

## Introduction

### Guidelines

1. If possible, schedule translation after the source questionnaire has been finalized.
2. If possible, make intensive use of advance translation in multiple languages, and thus schedule translation of the source questionnaire, although seen as complete and 'finalized', can still be adjusted if problems are encountered.
3. Schedule time to find, select, and brief translation team members, including any external assessment and verification personnel.
4. Schedule time to prepare the translation documents.
5. Schedule time to prepare translation instructions and assemble reference materials.
6. Schedule time to produce the initial parallel translations.
7. Schedule time to prepare for and hold review meetings.
8. Schedule time for several rounds of copyediting in the target language and checking against the source language.
9. Schedule any necessary harmonization between countries with shared languages before any assessments, including pretesting.
10. Schedule assessment and verification of translations using some combination of procedures discussed in Translation: Assessment, potentially independent of formal pretesting.
11. Include time for adjudication and documentation.
12. Schedule time for pretesting and discussion of pretest findings.
13. Schedule time for producing the final translated questionnaire or application.
14. Schedule time for consistency checks across documents.
15. Schedule time to translate, check, and produce any other materials needed.

### Reference

**Introduction** This section discusses scheduling the translation effort. Scheduling in a multinational project very much depends on how the translations figure into the project as a whole. Translations might, for example, be anticipated in features of the questionnaire design (for carrying out 'advance translations,' see ); there may be centrally approved specifications for how they should be conducted and when; and there might be centrally organized quality monitoring procedures. When translations are produced centrally for a multinational, multicultural, or multiregional ('3MC') survey project, it is likely that a document management system is used in the production and scheduling of source questionnaires and translations. The following guidelines focus on translation efforts managed at the local or national level. This is a normal procedure for many projects. However, many of the points considered would also need to be addressed in projects using centralized development and management systems. When translation is carried out at the local level, differences in deviances across local schedules will affect timing and milestones for the general project. No units of time per task are identified here since time required depends upon the length, repetitiveness, and difficulty of the material to be translated as well as on the number and experience of the people involved.

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**Guidelines 1. If possible, schedule translation after the source questionnaire has been finalized. Rationale** The length, nature, and coverage of the source instrument cannot be known until the instrument is finalized. All of these planning, scheduling, and quality procedures. Consistency lists, glossaries, and checklists, for example, are harder to implement without a finalized version of the source instrument. Material still to be determined may affect existing parts of the questionnaire, and implementing adjustments later is complex and error-prone. Organizing translation procedure is more complicated with regard to split options, language harmonization, and iterative review. These challenges are greatly increased if the instrument in question is long and has many submodules. **Procedural steps**

- 1.1 Make the importance of having a finished source version clear to those involved in procedures that impact instrument completion and aim to schedule accordingly.
- 1.2 Optimize scheduling of the source questionnaire to accommodate translation as relevant and possible.
- 1.3 Optimize scheduling of all steps related to translation.

### *Lessons learned*

- 1.1 Many steps can be completed before translation begins. Provided the nature and scope of the material is clear, the languages required can be specified, translation team members can be selected and briefed and some tools prepared.
- 1.2 Time constraints may require translation to start with only a pre-finalized source text, or with parts of the source text still missing. In such cases, mechanisms should be in place to efficiently and consistently update the source text to inform all team members of the changes (see [Translation: Tools](#)). In this case, a first round of translation can be followed later with a second TRAPD round. This increases costs but can resolve problems arising from working with partially finished instruments.

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**2. If possible, make intensive use of advance translation in multiple languages, and thus schedule translation of the source questionnaire, although seen as complete and 'finalized', can still be adjusted if problems are encountered.**

**Rationale** Careful question design and pretesting can help identify problems in the source questionnaire. Nonetheless, problems often become apparent only when translating into multiple languages. If adjustment can still be made to the source questionnaire and integrated into the translated questionnaires, quality and comparability can be enhanced. This does not contradict the recommendation to use the final source questionnaire as the basis for translation—these adjustments should rather be of a minor degree so as to ensure that they can still be incorporated before fielding the translated questionnaires. For a formalized use of translation in the questionnaire design process, see the advance translation section. **Procedural steps**

- 2.1 Schedule sufficient time between finalizing the source questionnaire and fielding in any location to permit field testing on the source questionnaires resulting from translation. Even when the source questionnaire is finalized, there are often corrections required to be made afterwards, and these often arise through the translation activities.
- 2.2 Optimize scheduling of the source questionnaire.
- 2.3 Optimize scheduling of all steps related to translation.
- 2.4 Identify how and to whom feedback (i.e., information about perceived difficulties) is to be conveyed.
- 2.5 Establish and schedule deadlines for feedback.
- 2.6 Emphasize that timely feedback is essential.

**Lessons learned**

- 2.1 Since problems related to the source instrument may only become apparent when translation begins, researchers sometimes recommend advance translation before beginning the formal TRAPD team approach to translation.

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**3. Schedule time to find, select, and brief translation team members, including any external assessment and verification personnel. Rationale** Source text quality and client specifications impact the potential quality of translation. Apart from these, however, translation quality depends to a large extent on the competence of the staff involved. It is important to allow sufficient time to recruit and select the best possible people for the job. **Procedural steps**

- 3.1 Consult the guidelines in [Translation: Team](#) and [Translation: Assessment](#) and set the time-frame appropriate to the project.
- 3.2 Include time for material preparation for these procedures (see [Translation: Team](#)).

**Lessons learned**

- 3.1 Finding, selecting, and briefing the translation team can be done before the source text is finalized, provided language(s) and the nature of the instruments to be translated are sufficiently known.
- 3.2 Engaging people already familiar with translation team procedures may reduce time for some of these steps
- 3.3 Contacting translators who worked well on other kinds of survey projects might reduce the time involved in potential staff.
- 3.4 It may be necessary to retrain long-established translators or other team members if the needs of the current are different from those of previous projects.

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**4. Schedule time to prepare the translation documents. *Rationale*** Essential preparation steps for the translation must be included in scheduling. ***Procedural steps***

- 4.1 Prepare translation and documentation tools for translators as soon as the source text is finalized (see [Translation Tools](#)). Easy-to-use translation and documentation tools speed up the translation process and make subsequent more efficient.
- 4.2 Prepare instructions on how to comply with and use the documentation tools.

***Lessons learned***

- 4.1 Allow sufficient time if the tools have to be produced manually. If mistakes are made in producing template used in every location, for example, later attempts to correct these across locations may be unsuccessful.
- 4.2 Some preparatory work can begin before the source material is finished, even if its completion has to wait on source material.
- 4.3 If tools required for the project are provided by a central coordinating center, the delivery date of these tools determines when the translation project can start at the national or local level.
- 4.4 Local teams may wish to begin translation as soon as they have the source instrument. If the tools are not available when that happens, the teams may translate without them, and intended quality assurance and control steps for the tools may then not be in place.

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**5. Schedule time to prepare the translation instructions and assemble reference materials. *Rationale*** Clear preparation instructions and comprehensive reference materials help translation teams to produce translations that meet the needs of the project. Preparation time and delivery dates for these need to be scheduled. ***Procedural steps***

- 5.1 Include time to compile documentation for the team on such relevant aspects of the survey as:
  - 5.1.1 The target population (different language variants might be applicable according to the educational background, age, or region of the targeted population): for instance, a questionnaire targeted for teenagers have to use a different language style and different words than a survey for the elderly; unsuitable language in this regard may later have an impact on the response behavior. On regional language use, see also the involving Swiss German in [Translation: Shared Language Harmonization, Appendix B](#).
  - 5.1.2 The mode or modes planned, and how these impact the formulation and structure of the instrument.

- 5.1.3 How to 'read' the source materials. For example, how to recognize in the source material the intended : for text segments (respondent, interviewer, programmer, etc.) and how to understand specific measurement features (e.g., such multiple specifications as: "Generally speaking, on an average weekday, how many total do you usually ...").
- 5.1.4 The purpose and character of source materials (e.g., interviewer manual, show cards, computer-assisted applications, explanations).
- 5.1.5 As applicable, style guides, quality checklists, and glossaries.
- 5.1.6 As applicable, reference materials such as parallel texts, previous source text versions, available translations of the same study, and relevant background information on the research goals.

### ***Lessons learned***

- 5.1 If translation team members are poorly informed about the needs of the project, quality suffers and review and adjudication become longer and more burdensome.
- 5.2 Release all materials at once, rather than sending bits and pieces to the translator teams. This makes it less likely that important materials are overlooked or forgotten.
- 5.3 If some or all instructions are provided by a central coordinating center, local coordinators only need to write and assemble the materials needed at their level.

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## **6. Schedule time to produce the initial parallel translations. *Rationale*** Quality concerns require that a reasonable timeframe be determined for the initial parallel translations. ***Procedural steps***

- 6.1 Agree on deadlines for delivery with the translators; these include the deadline for quality control (see [Translation: Overview, Guideline 2](#)) and the review deadline.
- 6.2 Instruct translators to report well in advance if a timeframe or deadline cannot be met, so that project management can respond accordingly.

### ***Lessons learned***

- 6.1 The timeframe available for production of the initial parallel translations may be very short. Translators often work on multiple projects simultaneously. The sooner they are informed about the time schedule, the easier it is for them to organize their workloads accordingly.

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## **7. Schedule time to prepare for and hold review meetings. *Rationale*** Quality concerns require a reasonable time for review. ***Procedural steps***

- 7.1 (See [Translation: Overview, Guideline 5](#)).
- 7.2 Include time to:
  - 7.2.1 Prepare documents for review (e.g., merge documents).
  - 7.2.2 Send translations to all team members involved in the review.

7.2.3 Prepare for the review meeting(s).

7.2.4 Hold the review meeting(s) and refine the translation(s).

### ***Lessons learned***

7.1 The earlier team members are informed about the time frame (i.e., the time available between receiving review documents and the review itself), the better they can prepare. This is true even if there is little time between the steps.

7.2 The time needed for the review meeting depends on the length and difficulty of the texts to be discussed, or experience level of the team, and on successful management of time during the review (see [Translation: Overview Guidelines 5](#) and [8](#)).

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## **8. Schedule time for several rounds of copyediting in the target language and checking against the source language. *Rationale*** Copyediting text produced is an essential step in quality assurance and control. ***Procedural steps***

8.1 Establish the stages at which copyediting will be undertaken and schedule accordingly.

8.2 See [Translation: Overview, Guidelines 5](#) and [8](#).

### ***Lessons learned***

8.1 Equipping copyeditors with a list of the most important features to check can streamline the process and reduce costs (see [Translation: Tools](#)).

8.2 The last rounds of copyediting should focus particularly on anything recently changed (following review or pretesting, for example), any programming specifications, and checking against the source questionnaire or other relevant materials.

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## **9. Schedule any necessary harmonization between countries with shared languages before any assessments, in pretesting. *Rationale*** In 3MC surveys, multiple countries or communities may field surveys in the same language. However, the regional standard variety of a language used in one country usually differs to varying degrees in vocabulary and structure from regional standard varieties of the same language used in other countries. As a result, translations produced in different locations may differ considerably. Harmonization should take place before pretesting to avoid unnecessary differences across their questionnaires. ***Procedural steps***

See [Translation: Shared Language Harmonization](#).

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## **10. Schedule assessment and verification of translations using some combination of procedures discussed in Translation: Assessment, potentially independent of formal pretesting (see also [Pretesting](#)). *Rationale*** Assessing translation prior to pretesting can identify certain types of errors that are difficult to detect through pretesting alone, allow for a more accurate questionnaire for evaluation in the pretest. ***Procedural steps***

See [Translation: Assessment](#).

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**11. Include time for adjudication and its documentation. *Rationale*** In the course of developing the translation, many versions of the instrument or given questions can be generated. In order to implement quality assurance and control decision must be made and recorded about which instrument or question version is taken as the final version for a given phase. ***Procedural steps***

- 11.1 See [Translation: Overview, Guideline 6](#) on adjudication. Adjudication is recommended at different steps during the TRAPD process: it is likely to be carried out before pretesting and also after discussing pretesting findings (see [Translation: Overview, Figure 2: European Social Survey Translation Process](#)). Schedule time accordingly.

***Lessons learned***

- 11.1 The resolution of some problems from the review may take more time than expected, especially when external informants or the source text designers themselves need to be contacted.

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**12. Schedule time for pretesting and discussion of pretest findings. *Rationale*** Pretesting is an essential component of quality assurance and quality monitoring. ***Procedural steps***

- 12.1 Schedule time for producing a version of the instrument and any other relevant materials adequate for pretesting and for the pretesting itself (see [Pretesting](#)).

***Lessons learned***

- 12.1 When multiple steps are involved in translation development (e.g., multiple languages for one location or many varieties of one language calling for shared language harmonization), the timetable for pretesting and revision become very tight.

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**13. Schedule time for producing the final translated questionnaire or application. *Rationale*** Completion of the translation is not synonymous with completing a questionnaire or application ready for either pretesting or final field use. Time should be scheduled for this. Final checks may again need to be made. ***Procedural steps***

- 13.1 This step includes formatting and producing any paper-and-pencil instruments and programming any computer-assisted instruments. If provided with adequate specifications, those with experience in these areas can provide estimates of the time needed.

- 13.2 Include time for any final testing required.

***Lessons learned***

- 13.1 Mistakes can be introduced at this phase too. Incorrect photocopying or scanning of a source questionnaire used in preparing a translated version can result in a question being inadvertently omitted, for example. Programming errors and oversights at a late stage can also negatively affect quality.

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**14. Schedule time for consistency checks across documents. *Rationale*** If some documents are related to other documents it may be necessary to check for consistency across them. For example, if show cards repeat questions or response scales from the questionnaire, consistency needs to be checked across these. The same holds for documents such as interviewer manuals. ***Procedural steps***

14.1 Identify which documents are involved and which sections of these documents need to be checked.

14.2 Schedule time accordingly.

### ***Lessons learned***

14.1 It is important to check not only for the presence of various components in the documents which need to be consistent, but to check for consistency of the order and fashion in which they are presented. The order of response categories could be inadvertently reversed, for example.

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**15. Schedule time to translate, check, and produce any other materials needed.** *Rationale* If other materials are then they will need to be included in the time schedule and budget. *Procedural steps*

15.1 Schedule time to:

15.1.1 Determine the nature of the other materials and for which stage of the study they are required.

15.1.2 Organize and complete their translation.

### ***Lessons learned***

15.1 If the other materials are not dependent on formulation and content in the questionnaire, translation can be scheduled whenever it is expedient to meet production requirements for this material.

15.2 If the other material repeats or depends on many questionnaire components, it is better to wait until the questionnaire translation is finalized.

15.3 If time constraints dictate simultaneous production of other materials and the instrument itself, it is wise to time for later consistency checks.

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### **Reference**

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