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Introduction

The section describes models of budgeting resources, as well as budget items that may need to be included for trans (see Tenders, Bids, and Contracts and Study Management for overall survey budgeting and management).

There is no one costing 'recipe' for all projects. The organization and scope of the translation project will determine structure and complexity of the budget planning. For example, in a centrally organized and centrally financed projec management may be asked to specify what funding resources are needed for top-down pre-specified procedures. Alternatively, a project at a local level may be asked to organize, conduct, and budget for one or multiple translation Depending on how various levels of the project are organized, their local-level costing may be needed to estimate re costs for just one translation or be used by a central national team organizing and budgeting for a number of translat within-country fielding. Such costs may also be needed by an international team coordinating and budgeting for a m country project.

In order to be of relevance for projects of various sizes and budgets, these guidelines do not assume sophisticated pr management tools for translation development. They do, however, refer to the potential of such and other options (see Translation: Tools). Large-scale projects on very tight timelines are likely to have such tools.

Guidelines

Goal: To ensure that participating research teams follow widely accepted standards for ethical and scientific conduc the design of the study through implementation and reporting.

1. Determine the project management form and the required personnel.

Rationale

Project management may vary according to the organization and scope of the translation project. In large translation centrally organized studies, and translation projects conducted by large organizations, a coordinator may be appointe manage the translation effort of all the languages. Additional coordinators may manage individual languages. When translation is organized at the national level and only involves the language(s) of the country, preexisting staff may t the function of project manager.

Procedural steps

  1.1   Identify the management required or specified.

  1.2   Identify or appoint one or more project manager(s) as appropriate.

1.2.1   If several people are involved in managing the project, ensure, if possible, that one person has ultimat responsibility for signing off on decisions, meeting deadlines, delivering products, etc.

1.2.2   Keep clear records so that someone else can take over if this proves necessary.

1.2.3   If several people share the work and responsibility, set up clear sharing, delivery, and checking proced This reduces the likelihood of omissions and oversights when work is passed back and forth.

1.3   Identify costs for such personnel as well as management components such as communication, offices, and r

1.4   Determine whether any external verification personnel and/or system will be used, such as described in Tra Assessment.

1.5   Identify any overhead costs not already covered.

1.6   Explore the potentials and limitations of management systems (as described in Translation: Tools) and dete whether any such system will be used.

1.7   Budget for organizing and undertaking all relevant steps above.

Lessons learned

1.1   The level of detail involved in translation project management can be easily underestimated. Good managen tools are important; they need not necessarily be sophisticated technology.

1.2   Large-scale projects will benefit from content management tools, as described in Translation: Tools.

1.3   Large-scale projects will benefit if the development of translations can be integrated into a system that also the development of any source questionnaire, as described in Translation: Tools.

2. Identify the material for translation and the language(s) required.

Rationale

The nature and scope of the material determine which translation procedure to adopt, the number and kind of key pl involved, and the schedules and budgets required.

Procedural steps

2.1   Identify the material that must be translated. Apart from the questionnaire itself, translations may be needed interviewer manuals, contact forms, information leaflets, and programming instructions. Some may call for a combination of local adaptation and translation.

2.2   Establish how many languages are involved and identify any special requirements, such as interpreters for u languages and word lists for interviewers working in regional dialects.

2.3   Identify any material already translated which will be considered for re-use; assess the quality of this materi its suitability for re-use in some form.

2.4   Select translation procedures on the basis of the material required and other relevant project considerations Translation: Overview and Guideline 3 below).

2.5   Determine whether special tools or software are to be used in the translation development process and whet involve costs for the project (see Guideline 6 below, as well as Translation: Tools).

2.6   Decide how translation costs are to be calculated (see [Appendix A](#)).

2.7   Budget for preparing materials for the translation process and any preparatory steps, such as creating templa[...]
inputting source text to software.

Lessons learned

2.1   Some materials requiring translation can be easily forgotten. For example, if each country programs its own
computer application, the programming instructions will require translation. Underestimation results in
underbudgeting, not just of costs but of personnel and time.

2.2   Questionnaires often have repetitive elements. If these can be identified ahead of time, consistency can be i[...]
and, often, costs reduced. Payment for handling repetitive elements should also be determined (see [Appendix](#)

2.3   It is important to identify clearly any sections which are not to be translated for both the budget staff and th[...]
translators.

2.4   Shared languages which are to be harmonized will call for different budgeting. Initial/first translations in su[...]
instances may be cheaper, but additional procedures for harmonization may increase costs again, depending o[...]
procedures followed (see [Translation: Shared Language Harmonization](#)).

2.5   Good planning and preparation of material to be translated and good briefing and training are investments v[...]
can reduce later costs and improve the quality of the translation. However, such preparation must also be inclu[...]
the budget.

3. Identify the translation procedures to be followed and the human resources needed, and budget accordingl[...]

Rationale

The translation protocol chosen impacts the number and kind of people involved and time allocations required, as w[...]
management, meeting, and communication costs. Translation procedures may be prescribed or selected according to[...]
nature of the material to be translated. Low-priority material might be produced by just one translator.

Procedural steps

3.1   Determine what procedures will be followed for translating the identified materials.

3.2   Determine what people need to be involved. Plan for translation, review and adjudication, assessment, copy[...]
formatting, and, if appropriate, programming of computer applications (see [Translation: Overview](#)).

3.3   Identify personnel already available and any that will need to be recruited for the translation project.

Lessons learned

3.1   Different procedures may be required by different organizations and project specifications. Large education[...]
projects, such as the Trends in International Mathematics and Science Study (TIMSS), typically include a rev[...]
revision component undertaken by a commercial company. The World Health Mental Health Survey Initiative[...]
required a harmonization meeting for Spanish versions. For some of its instruments, the Gallup Organization[...]
commercial company to organize translators and translations, while Gallup personnel closely monitor the out[...]
Survey on Health, Ageing and Retirement in Europe requires participating countries to use a common translat[...]
. Each of these factors can affect meetings, training, preparation required, and the degree of external vs. intern[...]
called for, as well as the number and kinds of people involved in activities.

3.2   The more intensive, and possibly more costly, procedures chosen for one set of materials may not be needed
       materials.

4. Determine the scope of selection and briefing meetings.

Rationale

Careful translator team selection and briefing is essential. Meetings for these purposes should be included in the bud
Translation: Team).

Procedural steps

4.1   Unless you are working within a framework that provides both the materials for selection and briefing and t
       protocols for these steps, budget for planning and developing these materials and protocols.

4.2   Include outlay for selection and briefing meetings in the budget.

4.3   Include any advertising and networking costs involved in this.

4.4   Decide whether or not in-house training is required.

       4.4.1   This will depend upon the study needs and the qualifications of the translators and any other personne
                involved.

Lessons learned

4.1   There are few selection and briefing resources publicly available for survey research translation. These can
       developed from existing surveys.

4.2   Physical meetings may be costly; training-the-trainer meetings may be of questionable suitability. Webcasti
       webinars require advance preparation and time zone scheduling but may be one viable option for a worldwide

4.3   Regional meetings (in whatever form) may prove more effective than too-large meetings across a project. Ii
       case, it would be useful if at least one experienced person were able to be involved in all of the regional meeti

5. Determine the nature and scope of review/adjudication.

Rationale

Review and adjudication discussions are central to the quality of the final translation product and should be included
budget.

Procedural steps

5.1   Identify the number of meetings required, the form of the meetings, and the people who must be involved.

5.2   Consider any catering, travel, or accommodation costs related to physical meetings and any other costs rela
       virtual meetings.

5.3   Develop a time schedule and plan for the meetings.

5.4   Determine the time and resources required to plan, conduct, and report on the meetings.

5.5   Reserve funds for planned meetings after the main translation phases (e.g., after pretesting), as well as for unexpected meetings to resolve last-minute problems.

Lessons learned

5.1   If personnel charge different rates at different times, meetings that need to take place during evenings or we may be more costly.

5.2   Time-zoning may also need to be considered.

5.3   Working days, public holidays, and 'office hours' differ across countries.

5.4   See [Translation: Shared Language Harmonization](#) and [Translation: Assessment](#) for details on this and an in of what it could mean for budgeting.

6. Budget for materials that may need to be acquired for the project. *Rationale*

Any special resources, such as software, language aids, or digital recorders should be budgeted for.

Procedural steps

6.1   Determine whether or not materials such as the following are needed and already available:

6.1.1   Dictionaries.

6.1.2   Manuals for translator training and briefing.

6.1.3   Software or licenses (translation tools, project management tools, webcasting).

6.1.4   Notebooks or computers.

6.1.5   Projectors.

6.1.6   Digital recorders (audio and/or video recording for documentation and possibly later research purpose

6.2   If they (or other materials) are not available but will be needed, budget accordingly.

Lessons learned

6.1   It may be difficult for a coordinator to identify or acquire materials with which they are not familiar and are uncertain how to locate.

6.2   It is a good idea to check that technical components and equipment are compatible with existing equipment intended locations before purchase. It is also useful to check that any equipment purchased has a reasonable s

References