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Teaching and Learning International Survey (TALIS) 2024

Roles and Responsibilities of NPMs

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International Consortium



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1 Introduction

Each TALIS participating country/economy (the “participant”) will appoint a National Project Manager (NPM) to take responsibility for the implementation of TALIS at the national level in liaison with that participant’s TALIS Governing Board (TGB) member. A well-qualified NPM is essential to the successful implementation of TALIS. The NPM position is a demanding and important one that requires constant attention to details, with overall responsibility for ensuring that all required tasks are carried out on schedule and with high quality according to the TALIS Technical Standards and as specified in the operational manuals. It is requested that only one NPM is appointed for all TALIS modules a participant may want to choose. The possibility of a second NPM will only be considered for exceptional cases.

The NPM is the main contact person for communication between the national centre and the international consortium. The NPM is expected to be responsible for and liaise with the consortium on the preparation and implementation of the pilot (where applicable), field trial and main survey, including, but not limited to: detailed reports of sampling plans; adaptation and translation of survey instruments, data collection procedures and manuals; quality control measures; the overall conduct and progress of the data collection and data capture; as well as cleaning and verification steps according to the TALIS Technical Standards and additional guidelines.

The participant will inform the consortium of the appointed NPM’s name, qualification, institutional affiliation and contact details. As a standard, NPMs should be appointed at the earliest opportunity but no later than 31 May 2021, to assure preparation for and participation in the virtual on-boarding NPM meeting scheduled for June 2021.

Each participant will establish a national centre, which is the local TALIS study centre to carry out the survey at the national or sub-national level. The national centre will be managed by the NPM. Depending on the participant’s resources the NPM may be assisted by a national sampling manager (NSM), a national data manager (NDM), and/or other support staff as described below. The experience and expertise of the NPM and the staff in her/his institution will influence how the range of tasks are allocated at the national centre.

The document describes the roles and the responsibilities of the NPM and discusses how the survey’s workload might be allocated to clerical/administrative support staff as well as to staff or sub-contractors assisting with translations, sample selection, field operations or data management.

2 Profile of National Project Managers

The position of NPM will desirably be full-time under stable conditions for continuity of activities over the course of the project, i.e., minimally until October of 2025, which is the period for the release of the initial results and reports targeted by the TGB. It should be made clear that, in the case that an NPM resigns or is replaced before October 2025, a systematic and comprehensive knowledge transfer needs to take place to prevent loss of information or delays with respect to the project’s timeline and/or tasks. Unless one or more international survey modules are taken up (ISCED 0, ISCED 1, ISCED 3, Novice Teacher Survey, Teacher Knowledge Survey), the NPM position’s time commitment could be less than full-time, depending on the availability of administrative assistants and senior staff for data management, sampling activities and/or field operations. However, it is recommended that a NPM commits at least half of his or her time to the project, year-round, to ensure the continuity of activities.

For those participants that have implemented TALIS 2013 and/or TALIS 2018, it is recommended to appoint the previous successful NPM again for the sake of continuity. Where this is not possible or

desired, new NPMs should liaise at least initially with the previous NPM and team to maximise the benefit in the use of materials and previously gained experience.

It is essential that a person appointed as NPM has:

- a high level of oral and written communication skills in English as all meetings, working documents, manuals for NPM use, and communications within the consortium are in English
- a university degree in education, educational psychology, assessment and measurement, or equivalent qualification/experience
- in-depth knowledge of the participant's school system and in case of participation in the ISCED 0 module also of the early childhood education and care (ECEC) system
- desirably previous experience in planning, organising and conducting international large-scale surveys and assessments in education
- ability to compose and manage a staff team to carry out project tasks such as survey planning, preparing national survey instruments, managing school/ECEC contacts, cooperating with national stakeholders etc., often needing simultaneous attention
- knowledge of and the confidence to liaise with government agencies, trade unions, school/ECEC leaders and teachers/ECEC staff as applicable, most importantly to obtain school/ECEC and teacher/ECEC staff cooperation
- familiarity with national large-scale sampling, survey quality control and data management procedures
- ability to oversee translation, adaptation, and verification activities
- sufficient knowledge of and experience with the overall TALIS design, processes, and procedures to represent the participant at international meetings where aspects of the project will be discussed
- basic statistical knowledge as well as familiarity with statistical packages such as SPSS or STATA
- familiarity with standard Microsoft applications such as Word, Excel, and PowerPoint.

In the case that the NPM will be responsible for the development and production of a national TALIS report, the NPM should also desirably possess advanced statistical knowledge, knowledge on cross-national comparisons, about the participant's policy questions and contexts as well as the ability and experience to write a policy-related report. The purpose of a national TALIS report is to inform all relevant national stakeholders about the TALIS results by focussing on themes of special interest with respect to the participant's educational system.

If a qualified candidate has familiarity with only some of these areas, members of the national team collectively will have to possess the required expertise as described under point 8 and 9.

3 Key survey periods

Since its first implementation in 2008, TALIS has been administered on a five-year cycle. However, TALIS is now administered under a six-year cycle to allow alignment with the OECD PISA project. TALIS involves instrument development, three key-milestones of data collection (an optional qualitative pilot, a mandatory quantitative field trial and the main survey), analysis and dissemination.

Key activities during the survey period are:

Date	Activity	Responsibility
Fourth quarter of 2021 and first quarter of 2022	Preparation and implementation of pilot survey	NPM
Second to fourth quarter of 2022	Preparation of field trial data collection: sampling, translation, adaptation, verification, training of School/ECEC Coordinators	NPM/NSM
First quarter 2023	Field trial data collection according to international standards	NPM/NDM
Second to fourth quarter 2023 (Northern hemisphere) Third and fourth quarter 2023 and first quarter 2024 (Southern hemisphere)	Analysis of field trial data, preparation for main survey data collection: sampling, translation, adaptation, verification, training of School/ECEC Coordinators	NPM/NDM
Feb – Apr 2024	Main survey data collection in Northern hemisphere countries	NPM/NDM
Jun – Aug 2024	Main survey data collection in Southern hemisphere countries	NPM/NDM
Third quarter 2024 – third quarter 2025	Analysis of main survey data, preparation and review of national databases, preparation of reports and dissemination of products	NPM/NDM/NSM
First quarter and beginning of second quarter 2025	Main survey follow-up data collection (only Novice Teacher Survey)	NPM/NDM
Third quarter 2025	Analysis of updated main survey data (including data from follow-up data collection of the Novice Teacher Survey), review of updated national databases, preparation of updated reports and dissemination of updated products	NPM/NDM

4 Responsibilities, required and optional resources

The NPM will undertake or supervise all tasks related to the development and implementation of TALIS at the national level. NPMs are expected to have appropriate levels of financial and human resources to be able to perform their tasks according to the TALIS Technical Standards and the guidelines released by the international contractor. NPMs will perform all tasks in compliance with

the data protection laws in place in the country. The following illustrates indicative human and material resources that may vary considerably under local conditions.

4.1 National centres and staff

Each participant will establish a national centre within the NPM's institution. The tasks and responsibilities assigned to TALIS will require additional staff members in addition to the NPM. The workload as well as the required expertise will differ during the duration of the project, especially at peak times, e.g., school/ECEC contact and within-school/ECEC listing and sampling, as well as by the overall volume of activities determined by local conditions and participation in international options. General clerical/administrative support will be necessary as well as assistance with translations, sampling, field operations and data capture. Clearly, multiple tasks/areas can be allocated to a single individual if his/her expertise and skill set allows this. If the NPM is working full time on TALIS and has expertise for example with survey design, data management and analysis, a second full-time staff member could for example fill the role of an administrative officer and a sampling manager or translation coordinator.

Administrative support will be needed during specific, busy phases of the project, such as school/ECEC contact or the dispatch and receipt of materials (including lists, tracking forms, cover letters in electronic or paper form). This can be expected to vary by country, depending mainly on the effort required to complete each task. Varying levels of support may also include gaining cooperation of local jurisdictions and stakeholders prior to contacting schools/ECEC and teachers/ECEC staff, dealing with logistical factors, and coordinating the appropriate level of translation or adaptation, especially if more than one survey language is used. Additionally, temporary IT support may be needed to support participating schools/ECEC and teachers/ECEC staff in case of technical issues related to the on-line data collection mode.

4.2 Translation and adaptation tasks

The international source version of the survey instruments for the field trial and main survey are to be released in English. The preparation of national survey instruments needs to follow the TALIS Technical Standards and the operational manuals and guidelines provided by the consortium.

The NPM is responsible for the following translation and adaptation activities:

- coordinate and monitor the translation of instruments, including the employment of translators and reviewers according to international specifications
- prepare and document the national adaptation of instruments and supporting materials according to international specifications
- communicate with the consortium on translation and adaptation issues
- finalise the national versions of instruments on the basis of the agreed adaptations and international translation verification outputs
- organise the adaptation and translation of operational manuals, mainly the School/ECEC Coordinator Manual, as needed.

4.3 Sampling and National Sampling Managers (NSM)

Participants may consider appointing a National Sampling Manager (NSM) to assist with all sampling-related activities, including national sample planning and stratification, frame preparation, sample selection, non-response bias analysis and communication with the consortium's sampling team. The expertise of the sampling manager would be required at the beginning of the project

until the time all main survey samples will have been drawn and – if at all necessary – towards the end of the survey when participants need to perform non-response bias analysis.

If a participant opts for nominating a NSM, it is recommended that the role of NSM is filled by a person with a statistical background. In this way, the NSM can provide support to the NPM. It is further recommended that the NSM be able to attend sampling related parts of early NPM meetings held by the consortium.

It is desirable that the NSM has following qualifications:

- knowledge of the participant's school/ECEC system
- experience in probability sample design, stratification and selection
- familiarity with weighting and, desirably, non-response bias analysis procedures
- familiarity with design-based estimation
- proficiency in English to reliably engage in sampling related communication with the consortium.

For the field trial as well as the main survey the NPM is responsible for the following sampling activities:

- coordination and monitoring of the sample design, frame preparation, and selection process according to detailed specifications provided by the consortium
- carrying out quality control and plausibility checks on teacher/ECEC staff lists and samples to identify, for example, teacher/ECEC staff lists that were abbreviated to just those that agreed to participate or are otherwise incomplete/inaccurate (school/ECEC sampling)
- coordination and monitoring of the listing of respondents teaching in/working with the target population in the sampled schools/ECEC, selection of a random sample of teachers/ECEC staff from these lists, and assignment of survey instruments to teachers/ECEC staff and school/ECEC leaders (within-school/ECEC sampling)
- If one or more international modules are taken up, discussion and agreement on the specifics of the sample design and selection with the consortium, especially with respect to sampling frame alignment and overlap control to avoid multiple sampling of schools for different options or other obstacles that may arise due to simultaneous survey administration.

4.4 National Data Manager (NDM) and staff for data capture

Since data related tasks tend to be highly technical and require special skills, each participant is requested to nominate a National Data Manager (NDM) who will be responsible for the day-to-day data management tasks. The NDM should work under stable conditions, i.e., be the same person throughout the project, including the main data collection in 2024 and the subsequent post-collection phase preferably until October 2025.

The NDM should possess:

- knowledge and skills with respect to survey research in general, and specifically the TALIS sample design, instruments, and variables
- the required technical skills with respect to (relational) databases
- experience in planning, conducting and supervising the data capture and management in large-scale surveys of this kind

- basic statistical knowledge as well as familiarity with statistical packages such as SPSS or SAS
- familiarity with standard Microsoft applications such as Word and Excel
- proficiency in English to reliably engage in data related communication with the consortium.

The NDM will be responsible for carrying out and overseeing all data-related activities during the field trial and the main survey. Attendance in data management trainings prior to the field trial is mandatory for performing the following activities:

- organisation and monitoring of data capture operations
- carrying out validation checks of data from the survey instruments following guidelines and specifications
- organisation of the dispatch of sampling and instrument data files
- responding to data queries from the consortium preferably within a few days
- attending secondary analysis training workshops to understand TALIS analysis and estimation methodologies and to develop expertise in the appropriate use of TALIS data products
- conducting national analyses, both for data checking purposes and for preparation of international reports
- participation in the review and validation of results generated by data products, most importantly the draft international report(s).

4.5 School/ECEC Coordinators

A staff member in each sampled school/ECEC or external personnel will need to be nominated as a School/ECEC Coordinator.

The NPM is responsible for the following tasks:

- recruitment of a staff member from each sampled school/ECEC, the School/ECEC Coordinator, whose work shall involve the collection and recording of information about the target population(s) within the school/ECEC, dissemination of information to the school/ECEC community, and assisting in the distribution and collection of survey instruments
- carrying out of training sessions for School/ECEC Coordinators on target population definitions and exclusions, listing procedures, survey instrument administration, and the confidentiality of the information provided by respondents. It is under the auspices of the NPM to develop training sessions that are based on the standards and guidelines prepared by the consortium
- coordination and monitoring of the production, dispatch and receipt of materials to and from schools/ECEC and ensuring that the procedures for administering the survey instruments are thoroughly understood and implemented by the School/ECEC Coordinators
- monitoring of the data collection progress and initiation of appropriate counteractive measures as needed, prioritising the non-response follow-up activities following TGB/OECD Secretariat recommendations in case of multiple modules.

4.6 Quality control observers

National and international quality controls are crucial for the successful implementation of TALIS. Key tasks for the NPM are to:

- provide and ensure quality assurance/control throughout the implementation of the survey, through prescribed monitoring, verification, and reporting activities
- nominate a national expert to serve in the role of TALIS international quality observer (IQO), for the ISCED Level 2 Core survey as well as the international modules (if applicable), who will be hired and trained by the consortium.
- liaise with the IQO during the main survey data collection by providing assistance as needed
- design and implement a national quality control monitoring programme based on the recommendations from the consortium.

4.7 Advisory committees and groups

Where advisable or desired, the NPM organises a national advisory committee composed of experts in the field of educational survey research to offer advice to the project with respect to substantive question of adapting materials to the local context as well as operational matters such as contact strategies or maximising response rates.

The purpose of such a committee would further be to contribute to the review of the instruments, in light of the conceptual framework, assist with forming the participant's position on the materials, and communicate this to the members of the consortium and to the questionnaire expert groups via the respective TGB member.

4.8 Subcontracted survey organisations

From experience, it is recommended that all tasks relating to the national project implementation be carried out at the NPM's organisation and under his or her direct supervision. However, a NPM may wish to or be required to delegate certain tasks in the project's implementation, such as the data collection in the field or the data capture, to a sub-contracted survey organisation. Where this is the case, the survey organisation should have the following qualifications:

- experience in collaborating successfully with other institutes/organisations/agencies
- substantial and professional practical survey experience
- capability to adhere to the Technical Standards defined for TALIS, including, but not limited to, the confidentiality of information
- successful completion of national probability surveys with considerable sample sizes of several thousand respondents.

If applicable, the participant will inform the consortium of the name, qualifications, and scope of work of the survey organisation. It will be the responsibility of the NPM to supervise the survey organisation's work and ensure the adherence to the TALIS Technical Standards and specifications in the operational manuals.

5 Facilities

Some facilities are mandatory to be available to the NPM and the national centre staff when establishing a national centre:

- availability of required hardware/software and necessary equipment, resources and materials, namely PCs running Microsoft Windows 7 or above with Office 2010 or above versions of the Excel, Word and PowerPoint applications
- reliable high-bandwidth Internet connection to monitor and utilise the secure TALIS website for material release and communication (including virtual meetings as necessary) on all project related activities
- reliable email facilities, as the bulk of the communication between the national centre and the consortium will be via email
- a Microsoft account to access the TALIS SharePoint website
- secure space for the storage of equipment and materials.

6 Dissemination

An important strategy in raising the awareness of TALIS is the dissemination of promotional material and reporting back the results of the survey. This could involve:

- communication of the participant's position on aspects pertaining to the project's national implementation
- preparation and/or tailoring a school/ECEC outreach strategy and related materials in an effort to promote the project and maximum participation, liaison with local media, trade unions or other stakeholders, if appropriate
- production of local promotional and publicity materials
- production of national reports of the survey results (main survey only). It is recommended that a national dissemination strategy be developed that takes the international reporting timeline into account (the initial international reports are planned to be released in October 2025. Until that date all national and international data are under embargo).

7 Tentative meeting and training schedule

NPMs (and other key national staff, as applicable) are expected to attend up to five international NPM meetings either in person or virtual during the survey period as indicated in the overall survey schedule. NPM meetings are convened for three main purposes: (1) to provide a forum for NPMs to receive overall status reports and review as well as comment on proposals presented by the consortium and the OECD Secretariat relating to the instruments, sampling requirements, field operations and data management; (2) to provide training for NPMs on sampling, adaptation and translation procedures, field operations, quality control monitoring, data capture, cleaning and delivery; and, (3) to brief NPMs on data analyses and report preparation at the international and national levels as well as to provide NPMs with the required analytical knowledge to conduct statistical estimations on their own. NPM meetings are a crucial aspect to the successful implementation of the survey as they provide a direct communication line between the NPM, the consortium and the OECD.

NPMs and other key national staff are expected to attend international meetings in person or, if required, virtual:

- NPM On-boarding Meeting: June 2021 (virtual)
- 1st NPM Meeting: September 2021 (virtual)
- 2nd NPM Meeting: August 2022 (location tbd)

- 3rd NPM Meeting: September 2023 (location tbd)
- 4th NPM Meeting: November 2024 (location tbd).

Data Management Training is provided twice during the survey period and National Data Managers and other key national staff are expected to attend such training sessions:

- Data Management Training: August 2022 (directly following the 2nd NPM Meeting)
- International Database Analysis Workshop: March 2025 (webinar series)

Additional virtual meeting and webinars may be provided upon request throughout the survey cycle to cover specific issues related to the project. NPMs and other key national staff are expected to participate in these webinars and meetings.

The International Study Centre wishes all NPMs and their teams a successful implementation of TALIS!