

Pre-Implementation Phase: Status Update***Project Task 1: Detailed Work Plans for Testing Operations***

32. CAE will develop detailed work plans for using the CLA performance tasks in the field, for either a full implementation of the Generic Skills Strand of the AHELO feasibility study – Phase 2, or for a smaller scale implementation.

Status: In process

33. CAE developed and is revising draft work plans for (a.) overseeing proctor training, (b.) supporting NPMs, (c.) managing scoring of performance tasks, and (d.) managing data output.

Project Task 2: Online Platform Adaptation

34. CAE will adapt the CLA online platform for delivery and scoring of the adapted/translated performance tasks in each participating country, involving the use of ITS as a supplier to CAE for the AHELO feasibility study.

Status: In process

35. ITS has imported the adapted English versions of the two selected performance tasks into the student interface of the online platform for test delivery. CAE has verified these changes and adaptations to the student interface.

36. The student interface contains two main subsections.

- A. User interface: a) *welcome page*, b) orientation page – also called “navigating through your assessment,” c) *assessment overview page*, d) the *performance tasks*.⁴ e) the local survey, & f) exit pages and miscellaneous site text;
- B. Start-test site: a) a log-in screen where students enter their email and password information, and b) a demographic profile form.

37. ITS has exported all site text from the user interface as word documents and provided the documents to CAE. These ITS word documents will be used to import translations to the student interface once finalized versions of the performance tasks and instructions are available.

38. The start-test site will enable a self-registering model of test delivery to track student identification. In summer 2010 CAE sent modification requests for the start-test site and proctor and scoring interfaces to ITS. These modifications are in the process of being made to online platform. The English site text for these platform components will be exported as Excel (.csv) files in fall 2010.

39. TBD in Spring 2011 CAE will coordinate user acceptance testing (UAT)/ review of the online testing platform once all translations have been uploaded.

Project Task 3: Sampling Guidelines

40. CAE will adapt and translate its existing United States student recruitment and sampling best practices for possible use in Phase 2 of the AHELO feasibility study, with the expectation that other contractors in the AHELO feasibility study project will be responsible for the development of an AHELO-specific sampling plan.

Status: TBD

41. Best practices for sampling and student recruitment (used in the United States for the CLA) will be translated in Fall 2010. The need to use and distribute these best practices will be determined by OECD.

Project Task 4: Proctor Training Manuals and Online Reference Tools

42. CAE will develop proctor training manuals and on-line reference tools such as training videos in each language.

Status: In process

43. CAE is currently modifying its CLA proctor manual to develop a proctor reference manual for AHELO. The finalized English content will be translated through a contracted company in fall 2010 and sent to country teams to review and revise.

⁴ Note the items in italics are documents CAE has asked country teams to translate. Items that are not in italics will be translated by a translation company contracted by CAE. Country teams will be responsible for reviewing this translated text.

44. The proctor training video will be based on the contents proctor reference manual. Video development is to be completed in two stages. The first stage, to be completed in fall 2010, will incorporate the full development and production of the proctor training video in English and the translation of the video script in each testing language. The second stage will incorporate the full production of the video in each test language.

Project Task 5: Test Result Report Parameters

45. CAE will design the results report information for the OECD, country-level results, and individual higher education institution level results. Design parameters will include a determination of what information to include on each level of report, the format for presenting the information and the explanatory and cautionary information to be included.

Status: TBD

46. This information will be incorporated as part of the managing data output work plan.