

PISA 2022 Technical Report



9 PISA Quality Monitoring

Introduction

PISA data collection activities were undertaken in accordance with strict quality assurance procedures. These procedures have two components: first, to develop and document procedures for data collection; and second, to monitor and record the implementation of those procedures. Chapter 8 describes the procedures which National Centres were required to follow while this chapter considers the second part of the process – monitoring data collection quality.

While the aim of quality control was to establish effective and efficient 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:

- Field Trial and Main Survey review questionnaires,
- National Centre Consultations,
- PISA quality monitor (PQM) Hiring Process,
- PISA quality monitor training,
- PISA quality monitor visits for the Main Survey,
- Data adjudication.

Field Trial and Main Survey review questionnaires

After the implementation of the Field Trial and the Main Survey, National Project Managers (NPMs) were asked to review and provide feedback to the international contractors on all aspects of their field operations. This information is used to guide future cycles of the PISA assessment at both the jurisdiction and international levels.

The Field Trial Review and the Main Survey review questionnaires were submitted via SurveyMonkey (a secure online survey platform). The review questionnaires were due no later than 4 weeks after the submission of the national database, which in turn is due no later than 8 weeks after the last date of testing, or on a flow basis after completion of each phase such as translation of instruments. The data from these two questionnaires were compiled into reports that were released after the Field Trial and Main Survey.

The Field Trial and Main Survey review questionnaires were organised around the different activities that took place during the Field Trial and Main Survey phases of the assessment. A rating system was used to document NPMs' level of satisfaction with or comments on:

- use and clarity of key documents and processes;
- communication with the international contractors;
- review of the quality of communication by activity;
- review of the usefulness of the PISA Portal;

- review of the quality and usefulness of the meetings (in-person and virtual);
- breaches of security and/or confidentiality;
- review the sampling tasks, the sampling software (ACER Maple) and the sampling process;
- review the translation, adaptation and verification processes;
- preparation of school-level materials and the process for adapting them, the webinars given on Test Administrator (TA) training and gaining co-operation and other test administration procedures;
- review of the coding process including coder training, coding systems and coding occupational categories; and
- review the data management process including data entry, data importing, data submission and data cleaning.

National centre consultations

Constant consultations took place between senior international contractor staff, NPMs or other representatives of National Centres throughout the entire PISA 2022 cycle. The consultations provided the opportunity for detailed discussions on a wide variety of PISA implementation questions and concerns.

PISA Quality Monitor Hiring Process

The number of PQM hired depended on the specific situation in each jurisdiction. For jurisdictions with a six to eight week assessment period, three PQMs generally were required. Shorter assessments required more PQMs. Jurisdictions with adjudicated regions usually required more PQMs. The number of PQMs per jurisdiction for PISA 2022 ranged from one to eight.

All PISA Quality Monitors were nominated by the NPMs and sent to the international survey operations contractor. Based upon the NPM nominations, which were usually accompanied by candidate CVs, the survey operations contractor selected monitors who were independent from the National Centre, generally knowledgeable in testing procedures or with a background in education and research and able to communicate adequately in English. In this context, independent from the National Centre means: a) not paid by or reporting directly to the NPM, b) not an immediate familiar member of the NPM or National Centre staff.

Suitable candidates were further vetted by the international survey operations contractor who interviewed them usually remotely. In the case of candidates returning from the PISA 2018 cycle, they received updated information via emails and sometimes were contacted by Zoom or WhatsApp if there were further questions. The survey operations contractor was responsible for hiring candidates in each of the participating jurisdictions, organising their training, selecting the schools to visit and collecting information from the PQM visits. Before getting access to confidential material such as the names of participating schools, names of students or test material, every PQM signs an Honoraria and Confidentiality Agreement.

PISA Quality Monitor Training

After signing the Honoraria and Confidentiality Agreement, PQMs also were given access to the school-level materials (manuals and script in both English and the regional language).

Each PQM was required to participate in two trainings: The National Centre Test Administrator Training and the PQM online training presented by the survey operations contractor The Test Administrator Training

was in-person, online, a combination of the two, or self-study. The purpose of this training was to familiarise the PQM with the tasks and procedures TAs needed to successfully conduct assessments.

Prior to the PQM training, PQMs received the PQM Manual and the Data Collection Form (DCF) used to document assessment observations. This training reviewed their role and responsibilities as quality monitors and familiarised PQMs with general PISA procedures and policies. After training, PQMs were required to complete a quiz that was reviewed by survey operations staff who provided feedback as needed. Survey operations contractor staff continued to be available to the PQMs when updates were needed or they had any questions or concerns.

PISA Quality Monitor Visits

PQMs visited a subset of schools to observe and to document the test administration. In each jurisdiction, at least, 15 schools (or sessions if more than one session was observed in a school). Five schools at a minimum were observed in each adjudicated region.

Survey operations contractor staff worked with each PQM to develop a schedule of school site visits to ensure that a range of different schools (roughly corresponding to the sampling strata plan) was covered and that the schedule of visits was both economically and practically feasible. Upon completion of their observations, the international survey operations contractor paid approved expenses and fees directly to each monitor.

Prior to visiting a school, PQMs contacted the School Coordinator and/or school principal to explain the purpose of the visit and to obtain information about the arrival time and other logistical information about the visits. Test Administrators were not informed of these visits in advance. School Associates who served as both TA and School Coordinators (SC) were informed of PQM visits in advance.

The international survey operations contractor also provided support to the National Centres throughout the data collection phase and addressed any issues or concerns with National Centres that were noted during the quality monitor visits.

Information collected in PQM observations

The Data Collection Form was developed for PISA Quality Monitors to record their observations systematically during each school visit. The form covered the following areas:

- preparation for the test session,
- testing environment,
- conducting the assessment
 - session date and timing
 - deviations from standard test procedures
 - conduct of the students,
- administering the questionnaire,
- other comments about the test session.

PQMs recorded all key test session information using a hard copy of the DCF. After each session, the monitor entered the data into the SurveyMonkey form.

This information was used to check that the implementation in each session was in accordance with the PISA Technical Standards. Discrepancies were reported to National Centres and clarified as needed. The information was also called upon if other contractors or the Technical Advisory Group (TAG) had any concerns or questions about the data and data collection process as mentioned below.

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 TAG to consider during the data adjudication process.

The TAG experts used the quality-monitoring reports from the central data adjudication database to make individual evaluations for each jurisdiction on the quality of school and student sampling, survey operations, translation and coding and data quality. The final reports by TAG experts were then used for the purpose of data adjudication that took place prior to the release of the data in 2023.

This work is published under the responsibility of the Secretary-General of the OECD. The opinions expressed and arguments employed herein do not necessarily reflect the official views of the Member countries of the OECD.

Note by the Republic of Türkiye

The information in this document with reference to “Cyprus” relates to the southern part of the Island. There is no single authority representing both Turkish and Greek Cypriot people on the Island. Türkiye recognises the Turkish Republic of Northern Cyprus (TRNC). Until a lasting and equitable solution is found within the context of the United Nations, Türkiye shall preserve its position concerning the “Cyprus issue”.

Note by all the European Union Member States of the OECD and the European Union

The Republic of Cyprus is recognised by all members of the United Nations with the exception of Türkiye. The information in this document relates to the area under the effective control of the Government of the Republic of Cyprus.

The statistical data for Israel are supplied by and under the responsibility of the relevant Israeli authorities. The use of such data by the OECD is without prejudice to the status of the Golan Heights, East Jerusalem and Israeli settlements in the West Bank under the terms of international law.

The use of this work, whether digital or print, is governed by the Terms and Conditions to be found at: <https://www.oecd.org/termsandconditions>