

### **PISA-Based Test for Schools**

National Service Provider Handbook

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# CONTENTS

1	Aud	lience and Purpose	3
2	PBT	S Overview	4
3	Ada	ptation and localisation	5
	3.1	When does adaptation and localisation start?	5
	3.2	What happens during this phase?	5
	3.3	Training plan	5
	3.4	Localise content	7
	3.4.	1 Overview	7
	3.4.	2 Cognitive Test and Questionnaire	7
	3.4.	3 ISCO Code Tables	8
	3.4.	4 Localising the digital platform for use in your country	9
	3.4.	5 Training and support documentation	9
4	Awa	areness raising in schools1	0
	4.1	When does awareness raising start?1	0
	4.2	How does awareness raising work?1	0
	4.3	Costs of school participation1	0
	4.4	Minimum requirements to qualify for a school report1	0
5	Pre	paration1	1
	5.1	Collecting enrolment and infrastructure data1	1
	5.2	Creating the student sample1	1
	5.3	Providing Session Codes1	2
	5.4	Providing Student Access Codes1	2
	5.5	How Session Codes and Access Codes are used1	2
	5.6	Training for School Coordinators and Proctors1	3
	5.7	Conducting a pilot1	3
6	Deli	very1	4
	6.1	Scheduling for test delivery1	4
	6.2	Supporting schools and the NSP during test delivery1	4
	6.3	Online versus offline test delivery1	4

e	5.3.1	Online delivery	14
e	5.3.2	Offline delivery	15
6.4	l Fin	nalising the test session	15
7 1	Marking	g	15
7.1	. Hir	ring and training of Markers and Coders	15
7.2	Ac	cessing the PBTS online platform to mark responses	16
7.3	B Ho	ow many markers and coders are needed?	16
8 A	Analysir	ng and reporting	16
8.1	. Th	e gold dataset	17
8.2	2 Th	e School Report template and Reader's Guide	17
8.3	B Th	e chart localisation sheet	18
8.4	Pro	oducing school reports and quality assurance	18
8.5	5 Dis	stributing school reports	18
8.6	6 Po	ost-assessment activities	18
٤	3.6.1	PISA for Schools support materials	18
٤	3.6.2	PISA for Schools Community	18
8.7	PIS	SA for Schools webinar	19

## **1** Audience and Purpose

This guide is designed to support the National Service Provider (NSP) for the PISA-based Test for Schools (PBTS) in a given country.

The purpose of this guide is to give the NSP a comprehensive view of:

- 1. Its role as the NSP as well as the OECD, Janison and other key stakeholders in the preparation and delivery of the PBTS test and School Report in your country.
- 2. Activities involved in preparation for and delivery of the PBTS test and School Report.

PBTS delivery can be organized into the following phases:

- a. Adaptation and localisation
- b. Awareness raising
- c. Preparation
- d. Delivery
- e. Marking
- f. Analysing and reporting
- 3. Training and supporting documents that the NSP will receive
- 4. Expected timeframes for critical parts of the process
- 5. Communications and project management tools used to share status and drive delivery.

Throughout the process, OECD and Janison teams will support the NSP in order to make sure that the PBTS experience is positive, constructive and smooth for all schools and students.

## **2 PBTS Overview**

The following graphic shows the key phases in the delivery of PBTS. These phases are described in detail as you progress through the document. Please note that these activities are not always sequential and several will take place concurrently in order to successfully deliver on time.



## **3** Adaptation and localisation

### 3.1 When does adaptation and localisation start?

Once the NSP agreements have been signed between the OECD, the International Platform Provider - Janison and the NSP, the adaptation and localisation can commence.

### 3.2 What happens during this phase?

Once the activity of signing agreements has been concluded, the Janison Project Manager and the OECD will organise the kick-off meeting.

#### The invitees to the kick-off meeting are:

- NSP
- OECD
- Janison

#### In the kick-off meeting the Janison Project Manager will:

- Describe the PBTS delivery overview
- Confirm key contacts in each team
- Ask questions of the NSP including:
  - confirmation of expected delivery dates for PBTS
  - o subsequent timeline for preparation
  - o expected number of schools to sit the test
  - o confirmation of language requirements for the purpose of localisation
  - indication of expected testing conditions given available technology and internet connectivity in schools (i.e. do we expect schools to take the PBTS online, offline or a mixture of both modes?)

#### Other discussion points during the kick-off meeting include:

- Sharing the Training Plan and initiating the scheduling of training sessions
- Confirming access to the Janison Secure File Transfer Protocol (SFTP) environment for sharing confidential documentation and training materials
- Setting communications schedule (e.g. weekly or fortnightly meeting)
- Setting out next steps and recording actions

### 3.3 Training plan

An important part of this phase is initiating the training plan. Janison is responsible for delivering a series of training sessions that will transfer critical knowledge and skills to the NSP in order to deliver the PBTS. The training sessions are provided using online meetings that can be recorded and reviewed by the NSP when needed. The training process is supported by training documentation and user guides that are made available to the NSP prior to each session.

#### **Training overview**

The training schedule below will be adapted to the needs of the NSP to support critical activities.

	Subject	Content	Reference			
1	Content Localisation	How to access the Authoring platform, check each item and provide feedback to Janison.	Reviewing questions			
2	Platform and Test Player localisation	How to provide translations that will localise the Test Player and the online platform screens that will be accessed by NSP, School Coordinators, Markers and Coders.	Localisation guide			
3	Enrolment Information	Enrolment information template				
4	Student experience of Online Test Delivery using Janison Replay application	How to check for device compatibility using Janison Replay Check, install the replay application, download student tests to the device and examine caveats around centralised software deployment tools. Offline and online mode will be explored. Next steps include understanding how Replay enables students to take the PBTS and a physical check will be run on device reconciliation status.	PBTS administration guide			
5	PBTS Administration Platform: Understanding roles					
6	Administering a Test Session	The Test Administration Script. This is a critical session for School coordinators and ensures delivery of an excellent proctor experience.	PBTS administration script			
7	Marking and Coding – How to use the Platform	How to access the platform and complete the marking and coding processes for each response.	Marking and Coding guide			
8	Marking and Coding – Applying the PISA standards	How to mark questions and code responses in line with PISA standards.	OECD			
9	School Report Template and Chart Localisation <b>Note</b> : This translation work can begin straight away.	How to provide essential NSP translations into the Report Generator Tool: - School Report Template (.PDF) - Chart Localisation sheet (.xlsx)	School Report template and Chart Localisation guide			

### 3.4 Localise content

#### 3.4.1 Overview

Localising the PBTS content to match the lived experience of students is critical for success. Various instruments are used throughout the delivery of PBTS and they will require both translation and localisation. For example, the PBTS written in Brazilian Portuguese would need to be localised for use in Portugal.

It is the NSP's important role to provide these translations and localisations with the support of the OECD. Sufficient time and expertise must be dedicated to completing this in a timely manner. Janison will provide guidance and training for the NSP where needed on how to review the instruments and provide the translations that are needed.

The documents requiring translation and location are listed below. The documents include:

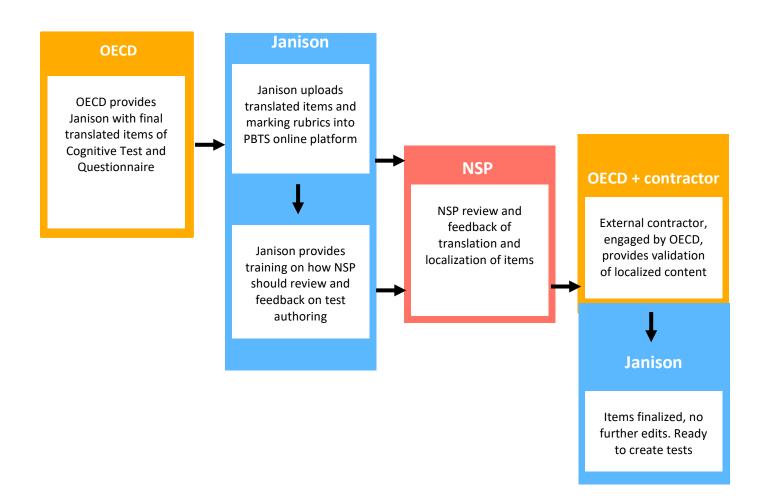
- questions and related marking rubrics for the PBTS Cognitive test
- questions in the PBTS Questionnaire
- International Standard Classification of Occupation (ISCO) Code tables that are used in the marking of the PBTS Questionnaire
- Janison Replay application
- Janison's PBTS online administration platform including marker dashboards
- Training and support documentation (please refer to Annex 1)
- School report and associated charts
- Reader's guide
- Video tutorial
- Upcoming localisation files for the Digital Dashboard

#### 3.4.2 Cognitive Test and Questionnaire

The OECD will provide the NSP with the Cognitive test items and Questionnaire to translate. Once the translation has been completed, the OECD and an external contractor will verify the translation and send the verified version to the NSP. Once the NSP has reviewed and signed off on the proposed changes, it will be adjudicated by the OECD for final sign off.

Once the final sign off has been given, item authoring on the Janison platform can begin.

The following diagrams show the work flow for the translation and localisation of the Cognitive Test and Questionnaire.



Janison will provide the NSP with training on how to access the platform in order to review items and provide feedback.

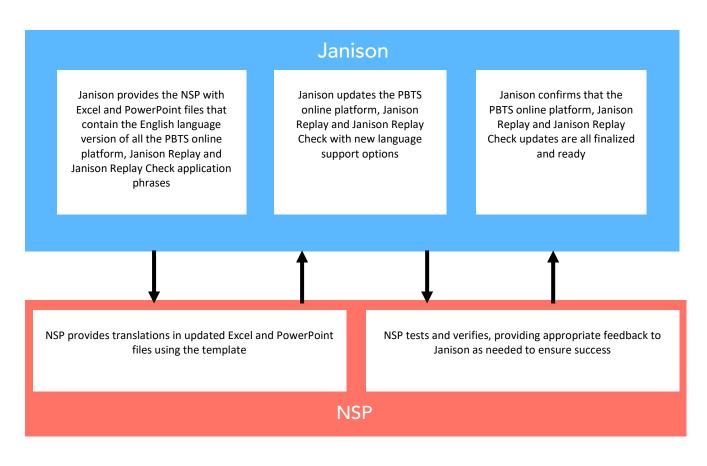
**Note**: It is imperative that the NSP verifies that the translated and localised items approved by the OECD have been correctly implemented in the platform.

#### 3.4.3 ISCO Code Tables



After receiving the ISCO codes from the OECD, the NSP must either translate the professions in conformance to the guidelines provided by the International Labour Organization (<u>ILO</u>) or utilize national versions (usually made available by national statistical bureaus or authorities).

#### 3.4.4 Localising the digital platform for use in your country



The NSP will provide translations to phrases that are present in Janison's software – the PBTS online platform, and the Janison Replay and Replay Check applications.

Once the translations have been applied in the software, the NSP will test the software and confirm that the translations and localisations have been correctly applied.

#### 3.4.5 Training and support documentation

It is the NSP's responsibility to provide training to administrators that are responsible for supporting the delivery of PBTS at their school.

The NSP must provide for effective knowledge transfer using the tools that are available to them. Training guides written in English will be provided.

The NSPs are best positioned to update and translate these guides for use by their audience. New or translated documents should bear only the NSP's logo and should be shared with the OECD for approval prior to distribution. They must not bear the OECD or Janison logos.

## 4 Awareness raising in schools

### 4.1 When does awareness raising start?

The PISA for Schools project is entirely demand-driven and the PISA-based Test for Schools is administered on a voluntary basis as schools engage with the OECD or the NSP directly. Raising awareness of the PISAbased Test for Schools in your country is the responsibility of the NSP. This can be achieved in many ways and the NSP is encouraged to actively recruit schools to participate in upcoming test events. In some cases, awareness raising and recruiting will happen before the NSP organisation actually commits to act as an NSP. In other cases, it will happen after the agreements have been signed, usually with the support of pre-existing relationships with schools (e.g. connections with school networks, partnerships with the Ministry of Education).

#### 4.2 How does awareness raising work?

Awareness-raising and outreach operations can take several forms including dedicated websites, invitations to events and webinars.

For the purpose of validating the PBTS in a country, the schools participating in Year 1 of the project need to be as diverse as possible (e.g. public/private, rural/urban, high/low performing, high/low socio-economic status). Therefore, once the bulk of the schools have been recruited, it could be that variability might be missing. In this case, the NSP will need to make a concerted effort to include at least some of them in the sample.

In most instances, our NSPs work with convenience samples. Therefore, there will be no sampling operations at school level (but sampling protocols will be applied in each participating school to ensure a statistically representative sample of students). In the event that an NSP chooses to use a representative sample of schools, then a school sampling framework will be designed directly by the OECD and external contractors, aligned with the sampling methodology utilised in PISA.

The OECD and Janison can help NSPs to raise awareness among schools by participating in live (online) events. The NSP is encouraged to extend an invitation so the OECD and Janison can better support it in this endeavour.

Furthermore, the OECD will provide the NSP with official marketing materials for PISA for Schools (such as an official brochure, flyer and PowerPoint presentation) to be circulated among schools. The School Report template and the Reader's Guide also represent powerful marketing materials for schools by offering a concrete example of the type of information to be delivered through the assessment. The OECD will sign off on your main public information (such as websites on the assessment or press releases). However, once approved the materials may be re-worked for additional uses without further sign off. If in doubt, do not hesitate to ask for clarification.

### 4.3 Costs of school participation

In some cases, the NSP may decide to charge individual schools to take part in the PBTS – in other cases costs will be covered by the NSP itself, or another funder (e.g. public agency or philanthropic organisation).

### 4.4 Minimum requirements to qualify for a school report

When schools agree to participate in the project, it is essential that they are made aware that to qualify for a school report, a significant amount of valid student responses must be collected to produce results. Students' responses to the Cognitive test and Questionnaire are deemed valid if student performance and socio-economic background can be determined.

That is, a student response is considered valid if:

- 1. Student eligibility can be ascertained through date of birth and gender information
- 2. Performance can be inferred through sufficient responses to the Cognitive test, and
- 3. There is enough information in the Student Questionnaire to estimate the student's socio-economic background. In particular, information regarding:
  - a. Parental occupation and education background
  - b. Student learning environment and socio-economic context at home

#### Therefore, the following eligibility criteria must be met:

- 1. The total number of valid student responses within the school must be **no less than 42**
- 2. **No less than 80% of tested students** (meaning participants from the main sample or replacement students) must provide valid answers.

If a school does not meet all the above-mentioned criteria, that school will not receive a school report.

### **5** Preparation

#### 5.1 Collecting enrolment and infrastructure data

Once a school is recruited, the NSP will provide the school with a school information template spreadsheet to complete. This template, provided by Janison, will gather required information including school names, codes and eligible students within each school. The school populates the template with the required information and returns the form back to the NSP.

At the same time, information will be gathered relating to the computer lab infrastructure.

While less common, some NSPs have chosen to apply PBTS to a representative sample of schools in their country. In this special case, a sampling framework will be designed by the OECD and will thus require additional data pertaining to the universe of schools to be sampled. Please contact the OECD to discuss this possibility.

### 5.2 Creating the student sample

There are clear guidelines around student eligibility and the process for producing the main sample for each school. The schools must have 42 or more students who are between 15 years and 3 completed months to 16 years and 2 completed months at the time of assessment. The operational definition of an age population directly depends on the testing dates. A variation of up to one month in this age definition is permitted.

For more information please refer to Section 6: Field Operations in the PBTS Technical Report.

The latest report can be located on the PISA for Schools page <u>http://www.oecd.org/pisa/pisa-for-schools</u>

#### Enrolling the students in the PBTS online platform

The NSP must collate all of the primary sample information from the schools in a single spreadsheet and share it with Janison. This sampling information is highly confidential and should only be transferred by upload to the Janison SFTP platform. It is important to note that no student names should be shared with Janison or the OECD.

District / Region Code 👻	School Code 👻	Student ID 👻	Birth Year 👻	Birth Month 👻	Grade 👻	Gender 👻	Additional Needs Status 👻

Upon confirmed receipt of the correctly formatted information, Janison will prepare the student enrolment on the PBTS online platform. There is an anticipated turnaround time of 7 calendar days. Please provide the required time for this to be successfully completed.

### 5.3 Providing Session Codes

In addition to the student access codes, a single, confidential test session code which is unique for each school is created by Janison. Janison transfers these session codes to the NSP via the SFTP site to ensure maximum security. The NSP must also transfer this info to the schools and will be instructed on this process during the relevant training session.

Session codes will be provided in the proctor materials in order to initialise testing on the test day.

### **5.4 Providing Student Access Codes**

During training sessions, it will be discussed the enrolment process and the creation of two confidential, unique access codes per student. Janison will provide these codes via spreadsheet through its SFTP. The NSP must pass these codes securely to each school. On the day of the test, the schools' test administrators confidentially pass the codes to each student before the test commences.

This process is to be handled by trained proctors and NSP staff only.

#### 5.5 How Session Codes and Access Codes are used

The Test Administration Script describes in detail the steps that each student takes on the day of the test. The PBTS is composed of a 90 minutes cognitive test, followed by a 15-minute break and concluded by a 35-45 minutes Student Questionnaire.

#### **Cognitive test**

In order to access the Cognitive test, each student at the same school will first enter the same common Session Code into the Janison Replay software. Then they will enter their unique Cognitive Test Access Code. Once this code is entered, the unique test booklet that has been specifically assigned to that student is loaded onto the student device.

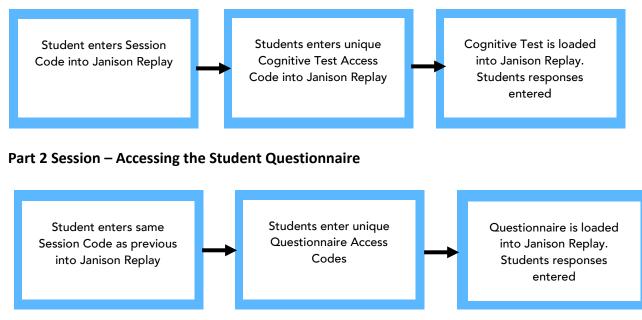
The proctors will clearly display the Session Code for all students (for example by writing it on the whiteboard) and will support them in entering their unique student code.

#### Student questionnaire

In order to access the Questionnaire, each student at the same school will enter again the same common Session Code for that school into the Janison Replay software. Then, each student will enter their unique Questionnaire Access Code. Once this code is entered, the Questionnaire questions will appear.

The following diagram describes this process:

#### Part 1 Session – Accessing the Cognitive Test



### **5.6 Training for School Coordinators and Proctors**

The NSP is responsible for providing training and document guidance to School Coordinators and Proctors on:

- 1. How to use Janison Replay Check
- 2. How to install and operate the Janison Replay software
- 3. How the School Coordinator can access the PBTS online platform to monitor student progress and finalise sessions
- 4. How to administer test sessions on the day of the test

In accordance with the Training Plan described in Section 3, Janison will provide all the necessary training and supporting user guides to the NSP that cover the above topics.

- The Janison Replay Check and Replay Installation Guide is provided and is targeted at technical administrators that will be responsible for setting up the students' devices
- The School Coordinator Guide describes the screens and functions on the PBTS platform for monitoring student progress and finalising sessions
- The Test Administration Script describes the running order of the test day and provides the exact words by which the Proctors will use to guide the students and administer the test

The NSP must ensure that this material, and any new user guides, are translated to ensure that all the relevant school staff are fully briefed about, and able to conduct, their important role in the PBTS administration.

### 5.7 Conducting a pilot

It is strongly recommended that a pilot test is conducted with 2 - 3 schools a few weeks prior to the test date in order to validate the processes for preparing schools and administering the test. If the pilot is conducted under identical conditions as the main administration and the schools meet the eligibility criteria, then the OECD will consider issuing them a school report.

## 6 Delivery

### 6.1 Scheduling for test delivery

The NSP is responsible for proposing a schedule that outlines intended test dates for each school. This should be done as soon as possible, preferably as soon as the Awareness Raising phase of the project is concluded.

Janison and OECD will review and approve the schedule with a view to ensuring the NSP is supported through the entire delivery process.

Following PISA Technical Standards, the overall duration of a testing window (i.e. the test dates for all schools in the sample, including the possible catch-up testing sessions for missed test sessions) must not exceed 6 weeks. Besides, this information is required in order to ensure that the PBTS online system as well as human support resources are aligned and optimised to support the necessary loads.

Please note catch up sessions are to be included in the NSP's scheduled test sessions plan to provide for situations beyond the school or NSPs control. The NSP should allocate times within the testing window where these tests could take place if needed. This enables schools to ensure that enough data has been collected to produce reliable results.

### 6.2 Supporting schools and the NSP during test delivery

Steps for Support Escalation:

- 1. School level primary technical support
- 2. NSP level technical support
- 3. Janison PBTS support team

The NSP will define with the schools the most appropriate means for providing primary technical support for the students and test administration staff. If there are any issues that cannot be resolved at this level, the School should escalate to the NSP for support. The NSP has been prepared to support the schools with all the necessary training provided by Janison. If there are any issues that cannot be resolved by the NSP, then the NSP should escalate to Janison PBTS support for assistance.

During the training session, NSPs will receive the phone numbers of the Project Manager and PBTS Technical Specialist for the purposes of escalation.

### 6.3 Online versus offline test delivery

Once student device compatibility has been confirmed using the Janison Replay Check application, the Janison Replay test player application can be installed. The timeline for this process will be agreed in collaboration with the NSP and the IPP.

The Janison Replay Application is used for both online and offline delivery of tests.

#### 6.3.1 Online delivery

Where feasible, online delivery is the preferred option for the PISA-based Test for Schools as it allows for real-time monitoring of the testing session and ensures immediate uploading of student responses to the PBTS server platform.

Upon entering the Cognitive Test Access Code, a test definition that is specific for that student is downloaded while the device is preparing to take the test. A stable internet connection is required to complete the student device preparation. Once the device has finished preparing, the student can commence the test.

Once the test has started, the test responses can be entered while the device is online or offline. The test player is resilient to network instability. If the device connection status is online, then responses will immediately be reconciled to the PBTS server platform as the student moves to the following question.

If the device goes offline, then responses will be stored locally until connection has been restored. When connection is restored, any stored responses will be reconciled automatically.

At the end of the test – if the device is offline –unreconciled responses can be reconciled either by bringing the device back online, or by using the reconciliation process described in the School Coordinator Guide.

Responses can be manually exported and reconciled using a different device with Janison Replay when online.

#### 6.3.2 Offline delivery

In situations where the schools or students have limited access or unstable internet connections, offline delivery is an option.

The process for preparing student devices and reconciling student responses is more labour intensive for the school and NSP compared to the online delivery method.

For offline delivery, and depending on the number and distribution of schools, Janison will prepare a series of USB images that are used to install the Replay application and load the test package content to the student device without the need for an internet connection.

Test responses are saved to the student device throughout the test.

By using the reconciliation process described in the School Coordinator Guide, responses can be manually exported and reconciled using a different device with Janison Replay when online.

### 6.4 Finalising the test session

After testing has been completed at the school, the test session may be finalised in the PBTS online platform.

It is the role of the School Coordinator to finalise the session for a school within the PBTS online platform. If the School Coordinator did not do this for some reason, the NSP can do this for the school.

When the session is finalised, the test responses are ready for marking.

## 7 Marking

### 7.1 Hiring and training of Markers and Coders

The NSP is responsible for the marking and coding of test responses, which can begin as soon as the first schools have completed their test events. The speed with which this step can be completed will depend upon the number and expertise of the markers. In some territories, it is possible to find markers that already have experience in providing marking and coding services for PISA and PBTS and are familiar with the specific requirements of a PISA-like assessment.

Typically, markers are domain specific. The number of items and item type needs to be considered when allocating marker resources, as it will have a direct impact on the duration of these marking operations.

In most cases, the NSP will choose to hire and train markers to conduct all marking and coding operations. In some instances, and depending on the language, Janison and the OECD can introduce the NSP to experienced markers that do not require any further training in order to be ready to commence marking PBTS items.

### 7.2 Accessing the PBTS online platform to mark responses

Generic accounts are created for each Marker, Senior Marker, Chief Marker and ISCO Coder. It is also important to know which domains (Reading, Science or Maths) each marker will be marking responses for, as this requires configuration by Janison.

Marker accounts can be created based on the marker's name and email address. Markers will mark responses from the domains that they are assigned to answer.

Twenty percent of the student responses will be double marked, i.e. marked by 2 markers, to meet the OECD's data quality assurance standards. Should the two assigned markers provide different grades, a Senior marker will need to resolve the conflict by adjudicating the most appropriate code to the response.

#### 7.3 How many markers and coders are needed?

Based on experience to date, the following metrics can be used as a rule of thumb for determining how many markers and coders are needed for the marking process.

Cognitive marker – approximately 6 questions per minute

ISCO Coder – approximately 4 responses per minute

Janison and the OECD are available to discuss how the NSP could best undertake forward planning for the marking and coding operations to maximise accuracy, efficiency and timeliness.

## 8 Analysing and reporting

Janison has developed a Report Generator tool that uses three inputs in order to create the school reports:

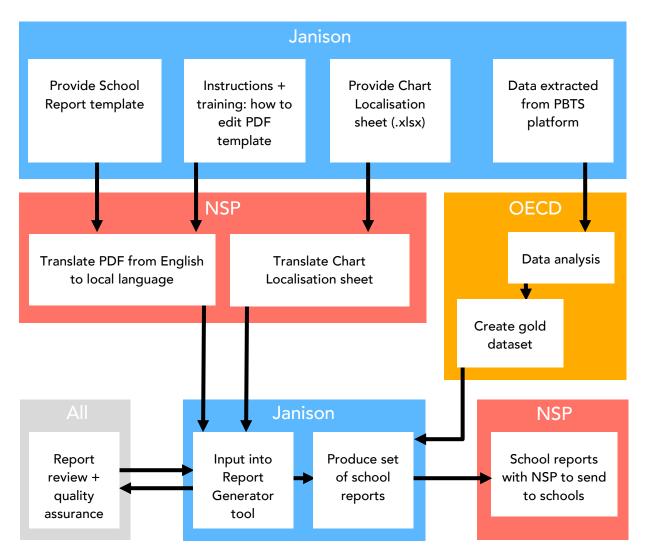
- 1. The School Report Template (PDF)
- 2. The Chart Localisation sheet (.xlsx)
- 3. The gold dataset

Part 1 and 2 – The School Report and Chart Localisation templates are the work of Janison and the NSP. These templates (provided by Janison) are translated and localised by the NSP for input into the report generator tool.

Part 3 – The gold dataset is produced by the OECD from the test data extracted from the PBTS platform and utilised for analysis and reporting. It is critical that the NSP checks against the reported figures to ensure it is an authentic and realistic representation.

The final outcome of this process is the School Report which is collated and prepared by Janison for distribution by the NSP to the schools.

The following graphic shows an overview of the process required to generate and distribute reports:



### 8.1 The gold dataset

When the marking and coding is complete, Janison extracts the SCORED (Cognitive) and RAW (Cognitive and Questionnaire) data files. These are transferred to the OECD via Janison's SFTP site. The OECD verifies that the dataset is complete and once the verification is finalised, the OECD generates the gold dataset using statistical analysis tools.

The NSP must verify that the data in the gold dataset is complete and broadly reflects results as expected in their context (e.g. most underprivileged schools performing worse than privileged schools).

The gold dataset is generated as an Excel spreadsheet. Janison and the OECD will review and approve the schedule with a view to ensuring supportability through the entire delivery process.

### 8.2 The School Report template and Reader's Guide

The School Report PDF template and the Reader's Guide document including static body text, certain images and logos have been designed by Janison based on the master version produced by the OECD. The base version is in English. It is the responsibility of the NSP to provide a translated version of this PDF. The NSP is also responsible for translating the accompanying Reader's Guide which will help schools in understanding and exploring their own school report.

Janison will provide the NSP with training on how to provide the translated version that is used to automatically generate the school reports.

### 8.3 The chart localisation sheet

Charts, tables and dynamic text are produced for input into school report. The code that produces these artefacts contains phrases that must also be translated from English to the local language. These phrases are provided to the NSP in an Excel spreadsheet. Instructions on how to provide the translations in this spreadsheet will be covered in Janison's NSP training sessions. Additional training is available if needed.

### 8.4 Producing school reports and quality assurance

An initial small batch of school reports is generated for review by the OECD, the NSP and Janison. If there are any issues, they are identified in the review process and resolved prior to publication and distribution.

The final deliverable is a set of school reports. There will be one school report for each school that has met the minimum criteria.

School reports are delivered to the NSP in PDF format and in the language chosen by the NSP.

Schools may elect to have a password applied to the School Report.

### 8.5 Distributing school reports

The NSP must securely distribute the School Report to the nominated recipients at each school (e.g. Principals, Assistant Principals) together with the password for access if required.

The NSP should ensure that all participating schools (even those who may not have met the eligibility criteria and will not receive a school report) are invited to take part in post-assessment activities. These include access to the PISA for Schools Online Community and follow-up events.

#### 8.6 Post-assessment activities

Assessment is a means, not an end in itself. Working closely with the OECD and Janison, the NSP should encourage participating schools to explore and use the unique data and insights contained in their School Report.

#### 8.6.1 PISA for Schools support materials

The OECD has developed a set of materials to help schools independently navigate their school reports:

- The Reader's Guide
- Video tutorials

The NSP is encouraged to translate these materials into their own language and to disseminate them among participating schools.

#### 8.6.2 PISA for Schools Community

The PISA for Schools Community provides a space for all participating schools to share and solve problems, learn from other schools' experiences, and engage in peer-learning as they pursue innovation in their classrooms, schools and school districts.

The OECD creates a unique registration ID for each PBTS participating school. The OECD will then provide the NSP with a complete list of IDs corresponding to each school in an Excel format. The NSP should provide these IDs to the schools together with the instructions on how to download their School Reports.

It is important to advise schools that teachers may have access to this valuable international peer learning community without being able to view their school's report and results should there be any concern on the part of school administrators.

The NSP will receive the following materials to complete this task:

- An Excel spreadsheet with unique registration IDs for each participating school
- A flyer about the PISA for Schools Community (in English, to be translated by the NSP)

### 8.7 PISA for Schools webinar

In order to help participating schools understand and explore their School Reports, the OECD team will conduct a webinar to explain key concepts that underpin the School Report and answer questions about methodology and the indicators used. The OECD team is responsible for the content of the webinar which is conducted in English.

The NSP is responsible for organising the webinar which is typically scheduled to be held 4-8 weeks after report delivery to allow school leaders and teachers time to read and reflect upon the findings in their School Report.

Please note that the NSP is responsible for logistics, promotion of participation, registration of participants and interpretation services (if applicable).