

*OECD-GESIS Seminar on Translating and Adapting
Instruments in Large Scale Assessments*

7-8 June 2018

BIOGRAPHIES OF THE SPEAKERS

PRESENTERS



Dorothee Behr is a senior researcher at GESIS – Leibniz Institute for the Social Sciences in Mannheim (Germany). Her research and services focus on translation and translation assessment methodology for cross-national and cross-cultural surveys. As a member of various international consortiums (PIAAC Cycles 1 and 2, ESS 5, EVS 2017), she has been responsible for setting up translation processes, developing translation guidelines (methods, content, IT tools), or integrating the translation perspective into instrument development. She regularly gives workshops on the development and translation of questionnaires. Besides translation, she has worked extensively on cross-national web probing – a mixed-method approach that helps to identify reasons for lack of equivalence in items based on open-ended answers. She holds a degree in translation studies and a doctorate on applied translation studies (questionnaire translation).



Klaus Boehnke is Professor of Social Science Methodology at Jacobs University Bremen, and chairs the Methods Center of the Bremen International Graduate School of Social Sciences (BIGSSS). Since 2017 he also is Deputy Head of the International Scientific-Educational Laboratory for Sociocultural Research at the Higher School of Economics in Moscow. He received his PhD in Psychology from Berlin University of Technology in 1985, and held assistant and associate professorships at the Free University of Berlin. In 1993 he became Professor of Socialization Research at the Department of Sociology of Chemnitz University of Technology, from where he moved to Jacobs in 2002. He is President-elect of the International Association for Cross-Cultural Psychology (IACCP) and was President of the Division of Political Psychology of the International Association of Applied Psychology (IAAP) from 2004 to 2010. He is an Honorary Fellow of IAAP and is affiliated to the Committee for the Psychological Study of Peace (CPSP) as Member and Senior Advisor since its inauguration as an ad hoc committee of the International Union of Psychological Science (IUPsyS) in 1988. His main research interest is in political socialization. He subscribes to a distinctly interdisciplinary approach to research methodology and has published well over 400 papers, among others in *Science*, the *American Journal of Sociology*, the *Journal of Personality*, the *Journal of Marriage and Family*, and other high impact publication outlets.



Steve Dept is one of the founders and co-directors of cApStAn. He is a Senior Associate and the company's hands-on CEO. He grew up in South Africa, Belgium and Germany, and received his primary and secondary education in four different languages (English, Dutch, French, and German). He studied Classical Philology but is essentially an autodidact and a field practitioner in the field of survey methodology. Steve set up his first proprietary translation and proofreading agency in 1993. In 1998, he participated in developing a second source version of the OECD/PISA item pool under the supervision of researcher Aletta Grisay. He was then sought out to organise the translation verification of PISA instruments in 24 languages for the PISA 2000 field trial. That is when he founded cApStAn Linguistic Quality Control (LQC) with Andrea Ferrari. Within cApStAn, Steve has coordinated LQC of PISA instruments across 7 survey cycles. He has supervised LQC Operations in TIMSS, PIRLS, AHELO, PIAAC, LAMP, ICILS, TALIS, ICCS, TEDS-M, STEP, Pew Research Center's Global Attitudes Project, the World Bank's African Enterprise Survey and the ESS. Steve has a helicopter view of cApStAn's activities. He is the architect of cApStAn's workable, suitably scalable and sustainable business model; and the driving force behind its adaptive strategy. Joint activities with researchers and survey methodologists provide input that feeds into the theoretical underpinning of cApStAn's empirical methodology. Steve is a frequent speaker at international conferences and serves on the advisory board of the Cross-cultural Survey Guidelines (CCSG) of the Survey Research Center of the University of Michigan (see <http://ccsg.isr.umich.edu/>).



Brita Dorer is a researcher at GENIS, specialized in the field of questionnaire translation and adaptation. She is heading the translation team of the European Social Survey (ESS) and currently leading Workpackage 3 'Maximising equivalence through translation' in the SERISS Project (Synergies for Europe's Research Infrastructures in the Social Sciences). Her scientific interests include the quality of questionnaire translations and adaptations, translation and assessment methods, translatability of source questionnaires/advance translations, close versus adaptive translations, intercultural aspects of questionnaire translation and translation process research. She is currently preparing a PhD on advance translations carried out for improving the translatability of survey questionnaires in the ESS. She holds a degree in English, French and Italian translation studies from Johannes-Gutenberg-University Mainz, FTSK Germersheim, where she also worked as a freelance lecturer for English-to-German and French-to-German translation. She has been involved in translating survey questionnaires into German, such as ESS, ISSP, PIAAC and SHARE.



Ronald K. Hambleton holds the titles of Distinguished University Professor and Executive Director of the Center for Educational Assessment at the University of Massachusetts Amherst in the USA. He earned his B.A. degree (with Honors) in 1966 from the University of Waterloo in Canada with majors in mathematics and psychology, and an M.A. in 1967 and Ph.D. in 1969 from the University of Toronto with specialties in psychometric methods and statistics. He is a Fellow of Divisions 5 and 15 of the American Psychological Association (APA), a Fellow of the American Educational Research Association, a Fellow of the International Association of Applied Psychology, and a member of the National Council on Measurement in Education (NCME) and the International Test Commission (ITC).

He teaches (or has taught) graduate-level courses in educational and psychological testing, introductory and advanced item response theory and applications, classical test theory models and methods, educational research methods including survey research, and seminars in applied measurement practices and special measurement topics. He has directed recently or co-directs currently, research contracts with the American Board of Certified Public Accountants, College Board, Educational Testing Service, Harcourt Educational Measurement, Measurement Progress, Microsoft, Massachusetts Department of Education, and Pearson Educational Measurement.

Professor Hambleton is the author or co-editor of eight books, and author or co-author of more than 700 research papers, reports, and reviews. He is currently conducting research on a number of topics: Computer-based testing (e.g., detecting item exposure), new test designs (specifically, multi-stage test designs), validity of emerging item types for assessment, development and validation of new methods for setting standards on performance assessments, methods and guidelines for adapting tests from one language and culture to another, design and field-testing of new approaches for reporting test scores, and technical issues in large-scale assessment programs (e.g., score reporting, and evaluation of standards). Professor Hambleton has also presented (or co-presented) over 600 papers at regional, national, and international conferences.



Danina Lupsa was born in Romania and has been living in Belgium for nine years. She has also lived in Saarbrücken, Germany for a few months. Apart from her native tongue (Romanian), she is fluent in French, English and German and has basic knowledge of Croatian. She obtained a Bachelor degree in Chemistry before studying multidisciplinary translation in the Translation and Interpreting department (ISTI-Cooremans) at the Université Libre de Bruxelles (ULB). Her passion for science sparked an interest in translation technology and she started learning how to use CAT tools in her free time to improve the consistency and quality of her translations. While studying, she started working at cApStAn as a translation technologist to offer first-tier technical support for OmegaT in PISA 2018. Since then, Danina has been involved in the coordination of several multilingual translation projects for ACER, CIPFA (The Chartered Institute of Public Finance and Accountancy), CONFEMEN, DIPF, HPEI (HalinPrémont Enneagram Institute), IEA, IPSOS MORI, PISA 2018 and UNESCO.



Maria Elena Oliveri, Ph.D., is a Research Scientist at Educational Testing Service in the Academic to Career Center. From the University of British Columbia (UBC), Vancouver, Canada, Dr. Oliveri completed a Ph.D. and Masters' degrees in measurement, evaluation and research methodology as well as a Master's degree in Clinical Counselling Psychology and completed most of the coursework for a School Psychology Masters' degree.

Dr. Oliveri's work portfolio includes significant contributions to fairness, validity, and innovative assessment design in support of learners from diverse cultural and linguistic backgrounds. She is currently the Associate Editor of *International Journal of Testing*; is co-editing a University of Cambridge book, titled *Higher Education Assessment Practices: An International Perspective*, and chairing the International Test Commission Guidelines titled *ITC Guidelines for the Large-Scale Assessment of Linguistically Diverse Populations*. She is currently leading the development of prototypes of scenario-based assessment tasks focusing on workplace English communication, and science-based tasks for underserved learners in elementary school.

She has actively disseminated her research in numerous published articles in journals such as *Applied Measurement in Education* and *International Journal of Testing*, led various professional development workshops at national and international conferences such as AERA, NCME, and ITC, and presented at numerous national and international conferences. Her article [*Toward Increasing Fairness In Score Scale Calibrations Employed In International Large-Scale Assessments*](#) was the most-read article by Taylor & Francis.

In earlier stages of her career, she was a literacy mentor to second-language teachers in the Vancouver School District, a teacher of second language learners and students with disabilities hosting demonstration classes for educators on innovative approaches to assessing culturally and linguistically diverse learners. She also taught courses on assessment and developmental psychology to students pursuing Bachelors of Education French Immersion programs at the University of British Columbia.



Yuri Pettinicchi is a survey specialist working for SHARE (Survey of Health, Ageing and Retirement in Europe) at Munich Center for the Economics of Aging (MEA) - Max-Planck-Institute for Social Law and Social Policy. For the last two years he has been taking care of the translation procedures. His work is about managing 28 country teams dealing with 40 country-specific languages.

Previously he worked for survey projects at Goethe University (Frankfurt) and Ca' Foscari University (Venice). He was part of the questionnaire development and operation teams of small-scale survey (one language in one country). These surveys investigated household finance related issues such as financial literacy, expectations and inter-generational transfers. He obtained his Ph.D in Economics from the University of Venice in 2012.



Stephen G. Sireci, Ph.D. is Distinguished University Professor and Director of the Center for Educational Assessment in the College of Education at the University of Massachusetts Amherst. He earned his Ph.D. in psychometrics from Fordham University and his master and bachelor degrees in psychology from Loyola College in Maryland. Before UMASS, he was Senior Psychometrician at the GED Testing Service, Psychometrician for the Uniform CPA Exam and Research Supervisor of Testing for the Newark NJ Board of Education. He is known for his research in evaluating test fairness, particularly issues related to content validity, test bias, cross-lingual assessment, standard setting, and computerized-adaptive testing. He is the author of over 130 publications and conference papers, and is the co-architect of the Massachusetts Adult Proficiency Tests. He is a Fellow of the American Educational Research Association and a Fellow of Division 5 of the American Psychological Association. Formerly, he was President of the Northeastern Educational Research Association (NERA), Co-Editor of the International Journal of Testing, a Senior Scientist for the Gallup Organization and a member of the Board of Directors for the National Council on Measurement in Education (NCME). He has received several awards from

UMass including the College of Education's Outstanding Teacher Award, the Chancellor's Medal, the Conti Faculty Fellowship, and a Public Engagement Fellowship. He also received the Thomas Donlon Award for Distinguished Mentoring and the Leo Doherty Award for Outstanding Service from NERA, and the Samuel J. Messick Memorial Lecture Award from Educational Testing Service and the International Language Testing Association in 2017. Professor Sireci reviews articles for over a dozen professional journals and he is on the editorial boards of *Applied Measurement in Education*, *Educational Assessment*, *Educational and Psychological Measurement*, and *Psicothema*. He was recently elected President-elect for NCME, and will assume the presidency in 2019.



William Thorn is a Senior Analyst in the Skills Beyond School Division in the Directorate for Education and Skills of the Organisation for Economic Cooperation and Development. He joined the OECD in August 2007. He currently manages the OECD's Programme for the International Assessment of Adult Competencies (PIAAC). Prior to joining the OECD, Mr Thorn held a wide range of senior positions in the Australian federal Departments of Education and Employment. This included the management of units responsible for research into education and the labour market, programme evaluation, statistical collections and analysis, tertiary education funding policy and the Commonwealth government's role in the testing and monitoring of basic skills such as literacy and numeracy in Australian schools.

Britta Upsing is the project manager of "MySkills – Identifying Professional Competencies" at the TBA Centre at the German Institute for International Educational Research (DIPF). The TBA Centre is a research and infrastructure centre that develops technology-based procedures for the survey of learning result. Britta Upsing joined the TBA Centre in 2007, and was the project coordinator for PIAAC at DIPF between 2007 and 2012.

Britta Upsing majored in applied linguistics and information science in 2005. She obtained her PhD in information science at the University of Hildesheim in 2017. In her thesis, she analysed translation and adaptation processes in PIAAC and other international large-scale assessment studies from the point of view of information science, focusing on the interplay between information needs of translation players and the information provided for the translation process.



Fons van de Vijver has studied psychology at Tilburg University in the Netherlands. He holds a Ph.D. from the same university. He holds a chair in cross-cultural psychology at Tilburg University, the Netherlands and an extraordinary chair at North-West University, South Africa, and the University of Queensland, Australia.

He has (co-)authored more than 500 publications, mainly in the domain of cross-cultural psychology. The main topics in his research involve bias and equivalence, psychological acculturation and multiculturalism, cognitive similarities and differences, response styles, translations and adaptations. He is or has been supervising about 35 PhD studies and 10 post-doc studies. He has teaching experience in cross-cultural psychology and methods/statistics. He has presented keynotes and invited lectures at various conferences and workshops in various countries. He is one of the most frequently cited cross-cultural psychologists in Europe. He is the former editor of the *Journal of Cross-Cultural Psychology*, and serves on the board of various journals; he has evaluated manuscripts for about 150 journals as ad-hoc reviewer. He is a former president of Division 2 (Assessment and Evaluation) of the International Association of Applied Psychology, the European Association of Psychological Assessment, and President of the International Association for Cross-Cultural Psychology. He is the 2013 recipient of the International Award of the American Psychological Association (for his contributions to international cooperation and to the advancement of knowledge of psychology) and the 2014 recipient of the IAAP Fellows Award (of the International Association of Applied Psychology for contributions to applied psychology) and the 2014 Sindbad Award of the Dutch Psychological Association (for his contributions to intercultural psychology).

MODERATORS



David Ebbs is a Senior Research Officer at IEA Amsterdam. He is experienced in managing the international translation verification processes for IEA, including the continuing training and re-training of international translation verifiers. Currently, he is overseeing the translation verification process for IEA TIMSS 2019. In addition, he is overseeing the translation verification and international quality assurance processes for IEA ICILS 2018, OECD TALIS 2018 and the OECD International ECEC Staff Survey. Together with colleagues from the IEA and the TIMSS and PIRLS International Study Center at Boston College, he works to further develop and improve the IEA e-Assessment system.



Béatrice Halleux is the manager of HallStat SPRL. She was the translation referee for PISA 2009, 2009+, 2012 and 2015 and currently is the translation referee for PISA 2018 and Pisa for Development. Her role notably includes monitoring the translation verification process, adjudicating the verification feedback for all national versions of cognitive instruments, managing potential disagreements with the translation verification team, reviewing all country requests for change in trends, establishing languages of testing with the sampling team, negotiating translation plans with each country, collaborating on the translation and verification procedures, guidelines and reports, providing advice on item writing (translatability review and item developers training on how to anticipate translation and cultural issues when writing items) and collecting countries suggestions for improvement.

Previously she was teacher in a Belgian Primary School for 14 years, then worked at the Australian Council for Educational Research from 2001 to 2002. She has been involved in OECD/PISA studies since 2001. For PISA 2003, she was in charge of finalising the instruments, documents, and manuals in French as well as the verification procedures and translation and adaptation guidelines. Ms. Halleux was the Translation and Verification Supervisor for PISA 2006. In PISA 2006, 2009 and 2012, she was responsible of the development of the French source version. Her consultancies included among others providing recommendation on translation for the AHELO study (OECD), reviewing the English questionnaires for the “International Study of

City Youth” (Melbourne University), preparing the French source for PISA 2015 and 2018 (cApStAn), adjudicating the French version of “ESENER 2” questionnaire (cApStAn) and reviewing the verification of the national versions for the pilot OECD study “Teachers’ Pedagogical Knowledge” (cApStAn).



Alisú Schoua-Glusberg is a cultural/linguistic anthropologist with over 30 years of experience in survey instrument translation and adaptation. She is a survey methodologist with particular expertise in the use of qualitative research to support multilingual instrument design. Since 1988 she has directed surveys at the National Opinion Research Center, Harvard University Medical School, Metropolitan Chicago Information Center, IMPAQ International, and Research Support Services.

Dr. Schoua-Glusberg has specialized in research studies with immigrant populations in the U.S., and in particular with Latin American immigrants, including topics such as methodology for instrument translations and qualitative pretesting of survey instruments in Spanish. An expert cognitive interviewer, since 2005 she has trained others internationally on cognitive interviewing techniques. In 2014 she co-authored a book chapter, "Assessing Translated Questions via Cognitive Interviewing."

Widely known in the U.S. and Europe as an expert in questionnaire translation, she has served on the US Census Bureau Expert Panel on Translation and is a current member of European Social Survey Translation Taskforce. She has written and presented extensively on the topic and has taught translation short courses and webinars on survey translation. She has led the Spanish translations for major US surveys, including the ECLS-K, MGLS, NPSAS:16, HSLs:09, the Education Longitudinal Study of 2002, the National Immunization Survey, National Survey of Family Growth, National Children's Study, National Household Study on Drug Abuse, General Social Survey, Panel Survey of Income Dynamics, and the American Time Use Survey. She is currently managing translations for two OECD-sponsored studies: the U.S. IELTS Pilot, and the Study on Social and Emotional Skills.



Anouk Zabal is a senior researcher at GESIS – Leibniz Institute for the Social Sciences in Mannheim (Germany). Her work focusses on different survey methodological topics, including survey operations, item development and questionnaire construction, as well as the translation and adaptation of survey instruments. As a member of various international consortiums (PIAAC Cycles 1 and 2, ESS, expert for ALL) and through her work in the National Project Management for PIAAC in Germany, she has extensive experience with international large-scale surveys and specifically the challenges of translating and adapting measurement instruments – both from the perspective of writing international translation guidelines, as well as from the country side as producer of national instrument versions.



Diana Zavala-Rojas is a survey methodologist interested in all aspects of the survey lifecycle. She is a specialist in multinational, multicultural and multilingual comparative surveys holding a doctorate in comparative survey methodology.

She is a member of the Core Scientific Team of the European Social Survey (ESS) based at Universitat Pompeu Fabra in Barcelona. In the ESS she collaborates on questionnaire design, translation, measurement quality and cross-national measurement equivalence. She has participated in the design and evaluation of the questionnaires of the ESS Rounds 6 to 9. She is also a member of the ESS Translation Expert Task Group. Diana is a researcher in the Synergies for Europe's Research Infrastructures in the Social Sciences project, studying the feasibility of applying computational linguistic methods to survey translation.

As a survey advisor, she has large experience as advising and training on questionnaire design, measurement quality of survey questions and analysis of survey data. In her previous experience, she coordinated the electoral surveys of a national newspaper for the 2006's Mexican presidential election. She collaborated as public opinion consultant at Mexican Senate and the Mexican Congress. Diana has been consultant for World Health Organization (WHO) advising on projects in Turkey and Spain.

Her current research lines focus on 1) quality of cross-cultural survey data, analysing the effects of minority languages in the reliability and validity questions. 2) Language effects in surveys by studying multilingual measurement equivalence. 3) Survey translation and, 4) correction for measurement errors in survey research. Other research interests are experimental designs in survey research and structural equation modelling.