

# **CAHPS GUIDELINES FOR ASSESSING AND SELECTING TRANSLATORS AND REVIEWERS**

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## **1. INTRODUCTION**

This document addresses the growing need for translating survey instruments from English into a variety of languages in a cost-effective yet culturally competent manner. It provides AHRQ with a set of guidelines for selecting individuals who will be involved in the translation of CAHPS survey instruments on consumer experiences of health care. The guidelines are also useful to CAHPS users developing translations of CAHPS surveys into languages other than Spanish (Spanish translations will be developed by the CAHPS team). In addition, the guidelines may be considered when selecting translators for interview protocols or other data collection materials

The intent of this document is to provide guidelines for the assessment and selection of translators and translation reviewers. Selecting translators and reviewers is only one step of a broader set of recommendations being defined by the CAHPS team for the translation and cultural adaptation of CAHPS surveys. As such, it does not include guidelines for the actual process of translation and review as those will be the subject of another document.

This document addresses three major topics: the roles of the translator and the translation reviewer; the process of selecting translators and translation reviewers (or translation firms); and the qualifications that each should have.

## **2. TRANSLATION TEAM MEMBERS**

Two types of team members are critical to the successful completion of a translation project: translators and translation reviewers. Unlike other translation models, we have not included a specialized technical reviewer as part of the translation and cultural adaptation team. Since CAHPS instruments are geared to the general public, health care-related terms should be familiar to the general public and do not require a special technical review.

The primary role of the *translator* is to translate documents from the source language into the target language. The translator should aim to produce a translation that is:

- Accurate (i.e., the translation preserves the intended meaning of the text in the original language)
- Correct in terms of grammar, syntax, style, and other formal aspects of written language
- Sensitive to regional variations in language use and different dialects of the target language, when present
- Written at the appropriate reading level for the target population

The *translation reviewer* (or *reviewer*, for short) checks the translator's work by comparing the translated version of the document with the original version in the source language. The reviewer's work focuses on both the accuracy of the translation and the correctness and optimal use of language in the translation.

The reviewer also needs to ensure that the translation is appropriate for the target population in terms of the reading level and the language use of the groups or subgroups of the target population. The reviewer ensures that the terms and expressions that refer to health care or other special topics are both technically correct and consistently understood by a majority of the people who would be responding to the survey in the target language.

Ideally, there should be several reviewers who work as a team in a review committee. This committee may include the translators, the reviewers, and a member of the research team, who facilitates the discussion and makes final translation decisions. This committee makes decisions by consensus with respect to the quality of the translation and the modifications that should be made in the document. The goal is to produce a reconciled version of the translation that is technically and conceptually equivalent, and culturally appropriate.

### **3. SELECTION PROCESS**

The process of selecting translators and reviewers consists of four stages.

Stage 1. Applicants are asked to submit:

- A curriculum vitae detailing his/her qualifications including education, general work experience in the target language, work experience as a translator, and other experience or skills that would enhance his/her translation skills.
- Contact information of at least two individuals, preferably former clients, that the project manager can contact get a candid evaluation of the individual's work.
- Work samples and, when appropriate, documents that substantiate stated qualifications.

Stage 2. Project staff evaluate the applicant's qualifications.

- Stage 3. Project staff interview qualified candidates to evaluate their range of skills, work, and cultural experiences. Ultimately, the interview should elucidate each candidate's unique set of strengths and weaknesses with respect to the translation project.
- Stage 4. Project staff may ask translators or translation reviewers to complete a short translation or translation review task to determine whether they have the skills needed for the project.

In evaluating translator or reviewer candidates, one should bear in mind that people vary considerably in their linguistic skills. This is particularly important in cases in which those who will select the translators are unfamiliar with the target language.

#### 4. REQUIRED AND DESIRABLE QUALIFICATIONS

Each person brings a unique set of strengths and skills that makes him or her more or less qualified than others for the position of translator or reviewer. In addition, each language into which a CAHPS instrument may be translated poses a unique set of challenges. For example, the supply of competent translators living in the U.S. may vary by language. In addition, some languages display greater variations in the way the language is spoken in different regions than others.

Given this diversity, it is unrealistic to expect that the same set of selection criteria can be applied to every target language under every circumstance. In order to make informed hiring decisions, it is useful to separate the translators' and reviewers' qualifications into two categories, required and desirable.

**Required qualifications.** Table 1 lists the required qualifications for translators and reviewers of CAHPS surveys. Ideally, in order to qualify as a translator or as a translation reviewer, a candidate *should* have each and every one of the qualifications listed. Notice that the set of required qualifications for translators is different from the one for reviewers.

**Table 1. Required qualifications**

| <b>Translators</b>  | <b>Reviewers</b>  |
|---|---|
| Should meet all of the following:   | Should meet all of the following:   |
| <ul style="list-style-type: none"> <li>• Native speaker of the target language</li> <li>• Proficient in reading in the source language</li> <li>• Demonstrated strong writing skills in the target language</li> <li>• Work experience in the target language</li> <li>• Prior professional experience translating and/or developing survey instruments for health services or social sciences</li> </ul> | <ul style="list-style-type: none"> <li>• Native speaker of the target language</li> <li>• Proficient in reading in the source language</li> <li>• Proficient in writing in the source language</li> <li>• Demonstrated strong writing skills in the target language</li> <li>• College degree or higher</li> <li>• Prior work experience in the health services area or participation in health services or social</li> </ul> |

|  |   |
|--|---|
|  | science research projects.<br>• Prior work experience in translation projects |
|--|---|

**Desirable qualifications.** Table 2 lists the desirable qualifications for translators and translation reviewers. These qualifications are characteristics that are not critical to selecting a candidate but which can contribute to ensuring a better translation. Desirable qualifications are helpful in making informed decisions in cases in which there are several candidates for the same position.

Project staff should use their discretion to decide the relevancy of the particular qualifications to be met by a given candidate. Unlike the required qualifications, the set of desirable qualifications for translators is the same as the one for reviewers.

**Table 2. Desirable qualifications**

| <b>Translators and Reviewers</b>  |
|---|
| <ul style="list-style-type: none"> <li>• Highest educational degree obtained in the target language</li> <li>• At least five years living in the U.S. as an adult</li> <li>• Familiarity with the U.S. health system</li> <li>• Professional/technical degree in a health-related discipline or experience in the health field</li> <li>• Professional work experience in the country of the target language</li> <li>• Prior professional experience as a translator in any substantive area, preferably health-related</li> <li>• Familiarity with regional variations in usage of the target language in the U.S.</li> <li>• Certified as a professional translator</li> </ul> |

## **5. ASSESSING CANDIDATE TRANSLATOR AND REVIEWER QUALIFICATIONS**

Those selecting and assessing translators and reviewers should pay attention to all qualifications listed as each speaks to a different facet of translation. Candidates need to provide evidence that substantiates each of the required and desirable qualifications. To assess the candidates' qualifications, one should examine three types of evidence: work references, any certificates and diplomas, and samples of recent translations into the target language of interest.

In reviewing the translators' or reviewers' qualifications, four important factors need to be considered.

- (1) People vary considerably in their linguistic skills. Even if two given individuals belong to the same group of native speakers of the same language and have similar histories as learners of a second language, they may have different reading, writing, verbal and comprehension skills in each language. It is because

of this diversity that selection decisions should be made after considering all the qualifications listed in Table 1.

- (2) Each language into which a CAHPS instrument may be translated poses a unique set of challenges. Therefore, it is unrealistic to expect that the same selection criteria can be applied to every language under every circumstance, given the diversity of foreign languages currently in use in the United States. For example, the supply of competent translators living in the U.S. may vary by language. In addition, some languages display greater regional and cultural variation in language use. For these, a translator faces the special challenge of addressing this diversity and developing a translation that will be suitable for the majority of speakers of that language.
- (3) One should avoid selecting a translator based solely on his or her verbal ability in the target language. This problem is more likely to occur when the persons who hire the translators are unfamiliar with the target language. Being a native speaker of a language is a requirement for a translator but in itself is not sufficient; accurate professional translations require specialized training and expertise.
- (4) *Desirable* qualifications should not be a substitute for *required* qualifications. Even candidates who have all the desirable qualifications should not be hired if they are missing any of the required qualifications.

## 6. HIRING AND ASSESSING TRANSLATION FIRMS

The same criteria described in these guidelines should be used to assess the qualifications of translation firms that may be contracted to conduct a translation or translation review. To be able to do so, several types of information and documentation should be requested from the translation firm in order:

- Process used to evaluate, select and train translators
- General qualifications of the translators employed and specific qualifications of the translator(s) who would be assigned to one's job
- Translation approach, including types of internal quality control checks to ensure accuracy and quality prior to delivery of translated document to the client
- Samples of recent translations, preferably completed by the translator(s) assigned to one's job
- List of client references

The process for assessing translation firms parallels the one already described for the selection of individual translators and translation reviewers. However, in the case of a translation firm, additional information is required on the internal translation, review and quality control processes used by the firm.

The guidelines described in this document should be useful to both CAHPS team members and CAHPS users who may be translating and culturally adapting CAHPS survey instruments into languages other than Spanish.