

Chapter 7: PISA FIELD QUALITY MONITORING

PISA-D data collection activities were undertaken in accordance with strict quality assurance procedures. The quality assurance procedure that ensures the PISA-D data are of high quality has two components: first, to develop data collection procedures; and second, to monitor and document the implementation of those procedures in the field. Chapter 6 described the data collection procedures that National Centres were required to follow, while this chapter reviews the second part of the process—monitoring and documenting data collection.

While the aim of quality control is to establish effective and efficient data collection procedures and guide the implementation process, quality monitoring activities were implemented to observe and record any deviations from those agreed procedures during the implementation of the survey. These activities included:

- National Centre consultations
- PISA-D Quality Monitor (PQM) visits

NATIONAL CENTRE CONSULTATIONS

A large number of consultation meetings took place between senior staff of the international contractors and National Project Managers (NPMs) or other representatives of National Centres, in the context of international NPM and training meetings. An extensive schedule of consultation meetings was developed prior to each meeting, and the consultations provided the opportunity for detailed discussion on a wide variety of PISA-D implementation matters on which additional advice or support was sought by the National Centre. In addition, the international contractors were in constant communication with all countries through email, Skype, webinars, and via the PISA-D SharePoint site.

PISA-D QUALITY MONITOR VISITS

The international contractor responsible for overseeing survey operations implemented all phases of the PISA-D Quality Monitor (PQM) process: interviewing and hiring PQM candidates in each of the countries, organising their training, selecting the schools to visit, and collecting information from the PQM visits.

PQMs are independent contractors located in participating countries who are hired by the international survey operations contractor. They visit a sample of schools to observe test administration and to record the implementation of the documented field operations procedures in the Main Survey. Typically, 3 to 4 PQMs were hired for each country, and they visited an average of 15 schools in each country. In countries with short test periods, up to 9 PQMs were hired in order to be able to observe 15 schools.

All PQMs were nominated by the NPMs through a formal process of submission of

nominations to the international survey operations contractor. Based upon the NPM nominations, which were accompanied by candidate resumes, the survey operations contractor selected PQMs who were independent from the National Centre (not paid by or reporting directly to the NPM), knowledgeable in testing procedures or with a background in education and research, and able to communicate fluently in English. Where the resume did not match the selection criteria, further information or an alternate nomination was sought. In a few cases, a PQM did not meet one or more of the above criteria mainly because he or she was not fluent in English. In such cases, accommodations were made to communicate in French or Spanish.

The PQM Manual, PQM quiz, the national versions of the Test Administrator's Manual and script, and a copy of the data collection form used to document session observations were made available to all PQMs upon receipt of their signed confidentiality agreement. Self-training involved reading the materials and completing a quiz. The quiz was reviewed by survey operations staff, who provided the answer key and feedback. After completing this self-study, PQMs were required to participate in two trainings: a webinar conducted by the survey operations contractor to review the PQM role and responsibilities, and an in-country Test Administrator training conducted by the National Centre to familiarise PQMs with national procedures and policies.

At the same time, the international survey operations contractor provided support and addressed any issues or concerns via email, telephone, or Skype. The PQMs and the international survey operations contractor collaborated to develop a schedule of test administration site visits to ensure that a range of different school types were covered and that the schedule of visits was both economically and practically feasible. The international survey operations contractor paid the expenses and fees directly to each PQM.

The School Co-ordinator¹ in each school was responsible for providing a link between the NPM and the school, its students, teachers, and principal, as well as organising a suitable venue for the testing. The international survey operations contractor supplied each PQM with the contact information for schools he or she was scheduled to monitor. The PQMs were responsible for contacting School Co-ordinators to inform them of their visits and to confirm the logistics of the assessment such as the date and time.

School visits were unannounced to the Test Administrator. This, of course, was not possible where the Test Administrator and the School Co-ordinator were the same person (School Associate).

INFORMATION COLLECTED IN PQM VISITS DURING TEST ADMINISTRATION

A Data Collection Form (DCF) was developed for PQMs to record their observations systematically during each school visit. The DCF covered the following areas:

- preparation for the assessment,
- conducting the assessment, and
- general questions concerning the assessment.

PISA-D Quality Monitors recorded all key test session information using a hard copy of the Data Collection Form. After each session, the PQM entered the data from this form into the PDF version of the DCF and submitted it to the international survey operations contractor via email. This form provided detailed data on test administration, including:

- session date and timing,
- deviations from standard test procedures,
- conduct of the students, and
- testing environment.

This information was used to check that the implementation in each school was in accordance with the PISA-D Technical Standards. The information was also called upon if a country's results showed, for example, a greater degree of country-item interaction.

DATA ADJUDICATION

All quality assurance data collected throughout the cycle were entered and collated in a central data adjudication database. Comprehensive reports were then generated for the Technical Advisory Group (TAG) for consideration during the data adjudication process (for details and results of the data adjudication process, see Chapter 14).

The TAG experts used the consolidated quality-monitoring reports from the central data adjudication database to make country-by-country evaluations on the quality of field operations, school and student sampling, and coding. The final reports by the TAG were then used for the purpose of data adjudication that took place in June 2018.

Notes

1. Throughout this document, the terms “School Co-ordinator” and “Test Administrator” are used when discussing the administration of the test in schools. However, please note that some countries use School Associates, individuals who fulfil the role of both School Co-ordinator and Test Administrator. School Associates received a School Associate’s Manual and were trained by the National Centre.