Methodological Guidelines EVS2017
App A3: Translation

Related to the EVS 2017 integrated dataset ZA7500

The *Translation Guidelines* and related appendixes outline the main rules for the translation of the Master Questionnaire into national languages.

The document points out the tool used for translation (Translation Management Tool, or TMT), it explains how to review existing translations and sets the guidelines to perform translation of new questions.

Harmonization of translation between countries that share a language (or multiple languages) is also covered, as well as the adaptation to different modes of data collection.

European Values Study

Translation Guidelines[1]

Version 27 April 2017

1. General comments

Translation in the Methodological Guidelines of the EVS is summarized as follows:

> *„The observation of rigorous criteria during the translation process is fundamental to guarantee the comparability of the instrument between all the languages. The master questionnaire is provided in English and each PD must ensure that the questionnaire is translated into all the languages spoken by 5% or more of the population in the country. A central team will monitor the translation process. Further information on the translation process will be provided."*

These Translation Guidelines provide further information on the translation process. They are based on the ESS Translation Guidelines, widely regarded as a benchmark in survey translation, containing many best-practice solutions that could be successfully adopted in the translation of the European Values Study questionnaire. The ESS Round 8 Translation Guidelines can be found under the following link:

http://www.europeansocialsurvey.org/docs/round8/methods/ESS8_translation_guidelines.pdf

It is important to read the entire text of these EVS Translation Guidelines to ensure consistency across participating countries and avoid errors.

2. Translation Management Tool (TMT)

In the past, the WebTrans tool was used for translation of the EVS questionnaire. For the EVS 2017, the TMT – Translation Management Tool – will be used, as developed in the framework of SERISS[2].

A separate instructions document will be provided to countries.

3. Existing translations – re-use and review

The EVS Master Questionnaire (2017) contains identical or modified items from EVS 2008 and WVS waves as well as new items. Thus, for countries which participated in previous EVS and WVS waves, a considerable part of the questionnaire already exists having been translated before. This means that existing translations can be re-used and **only the new and/or modified parts** of the EVS Master Questionnaire (2017) will need to be translated.

However, as errors and omissions have been detected in some of the existing translations, countries are asked to conduct a **review** of the existing EVS (and WVS) translations in their respective languages, whenever such questions are included in the current EVS Master Questionnaire. Existing translations are automatically imported into the EVS Translation

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[2] http://seriss.eu/about-seriss/work-packages/wp3-maximising-equivalence-through-translation/

Management Tool (TMT). For more information on the TMT, please consult the separate TMT instructions.

As a result of such review, countries should modify their translations (questions, battery items) where a **serious** translation error occurred. A 'serious error' generally means a deviation which will lead to asking a different question (such errors include, for instance, an omitted item in a battery, an unfounded and meaning-changing addition, or a distorted meaning).

Decision about any changes to existing translations should be made with **extreme caution** and only where absolutely necessary and only when a well-founded rationale exists, given the fact that the EVS is a replication survey and consistency must be preserved in its time series.

Countries that, in 2008, 'shared a language' with another country should prior to proposing any change contact the respective country/countries and discuss the general and/or country-specific need of the desired change.

Any proposed changes to an existing translation should be entered in the TMT tool, along with a rationale, and a subsequent decision will be jointly done with Tilburg University (contact: Claudia Brunori at Tilburg University: c.brunori@tilburguniversity.edu). More information on the process can be found in the TMT instructions.

Appendix A provides some examples of errors and deviations that got detected during data processing and documentation or were reported by program directors or data users.

4. Translation procedure for new and modified trend items

The current best practice in survey translation is the so-called 'team approach' (or 'committee approach'), which means that questionnaire translation is prepared by a team of people.

This approach helps to avoid errors resulting from subjective choices, individual style and preferences, as well as errors caused by careless reading or misunderstanding of the original text by an individual person.

The team approach is also known as the TRAPD procedure, successfully used in many other survey translation and assessment endeavours (Harkness, 2003). The TRAPD acronym is made up of words which describe the subsequent stages of the process: **T**ranslation, **R**eview, **A**djudication, **P**retest and **D**ocumentation. Figure 1 depicts the process.
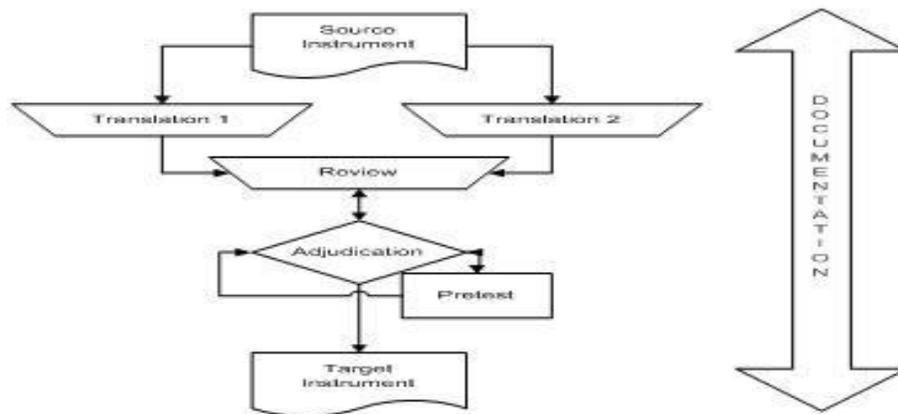
Figure 1: The TRAPD translation process (Mohler, P., Dorer, B., de Jong, J., & Mengyao Hu, M., 2016)

Translation involves two parallel translations of the same questionnaire prepared independently. Translators may also be asked to make comments on their choices or issues spotted.

Review means that the translators and a reviewer (and other experts, as needed) go through the entire questionnaire (set of questions), discussing different versions and agreeing on a final version.

Adjudication means that an adjudicator assesses the final version vis-à-vis the original document, considering the two original translations, the final version and any comments made in the process.

The stages of review and adjudication are often merged, and the reviewer then simultaneously acts as an adjudicator during the review meeting.

After adjudication, the translated questionnaire is carefully copy-edited (layout, spelling, omissions) and prepared for a pretest.

Pretest means that the translated version is applied in a small-scale quantitative or qualitative study, and the feedback from the pretest is used to correct/modify the translated questionnaire. Ideally countries set aside a small budget for pretesting in one or the other form.

Documentation means that all stages of the process are duly documented. This includes the parallel translations, the results of the review meeting, the adjudicated version, adaptations made, any remaining issues, comments for subsequent rounds of the survey, communication with item developers, pretest results and modifications made after the pretest, the final version of the questionnaire which was actually fielded, etc. All documentation should be

prepared **in English** to ensure access for anyone interested. The Translation Management Tool (TMT) used for translating the EVS 2017 will help to document the translation.

For the documentation of the overall translation process adopted (processes, persons involved), please fill in see the Methodological questionnaire for EVS 2017 accordingly.

It is important to allocate **sufficient time** for the two translations to be prepared and the review (adjudication) discussion. This will help to avoid many problems such as careless reading, hasty translation without considering various options, errors in the translated text, etc. The recommended time for the translation of the EVS 2017 Master Questionnaire is a minimum of two full weeks. [3]

Appendix C provides an evaluation grid with a summary of issues to consider in questionnaire translation.

5. Translators, reviewers, adjudicators

Translations in cross-national surveys are usually prepared by team members and/or professional translators. **Translators** should be native speakers of the target language, have an excellent knowledge of English (preferably confirmed by a university degree, a language certificate, etc.) and experience in translation, ideally in questionnaire translation. The translators should also be familiar with the nature of survey research and characteristics of questionnaires; if translators seem suitably skilled but lack experience in questionnaire translation and knowledge in survey research, they may undergo briefing by the national team prior to the translation, or alternatively they may be 'trained' in these regards during the review discussion itself. We strongly recommend including at least one professional translator or linguist in the process in order to cover the needed translation competence. Places to find and recruit professional translators from may be translator associations in each country[4] or institutions of higher education where translation is taught.

Reviewers and **adjudicators** should also be native speakers of the target language and have a strong command of English as well as knowledge of survey research. Often, the program director serves as a reviewer (and/or adjudicator).

Translators and everyone involved should receive these translation guidelines in advance to the process.

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[3] Experience shows that translators, when carefully translating and commenting, require on average 4 hours for 20 items; the same applies to a review discussion.

[4] Professional translation associations: https://inboxtranslation.com/resources/professional-associations-translators-interpreters/ // see also further stimulating ideas for hiring translators: http://ccsg.isr.umich.edu/index.php/chapters/translation-chapter/finding-selecting-and-briefing-translation-team-members

6. Language harmonisation for 'shared-language' countries

As is the case with many other major cross-national surveys, some EVS participating countries share the same language, that is, they translate into the same language, such as French (Belgium, France, and Switzerland). In such cases, the translation of the EVS questionnaire should follow a specific procedure.

In the past, the translation of EVS questions was **centralised** in cases where a few countries shared the same language. It is recommended that the centralised translation procedure is also followed for the EVS 2017 questionnaire. This will help to avoid situations from the past, where *different* concepts or wordings were adopted by countries sharing the same language.

Appendix B provides a graph systematising the languages in EVS 2008. In this graph, the countries in **bold and italics** provided their translations to other countries which shared the same language and which then adapted the version in linguistic and cultural terms to their own situation. This graph may be used as a starting point for contacting co-sharing countries in 2017. The guiding principle for adaptation should be: '*Identical if possible, different if needed'*. Linguistic and cultural adaptations should be thoroughly discussed in the adopting countries and documented.

Countries 'sharing a language' should contact each other as soon as possible and clarify 'sharing options'.
A) *Cooperation – if countries can produce their translations at around the same time (preferred option)*
   1) 2 translators translate the new items independently from each other (that is, 2 translations for all countries in total participating in the 'sharing' approach are produced).
   2) Each country participating in the sharing approach receives these translations in advance to a review meeting to allow enough time for preparation.
   3) There will be a joint review meeting with participants of each country, including both survey/substantive experts and translation experts.
       a. Video conference(s) with 'shared screen' OR
       b. Face-to-face meeting
   4) Guiding principle for decisions: *Identical if possible, different if needed*. Differences between the countries should be documented in the TMT.
B) *Adapting existing version – if countries have different timetables*
   1) If a translation in a shared language already exists when a country commences preparations for fieldwork, this translation should serve as a starting point for linguistic and cultural adaptations. This process should also include a team consisting of survey/substantive experts and at least one translation expert.
   2) Guiding principal for decisions: *Identical if possible, different if needed*. Differences between the countries should be documented in the TMT.

The TMT instructions for the Translation Management Portal will explain some more sharing processes for 'language-sharing' countries.

7. Language harmonisation for countries translating into several languages

Countries translating into several languages will have the opportunity to compare their (pre)final versions in the different languages on one screen and fine-tune and harmonize any decisions in terms of intra-country comparability. The TMT tool allows this. Instructions will be provided in the TMT instructions.

8. Adaptation to different modes

The master questionnaire includes different sets of instructions for different modes (face-to-face, web, paper) so that countries can translate along the master questionnaire version that fits their chosen survey mode.

9. General rules of translation

Translated questionnaires should enable the EVS team to **'ask the same question'** in all countries and languages. This general principle should be kept in mind when preparing the translated versions.

Another general rule of questionnaire translation is that this **should ensure translation of meaning (the so-called functionally equivalent translation).** Translation of meaning means that in quite a few instances the structure of the original sentence will need to be modified, the word order changed, etc. Thus, one should, of course, *not* stick to word-for-word translation or literal translation where this does not make sense or sound unnatural and awkward in a language. The further languages and cultures are apart from the English language and culture, the more changes on the "formal" or "surface" level will be needed.

Like many other general population surveys, the EVS is addressed to the **general public**. Therefore, care should be taken to **avoid overcomplicated** terms, phrases and structures and to make sure that the translated text is clear and understandable to respondents of different age and educational groups. Reading aloud the translation in the process of finalizing it helps to identify whether it is clear, has a good flow, and can also be easily administered by interviewers.

It is recommended that the translations use **standard forms of politeness** and **ways of addressing respondents** in the target country to ensure smooth administration.

Care should be taken to **avoid omissions and unnecessary additions** in the translated versions.

Consistency is another important rule – the same phrases and/or scales should be translated in the same way whenever possible. This also applies in comparison to questions from previous waves.

Layout of scales is very important – it should be preserved. The order of response categories *should not* be reversed, a horizontal scale *should not* be changed into a vertical scale, etc.

For other tips on specific translation issues, please refer to Part B of the previously mentioned ESS Round 8 Translation Guidelines.

10. Instructions for specific questions

Translation instructions regarding the translation of specific questions will be prepared in order to assist countries/teams with their translation work.

Amongst others, also changes of trend items are specified; at the same time, please compare your resulting modified translation carefully against the modified trend item (master version) to make sure that all changes are taken on board.

If countries are uncertain about the meaning of items, terms, etc., please contact the EVS team: Claudia Brunori at Tilburg University: c.brunori@tilburguniversity.edu. It is likely that other countries face similar challenges when items are problematic, so a clarification for all countries will enhance the comparability in the survey.

Bibliography

European Social Survey (2016). ESS Round 8 Translation Guidelines. London: ESS ERIC Headquarters. http://www.europeansocialsurvey.org/docs/round8/methods/ESS8_translation_guidelines.pdf (29 March 2017).

Harkness, J. (2003). Questionnaire Translation. In J. Harkness, F. J. R. van de Vijver & P. Ph. Mohler (Eds.), *Cross-Cultural Survey Methods*, (pp. 35-56). Hoboken, NJ: Wiley.

Mohler, P., Dorer, B., de Jong, J., Mengyao Hu, M. (2016). Translation: Overview. Guidelines for Best Practice in Cross-Cultural Surveys. Ann Arbor, MI: Survey Research Center, Institute for Social Research, University of Michigan. Retrieved April, 25, 2017, from http://www.ccsg.isr.umich.edu/

Appendix A: Some sources of error

Source: https://info1.gesis.org/EVS/Translation/EVS_Table_Translation2008.html

Misunderstanding of source text
- v367_EVS2008: Parents had problems replacing broken things
    - Translated as 'My parents had problems bringing balance back into their relationship'.
- V83_EVS2008: Here are some aspects of a job that people say are important - Family friendly
    - In some languages item "family friendly" seems to be translated in terms of 'a familiar, friendly work' instead of "work-life balance".
- **Remedy:**
    - Include skilled translation practitioners with excellent knowledge of the English language;
    - take into account the concept when making translation decisions;
    - ask when the concept is unclear.

Careless reading
- V154: Homosexual couples - adopt children (Q47C)
    - Question in Master Questionnaire 'Homosexual couples should be able to adopt children' is translated as 'Homosexual couples should *not* be able to adopt children'.
- **Remedy**:
    - Parallel translation;
    - copy-editing prior to finalization of translation.

Appendix B: Languages and shared languages in EVS 2008[5]
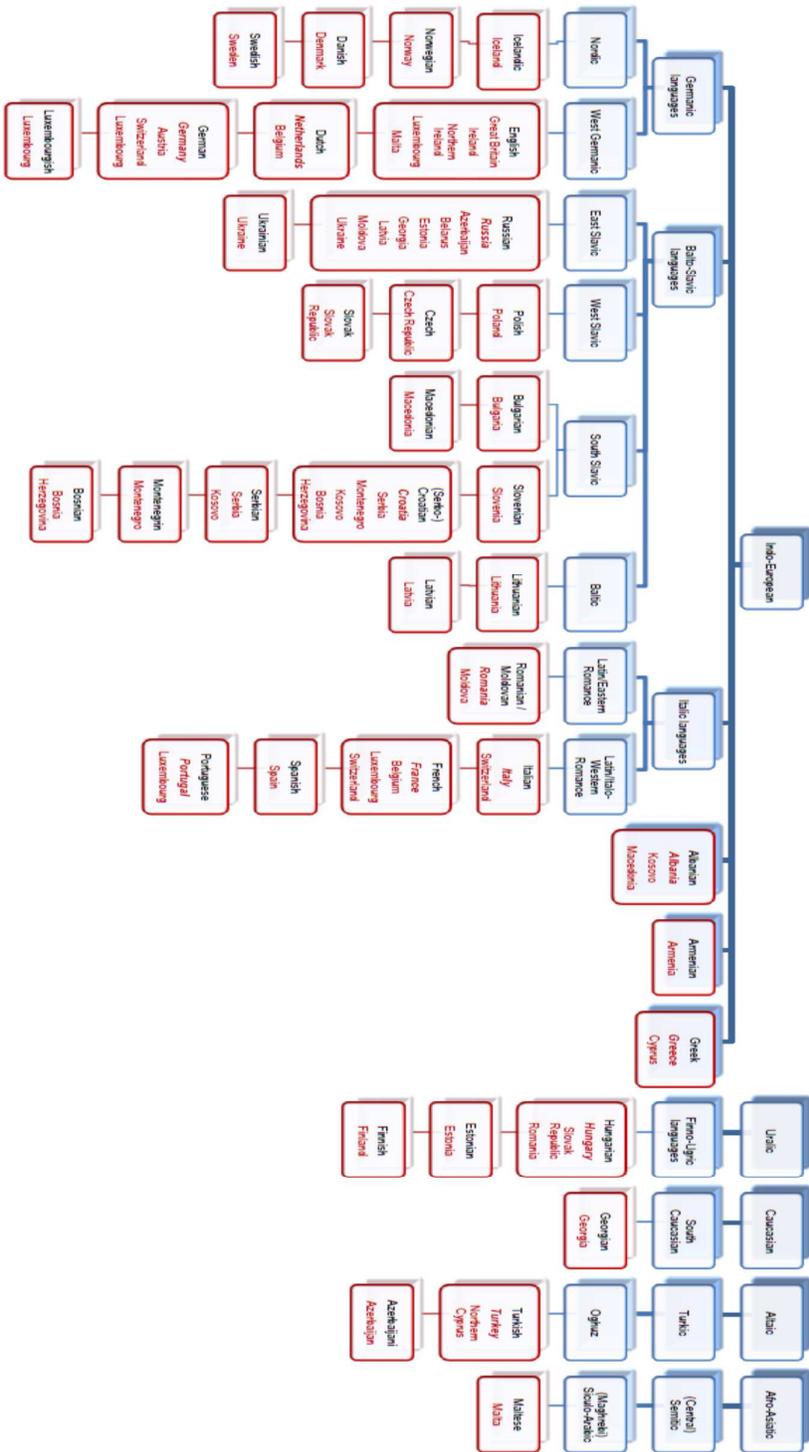
1st level – Language family (dark blue)
2nd and 3rd level – Subdivision (blue, light blue)
4th level – Languages used in EVS 2008 (red)

Red boxes contain EVS languages and the country/countries in which they were used.

Some languages are shared in several countries (e.g. Italian in Italy and Switzerland). Countries providing their field questionnaire as source for adaptation of the translation are marked with **bold and italic font** (e. g. the field questionnaire of Italy in Switzerland).

Countries using English field questionnaire adapted the EVS Master Questionnaire.

Evaluation grid –

Guidelines for the Evaluation of Questionnaire Translations[6]

> *Note: Depending on language combination and survey context it may not be possible to meet all the provided "guidelines"; rather it may be necessary to make trade-off-decisions.*

Checking of meaning

Possible sources of error:
- Obvious misinterpretations of the source questionnaire
- Shifts in meaning (e.g.. formulation is too narrow or too wide)
- Unsuitable connotations
- Unclear meaning
- Ambiguity or potential misunderstanding
- Omitting of meaningful text elements (e.g., "in general")
- Unnecessary adding of text elements

Checking of cultural adequacy
- Concerning the cultural background (behaviour, traditions, customs, relevant knowledge, …) → **cultural adaption necessary?**
- Concerning the socio-political background (political system, economic system, etc.) → **cultural adaption necessary?**

Checking of style and register
- Short, simple and clear sentence structure
- Simple words and formulations
- Adequacy of language for the target population considering age, education and other relevant socio-demographic characteristics
- Adequacy of (technical) terms for the target population
- Adequacy of the translation for the mode (*oral* communication face-to-face or by telephone, *written* communication paper-based or computer-based)
- Adequacy in terms of typical question formulations and questionnaire conventions (e.g., when addressing men/women if languages differentiate in this regard)
- Complying with cultural conversational conventions (politeness, form of address, speech acts, etc.)

Checking of scales
- Semantic comparability to the original, that is, paying attention to the dimension and the quantification/negation of the scale
- Symmetry or equal distance between scale points if existing in original
- Disjunct answer categories (= excluding each other, especially relevant for numerical scale points)

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[6] Based on Behr (2009), see also Pan und de la Puente (2005)

- Idiomatic and linguistic fitting between modal adverbials (very, quite, etc.) and the corresponding adverbs/adjectives
- (Grammatical) fit between question and scale

Checking of linguistic correctness
- Spelling
- Punctuation
- Syntax and grammar
- Collocation (= typical combinations of words)
- Correct usage of tenses

Checking of consistency
- Consistency between different waves of a study (replication)
- Consistency of repeated elements in a questionnaire, e.g.
    o Instructions
    o Core concepts
    o Scales
    o Almost identical questions
    o Scale, anticipated in question text, and the corresponding answer scale

Checking of layout/ presentation
- Equivalent text formatting (bold, underlined, etc.)
- Taking over the layout of the scale
- (If applicable) Cultural adaptations (colours, text boxes, writing direction, etc.)

References and further reading:

Behr, D. (2009). *Translationswissenschaft und international vergleichende Umfrageforschung: Qualitätssicherung bei Fragebogenübersetzungen als Gegenstand einer Prozessanalyse*. GESIS: Bonn, 2009. http://nbn-resolving.de/urn:nbn:de:0168-ssoar-261259

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