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## Introduction

The following guidelines describe how to find and select suitable people for a team translation effort and outline a b for members of the team. The strategies used to select translators and others members of the translation team can als used to train them, as relevant, in the unique aspects of survey translation. The term 'source language' used below re the language out of which a translation is made, and the term 'target language' refers to the language into which a tra is made.

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## Guidelines

**Goal:** To locate potential candidates for a team translation effort and to select the most suitable from among these; t selected translators on general features of relevance for survey translation and on specific features of the study; and engage and brief relevant other members of the team.

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### 1. Search for translators in contexts in which they are likely to work, advertise, or acquire their translation tr

*Rationale*

At the selection stage it is important, whenever possible, to have multiple candidates from whom to choose. A team also requires more than one translator. Organizations that employ or train translators and associations with which tra register or advertise are likely places to begin locating translators for the language(s) required.

***Procedural steps***

1.1 Identify likely organizations, associations, and places where translators register and advertise. Local options vary greatly; search the Internet and telephone directories, places of instruction (e.g., translating colleges), newspapers, and trade journals, and contact any local chambers of commerce, publishers, medical institutions international firms, advertising companies, places of higher education, and your own network channels and institutions, as available, for help in making contact.

1.2 Compose and write a job description. Post this at any place identified as potentially relevant. Send the desc any contacts made in organizations. If appropriate, include in the advertisement a request for help in locating people.

1.3 Utilize your own organizational and personal networks. Post the advertisement or job description within yo institution, and ask people you know to suggest contacts.

***Lessons learned***

1.1 In some locations, it may be difficult to find trained translators, either in general or for a language you requ this case, proficient bilinguals may be the only personnel available. Follow through with them as many of the selection and briefing steps as possible.

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**2. Require candidates to submit application materials prior to the job interview.**

***Rationale***

Information about a candidate's experience and training and examples of previous translation work may help decide a candidate merits consideration. If there are numerous applicants, these materials can be the basis for selecting peo interview.

***Procedural steps***

2.1 Identify the application materials required in the advertisement. If contact is not made through an advertise provide candidates with the job description and request delivery of the application materials before arranging interview.

2.2 Ask applicants to provide the following:

2.2.1 An outline of their training and experience in translation for the languages involved (source and target should include the kind of translations the applicant has worked on.

2.2.2 Examples of any recent work, if possible.

2.2.3 Recent references relevant to the job application.

2.2.4 Details of their computer skills and access to computer technology.

2.2.5 Details of their work experience.

2.2.6 Details of their education in general.

2.2.7 Details of how, when, and where they acquired competence in the source and target languages.

2.2.8 Details of whether they have knowledge about surveys and questionnaires in general, and experience i questionnaire translation in particular.

***Lessons learned***

2.1 Application materials only tell part of the story; avoid hiring on the basis of these alone. Translations delive inspection are, for example, not produced under team translation conditions, nor can you know precisely who contributed to their production.

2.2 It is important to identify whether candidates are currently working in the source and target languages, or w their exposure and use of one or the other lies in the past. Translators should ideally be embedded in the targe and language, as well as fully conversant with the source language and, as relevant, the culture from which it

It is also important to ensure that applicants are competent in both speaking and writing the target and source languages.

2.3 Although language competence in the source and target languages does not guarantee that someone can tran is a prerequisite. If bilingual individuals without translation training represent the highest level of expertise av in a given context, select from these, using the materials described in Guidelines 4 and 5 below, and train ther intensively.

2.4 Avoid engaging someone simply on the basis of recommendations whenever possible. If there are people w whom, for whatever reasons, the project team is expected to work, evaluate these people to ascertain their skil possible language expertise. In looking for translators, you may also find suitable candidates for back-up pers

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**3. If working with translation agencies, require reference materials and specifications for both the agency anc translators.**

***Rationale***

The professionalism of the agency needs to be verified, as well as the suitability of translators employed for the surv project. Team translation requires that the translators be available for meetings. Make sure that any agency involved understands and accepts the requirements (see Translation: Overview).

***Procedural steps***

3.1 Ask agencies to provide the following information about themselves:

3.1.1 A list of clients and contact options.

3.1.2 A list of projects (the agency experience record).

3.1.3 Experience in translating questionnaires, if available.

3.1.4 References from recent representative clients.

3.1.5 Years of operation.

3.1.6 Information about the business focus and personnel in the agency (for example, whether the owner or has a translation background and whether translation is a central part of the agency's activities).

3.1.7 Any agency sub-contracting procedures relevant for your project.

3.1.8 The agency's procedures for hiring and training translators:

- How they find and select translators.
- How they train, if they do so.
- How they monitor translation performance (who monitors, and how).
- How they ensure quality (4-eyes principle, systematic expert or peer reviews?).

3.1.9 How they intend to accommodate the team translation requirements of your project (meetings, repeat a the same translators, etc.).

3.2 Ask agencies to provide the translator materials outlined in Guideline 2 above in preparation for the selectio interview(s).

***Lessons learned***

3.1 The cost differential between translators working as self-employed professionals and those provided by age greatly depends on the individual context. The same holds with regard to quality. In general, agencies pay trar less than what independent translators working full time earn. Competent translators may nonetheless work w agencies, as, for example, they can provide a steady flow of work.

3.2 Agencies initially reluctant to cooperate on requirements for team translation may later develop into valuab reliable partners.

3.3 If working with a translation bureau or agency, it is important to ensure that you have direct contact with th translators, that you can work with the same translators if possible over rounds (if that is what you wish), and other requirements for your translation effort can be met. Using translation bureaus will in some cases not be option, since, for example, translators may work long-distance and will be unable to attend review meetings. may also not be allowed by their employers to interact directly with you as 'clients' or, indeed, with each othe not common for translation bureaus to accommodate the selection procedures outlined below, and they may b expensive than individual translators are. Many fielding agencies may not be able to provide translators to fit TRAPD model either .

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**4. Select translators on the basis of submitted materials and their performance in the interview.**

***Rationale***

The interview is the opportunity to explore and verify information provided in the application and to test performan tasks needed for a team translation effort.

***Procedural steps***

4.1 Appoint one or more people with expertise in survey translation and the languages in question to conduct th interview (typically, senior translation reviewers).

4.2 Organize the interview in such a way that candidates actually demonstrate their competence on the spot, inc their ability to produce translations, review existing translations, and accept critiquing of their translations, as indicate their knowledge of relevant tools, etc. It can be also helpful to let new translators work as interns bef hiring them definitely.

4.3 Use the following indicators as the basis of evaluation criteria for selecting any given translator:

4.3.1 Current knowledge of and competence in the source and target languages and cultures.

4.3.2 Generally, the mother tongue of the translator is the target language.

4.3.3 Translation and review performance on test materials.

4.3.4 Experience and expertise in translation.

4.3.5 Knowledge of translation tools.

4.3.6 Team suitability.

4.3.7 Computer skills and access to computer technology. This may be a requirement in many projects.

4.3.8 Knowledge of, and, experience with translating surveys.

4.3.9 Availability and salary/payment requirements.

***Lessons learned***

4.1 Extensive translation experience in one very specialized field may be a drawback for working on survey translations. Someone with years of experience in legal translation may be unused to the everyday language a often aimed for in survey translation. But the opposite may also be true—a translator successful in a specializ may be a competent and versatile translator in general, and apt to adapt to 'survey speak' very quickly.

4.2 Experience in producing survey translations should not be taken as proof of suitability, as many survey tran are poor.

4.3 Given the scarcity of training opportunities for survey translation, few translators will have been trained to t questionnaires adequately, and many may not recognize key measurement features. Thus, in many cases, prov translating skills will be more important than survey translation experience. At the interview, assessment shou on the demonstrated ability to understand the source text and render it fluently in the target language, as well a ability to identify problems for translation or adaptation and to ask relevant questions. Translators who have h experience in translating questionnaires but were never actually trained on how to handle this kind of text may indeed, prove difficult to (re-)train. Training on survey measurement features can follow, if a candidate is hire

4.4 It is important to try to assess whether a candidate seems likely to work successfully as a member of a team translators at the application stage about the way the work will be organized and make the team discussion co clear. It is not uncommon for translators to be a little wary at first about the idea of discussing/critiquing versi Take the time to explain that teamwork benefits the end product and that people involved in such teams actual sharing responsibility and can learn from one another.

4.5 It is useful to have a number of applicant translators. Even if you feel you have suitable candidates used in p projects, it is suggested that these people be 'put to the test' along with new recruits. In this way, for example, easier to decide who might be better suited as a reviewer and who as a translator, or which of two translators i stronger for the task at hand.

4.6 Where several different translated questionnaires are to be produced by one country, for each target languag questionnaire, translation begins from the source questionnaire, not from a translated questionnaire (e.g. for a questionnaire with a source language of English and planned translations into both Catalan and Spanish, both Catalan and Spanish translations should originate from the English version, rather than the Catalan originating the Spanish translation). Thus, in every case, translators are needed who habitually work from the source lang into the target language (this being their 'strongest' language or mother tongue) .

4.7 The people most likely to be good questionnaire translators are people who are already good translators and can learn or are trained to become questionnaire translators. The procedures suggested for training include pro which can be used to assess the suitability of applicants. Training materials can readily be developed from ava questionnaire translations; old questionnaires can be used for training and practice .

4.8 Applicants can be asked to identify problems in question formulations in the target language; to provide tra with common pitfalls such as a symmetrical source scale that is difficult to match in the target language, or a s or difficult target scale; to comment on translations already available (old questionnaires or questionnaires spe prepared for this purpose); to correct translations; to compare their versions with other versions; to make ques more suitable for a specified target population; to comment on questions that are culturally inappropriate or e biased in translation; to explain what questions are actually asking; and so forth .

4.9 These tasks will raise some issues that relate to the source language and source text and others that relate m translation. In this way, you should gain a sense of their target language proficiency and their skill in translati will also gain some impression of their ability to work with the specific materials, as well as their 'ear' for sui language for different modes and target audiences. By asking them to translate items and then engaging with t comparison and discussion of their version against one already available, you can gain a general sense of thei commenting skills, an indication of how well they can operate impromptu, and a good first impression of how react when their translations are discussed—as will happen in the review process. Their flexibility in impromp generation of versions (alongside the quality of these versions) is a good indicator of likely suitability .

4.10 Ideally, team members should both show initiative and be able to recognize and follow good suggestions m others. Good translators, aware of the constraints, tend to recognize good translation solutions when they see t

4.11 Interviewer training will equally require familiarization with the annotated questionnaire and with the documentation required for the translation/review process .

4.12 Even once translators have been appointed, decisions sometimes need to be reversed. The first 10 percent o assignment should be delivered—and assessed by a project coordinator or the reviewer—for monitoring as so is completed. It is unlikely that serious deficiencies can be remedied by pointing out or discussing problems. I translation quality is not already reasonable, it is probably better to start again with a new translator. Reviewin early also allows you to tell translators about aspects you wish them to treat differently .

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**5. Brief translators on general features of surveys relevant for survey translation, as well as on specific featur given study.**

***Rationale***

Briefing translators helps them to read, understand, and translate questionnaires as instruments of measurement. Tra need to be able to recognize the design features and various components of surveys in order to handle them appropr For example, survey questions have special vocabulary and syntactical features that may run counter to normal writ language; instruments have sections addressed to different audiences (interviewers, respondents, programmers, etc.) questions and response scales reflect measurement goals that an untrained reader might not perceive as what they ar Translators also need to understand the function of target and source texts in order to see the best possible translatio options. What they produce as a translation depends not only on their ability and training, but on the quality of the n they are asked to translate and on the task specifications they receive.

***Procedural steps***

5.1 Use specially developed materials or real questionnaires in source and target languages to brief translators c following:

5.1.1 Different components of a questionnaire.

- Questions, instructions, explanations, response scales, filters, fills, annotations, sections for official use, programmer instructions, formatting conventions, house-style requirements, etc.
- Vocabulary requirements for the target population.
- Level of vocabulary, as well as regional vocabulary considerations (see Translation: Shared Language Harmonization).
- Segments of the text which are for interviewers and those which are for respondents, with the mode inte different materials being indicated. Countries using computer-assisted applications should explain fills a provide, as appropriate, the hidden CAPI instructions to be translated.

5.1.2 Explain the notion of questionnaire modes and details of the mode selected for the project at hand (e.g written presentation, branching presentation of answer options, Web-based response features, etc.).

5.1.3 Response scale designs and their purposes.

5.1.4 Adaptation and any feedback procedures to be followed, and the most common causes of mistranslatic survey research. (See Translation: Overview, Appendix C for a review of mistranslation causes and exan from past survey research.)

5.1.5 Translation documentation and the procedures to be followed.

5.1.6 The notions of response styles and social desirability, as well as any feedback required from translator these situations.

5.1.7 The purpose and procedures of any pretesting planned.

5.1.8 Any translated components (e.g., instructions, response scales, replicated questions) used in earlier rou survey that are to be repeated in an upcoming round should be clearly marked in what is given to the tra Giving translators the entire document lets them see the context for which the material to be translated is intended. This is a better idea than deleting sections that you do not require to be translated. If appropria translators can also harmonize new translations with existing translations; that is, keep new translations consistent with existing translations covering related material . (See also Translation: Overview, Append changing material in existing questionnaires.)

5.2 In the briefing process, translators can be asked to identify problems in question formulations in English or target language; to provide translations, for instance, with a symmetrical source scale that is difficult to match target language, or a skewed or difficult target scale; to comment on translations already available (old, prepa questionnaires); to correct translations; to compare their versions with other versions; to make questions more for a specified target population; to comment on questions that are culturally inappropriate or end up biased ir translation; to explain what questions are actually asking; and so forth, in order to improve survey instrument translation capacity .

***Lessons learned***

5.1 Careful briefing is important to guide translators' perceptions of questionnaires and ensure consideration of respondent needs and questionnaire designers' needs in translations.

5.2 Without briefing, translators will translate according to the text models and text types with which they are a familiar. They should be reminded that survey instruments are a very specific text type intended for specific ta populations. (a) to (c) are examples of issues that may be particularly relevant when briefing your translation For obvious reasons, this will always have to be a case-to-case decision:

(a) Unless they are reminded that an instrument is intended for *oral* presentation, they may produce a tr more suited as a *written* questionnaire. These guidelines do, in general, assume that questionnaires are administered orally; for instance, in face-to-face or telephone interviews. Written administration, such as completion situations or for Web surveys, sometimes requires a different way of writing. But this is more understood as a questionnaire design issue for the source instrument than as a translation problem. (b) Questionnaire translators should also be informed that questionnaire elements such as visual presentations modified between source and target instruments: for instance, local conventions in terms of vertical vs. hc or ladder vs. triangular presentations of response scales have to be considered and changed, if necessary, to left vs. left-to-right response scales in Arabic or Hebrew questionnaires (See Adaptation for more infor (c) Regional language use, social class, or accents may be an important point to brief your translating tean Should the target instrument be drafted for a specific target population in this regard? The translating tean need some guidance on how to decide in this regard. (See the example of German used in Switzerland or diglossia in Adaptation.)

5.3 Briefings should include motivating information to encourage translator commitment and care. Survey trans may call on translators to work repeatedly on the same questions; this iterative process may run counter to the expectations. If they are informed about the high-stakes nature of a survey and the costs involved should ques wrong, they will better understand the repetitive aspects of team procedures.

5.4 If not given job specifications, translators mentally decide their own, since they cannot translate in a vacuur specifications must thus indicate the intended audience, level of literacy, and tone of text (e.g., official or mor casual); the function of the text (e.g., a questionnaire for fielding or notes to describe the contents of a questio and the degree of freedom permitted in translation. Translators need to be informed of how close or free the translation is required to be .

5.5 Translators should be encouraged to produce questions that do not sound like translations and to use vocabu can be understood by less well-educated respondents as well as the better educated. Translators must take intc that questions are intended to be offered (spoken) once, and to require only a normal degree of textual process

5.6 Translators who are informed about the measurement components of questions and are trained to be sensitiv design requirements as well as target audience requirements are in an optimal position to produce good versio are also more likely to be able to point out when a requirement cannot be met and to recognize problems . It is strongly recommended that translators are given support materials, example texts, and the information relevar their part in producing instruments. For example, the format of an annotated questionnaire and the documenta required are likely to be new to many translators, and this should be covered in the briefing session .

5.7 Monolingual source language dictionaries listing the different meanings of a word may help finding out wh can mean in various contexts. Sometimes one only thinks of the most typical meaning of a given word and the ignores all others, or may even be unaware of the fact that a word can have additional meanings to those that a usually known. Monolingual dictionaries can help in deciding which meaning of a word is activated and, in ac may help in finding the appropriate translation by offering paraphrases and near synonyms which could be us basis for translation .

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**6. Identify and engage suitable other personnel required for the translation effort: the senior reviewer, who m coordinate the project; the adjudicator; and substantive experts.**

***Rationale***

Finding good translators is only one requirement to producing suitable target language instruments. The other perso should be chosen with care so as to bring together the skills and knowledge required for the project, as outlined in Translation: Overview.

***Procedural steps***

6.1 Identify the procedures to be undertaken and the skills required for this as described in Translation: Overview and Translation: Overview, Appendix B and seek suitable personnel.

6.2 Require these personnel, as appropriate, to demonstrate their abilities for the tasks in which they will be eng possibly along the model outlined above for translators.

6.3 Tailor their briefing and training to the contributions they will make. Ensure this includes a general overviev planned translation project phases, procedures, and responsibilities.

6.4 If there are people with whom, for whatever reasons, the project team is required to work, meet with and ev these people to ascertain their skills and possible language expertise.

6.5 Increase the size of the team as necessary to ensure the right mix of skills is available. Not everyone will be at all times throughout the project (see Translation: Overview).

*Lessons learned*

6.1 The senior reviewer and the translators are likely to be the people most important for translation quality; it r sense to select the best people available.

6.2 Training and briefing can greatly improve the performance of individuals and the team. Be sure to factor in time for training and briefing when scheduling the translation process.

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**7. Use documentation as a deliberate quality assurance and control tool to enhance selection, training, and br and to record performance.** ***Rationale***

Selection is partly based on reviewing documentation submitted on team members' performance and experience. It i partly based on candidates' performance on materials and documents presented at selection and training meetings. T selection materials serve multiple functions. Initially, they allow selection committee members to prepare for the sel process, permit comparisons of candidate experience and performance, and are the basis of benchmarking. Later, se materials used to test ability and understanding can function as training and briefing documents.

***Procedural steps***

7.1 Previous guidelines indicated the kinds of material to request of candidates and what to prepare for selectio testing, and briefing.

***Lessons learned***

7.1 Over time, an array of materials can be assembled. Documents produced for one round of selection and brie be used again for other projects. Materials from surveys can be good resources.

7.2 For some translation performance testing or briefing, it may be easier to create examples and tests.

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**References**

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