Translating questionnaires for cross-national surveys – a text genre and its particularities

Dorothée Behr, GESIS
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Outline

- Translation expertise & genre competence
- Genre competence
  - The larger context of survey methodology
  - A tailored competence model
- The translation competence model of ISO 17100
  - its application to the genre of questionnaires
- Summary and discussion on needed knowledge
Translation expertise & genre competence

- Harkness’ model (2003): the translator as a “skilled practitioner” who is *experienced in questionnaire translation and/or specifically briefed and trained for this genre*

- ITC Guidelines (2017): a translation and adaptation “expert” is
  - “a person or a team with sufficient combined knowledge of (1) the languages involved, (2) the cultures, (3) the content of the test, and (4) general principles of testing, to produce a professional quality translation/adaptation of a test.” (p. 12)
Genre competence I

- Typical for other translation fields to embed translation into a larger context
Genre competence II

- Typical for other translation fields to produce a tailored competence model – that is, a model that includes the particularities coming with particular domains or textual genres

2. Towards a legal translation competence model

Prieto Ramos (2011)
Questionnaire translation: There is a need to ...

- ... systematically embed questionnaire translation into a larger context
- ... develop a competence model tailored to this genre
- Why?
  - Helps to *systematically* introduce new translators to the field
  - Helps to prevent many “simple” mistakes from arising (e.g. consistency issues, omission of important measurement properties, issues in scales)
  - Supports translators in the decision-making process by allowing them to identify the crucial elements that need to be maintained – the “larger picture” is needed for that
The basics of general survey methodology

- Total survey errors approach, documentation, process quality
- **Design and development of questionnaires, e.g.**
  - standardization, operationalization (construct-indicator-item), validity, reliability, response model, guidelines for writing survey questions, design of scales
- **Construction of questionnaires as a whole, e.g.**
  - Overall structure, routing, dynamic fills, consistency needs
- **Modes, and mode-dependency of survey wording, e.g.**
  - Gender, layout or response selection instructions
The basics of cross-national survey methodology

- **Relationship between source and target questionnaire, e.g.**
  - Standardization of the survey instruments across languages; translation vs. adaptation (ASQ vs. ADQ); dependency of statistical analyses on these relationships; equivalence

- **Translation and assessment methods, incl.**
  - documentation and pretesting
Linking the larger context & practice

- Translation competence model, based on the ISO 17100 - *Translation services -- Requirements for translation services*:
  - Translation competence
  - Linguistic and textual competence in both target and source language
  - Domain competence
  - Competence in research, information acquisition, and processing
  - Cultural competence
  - Technical competence

A tailored competence model
Translation competence

- ability to produce a translation in compliance with the purpose of a translation and any given project requirements
### Different types of questionnaire translation

<table>
<thead>
<tr>
<th>Source questionnaire</th>
<th>Instrumental translations</th>
<th>Documentary translation</th>
</tr>
</thead>
<tbody>
<tr>
<td>designed with a view to cross-national application</td>
<td>Comparability with source questionnaire planned</td>
<td>Comparability with source questionnaire <strong>not</strong> planned</td>
</tr>
<tr>
<td></td>
<td><strong>I:</strong> Adaptations possibly necessary; permissible adaptations are often identified in advance; further adaptations are usually subject to approval</td>
<td><strong>III:</strong> Adaptations possibly necessary, no constraints</td>
</tr>
<tr>
<td>designed for a specific country</td>
<td><strong>II:</strong> Adaptations probably necessary; however, they are constrained by the comparability requirement</td>
<td><strong>IV:</strong> Adaptations probably necessary, no constraints</td>
</tr>
</tbody>
</table>
Linguistic and textual competence in both target and source language

- Ability to appropriately understand the source language, to fluently render text in the target language, and to apply general and genre-specific conventions

  - Importance of comparability needs
  - Importance of clarity, simplicity and comprehensibility – this may run counter to usual translation and writing activities
  - Importance of language use adapted to survey mode
Domain competence

- **Ability to understand the content of the source language and to reproduce it in accordance with appropriate style and terminology**
  - Domain: survey methodology - understanding the basics of general and cross-national survey methodology – the larger framework as presented before
  - E.g., ‘in general’, consistent repetition of key words
Competence in research, information acquisition and processing

- **Ability to efficiently search for any information needed for understanding the source text and rendering it in the target language (linguistic, subject-matter, etc.)**

- Awareness needed of:
  - Data archives with extensive metadata, for instance, questionnaires
  - “Parallel” texts (i.e. questionnaires) in the target language
  - Target-language corpora to assess and test language use
  - Pretest archives
Cultural competence

- Ability to apply knowledge of both source and target culture to the translation process (e.g., knowledge of behavioral standards or value systems)
  - For deliberately designed cross-national surveys, the design process should benefit from this competence
  - For questionnaires adopted from other countries, this competence is crucial to adapt the instrument to the target culture’s needs
Technical competence

- Knowledge of and skills to use technical resources (tools, IT systems) in the production of the translation
  - Large-scale surveys or companies may use their own tools and platforms, with or without interfaces to known translation software
Summary

- We lack a translation competence model tailored to questionnaires.
- In such a model, particularities related to questionnaire translation should be linked to basic knowledge of survey methodology.
- The ISO 17100 competence model may serve as a structuring device.
- What is according to your experiences the knowledge that translators need?
- Should a corresponding “commissioner/reviewer” model be created for survey researchers – on what they need to know on translation, e.g. to effectively steer it?