

VI. Translation: Translation Budgeting

Introduction

This section describes various models of budgeting resources for a cross-national translation project, as well as budget items that may need to be included (see [Guideline 2 of Tenders, Bids, and Contracts](#) for overall survey budgeting). There is no one costing 'recipe' for all projects. The organization and scope of the translation project will determine the structure and complexity of the budget planning. For example, in a centrally organized and centrally financed project, management may be asked to state what funding resources are needed for top-down pre-specified procedures. Alternatively, they may have to decide for themselves how to organize and conduct one or multiple translations. They may need to predict required costs to a central team, for an entire multi-country project, or for a translation project at the local level.

To organize translators and reviewers for a single translation effort, see [Translation](#). For projects that need to produce multiple translations or for which translations efforts are centrally coordinated, this section may be useful.

Guidelines

1. Determine the project management form and personnel.

Rationale

Project management may vary according to the organization and scope of the translation project. In large translation efforts, centrally organized studies, or translation projects conducted within a large organization, a coordinator may be hired to manage the entire translation effort (language and material identification, personnel selection, schedule, problem or team coordination, progress checking, etc.); additional coordinators may manage individual languages. In decentralized efforts (e.g., where translation is organized at the national level and thus only involves the language(s) of the country), preexisting staff may take on the function of project manager.

Procedural steps

- Identify the management required or specified.
- Identify or appoint one or more project manager(s) as appropriate.
 - If several people are involved in managing the project, ensure, if

- possible, that one person has ultimate responsibility for meeting deadlines, delivering products, etc.
- Make sure that clear records are kept so that someone else can step in if this is made necessary by illness, job change, or other unforeseen events.
 - If several people share the work, set up a clear sharing and checking procedure so that omissions are not made when one person takes over from another.
- Identify costs for such personnel and management structures, such as communication, offices, and meetings.
 - Identify any overhead costs.

Lessons learned

- The level of detail involved in translation project management can be easily underestimated. Good management tools, such as recording deliveries, are important.

2. Identify the material for translation and the language(s) required.

Rationale

The nature and the scope of the material determine which translation process to apply and the number of key players involved.

Procedural steps

- Identify the material that must be translated. Apart from the questionnaire itself, interviewer manuals, contact forms, information leaflets, etc., may require translation or a combination of local adaptation and translation.
- Identify any material already translated and assess the quality of this material.
- Determine the extent of all materials that require translation or quality checking before re-use.
- Establish how many languages are involved and identify any special requirements, such as interpreters for [unwritten languages](#) and word lists for interviewers working in regional dialects.
- Select translation procedures on the basis of the material required (for example, two or more translators, full translations, split translations,

team review procedures, single translator, or combined approaches) (see [Guideline 3.](#))

- Decide how translation costs are to be calculated -- by words, by time spent, by language difficulty, by express delivery, by number of translators involved, and/or by inclusion of re-used material.
- Budget for preparing materials for the translation process and any ensuing steps, such as creating templates.
- Estimate costs (see note on estimating translation costs in [Appendix A](#)).

Lessons learned

- Some materials requiring translation, as described in the first procedural step above, can be easily forgotten. For example, if each country programs its own computer application, the programming instructions will require translation. Underestimation results in underbudgeting, not just of costs but of personnel and time.
- Questionnaires often have repetitive elements. If these can be identified ahead of time, consistency can be improved and, often, costs reduced (see note on estimating translation costs in [Appendix A](#)).
- It is important to clarify, both to the budget staff and to the translators, any sections which are not to be translated.
- Any languages shared may result in some reduced costs, depending on the procedures followed in the project (see [Language Harmonization and Shared Languages](#)).
- Harmonization procedures may also increase costs (see [Language Harmonization and Shared Languages](#)).
- Good prior preparation of the material to be translated and any subsequent steps, such as the provision of templates and/or clear identification of the function of the material, can reduce costs and improve the quality of the translation. However, such preparation must also be included in the budget.

3. Identify the translation procedures to be followed and the human resources needed.

Rationale

The translation protocol chosen impacts the number and kind of people involved and time allocations required, as well as management, meeting, and communication costs. Translation procedures may be prespecified or selected according to the nature of the material to be translated. Low priority material might be produced by just one translator. [Unwritten languages](#), on the other hand, call for extra production steps.

Procedural steps

- Determine what processes will be required for translating the identified materials.
- Determine what people need to be involved. Plan for translation, review and adjudication, copy-editing, formatting and, if appropriate, the programming of computer applications (see [Translation, Guideline 1](#)).
- Identify personnel already available and any that need to be recruited for the translation project.

Lessons learned

- Different procedures may be required by different organizations and project specifications. Large educational testing projects, such as TIMSS, typically include a review and revision component which is undertaken by a commercial company. The WHO WMHI project required a harmonization meeting for Spanish versions. For some of its instruments, the Gallup Organization hires a commercial company to organize translators and translations while Gallup personnel closely monitor the output.
- The intensive, and possibly more costly, procedures chosen for one set of materials may not be needed for all the materials.

4. Determine the scope of briefing meetings.

Rationale

Careful translator briefing is essential to preserve comparability while meeting respondents' and designers' requirements (see [Finding, Selecting and Briefing Translators](#)).

Procedural steps

- Decide whether or not in-house training is required.
 - This will depend upon the study needs and the qualifications of the translators and any other personnel involved.
 - Include training and briefing needs in the budget.

Lessons learned

- Unless you are working within an existing framework that provides materials for briefing and the organization of briefing, these will require planning -- especially since there are few resources publicly available. Physical meetings may be costly, training the trainer meetings may be of questionable suitability, and webcasting calls for advance preparation and time zone scheduling.

5. Determine the nature and scope of review/adjudication meetings.***Rationale***

Review and adjudication discussions are central to the quality of the final translation product.

Procedural steps

- Identify the number of meetings required, the form of the meetings, and the people who must be involved.
- Consider any catering, travel, or accommodation costs related to physical meetings.
- Develop a time schedule and plan for the meetings.
- Determine the time and resources required to plan, conduct, and report on the meetings.
- Reserve funds for planned meetings after the main translation phases (e.g., after pretesting), as well as for unexpected meetings to resolve last minute problems.

Lessons learned

- If personnel charges different rates at different times, meetings that need to take place during evenings or weekends may be more costly than those which occur during regular working hours.

- See [Language Harmonization and Shared Languages](#) for the specifics of this coordinated effort and what it could mean for budgeting.

6. Budget for materials that may need to be acquired for the project.

Rationale

Special resources, such as software, language aids, or digital recorders for interpreting testing, may be required.

Procedural steps

- Determine whether or not the following materials are already available:
 - Dictionaries
 - Manuals for translator training and briefing
 - Software or licenses (translation tools, project management tools, webcasting)
 - Notebooks or computers
 - Projectors
 - Digital recorders

Lessons learned

- It may be difficult for a coordinator to identify or acquire materials with which he/she is not familiar and is uncertain how to locate.
- If unfamiliar with products, it is a good idea to team up with someone more knowledgeable whenever possible. Make sure that any technical components are compatible with the way they will be used in the project. If the materials are likely to be used often, ensure that they will not become obsolete soon.

Appendix A [under construction]

Glossary

Unwritten language

An unwritten language is one which does not have any standard written form used by the native speakers of the language to communicate with one another.

Further Reading

Cantor, S., Byrd, T., Groff, J., Reyes, Y., Tortolero-Luna, G. & Mullen, P. (2005). The Language Translation Process in Survey Research: A Cost Analysis. *Hispanic Journal of Behavioral Sciences*, 27(3), 364-370.

Matis, N. (2006). Translation Project Management. Retrieved September, 23, 2008, from http://www.translation-project-management.com/uk/ressources_necessaires.htm

Rico Pérez, C. (2002). Translation and Project Management. *Translation Journal*, 6(4), Retrieved September 24, 2008, from <http://accurapid.com/journal/22project.htm>