

Principles and Methods of Test Construction

Karl Schweizer
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(Editors)

Standards and Recent Advances

Principles and Methods of Test Construction

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Standards and Recent Advances

Edited by

Karl Schweizer and Christine DiStefano



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Part I

Introduction

Chapter 1

Introduction

Karl Schweizer¹ and Christine DiStefano²

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During the past 10–20 years, the methodology used to develop and to administer tests has experienced a number of substantial advancements. However, many of these advancements are dispersed across numerous outlets, such as journal articles, conference papers, or presentation materials. A major motivation for undertaking this book project was to collect knowledge concerning advancements in test construction, to provide information about the current practices, and to disseminate information about recent advances. We hope that in this way we may equip researchers and students with sufficient knowledge to successfully execute test construction projects, rather than learning of advancements through unfavorable interactions with discussants, editors, or journal reviewers. So, to us (and hopefully also to the readers), it appears to be valuable to collect information about the state of the art in test construction. The selection of the chapters is the result of our perceptions regarding advancements in test construction as well as issues that may benefit from further elaboration.

The first section provides a platform to examine and strengthen the role of the underlying theory when designing tests. The standards that govern test construction are explored to provide readers with information about the history and evolution of the guidelines that regulate best practices. Also included are chapters that discuss a modern test theory approach toward designing new measures according to a theory base and the study of the associated psychometric properties. Both the factor analytic and the item response theory (IRT) frameworks are provided.

The second section considers features related to item format and test presentation. A variety of item formats are examined to assist researchers with best practices for writing items for cognitive or affective measures. Discussion includes both formats that are more traditional (e.g., multiple choice) as well as newer formats that incorporate technological advances into items, producing a more interactive testing experience for examinees. Also, computerized and online assessments provide favorable preconditions for the increased utilization of adaptive testing. Online assessment has become more and more important for research as the Internet provides the opportunity of accessing large samples without a personal contact or a visit to a central location, such as a laboratory, career center, or testing site, needed. Thus, it is necessary to understand the possibilities as well as the potential pitfalls and shortcomings of this type of assessment. Moreover, adaptive testing shows a number of advantages that generally require fewer items to achieve a precise measurement of latent constructs with a shorter time commitment; such advantages need to be balanced against the challenges that online testing poses.

The third section discusses features related to model testing and selection, primarily from the structural equation modeling framework. Recent advancements have seen the rise of alterna-

tive estimators to deal with issues often encountered in test construction, such as analysis of nonnormally distributed observed level data or analysis and/or ordered categorical data. The chapters included provide information regarding selection of an estimation technique that can accommodate the characteristics of the collected data. Further, model selection and reporting of model-data fit information has been a controversial topic for many years and, in a way, has created insecurity of what constitutes best practice.

Group-specific biases of psychological measures have become a concern because of public sensitivity and, therefore, demand an especially exhaustive treatment. The fourth section provides information regarding statistical methods that enable the identification of group-specific bias. These chapters discuss differential item functioning, originating from the IRT framework, as well as multiple group testing from the structural modeling framework. The use of these methods can be helpful in evaluating the general appropriateness of the items selected or the differences in conceptualization of latent variables for relevant subgroups of a population.

The fifth section of the book discusses topics of special relevance. For example, test construction assuming one latent source gives rise to the expectation of one underlying dimension. This preferred model has stimulated the construction of measures showing a high degree of homogeneity, but may impose a structure that is not appropriate for the construction of measures representing intermediate or even higher-order constructs. The elaboration of the bifactor model may provide a method for researchers to consider. Also, since the publication of the seminal work by Campbell and Fiske it is known that the true variance characterizing a measure may be inflated by a contribution of the observational method. More recent research suggests that the presence of method effects in survey data is more likely than its absence. Chapters describing modern techniques for conducting multitrait-multimethod research as well as examination of method effects due to position effects are included. Another challenge is the creation of abridged scales or screeners, as short forms of instruments are increasingly common owing to testing expenses in terms of time and cost. Methods for creating both abridged forms and screening instruments are provided in this section.

Part II

Major Approaches to Test Construction

Chapter 2

The Use of Standards in Test Development

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The present chapter deals with the question of the use of standards in test development. The best known example of such standards are the “Standards for Educational and Psychological Testing” published by the American Educational Research Association, the American Psychological Association, and the national Council on Measurement in Education (American Educational Research Association, American Psychological Association, & National Council on Measurement in Education, 2014). The latest version, published in 2014, has just been released. This version updated earlier editions of the standards. For example, the 1999 publication of the standards was an update of the 1985 edition (<http://www.teststandards.org/history.htm>), which mainly covered the groundwork of test development, grounded in classical statistics, such as classical test theory (Lord & Novick, 1968). At that time it was the most comprehensive overview of do’s and don’ts in test development. The 1999 version was updated to recognize the following (American Psychological Association, 2013):

Changes in federal law and measurement trends affecting validity; testing individuals with disabilities or different linguistic backgrounds; and new types of tests as well as new uses of existing tests. The Standards is written for the professional and for the educated layperson and addresses professional and technical issues of test development and use in education, psychology and employment.

Changes from 1999 to the current standards are discussed in this chapter. The Standards, as they are usually referred to, were originally meant for the American market of test users, test developers, and policy makers. However, since the Standards were so comprehensive and similar standards were not formulated in many other countries, the book became an authoritative source in the area of test development.

The aforementioned quotation reflects important characteristics of many standards. First, they are compiled on a voluntary basis. Also, they provide links with the recent developments and psychometrics so as to ensure their scientific soundness and up-to-date nature. Finally, standards are influenced by various developments in science and society. Psychology is not unique in its attempts to enhance the quality of its services by implementing standards. The ISO (International Organization for Standardization; <http://www.iso.org/iso/home/about.htm>) is the world’s largest developer of voluntary international standards. In this organization, “a standard is a document that provides requirements, specifications, guidelines or characteristics that can be used consistently to ensure that materials, products, processes and services are fit for their purpose” (<http://www.iso.org/iso/home/standards.htm>). Since 1947, almost 20,000 standards

have been developed, covering almost all aspects of technology and business. ISO certification has become an important hallmark of quality. Psychology as a discipline does not have the highly formalized systems of service delivery and quality checks as implemented in the ISO Standards. Still, the same underlying reasoning of enhancing quality by agreeing on standardized procedures can be found in psychology.

Since the launch of the Standards for Educational and Psychological Testing in 1955, many more standards have been developed. The present chapter gives an overview of recent advances in the development of standards in the domain of psychological assessment. It is impossible to review all aspects of the standards presented here. Therefore, I present the contents of standards in tables and deal with other aspects in the main text. I focus on various sets of standards that have been proposed in the last 20 years so as to accommodate new target groups and new modes of administration. Furthermore, I move outside of the realm of psychological and educational testing where the standards were originally developed. More specifically, I describe guidelines that were designed for international testing, notably dealing with translations and adaptations, standards for computer-based and Internet testing, standards for test use, and standards for quality control. Conclusions are drawn in the last section.

Two caveats are needed on terminology. The first is the distinction between educational and psychological testing. This distinction is made more in the American literature than in the European literature, in which the two types of assessment are often considered together. I follow here the European tradition and refer to testing and assessment as involving both educational and psychological instruments. Second, the literature uses two related concepts to refer to desirable features of psychological assessment: standards and guidelines. There is a subtle, yet essential, difference between the two. Standards typically have a prescriptive meaning. Standards describe prerequisites of instruments and their administration needed to ensure valid outcomes of the assessment process. Guidelines, on the other hand, are typically less prescriptive and are formulated as aspired or best practices. The distinction between these aspects seems to be easy to make. In practice, the distinction can be fuzzy as the terms are not always used from the perspective of this difference. Some guidelines are prescriptions, while some standards describe recommendable practices.

The Standards for Educational and Psychological Testing

The Standards for Educational and Psychological Testing are an initiative of the American Educational Research Association (AERA), the American Psychological Association (APA), and the National Council on Measurement in Education (NCME). The Standards for Educational and Psychological Testing have been very influential in psychology and education; the latest version, the fifth revision, was launched in 2014 (a description of the changes in this version was made by Plake & Wise, 2014). The history of the standards has clearly shown that defining norms regarding development, administration, and interpretation of tests helps to advance the quality of the field of assessment. References in the literature to the Standards for Educational and Psychological Testing are numerous (see, e.g., http://teststandards.org/files/Standards_citations_Jan_2010.pdf) and to the best of my knowledge, their reception has not been controversial. The standards are meant to provide criteria for the evaluation of tests, testing practices, and the effects of test use (AERA, APA, & NCME, 2014). The standards are not meant to influence policy, but they can provide recommendations on how psychometrics can be used to underline policy decisions. For instance, rather than prescribing which minimum cutoff score should be established for an admission test, the standards can help to identify conditions that are critical for determining cutoff scores.

The Standards for Educational and Psychological Testing cover three domains (see Table 2.1). The description of each domain starts with a general presentation of the context. Important concepts are defined and an overview of the main issues in the domain is presented.

Table 2.1. Overview of topics covered in 1999 Standards for Educational and Psychological Testing (American Educational Research Association, American Psychological Association, & National Council on Measurement in Education, 2014)

(a) Aim and domains covered	
Aim	To promote the sound and ethical use of tests and to provide a basis for evaluating the quality of testing practices
Domains covered	<ol style="list-style-type: none"> 1. Foundations 2. Operations 3. Testing Applications
(b) Guidelines	
Part I. Foundations	
<ol style="list-style-type: none"> 1. Validity 2. Reliability/precision and errors of measurement 3. Fairness in testing 	
Part II. Operations	
<ol style="list-style-type: none"> 1. Test design and development 2. Scores, scales, norms, score linking, and cut scores 3. Test administration, scoring, reporting, and interpretation 4. Supporting documentation for tests 5. The rights and responsibilities of test takers 6. The rights and responsibilities of test users 	
Part III. Testing Applications	
<ol style="list-style-type: none"> 1. Psychological testing and assessment 2. Workplace testing and credentialing 3. Educational testing and assessment 4. Uses of tests for program evaluation, policy studies and accountability 	
Source: http://www.apa.org/science/programs/testing/standards.aspx	

The first part of the Standards for Educational and Psychological Testing, called Foundations, refers to the core business of psychometrics: test construction, evaluation, and documentation. Validity, viewed as pivotal in the psychological assessment process, refers to the degree to which evidence and theory support the interpretations of test scores entailed by proposed uses of tests (AERA, APA, & NCME, 2014). Thus, the standards describe how validity evidence can be obtained. The standards emphasize the need for finding validity evidence, specifying intended test use, and for clearly stating the recommended interpretation and use of test scores. The common theme of norms in the validity section of the standards is that it is incumbent on the user to provide validity evidence and to refrain from making untested assumptions about test use. The chapter on reliability, referring to consistency when a testing procedure is repeated, emphasizes the need for standardized administration procedures so as to increase reliability. The chapter describes various approaches to reliability, such as classical test theory with its internal consistency coefficients, standard errors, and interrater agreement (e.g., Lord & Novick, 1968), item response theory (e.g., Van der Linden & Hambleton, 1997) with its test information functions, and generalizability theory (e.g., Webb, 1991) with its multiple ways of computing reliability. The remaining chapters of the first section deal with test development and revision, scales, norms, administration scoring, and documentation. The standards mentioned there provide an excellent overview of commendable practices in these domains.

The next section is called Operations. The section is a major revision of the previous (1999) version. An important aspect of the section is fairness. Issues of fairness are salient aspects of assessment in all multicultural societies. Where in the 1999 version there was an emphasis on fairness for various subgroups in society that could be adversely affected by the use of psychological tests, such as women, members of specific ethnic groups, or people from the LGBT community, the 2015 version takes a broader perspective.

A measure is fair if it is free from bias. The conceptualization that is used in the standards is borrowed from the literature on item bias (usually labeled *differential item functioning*; Van de Vijver & Leung, 1997). An item is said to be biased if individuals from different groups (e.g., different genders, age groups, or ethnic groups) with the same standing on the latent trait that is being assessed do not have the same expected scores on the item. A strong aspect of this definition is that it is supported by many statistical procedures to identify this bias, such as analysis of variance, regression analysis, exploratory and confirmatory factor analysis, and contingency table analyses (see Van de Vijver & Leung, 1997; Zumbo, 2007). The weak spot of this definition is its emphasis on item-related sources of bias. In my experience, important sources of cross-cultural differences in scores that are not related to the target construct that is measured are usually not item based but instrument based. For example, there are large cross-cultural differences in response styles, such as social desirability (Van Hemert, Van de Vijver, Poortinga, & Georgas, 2002). Vieluf, Kuenther, and Van de Vijver (2013) analyzed the 2008 TALIS data on teacher self-efficacy. At country level, significant positive correlations were found between self-efficacy and job satisfaction; in addition, teacher self-efficacy was related to collectivism, modesty, and extremity scoring. It was concluded that mean score differences between 23 countries were strongly influenced by extremity scoring. Such response styles challenge the validity of cross-cultural comparisons in personality and attitude assessments, among many other domains. However, statistical procedures to identify item bias will typically not pick up cross-cultural differences in response styles, as the latter tend to have a global rather than item-specific influence on the assessment process.

Another problem with the chapter on operations is its focus on instrument characteristics. There are useful standards describing how to validate measures in each group and how to examine the identity of the meaning of test scores; however, there is no description of which group characteristics could impact bias. Examples are previous test exposure, response styles, education, and various other background variables that tend to differ across target groups, notably in the assessment of ethnic groups. Similarly, in the chapter on the assessment of individuals of diverse linguistic backgrounds, the description of the problem and the Standards for Educational and Psychological Testing do not refer to specific groups or acculturation issues, but only to recommendations to be cautious and to present evidence about the validity of the measure. Apart from these qualms, the chapter on fairness describes many valuable procedures to achieve equitable treatment among all test takers.

The third part of the Standards for Educational and Psychological Testing, called Testing Applications, describes issues in testing applications, such as work place testing and credentialing. The Standards in this part are based on a rich experience of psychological assessment in many different domains and a keen awareness of the legal issues accompanying psychological assessment. There is also a chapter on specific issues in educational assessment.

The Standards for Educational and Psychological Testing are the most elaborate standards available in the field of psychology and education. It is a major strength of these standards that many experts have been involved in the process of writing standards and providing feedback on earlier versions. As a consequence, the standards integrate theoretical and practical insights

in the assessment process. The quality of the standards is so high that it is easy to appreciate why they have become so influential. In their quest for quality, the authors have attempted to be inclusive and exhaustive in many ways. For example, in the chapter on reliability, various theoretical perspectives on the concepts are presented, emphasizing common themes rather than highlighting differences between approaches. The quest has also been beneficial from another perspective. The Standards for Educational and Psychological Testing have influenced testing practices and have served as a template in many countries. Many standards that have been formulated are relevant in various countries. Notably the first part, dealing with test construction, evaluation, and documentation, has many standards that are widely applicable. The part on fairness also has a broad applicability, even though particular issues related to fairness may be country specific as the diversity of countries differs in nature. The part on testing applications is also widely applicable, although there are aspects such as credentialing that are relatively more important in a country with much high-stakes testing, such as the US, than in other parts of the world.

Plake and Wise (2014) warn against possible misuse and misinterpretation of the standards. Their description is interesting as their recommendations go beyond the standards. The first aspect they mention is that the standards are meant to provide professional guidelines and are not meant to be applied in a literal fashion. Professional judgment, based on solid scientific insights, should undergird any decision about the application of the standards. Furthermore, the authors emphasize that there is no authority to enforce or guard applications of the standards, which implies that any claim about compliance with the standards should be checked. Finally, the standards cover a rapidly evolving field; as a consequence, older versions may no longer apply and elements of the current version may also need modification in the near or distant future. In short, the standards should be used judiciously and should not be used as a detailed guide of what (not) to do.

Guidelines for International Testing

In 1992 the International Test Commission (ITC; <http://www.intestcom.org>) took the initiative to set up a project to develop guidelines for international assessment; an updated version was published in 2010. Various international psychological associations participated in the project: European Association of Psychological Assessment, European Test Publishers Group, International Association for Cross-Cultural Psychology, International Association of Applied Psychology, International Association for the Evaluation of Educational Achievement, International Language Testing Association, and International Union of Psychological Science. The idea behind development of the Guidelines for International Testing was the perceived need to attend to issues of quality during the process of translating and adapting tests. In those days there was a continually growing body of international studies and there was no agreement as to the criteria for evaluating quality standards regarding reliability, validity, sampling procedures, and translation procedures that apply to such studies (Hambleton, 1994, 2001; Gregoire & Hambleton, 2009; Hambleton, Yu, & Slater, 1999; Van de Vijver & Hambleton, 1996). The criteria that were taken to apply to these international tests adhered to the standard psychometric practice, as described earlier, as well as implementing checks to assess the quality of the translations. These criteria were greatly expanded by the ITC Guidelines.

The most common translation check was the use of the so-called back-translation procedure (Brislin, 1970). Such a procedure consists of three steps. In the first, an instrument is translated from a source language to a target language, followed in the second step by an independent

back translation. In the final step, the source and back-translated versions are compared. If the two instruments are identical or do not deviate in any major respect, the translation is taken to be adequate. If the two versions are not identical, some adjudication is needed, which usually takes place through interactions between the researcher and one or more translators. The main advantage of this widely applicable procedure is that the researcher does not need to have knowledge of the target language. However, in the 1990s it had already become clear that the procedure also has some disadvantages. For example, the most important quality criterion is the correspondence between the original and back-translated version. This favors translations that stay very close to the original source (literal translations). Such translations often do not have the natural flow and clarity of the original version. Notably if the original text includes metaphorical expressions (e.g., “I feel blue”), close translations are near impossible and back translations are almost never identical to the original text. Various new procedures have been proposed for translating instruments (Harkness, 2003), such as the comparison of multiple, independent forward translations, followed by an adjudication procedure to select the best translation. Also, a committee approach has been advocated. A group of experts, usually combining linguistic, cultural, and psychological knowledge of the target construct, jointly prepare a translation. The main advantage of such an approach is the balanced treatment of various perspectives that are relevant in the translation process. Whereas translations in the past were mainly viewed as involving linguistic aspects, the zeitgeist of the 1990s brought forth the idea that translating requires multiple types of expertise and that a good translation must try to do justice to psychological, linguistic, and cultural considerations. One of the most significant changes created by this new way of thinking has been the introduction of the term *adaptation* (Hambleton, Merenda, & Spielberger, 2005); subsequently, the term *translation* is used less frequently nowadays. Compared with the old procedures, adaptations tend to be more tailored to the specific cultural context in which the instrument will be applied.

These ITC Guidelines for International Testing are not the only ones that have been developed in the domain of test adaptations. Another example is Comparative Survey Design and Implementation (<http://ccsg.isr.umich.edu/archive/pdf/fullguide061108.pdf>). The group behind this initiative has developed an extensive set of guidelines concerning how to develop and implement cross-cultural surveys. There are various topics in the guidelines about Comparative Survey Design and Implementation that are minimally covered or not covered under ITC guidelines, such as costs, ethics considerations, sample design, and harmonizing data (e.g., converting socioeconomic status data based on country-specific indicators to a common metric). These Comparative Survey Design and Implementation Guidelines have been written from the perspective of large-scale international reviews, such as the International Social Survey Programme (<http://www.issp.org>). Where psychological and educational guidelines are often somewhat more focused on statistical procedures to ascertain equivalence, these survey guidelines focus more on design and implementation issues. Therefore, these are a valuable addition to psychological and educational guidelines.

The Guidelines for International Testing are presented in Table 2.2. It is significant that the guidelines start with recommendations regarding the context. Thus, rather than opening with specific recommendations, the guidelines start with the notion that is considered to be crucial in developing adaptations: It is important to study the context in which this study will take place and try to minimize the relevant yet confounding cross-cultural differences in the background variables as much as possible. This recommendation does not primarily refer to psychometric concentrations or to procedures to prepare translations, but emphasizes the need to take the linguistic and cultural context seriously. The second recommendation that deals with a description of the context of the study in general argues that we cannot simply assume that