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Translating the Word, Translating the World: A Closer Look into Translation in Adult Education Research

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Abstract: This paper outlines a proposed approach to the issue of translation in the instrument adaptation process in adult education field, and describes a design ensuring effective use of translators to achieve a translation that is appropriate and adequate for a given task.

Introduction

There is a long history of adapting or translating achievement, ability, and personality tests and questionnaires prepared in one language and culture into other languages in educational and psychological testing (Hambleton & Patsula, 1998). Yet research on tests used with adults generally remains unpublished (Oakland, 2005). In the same vein, there is very little research and scholarly literature on research instrument adaptation that aims to provide discipline-specific guidelines for cross-cultural and comparative researchers in the field of adult education (Prieto, 1992). The purpose of this paper is depict a proposed approach to the issue of translation in the adaptation process, and to describe a design ensuring effective use of translators that assures a quality translation appropriate and adequate for a given task (Harkness & Schoua-Glusberg, 1998). Such a translation method may contribute to a more culturally-sensitive approach in cross-cultural adult education research in which the researchers are careful not to make gross comparisons among societies based on adaptations that are most meaningful in the specific context for which they were produced.

The term test adaptation is generally preferred over the term test translation as the former term is more inclusive of the variety of activities in the task from the selection of the translators to techniques used to check “equivalence.” Moreover, it is more reflective of the nature of the translation process that goes beyond literal translation (Hambleton, 2005). This needed attention on the wide range of activities in the adaptation process runs the risk of obscuring the very crucial role that translation and the translators play to ensure the quality of the final adaptation. This paper aims to refocus attention to an essential aspect of the adaptation process, the translators, and the translation they produce. It does so by highlighting on the actual translation process rather than the data collection designs that aim to check the translation quality through administration of both language versions of an instrument to bilinguals and consequent statistical analysis. We argue that an efficient “judgmental design” (Hambleton, 2005) of the translation involves selection of appropriate translators for the task, the use of translator committees and extra translators for quality checking, seeking local expert opinion on the “appropriateness” of the translation for the construct under study as well as ensuring that research aims and the characteristics of the target population are communicated to all the participants in the process.

The proposed approach is based on one of the authors’ experience during the adaptation of the Education Participation Scale (EPS), developed by Boshier (1991), for implementation in Turkish adult literacy programs in an urban environment. The adaptation study examined the reliability and validity of the adapted version of the EPS for the Turkish setting. It was carried out in two phases. First, the “translational equivalence” was established, and then the reliability of the Turkish form of the EPS was studied. There were two initial goals of the translation

process; to create a translation “equivalent” to the original form of the EPS both linguistically and conceptually, and to ensure that the translated version of the instrument was appropriate for use with the intended audience, namely adults participating in government-funded literacy courses in Istanbul. Based on the illustrative example of instrument translation, this paper aims to critically analyze, and suggest modifications to the dominant translation/back-translation method that is used in most adaptation studies.

Theoretical Framework

There is a large volume of research on how to adapt an instrument into a new linguistic setting (Hambleton, 2005; Hambleton & De Jong, 2003; Hambleton & Patsula, 1998, 1999, 2000; Harkness & Schoua-Glusberg, 1998; Oakland, 2004, 2005; Prieto, 1992; Sireci, Yang, Harter, & Ehrlich, 2006; Smith, Mohler, Harkness, & Onodera, 2005; Weeks, Swerissen, & Belfrage, 2007). However Harkness (2003) suggests that, since the challenges of adapting an instrument from one culture to another changes from discipline to discipline, it would be more relevant to seek discipline-specific procedures. Thus, for the purposes of this study, the steps that Prieto (1992) proposed as guidelines for translation procedures for the adaptation of an adult education instrument into a new cultural setting were used as the initial model for translation.

The EPS has already been translated into Portuguese, Spanish, German, French and Chinese and has been printed commercially since 1982 (Boshier, 1991). Boshier did not control the Portuguese, Spanish or German versions, but ensured that the French and Chinese versions of the EPS went through these steps: (a) forward-translation of the EPS into the target language; (b) back-translation of the target language version into English; (c) comparison of the original with the new English version (Prieto, 1992). After examining the factor analysis data from the Chinese and French versions, Boshier concluded that the factor structure of the A (Alternative) Form (which is the same form used in this study) would be better suited to non-English speaking populations as the factors are more universal than the previous F-Form, which was originally designed for use in New Zealand (cited in Prieto, 1992). The EPS A-form is comprised of seven factors that measure motivational orientations. It is a 42 item, retrospective, paper and pencil scale, with a 4-point response category from “no influence” to “much influence” designed to identify motivation orientations towards adult education activities. The scale does not have an overall score, but provides mean scores on the 7 sub-scales. Each sub-scale is comprised of six items which makes it easier to compare sub-scale means of an individual as each factor has an equal number of items.

Research Design

Inaccurate personal interpretations and expected translator blind spots can be dealt with by involving several translators and an exchange of versions and views is part of the review process (Hambleton, 2005; Weeks et al., 2007). First, in order to select translators to put into the forward-translation and back-translation committees, individuals were sought who were fluent in both languages, familiar with the cultures under study, and with some knowledge of test construction and the construct being measured. Bilinguals who have studied adult education at the MA level were included in each of the translation committee to make certain that the translators were also aware of the challenges of the research questions at hand. A group of ten translators, who were known to the researcher as being bilingual, were decided upon to comprise the two translation committees.

The translation from the original language to the target language is called forward-translation (Prieto, 1992). The first step was to form the forward-translation team. The teams were formed based on the mother tongue of the translators. The assumption was made that the translators would have an easier time translating into their native language. For this reason native speakers of Turkish translated the original form of the EPS into Turkish. A challenge was to combine the five translations that came from the forward-translation team into a single form before the back-translation process. The researcher compiled the translations by different translators and decided on the version of every item to include in the forward translated form by selecting whichever was most similarly translated by most of the translators. In the cases where this was not possible, because there seemed no consensus on the translation of a certain expression or word, all different versions were kept to further inquire their appropriateness.

To decide on the translation of those controversial items and to further verify the appropriateness of the forward-translation for the intended audience, a dialogue session with the committee of professors supervising this research was held. Translation difficulties as well as the appropriateness of the translation for the intended audience were discussed. All of the committee members were from the adult education program at Bogazici University, Istanbul and had experience with adult literacy education. Furthermore, they were all bilinguals. There were some modifications suggested and the resulting Turkish form was checked and revised again with the help of a professional translator, bearing in mind the comments made by the professors on the research committee. The professional translator was a faculty member of the Bogazici University in the Department of Translation and Interpreting Studies and did not participate in the forward-translation. In effect, he decided on the final version of the forward-translation.

To check for any possible conceptual or literal mistakes, the back-translation technique was employed. Back-translation operates on the assumption that what goes in ought to come out (Harkness, 2003). This time, three of the five translators were native speakers of English and the remaining two were native in Turkish with a strong command of English. Although they were informed about the aim of the study and the characteristics of the intended audience, they had no previous exposure to the instrument. The researcher compiled all five back-translations and, using the same technique as with the forward-translation phase, decided upon a single back-translated version after examining the five different versions submitted by the translators.

The two English versions of the EPS, the original version and the back-translated version, were then compared to determine their similarities and differences. The comparisons were made with a native speaker of English who did not participate in either the forward-translation or back-translation process. She was asked to rate the similarity of every item on 5-point scale. There were a couple of items that got 3, but the rest got at least 4. Before determining the final Turkish version of the scale, the expert opinion of another professional translator was secured. This translator is a professor of English language and literature and a highly acclaimed translator of English, American and Greek poetry into Turkish. He was asked to assess the quality and the suitability of the translated instrument for the intended audience, and found the translation “appropriate for the aims of the study.”

Findings and Conclusions

We realize that it is unrealistic to assume every researcher would have access to this many translators for a cross-cultural project. However, the use of 12 translators and a native speaker of English to compare the original and the back-translated versions and the wide variety of different translations that they came up with for arguably simple lexical items and expressions

has implications for researchers in the field. First of all, the research process indicated that to create a translation “equivalent” to the original, one of the initial objectives, was at least unrealistic if not downright impossible. The results of the translation process for this project is in line with Harkness & Schoua-Glusberg’s position (1998) in that the term “translatory equivalence” is misleading as it fails to recognize that languages are not isomorphic, and a mechanic understanding of the translation process as what goes in (the source language text) can be completely matched by what comes out (the target language text) does not recognize the complexity of languages and their inextricable ties to culture. For example, even the linguistically not so complex expressions like “an enquiring mind” “general knowledge” and “to expand my mind” were translated very differently into Turkish, and certain choices were made only through bearing in mind the assumed characteristics of the intended audience. Different choices would have been possible if the translation was being done for a different Turkish population. This indicates that it is hard, if not impossible, to argue there is one right translation to speak of rather than a translation that is bound by the goals of the research project.

Based on their analysis of the definitions of the various types of equivalence in cross-cultural studies that involved instrument adaptation on Health-related quality of life (HRQOL), for example, (Herdman, Fox-Rushby, & Badia, 1997) report definitions of 19 different types of equivalence; unclear or contradictory definitions of especially conceptual equivalence; and the use of many redundant terms. In considering translation quality, an assessment that is based on the appropriateness or adequacy for a given task may provide a more reachable objective rather than equivalency. Harkness & Schoua-Glusberg define appropriateness as degree to which the translation successfully fulfils predetermined goals for the translation, within the constraints of what is possible. Therefore, it is necessary to articulate concrete translation goals bearing in mind the nature of the construct under study and the characteristics of the intended audience of the instrument. It is also crucial to communicate the translation goals to every participant in the translation process. Contextualizing the translation task helps the translators give more informed decisions when they are weighing different options for the translation of a given word or expression. Moreover, we believe that social, historical, cultural, and economic realities of the target research situation for which the translation is done and the characteristics of the intended audience of the translated instrument are important factors in evaluating the quality of a translation.

A committee approach proved to be time-consuming yet at the same time was very effective to deal with mistakes that resulted from the peculiar knowledge base and characteristics of only one translator. We understand that it will not be possible for every researcher to reach as many translators, however, we suggest that at least two translators in each committee. Having an odd number of translators was helpful as it provided the researcher with a most accepted version; however, it does not necessarily guarantee a better translation. Getting the perspective of the local adult educators (both researchers and practitioners) was helpful to get a better understanding of the intended research setting. Finally, a judge who is native in the language of the original instrument is recommended to compare the back-translated version and original instrument.

Moreover, a translator (two were used in the current study, one to ensure the quality of forward-translation and one to comment on the appropriateness of the final Turkish version) is necessary to help the researcher combine different versions when a committee approach is taken. In this case, the researcher was bilingual; however, in situations where the researcher does not speak the target language, it is inevitable to need the help of a translator to decide on a single

forward-translated version. Furthermore, the quality of the forward-translation is crucial since back-translation as an approach to deal with problems is bound to fail if the forward-translated versions carries too many semantic, lexical, and structural traces of the original language. For example, two of the translators interpreted the item “to expand my mind” as “zihnimi genişletmek için” which literally means to expand my mind in Turkish. If this version had gone through back-translation process, it would have very easily been translated as to expand my mind. However, the similarity between the two versions would have indicated nothing useful about the quality of the translation. Instead, after many sessions of heated debate over the term, “ufkumu genişletmek için” (literally to expand my horizons) was decided upon. There is, indeed, a meaning difference between these terms, however, the majority of translators felt that to expand one’s horizon included the mental expansion as well, and it was assumed that it would be a more familiar expression for the intended audience.

The approach that we suggest to the translation of a research instrument includes selection of appropriate translators for the task, the use of translator committees and extra translators for quality checking, seeking local expert opinion on the “appropriateness” of the translation for the construct under study as well as ensuring that research aims and the characteristics of the target population are communicated to all the participants.

Conclusions

The main problem with adapting an instrument is slightly modifying the items during the translation process. It was inevitable that some minor changes needed to be made to ensure that the adapted Turkish version of the instrument would be fully functional in the Turkish context. However, small changes are not always the same as insignificant changes. Therefore, adapted questions should be treated as new questions and not automatically compared with original versions and their performance (Harkness et al, 2003). Therefore, direct comparisons of the results that will be obtained from this study and the previous research that used the EPS as the survey instrument is not possible.

Translation from one language to another is not an easy, linear process. For a researcher, it requires a lot more care and effort than finding someone who knows the languages, and having that person spend “a couple of hours” in getting the job done. In a globalized world, comparative studies and studies of non-Western understanding of learning are bound to increase. It is paramount to adult education that translations of research instruments and designs (quantitative or qualitative) be done carefully with a goal of not imposing Western understanding and without the pretension of equivalency. This study provides adult educators with a different and more sophisticated way to insure that translations respect the cultural norms of the local population.

Lastly, the focus on the translation process does not deny the necessity of field testing of the translated version. As Sparks (2002) points out cross cultural research in adult education is difficult considering the rich diversity of populations engaged in adult education activities. In many cases there are racial, ethnic, class, gender, and sexuality differences between the researcher and the subjects which necessitate, in this case, making sure that those who will use the research instrument are asked to evaluate the quality and appropriateness of the translation directly (e.g. think-aloud procedures) or indirectly (e.g. data collection designs) rather than only depending on translators and experts. However, better results can be expected from field testing if the translation is appropriate for the intended audience in the first place.

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