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INFORMATION FUNCTIONS FOR GENERAL MODEL DEVELOPED FOR DIFFERENTIAL STRATEGIES IN COGNITIVE PROCESSES

FUMIKO SAMEJIMA

UNIVERSITY OF TENNESSEE

KNOXVILLE, TENN. 37996-0900

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In the preceding research report, ONR/RR-83-2, entitled "A Latent Trait Model for Differential Strategies in Cognitive Processes," a general model was proposed in the context of latent trait theory which deals with differential strategies in cognitive processes. With that general model, it is necessary to define the information functions expanded from those defined for the models on the graded response level. In the present report, such an attempt is made and described.

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I. Introduction

One of the main objectives of this research project is to "bridge" psychometrics with cognitive psychology through the advancement of latent trait theory. With the rapid progress of microcomputers in the past decade and accompanied decreases in their cost, many scientific investigations which were considered practically impossible in the past are now within our reach. Thus in many areas of cognitive psychology, where researchers used to conduct their research using relatively small samples of subjects, we can plan our research on a much larger scale. Time is coming, therefore, that latent trait theory will find its way to contribute to the progress of cognitive psychology.

Some cognitive psychologists, who have tried to approach psychometric theories, say that they do not provide them with theories and methods with which they can deal with differential strategies. They are not exactly right, however. As early as in the late nineteen-sixties, the heterogeneous case of the graded response level in the context of latent trait theory was proposed (Samejima, 1967) as a model for cognitive processes. Some useful hints for differential strategies are also seen (Samejima, 1972, Section 3.4) under the title "Multi-correct and multi-incorrect responses."

In the preceding research report (Samejima, 1983), a latent trait model for differential strategies in cognitive processes was proposed. In so doing, digraphs were used to represent cognitive processes, with traversing each path indicating the completion of each successful strategy.

Let θ be a unidimensional latent trait, or "ability", which assumes

any real number, so that we can write

$$(1.1) \quad -\infty < y_g \leq \infty.$$

Suppose there is only one successful strategy for solving the problem g , and that we need m_g sequential subprocesses. Let y_g denote the attainment category or attainment score. One must successfully follow all the m_g sequential subprocesses in order to solve the problem g , so the attainment category y_g assumes integers, 0 through (m_g+1) , with $y_g = 0$ indicating that the individual subject has successfully followed none of the subprocesses, and with $y_g = m_g$ meaning that he has completed all m_g subprocesses required to solve the problem. The additional attainment score, (m_g+1) , indicates that the subject has successfully followed the additional subprocess which does not exist but is hypothesized at the end of the entire sequence of subprocesses. Since no one can accomplish this, the conditional probability, given θ , with which the subject obtained the attainment score y_g equals zero, regardless of a given value of θ . With this setting, we can see that the general graded response model can readily be applied to the single strategy case of problem solving. It is a fairly common phenomenon, however, that there exist more than one way of solving a problem. Our main objective is to approach a general model for the multiple strategy case, or differential strategies, in the context of latent trait theory.

Let w denote the number of successful strategies for solving the problem g , and y_{qi} ($= 0, 1, \dots, m_{qi}$) be the attainment score for the

subject who has taken the strategy i ($= 1, 2, \dots, w$) for solving the problem g . Figure 1-1 presents an example of the digraph representing five differential strategies, i.e., $w = 5$, which was used as one of the examples in the previous research (Samejima, 1983). In this figure, for the purpose of illustration, the set of attainment scores for the strategies No. 1 and 4 are attached to the edges.

In our cognitive process we often falter or choose wrong strategies which do not lead to the solution of the problem at all. Even if the subject took a wrong strategy, however, he may become aware of his mistake and come back to a previous point in the path and try another strategy. There are a great many other varieties of paths, trails and walks, each of which might represent a specified subject's cognitive process. It is obvious, however, that traversing on cycles or taking those unsuccessful paths, trails and walks will not improve the subject's degree of attainment in solving the problem; they should be more or less ignored. It is a kind of directed graph which contains several paths representing different strategies, joining a common initial endpoint with the distinct other endpoints. Since no one can surpass a solution point, it also represents a hypothesized attainment score which no one can obtain.

The differential strategy tree was proposed to represent both successful and unsuccessful strategies for solving a specified problem. Each tree starts from a single "nothing point" and, if we ignore all unsuccessful strategies, ends with as many "solution points" as we have different successful strategies.

Figure 1-2 presents the differential strategy tree for the example

FIGURE 1-1

An Example of the Digraph Representing $w (= 5)$ Different Strategies for Problem Solving. Attainment Scores y_{gi} Are Also Shown for Strategies No. 1 and No. 4 for Illustration.

FIGURE 1-2

The Differential Strategy Tree for the Example Given in Figure 1-1, and the Attainment Scores y_{gi} for Separate Edges.

given in Figure 1-1, in which only successful strategies are drawn, and the attainment is score assigned to each edge. Thus in our example, we have five successful strategies and five solution points.

ii. General Model for Differential Strategies

A general model for differential strategies concerns the assignment of an operating characteristic to each attainment score y_{gi} of each of the w strategies for solving the problem g . By such an operating characteristic we mean the conditional probability with which the subject of trait θ chooses the strategy i and obtains the attainment score y_{gi} . We notice, however, that in general, if the subject's performance stopped before branching, there is no way to decide which of the two or more strategies he would have taken. For example, $(s_1 s_2)$ and $(t_1 t_2)$ in Figure 1-2 are a single edge, and so are $(v_1 v_2)$ and $(w_1 w_2)$. Thus we must design a single operating characteristic for each edge of the differential strategy tree. Since each edge represents a union of one or more attainment scores, the operating characteristic is to be assigned to each union. For instance, following an appropriate model, a single operating characteristic will be assigned to the union of $y_{gi} = 0$ for $i = 1, 2, 3, 4, 5$, and the same model will provide us with an operating characteristic solely for $y_{gi} = 3$. For convenience, we shall choose the smallest i in each union, and let y_{gis}^* denote such a union with s for the actual attainment score.

Let $P_{y_{gis}^*}^*(\cdot)$ be the conditional probability assigned to the union of attainment scores y_{gis}^* , with which the subject of trait θ chooses a strategy which belongs to y_{gis}^* and obtains the attainment score s or

greater. We shall call this function the cumulative operating characteristic of the attainment score union y_{gsi}^* . By virtue of the natures of the attainment scores 0 and $(m_{gi}+1)$, we have

$$(2.1) \quad P_{y_{gsi}^*}^*(\theta) \quad \begin{cases} = 1 & s = 0 \\ = 0 & s = m_{gi} + 1 \end{cases}$$

for the entire range of θ .

The operating characteristic, $P_{y_{gsi}^*}^*(\theta)$, defined for the union of the attainment scores y_{gsi}^* is given by

$$(2.2) \quad P_{y_{gsi}^*}^*(\theta) = P_{y_{gsi}^*}^*(\theta) - \sum_{j^*} P_{y_{g(s+1)j}^*}^*(\theta),$$

where $\sum_{j^*}$ indicates the summation over all the strategies j branching from the point which lies immediately after the line representing y_{gsi}^* in the differential strategy tree. This operating characteristic can be considered as the likelihood function in estimating the subject's latent trait θ .

When there are more than one problem to solve, i.e., $g = 1, 2, \dots, n$, the maximum likelihood estimation of the subject's latent trait can be performed on the basis of the response pattern V , such that

$$(2.3) \quad V' = (y_{1i_1}, y_{2i_2}, \dots, y_{gi_g}, \dots, y_{ni_n})$$

for the n problem solving tasks, where i_g is a strategy for solving the problem g and y_{gi_g} is the attainment score when the subject chooses the strategy i_g for solving the problem g , provided that the conditional

independence of the distributions of the attainment scores across the different tasks, given (2.1), holds. Let $P_V(\theta)$ be the operating characteristic of the specific response pattern V . We can write

$$(2.4) \quad P_V(\theta) = \prod_{\star} P_{y_{\text{gsi}}^{\star}}(\theta),$$

where $\prod_{\star}$ indicates the multiplication over every union $y_{\text{gsi}}^{\star}$ to which an element of V belongs.

It is beneficial to search for a family of models which provide us with a unique maximum for every possible response pattern given by (2.3). This can be done as a generalization of the unique maximum condition proposed for the graded response model (cf. Samejima, 1969, 1972).

The basic function, $A_{y_{\text{gsi}}^{\star}}(\theta)$, for the union of attainment scores $y_{\text{gsi}}^{\star}$ is defined by

$$(2.5) \quad A_{y_{\text{gsi}}^{\star}}(\theta) = \sum_{i \in y_{\text{gsi}}^{\star}} \log P_{y_{\text{gsi}}^{\star}}(\theta).$$

The maximum likelihood estimate, $\hat{\theta}$, of the subject's latent trait based upon his response pattern is given as the solution of the likelihood equation such that

$$(2.6) \quad \begin{aligned} \frac{d}{d\theta} \log P_V(\theta) &= \sum_{\star} \frac{d}{d\theta} \log P_{y_{\text{gsi}}^{\star}}(\theta) \\ &= \sum_{\star} A_{y_{\text{gsi}}^{\star}}'(\theta), \end{aligned}$$

where $\sum_{\star}$ indicates the summation over every union $y_{qsi}^{\star}$ to which an element of V belongs. A sufficient condition that a unique modal point exists for the likelihood function $P_V(\cdot)$ of each and every response pattern V is that this basic function is strictly decreasing in θ with non-negative and non-positive values as its two asymptotes, respectively, for every union $y_{qsi}^{\star}$. This can be shown in the same way that we did for the basic function $A_{x_q}(\cdot)$ of the graded item score x_q (cf. Samejima, 1969). For brevity, sometimes we call this condition the unique maximum condition.

Similarities between the differential strategies in problem solving and the multi-correct responses in testing are obvious. If we consider two or more different strategies which lead to the solution of the problem as two or more different answers to a question, then they will be treated as multi-correct responses. We can see that the concept of multi-correct responses can be transferred to differential strategies, when there exist more than one successful strategy in solving the problem.

III. Homogeneous Case

The Homogeneous case of the graded response level has been developed and discussed (Samejima, 1972) as a generalization of a family of models on the dichotomous response level. Sufficient conditions that a model provides us with a unique modal point for the likelihood function of each and every response pattern have been investigated. In the homogeneous case, a sufficient condition is that, for an arbitrary item score x_q ($\neq 0$), the cumulative operating characteristic $P_{x_q}^*(\theta)$ is strictly increasing in θ with zero and unity as its two asymptotes, i.e., of Type A, and its

asymptotic basic function, $\hat{A}_{x_g}(\theta)$, which is defined by

$$(3.1) \quad \hat{A}_{x_g}(\theta) = \frac{\partial}{\partial \theta} \left[\log \left(\frac{\partial}{\partial \theta} P_{x_g}^*(\theta) \right) \right],$$

is strictly decreasing in θ . The satisfaction of this sufficient condition also implies two desirable features of the model such that: 1) the operating characteristic of each graded item score of each item has a single modal point, and 2) those modal points for a single item are arranged in the same order as the item score itself. The normal ogive and logistic models, which have been generalized from the corresponding models on the dichotomous response level, are two examples of the models which satisfy the above sufficient condition.

These models of the homogeneous case on the graded response level can be generalized to provide us with those which belong to the general model of differential strategies. Let $\Psi(\theta)$ be a function of Type A. We shall consider the cumulative operating characteristic, $P_{y_{gsi}}^*(\theta)$, of the union of attainment categories y_{gsi}^* such that

$$(3.2) \quad P_{y_{gsi}}^*(\theta) = \beta_{y_{gsi}} \Psi(\theta - \alpha_{y_{gsi}}),$$

where

$$(3.3) \quad -\infty = y_{g0i}^* < y_{g1i}^* < \dots < y_{gm_{gi}i}^* < y_{g(m_{gi}+1)i}^* = \infty$$

for every strategy, and $\beta_{y_{gsi}}^*$ is a constant which satisfies

$$(3.4) \quad \begin{cases} \beta_{y_{gsi}^*} = 1 & s = 0 \\ \sum_{j^*} \beta_{y_{gsj}^*} = \beta_{y_{g(s-1)i}^*} & s = 1, 2, \dots, m_{gi}, \end{cases}$$

with $\sum_{j^*}$ indicating the summation over all the strategies j branching from the point of the differential strategy tree which is located right after the edge representing the union $y_{g(s-1)i}^*$ in the differential strategy tree. From (3.4) it is obvious that, as far as there is no branching, $\beta_{y_{gsi}^*} = \beta_{y_{g(s-1)i}^*}$.

A sufficient condition that the model satisfies the unique maximum condition is: 1) that the values of the constant $\alpha_{y_{gsj}^*}$ are the same for all the strategies j which branch from the vertex located immediately after the edge representing y_{gsi}^* , and 2) that we have

$$(3.5) \quad \frac{\partial}{\partial \theta} \left[\log \left(\frac{\partial}{\partial \theta} \Psi(\theta) \right) \right] < 0$$

almost everywhere in the domain of θ . To prove this, we obtain from (2.2), (3.2), (3.4) and the definition of the basic function $A_{y_{gsi}^*}(\theta)$, which was given by (2.5),

$$(3.6) \quad A_{y_{gsi}^*}(\cdot) = \frac{1}{\sum_{j^*} \psi(-\alpha_{y_{gsi}^*})} \log \left\{ \frac{\psi(-\alpha_{y_{gsi}^*})}{\sum_{j^*} \psi(-\alpha_{y_{g(s+1)j^*}^*})} \right\},$$

where $\sum_{j^*}$ indicates the summation over all the strategies j^* branching from the vertex which lies immediately after the edge representing the union y_{gsi}^* in the differential strategy tree. By virtue of the first condition, we can rewrite (3.6) in the form

$$(3.7) \quad A_{y_{gsi}^*}(\cdot) = \frac{1}{\sum_{j^*} \psi(-\alpha_{y_{gsi}^*})} \log \left\{ \frac{\psi(-\alpha_{y_{gsi}^*})}{\psi(-\alpha_{y_{g(s+1)j^*}^*})} \right\} \\ = \left\{ \frac{\psi'(-\alpha_{y_{gsi}^*})}{\psi(-\alpha_{y_{gsi}^*})} - \frac{\psi'(-\alpha_{y_{g(s+1)j^*}^*})}{\psi(-\alpha_{y_{g(s+1)j^*}^*})} \right\} \\ \left\{ \frac{\psi(-\alpha_{y_{gsi}^*})}{\psi(-\alpha_{y_{g(s+1)j^*}^*})} \right\}^{-1},$$

where $\alpha_{y_{g(s+1)j^*}^*}$ indicate the common constant for all j^* 's, and $\psi'(\cdot)$ indicates the first derivative of $\psi(\cdot)$ with respect to θ . We notice that, if we replace y_{gsi}^* by the graded item score x_g and use $\psi(-\alpha_{x_g})$ as the cumulative operating characteristic $P_{x_g}^*(\theta)$, the last form of (3.7) is identical with the basic function of the graded item score, and the left hand side of (3.5) is identical with the corresponding asymptotic basic function. Thus we can say that all the unions, y_{gsi}^* , are equivalent to syndrome response categories (cf. Samejima, 1972, Section 5.2), and a unique maximum is assured for every possible response pattern.

IV. Information Provided by Differential Strategies

The information function, $I_{y_{gsi}^*}(\theta)$, for the union of the attainment scores y_{gsi}^* is defined by

$$(4.1) \quad I_{y_{gsi}^*}(\theta) = -\frac{\partial^2}{\partial \theta^2} \log P_{y_{gsi}^*}(\theta) = -\frac{\partial}{\partial \theta} A_{y_{gsi}^*}(\theta),$$

where $P_{y_{gsi}^*}(\theta)$ is the operating characteristic, and $A_{y_{gsi}^*}(\theta)$ is the basic function, of y_{gsi}^* , which are defined by (2.2) and (2.5), respectively.

This function is non-negative whenever the unique maximum condition is satisfied.

In the homogeneous case, as we observed in the preceding section, if there is a single value $\alpha_{y_{gsj}^*}$ common for all the strategies j^* 's, which leads to the satisfaction of the unique maximum condition, we can write for the operating characteristics of y_{gsi}^*

$$(4.2) \quad P_{y_{gsi}^*}(\theta) = s_{y_{gsi}^*} [\Psi(\theta - \alpha_{y_{gsi}^*}) - \Psi(\theta - \alpha_{y_{g(s+1)j^*}^*})],$$

which is obvious from (2.2), (3.2) and (3.4). Substituting (4.2) into (4.1) we obtain

$$(4.3) \quad I_{y_{gsi}^*}(\theta) = \{ \Psi'(\theta - \alpha_{y_{gsi}^*}) - \Psi'(\theta - \alpha_{y_{g(s+1)j^*}^*}) \}^2 \\ \{ \Psi(\theta - \alpha_{y_{gsi}^*}) - \Psi(\theta - \alpha_{y_{g(s+1)j^*}^*}) \}^{-2}$$

$$- \{ \Psi''(\theta - \alpha_{y_{gsi}^*}) - \Psi''(\theta - \alpha_{y_{g(s+1)j^*}^*}) \} \\ \{ \Psi(\theta - \alpha_{y_{gsi}^*}) - \Psi(\theta - \alpha_{y_{g(s+1)j^*}^*}) \}^{-1},$$

where $\Psi''(\cdot)$ indicates the second derivative of $\Psi(\cdot)$ with respect to θ . From this result and (3.3), it is obvious that when θ approaches negative infinity $I_{y_{gsi}^*}(\theta)$ tends to the limiting case of

$$(4.4) \quad \{ \Psi''(\theta - \alpha_{y_{gsi}^*}) \}^2 \{ \Psi'(\theta - \alpha_{y_{gsi}^*}) \}^{-2} \\ - \{ \Psi'''(\theta - \alpha_{y_{gsi}^*}) \} \{ \Psi'(\theta - \alpha_{y_{gsi}^*}) \}^{-1}$$

for $s = 1, 2, \dots, m_{gi}$, where $\Psi'''(\cdot)$ indicates the third derivative of $\Psi(\cdot)$ with respect to θ . It is also obvious that, when θ approaches positive infinity, the asymptote of $I_{y_{gsi}^*}(\theta)$ is also given as the limiting case of (4.4) for $s = 0, 1, 2, \dots, (m_{gi}-1)$. Note that the above does not include the case where $s = 0$ and θ approaches negative infinity, or the case where $s = m_{gi}$ and θ tends to positive infinity. In these two cases the asymptotes are obtained more straightforwardly from (4.3).

We can also see from (4.3) that this function is symmetric with

$\theta = [\alpha_{y_{gsi}^*} + \alpha_{y_{g(s+1)j^*}^*}] / 2$ as the axis of symmetry for $s = 1, 2, \dots, (m_{gi}-1)$, whenever $\Psi(\cdot)$ is point-symmetric. At this point of θ , because of this point-symmetry, the first term on the right hand side of (4.3) disappears, and we have

$$\begin{aligned}
 (4.5) \quad I_{y_{gsi}^*}(\theta) &= 2\psi''\{(\alpha_{y_{g(s+1)j^*}^*} - \alpha_{y_{gsi}^*})/2\} \\
 &\quad [1 - 2\psi\{(\alpha_{y_{gsi}^*} - \alpha_{y_{g(s+1)j^*}^*})/2\}]^{-1}, \\
 \text{for } \theta &= (\alpha_{y_{gsi}^*} + \alpha_{y_{g(s+1)j^*}^*})/2.
 \end{aligned}$$

It has been shown that if $\psi(\cdot)$ is either a normal ogive function or a logistic distribution function, which are defined by

$$(4.6) \quad \psi(t) = (2\pi)^{-1/2} \int_{-\infty}^t e^{-u^2/2} du$$

and

$$(4.7) \quad \psi(t) = [1 + \exp\{-D\alpha t\}]^{-1},$$

respectively, where $a (> 0)$ is a constant and $D (> 0)$ is a scaling factor, the unique maximum condition is satisfied (cf. Samejima, 1972, Section 5.2). Note that in both models $\psi(\cdot)$ is point-symmetric, and, therefore, $I_{y_{gsi}^*}(\theta)$ is symmetric for $s = 1, 2, \dots, (m_{gi} - 1)$.

For the item information function $I_g(\theta)$ we can write

$$(4.8) \quad I_g(\theta) = E[I_{y_{gsi}^*}(\theta) | \theta] = \sum_{y_{gsi}^*} I_{y_{gsi}^*}(\theta) P_{y_{gsi}^*}(\theta)$$

$$\begin{aligned}
&= \sum_{y_{gsi}^*} \beta_{y_{gsi}^*} \{ \Psi'(\theta - \alpha_{y_{gsi}^*}) - \Psi'(\theta - \alpha_{y_{g(s+1)j^*}^*}) \}^2 \\
&\quad \{ \Psi(\theta - \alpha_{y_{gsi}^*}) - \Psi(\theta - \alpha_{y_{g(s+1)j^*}^*}) \}^{-1} \\
&\quad - \sum_{y_{gsi}^*} \beta_{y_{gsi}^*} \{ \Psi''(\theta - \alpha_{y_{gsi}^*}) - \Psi''(\theta - \alpha_{y_{g(s+1)j^*}^*}) \} ,
\end{aligned}$$

where $\sum_{y_{gsi}^*}$ indicates the summation over all the unions of attainment scores, or over all the edges in the differential strategy tree. Since we have

$$(4.9) \quad \sum_{y_{gsi}^*} p_{y_{gsi}^*}(\theta) = 1$$

for the entire range of θ , from this and (4.2) it is obvious that the second term of the rightest hand side of (4.8) equals zero. We obtain, therefore,

$$\begin{aligned}
(4.10) \quad I_g(\theta) &= \sum_{y_{gsi}^*} \beta_{y_{gsi}^*} \{ \Psi'(\theta - \alpha_{y_{gsi}^*}) - \Psi'(\theta - \alpha_{y_{g(s+1)j^*}^*}) \}^2 \\
&\quad \{ \Psi(\theta - \alpha_{y_{gsi}^*}) - \Psi(\theta - \alpha_{y_{g(s+1)j^*}^*}) \}^{-1} .
\end{aligned}$$

It is obvious from (4.10) that within each strategy the more subprocesses we have the greater amount of item information we get, with the case of continuous subprocesses as the limiting situation. This can be observed by following a similar logic that is applied for the relationship between the graded response model and the continuous response model (Samejima, 1973).

A question may arise as to the possibility of increasing the amount of item information by increasing the number of successful strategies. The answer is not directly positive, however. We can see it through the following example. Figure 4-1 presents the digraph and the differential strategy tree of a simple case where we have only two successful strategies. Suppose that the homogeneous case is applied and that we have a common value $\alpha_{y_{g1j}^*}$. If, in addition, we have

$$(4.11) \quad \begin{cases} \alpha_{y_{g21}^*} = \alpha_{y_{g22}^*} \\ \alpha_{y_{g31}^*} = \alpha_{y_{g32}^*} \end{cases},$$

then the information function, which is given by (4.3), becomes identical for $i = 1, 2$ for the same attainment score s ($= 0, 1, 2, 3$). From this fact and (3.4) we obtain from (4.10) for the item information function

$$(4.12) \quad \begin{aligned} I_g(\theta) &= \sum_{y_{gs1}^*} \{ \Psi'(\theta - \alpha_{y_{gs1}^*}) - \Psi'(\theta - \alpha_{y_{g(s+1)1}^*}) \}^2 \\ &\quad \{ \Psi(\theta - \alpha_{y_{gs1}^*}) - \Psi(\theta - \alpha_{y_{g(s+1)1}^*}) \}^{-1} \\ &= \sum_{y_{gs2}^*} \{ \Psi'(\theta - \alpha_{y_{gs2}^*}) - \Psi'(\theta - \alpha_{y_{g(s+1)2}^*}) \}^2 \\ &\quad \{ \Psi(\theta - \alpha_{y_{gs2}^*}) - \Psi(\theta - \alpha_{y_{g(s+1)2}^*}) \}^{-1}. \end{aligned}$$

The amount of item information is, therefore, the same as that of each single strategy case. Thus branching itself does not necessarily increase the amount of item information.

FIGURE 4-1

The Digraph and the Differential Strategy Tree of a Simple Case Where We Have Two Strategies and There Are Four Subprocesses in Each Strategy.

It is also obvious, however, that the differentiation of successful strategies contributes to the increment in the amount of item information through the varieties of different configurations of $P_{y_{gsi}}^*(\theta)$ across the separate strategies, for the more differential strategies we have the greater possibility there is that "detoured" strategies provide us with greater numbers of subprocesses.

When we have n problem solving tasks which require the same latent trait θ , we can write for the test information function $I(\theta)$

$$(4.13) \quad I(\theta) = \sum_{g=1}^n I_g(\theta),$$

following a similar logic applied for the graded response model.

In the normal ogive model, from (3.2) and (4.6) we can write for the cumulative operating characteristic of y_{gsi}^*

$$(4.14) \quad P_{y_{gsi}^*}^*(\theta) = \beta_{y_{gsi}^*} (2\pi)^{-1/2} \int_{-\infty}^{-a_g(\theta - b_{y_{gsi}^*})} e^{-u^2/2} du,$$

where $a_g (> 0)$ is the item discrimination parameter, and $b_{y_{gsi}^*}$ is the difficulty parameter for the subprocess y_{gsi}^* , which replaces $\alpha_{y_{gsi}^*}$ by virtue of the familiarity in notation. Thus we have for the first and second derivatives of $P_{y_{gsi}^*}^*(\theta)$ with respect to θ

$$(4.15) \quad P_{y_{gsi}^*}^{*'}(\theta) = \beta_{y_{gsi}^*} (2\pi)^{-1/2} a_g \exp[-a_g^2(\theta - b_{y_{gsi}^*})^2/2]$$

and

$$(4.16) \quad P_{y_{gsi}^*}^{*''}(\theta) = -a_g^2(\theta - b_{y_{gsi}^*}) P_{y_{gsi}^*}^{*'}(\theta),$$

or, alternatively, from (4.6) we can write

$$(4.17) \quad \psi'(\theta - b_{y_{gsi}^*}) = (2\pi)^{-1/2} a_g \exp[-a_g^2(\theta - b_{y_{gsi}^*})^2/2]$$

and

$$(4.18) \quad \Psi''(\theta - b_{y_{gsi}^*}) = -a_g^2 (\theta - b_{y_{gsi}^*}) \Psi'(\theta - b_{y_{gsi}^*}) .$$

Figure 4-2 presents the cumulative operating characteristics of the unions of attainment scores, which follow the normal ogive model, of a relatively simple example which was given as Example 1 in the preceding research report. In this example, $a_g = 1.00$, $b_{y_{g11}^*} = -2.50$, $b_{y_{g21}^*} = -1.00$, $b_{y_{g31}^*} = 0.50$, $b_{y_{g22}^*} = -1.80$, $b_{y_{g32}^*} = 0.00$, $b_{y_{g42}^*} = 2.00$, $\beta_{y_{g11}^*} = 0.60$ and $\beta_{y_{g12}^*} = 0.40$. The corresponding operating characteristics for these unions are presented in Figure 4-3.

The differential strategy tree of this example was presented in the preceding research report, and also here as Figure 4-4. Since there are as many as eight edges in the differential strategy tree, each edge is drawn by a unique type of line. These separate types of lines will be carried to the subsequent two figures for the sake of identification, so that we shall be able to avoid confusions.

The corresponding eight information functions $I_{y_{gsi}^*}(\theta)$ are presented in Figure 4-5, together with the item information function which is shown by a solid line. Since in the normal ogive model we have

$$(4.19) \quad \Psi''(\theta - b_{y_{gsi}^*}) = a_g^2 \Psi'(\theta - b_{y_{gsi}^*}) [a_g^2 (\theta - b_{y_{gsi}^*})^2 - 1] ,$$

which is obvious from (4.18), we obtain

$$(4.20) \quad \Psi''(\theta - b_{y_{gsi}^*}) / \Psi'(\theta - b_{y_{gsi}^*}) = -a_g^2 (\theta - b_{y_{gsi}^*}) ,$$

FIGURE 4-2

Cumulative Operating Characteristic of the Union of $(y_{g1} = 0)$ and $(y_{g2} = 0)$ (Solid Line), Those of $(y_{g1} = 1)$, $(y_{g1} = 2)$ and $(y_{g1} = 3)$, Respectively (Dotted Lines), and Those of $(y_{g2} = 1)$, $(y_{g2} = 2)$, $(y_{g2} = 3)$ and $(y_{g2} = 4)$, Respectively (Dashed Lines).

FIGURE 4-3

Operating Characteristic of the Union of ($y_{g1} = 0$) and ($y_{g2} = 0$) (Solid Line), Those of ($y_{g1} = 1$), ($y_{g1} = 2$) and ($y_{g1} = 3$), Respectively (Dotted Lines), and Those of ($y_{g2} = 1$), ($y_{g2} = 2$), ($y_{g2} = 3$) and ($y_{g2} = 4$), Respectively (Dashed Lines).

FIGURE 4-4

Differential Strategy Tree Whose Edges Are
Drawn by the Same Separate Types of Lines As
Those in Figures 4-5 and 4-6.

$$(4.21) \quad \psi''(\theta - b_{y_{gsi}^*}) / \psi'(\theta - b_{y_{gsi}^*}) = a_g^2 [a_g^{2(\theta - b_{y_{gsi}^*})} - 1] ,$$

and finally

$$(4.22) \quad \begin{cases} \lim_{\theta \rightarrow -\infty} I_{y_{gsi}^*}(\theta) = a_g^2 & \text{for } s = 1, 2, 3, \dots, m_{gi} \\ \lim_{\theta \rightarrow \infty} I_{y_{gsi}^*}(\theta) = a_g^2 & \text{for } s = 0, 1, 2, \dots, (m_{gi} - 1) . \end{cases}$$

Note that this common asymptotic value equals the constant item response information function of the continuous item response in the normal ogive model (cf. Samejima, 1973). Since in our example $a = 1.00$, these asymptotes are unity, as we can see in Figure 4-5. When $s = 0$, since we have

FIGURE 4-5

Information Functions Following the Normal Ogive Model for Eight Edges of the Differential Strategy Tree Shown As Figure 4-4.

$$(4.23) \quad \begin{cases} \psi(\theta - b_{y_{g0i}^*}) = 1 \\ \psi'(\theta - b_{y_{g0i}^*}) = \psi''(\theta - b_{y_{g0i}^*}) = 0, \end{cases}$$

from this and (4.3) we can write

$$(4.24) \quad I_{y_{g0i}^*}(\theta) = \{\psi'(\theta - b_{y_{g1i}^*})\}^2 \{1 - \psi(\theta - b_{y_{g1i}^*})\}^{-2} \\ + \{\psi''(\theta - b_{y_{g1i}^*})\} \{1 - \psi(\theta - b_{y_{g1i}^*})\}^{-1},$$

and, therefore, we obtain

$$(4.25) \quad \lim_{\theta \rightarrow -\infty} I_{y_{g0i}^*}(\theta) = 0.$$

When $s = m_{gi}$, since we can write

$$(4.26) \quad \psi(\theta - b_{y_{g(m_{gi}+1)i}^*}) = \psi'(\theta - b_{y_{g(m_{gi}+1)i}^*}) \\ = \psi''(\theta - b_{y_{g(m_{gi}+1)i}^*}) = 0,$$

substituting this into (4.3) we have

$$(4.27) \quad I_{y_{gm_{gi}i}^*}(\theta) = \{\psi'(\theta - b_{y_{gm_{gi}i}^*})\}^2 \{\psi(\theta - b_{y_{gm_{gi}i}^*})\}^{-2} \\ - \{\psi''(\theta - b_{y_{gm_{gi}i}^*})\} \{\psi(\theta - b_{y_{gm_{gi}i}^*})\}^{-1},$$

and, therefore, we obtain

$$(4.28) \quad \lim_{\theta \rightarrow \infty} I_{y_{gm_{gi}i}^*}(\theta) = 0.$$

These asymptotes are shown in the three curves of Figure 4-5.

As was observed earlier, $I_{y_{gsi}^*}(\theta)$ is symmetric in the normal ogive model as $\theta = [b_{y_{gsi}^*} + b_{y_{g(s+1)j^*}^*}] / 2$ as the axis of symmetry for $s = 1, 2, 3, \dots, (m_{gi} - 1)$. From (4.5) and (4.18) we obtain

$$(4.29) \quad I_{y_{gsi}^*}(\theta) = a_g^2 (b_{y_{g(s+1)j^*}^*} - b_{y_{gsi}^*}) \\ \psi' \{ (b_{y_{g(s+1)j^*}^*} - b_{y_{gsi}^*}) / 2 \} \\ [1 - 2\psi \{ (b_{y_{gsi}^*} - b_{y_{g(s+1)j^*}^*}) / 2 \}]^{-1}, \\ \text{for } \theta = (b_{y_{gsi}^*} + b_{y_{g(s+1)j^*}^*}) / 2.$$

We notice that this value decreases as the distance between $b_{y_{gsi}^*}$ and $b_{y_{g(s+1)j^*}^*}$ increases, with a_g^2 and zero as its two asymptotes.

Figure 4-6 presents the information share, $I_{y_{gsi}^*}(\theta) P_{y_{gsi}^*}(\theta)$, for

FIGURE 4-6

Information Shares Following the Normal Ogive Model for Eight Edges of the
Differential Strategy Tree Shown As Figure 4-4.

each of the eight y_{gsi}^* 's, together with the item information function.

In the logistic model, as is obvious from (3.2) and (4.7), we have for the cumulative operating characteristic

$$(4.30) \quad P_{y_{gsi}}^*(\theta) = \beta_{y_{gsi}} [1 + \exp\{-Da_g(\theta - b_{y_{gsi}}^*)\}]^{-1},$$

where a_g and $b_{y_{gsi}}^*$ are the same parameters that are used in the normal ogive model, and D (> 0) is the scaling factor which is usually set equal to 1.7 in order to make the discrimination parameter a_g comparable to the one in the normal ogive model. Thus we have for the first and second derivatives of $P_{y_{gsi}}^*(\theta)$ with respect to θ

$$(4.31) \quad P_{y_{gsi}}^{*'}(\theta) = \beta_{y_{gsi}} Da_g \{ \exp\{-Da_g(\theta - b_{y_{gsi}}^*)\} [1 + \exp\{-Da_g(\theta - b_{y_{gsi}}^*)\}]^{-2} \}$$

and

$$(4.32) \quad P_{y_{gsi}}^{*''}(\theta) = Da_g P_{y_{gsi}}^{*'}(\theta) [1 - 2\{\exp\{-Da_g(\theta - b_{y_{gsi}}^*)\}\}^{-1}],$$

or we can write from (4.7)

$$(4.33) \quad \Psi'(\theta - b_{y_{gsi}}^*) = Da_g \Psi(\theta - b_{y_{gsi}}^*) [1 - \Psi(\theta - b_{y_{gsi}}^*)],$$

$$(4.34) \quad \Psi''(\theta - b_{y_{gsi}}^*) = Da_g \Psi'(\theta - b_{y_{gsi}}^*) [1 - 2\Psi(\theta - b_{y_{gsi}}^*)],$$

and

$$(4.35) \quad \Psi''(\theta - b_{y_{gsi}}^*) = D^2 a_g^2 \Psi'(\theta - b_{y_{gsi}}^*) [1 - 6\Psi(\theta - b_{y_{gsi}}^*) + 6\{\Psi(\theta - b_{y_{gsi}}^*)\}^2] .$$

From these results and (4.3) we can write

$$(4.36) \quad I_{y_{g0i}}^*(\theta) = D^2 a_g^2 \Psi(\theta - b_{y_{gli}}^*) [1 - \Psi(\theta - b_{y_{gli}}^*)]$$

and

$$(4.37) \quad I_{y_{gm_{gi}i}}^*(\theta) = D^2 a_g^2 \Psi(\theta - b_{y_{gm_{gi}i}}^*) [1 - \Psi(\theta - b_{y_{gm_{gi}i}}^*)] .$$

Thus unlike the normal ogive model this model provides us with symmetric and unimodal functions for $I_{y_{g0i}}^*(\theta)$ and $I_{y_{gm_{gi}i}}^*(\theta)$, with the modal points at $\theta = b_{y_{gli}}^*$ and $\theta = b_{y_{gm_{gi}i}}^*$, respectively. At each of these modal points, the function assumes $D^2 a_g^2 / 4$.

As for the other edges, since we have from (4.33), (4.34) and (4.35)

$$(4.38) \quad \Psi''(\theta - b_{y_{gsi}}^*) / \Psi'(\theta - b_{y_{gsi}}^*) = D a_g [1 - 2\Psi(\theta - b_{y_{gsi}}^*)] ,$$

and

$$(4.39) \quad \begin{aligned} \Psi''(\theta - b_{y_{gsi}}^*) / \Psi'(\theta - b_{y_{gsi}}^*) \\ = D^2 a_g^2 [1 - 6\Psi(\theta - b_{y_{gsi}}^*) + 6\{\Psi(\theta - b_{y_{gsi}}^*)\}^2] , \end{aligned}$$

from (4.4) we can see that the asymptote of $I_{y_{gsi}}^*(\theta)$ is given as the limiting case of

$$(4.40) \quad 2D^2 a_g^2 \Psi(\theta - b_{y_{gsi}}^*) [1 - \Psi(\theta - b_{y_{gsi}}^*)]$$

for $s = 1, 2, \dots, (m_{gi} - 1)$, in either case where θ tends to negative or positive infinity. Thus again unlike the normal ogive model this model provides us with one or more modal points for $I_{y_{gsi}}^*(\theta)$, with zero as the two asymptotes when θ tends to negative and positive infinities, for $s = 1, 2, \dots, (m_{gi} - 1)$. For these edges, the axis of symmetry for $I_{y_{gsi}}^*(\theta)$ lies at $\theta = (b_{y_{gsi}}^* + b_{y_{g(s+1)j}^*})/2$, and at this point of θ

$$(4.41) \quad I_{y_{gsi}}^*(\theta) = 2D^2 a_g^2 \Psi\{(b_{y_{g(s+1)j}^*} - b_{y_{gsi}}^*)/2\} [1 - \Psi\{(b_{y_{g(s+1)j}^*} - b_{y_{gsi}}^*)/2\}] .$$

Figures 4-7 and 4-8 present the cumulative operating characteristics and the operating characteristics of the eight edges of the differential strategy trees following the logistic model, respectively, with the scaling factor, $D = 1.7$, and with the same parameter values that we used for the normal ogive model. We can see that these graphs are very similar to those on the normal ogive model, which were shown as Figures 4-2 and 4-3. The corresponding information functions for y_{gsi}^* and information shares are shown in Figures 4-9 and 4-10, respectively, together with $I_g(\theta)$.

Figures 4-11 through 4-14 present these four sets of functions for the five strategy case illustrated in Figures 1-1 and 1-2. They follow the normal ogive model, with the parameters, $a_g = 1.0$, $b_{y_{g11}}^* = -2.5$, $b_{y_{g21}}^* = -2.0$, $b_{y_{g31}}^* = -1.5$, $b_{y_{g41}}^* = 0.5$, $b_{y_{g51}}^* = 1.5$,

$b_{y_{g32}}^* = -1.5$, $b_{y_{g42}}^* = -0.5$, $b_{y_{g52}}^* = 1.5$, $b_{y_{g62}}^* = 2.5$,
 $b_{y_{g13}}^* = -2.5$, $b_{y_{g23}}^* = -1.8$, $b_{y_{g33}}^* = -0.3$, $b_{y_{g43}}^* = 1.8$,
 $b_{y_{g14}}^* = -2.5$, $b_{y_{g24}}^* = -1.5$, $b_{y_{g34}}^* = -1.0$, $b_{y_{g44}}^* = 0.0$,
 $b_{y_{g35}}^* = -1.0$, $b_{y_{g45}}^* = 0.7$, $b_{y_{g55}}^* = 2.0$, $\beta_{y_{g11}}^* = 0.400$,
 $\beta_{y_{g13}}^* = 0.250$, $\beta_{y_{g14}}^* = 0.350$, $\beta_{y_{g31}}^* = 0.160$, $\beta_{y_{g32}}^* = 0.240$,
 $\beta_{y_{g34}}^* = 0.210$ and $\beta_{y_{g35}}^* = 0.140$. The corresponding results for the

logistic model are shown as Figures 4-15 through 4-18. Note that in each of these figures five separate graphs were drawn for the five successful strategies, in order to avoid confusions by presenting too many curves in a single graph.

Comparison of these functions in the normal ogive model with those in the logistic model in each of the two examples reveals that, in spite of the similarity between the two models with respect to their cumulative operating characteristics, and, therefore, to the operating characteristics of y_{gsi}^* , there exist substantial differences between the two models in terms of their information functions. These differences do not affect the information shares too much, however, except that those functions are steeper in the logistic model than in the normal ogive model. As the result, neither do they affect the item information function $I_g(\theta)$ too much.

These are only two of the many conceivable mathematical models. Some models provide us with cumulative operating characteristics which are not point-symmetric as those in the normal ogive and logistic models are. In such cases it is expected that those functions will be more complicated as the result of this asymmetry.

Cumulative Operating Characteristics Following the Logistic Model for Eight Edges of the Differential Strategy Tree Shown as Figure 4-4.

Operating Characteristics Following the Logistic Model for Eight Edges of the Differential Strategy Tree Shown as Figure 4-4.

FIGURE 4-9

Information Functions Following the Logistic Model for Eight Edges of the
Differential Strategy Tree Shown As Figure 4-4.

FIGURE 4-10

Information Shares Following the Logistic Model for Eight Edges of the Differential Strategy Tree Shown as Figure 4-4.

FIGURE 4-11

Cumulative Operating Characteristics of the Subprocesses
in Each of the Five Successful Strategies of the Example
Whose Differential Strategy Tree Is Shown as Figure 1-2,
Following the Normal Ogive Model.

FIGURE 4-12

Operating Characteristics of the Subprocesses in Each of the Five Successful Strategies of the Example Whose Differential Strategy Tree Is Shown as Figure 1-2, Following the Normal Ogive Model.

FIGURE 4-13

Information Functions of the Subprocesses in Each of the Five Successful Strategies of the Example Whose Differential Strategy Tree Is Shown as Figure 1-2, Following the Normal Ogive Model.

FIGURE 4-14

Information Shares the Subprocesses in Each of the Five Successful Strategies of the Example Whose Differential Strategy Tree Is Shown as Figure 1-2, Following the Normal Ogive Model.

FIGURE 4-15

Cumulative Operating Characteristics of the Subprocesses
in Each of the Five Successful Strategies of the Example
Whose Differential Strategy Tree Is Shown as Figure 1-2,
Following the Logistic Model.

FIGURE 4-16

Operating Characteristics of the Subprocesses in Each of the Five Successful Strategies of the Example Whose Differential Strategy Tree Is Shown as Figure 1-2, Following the Logistic Model.

FIGURE 4-17

Information Functions of the Subprocesses in Each of the Five Successful Strategies of the Example Whose Differential Strategy Tree Is Shown as Figure 1-2, Following the Logistic Model.

FIGURE 4-18

Information Shares the Subprocesses in Each of the Five Successful Strategies of the Example Whose Differential Strategy Tree Is Shown as Figure 1-2, Following the Logistic Model.

V. Discussion

A question may arise as to which estimate of the latent trait should be taken if the subject faltered from one strategy to another and did not reach the solution of the problem. One answer to this question may be to take the attainment score of the strategy that he took last, and use its corresponding operating characteristic in estimating his latent trait. Another answer may be to compare the resultant estimates of θ obtained by the separate strategies the subject has taken and select the highest estimate.

The usefulness of the proposed model is yet to discover. We need the collaboration of cognitive psychologists who are willing to collect data on larger samples, taking advantage of modern technologies.

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University of Tennessee/Gamajima

University of Tennessee/Gamajima

Dr. Terry Ackerman
American College Testing Programs
P.O. Box 168
Iowa City, IA 52243

Dr. Robert Ahlers
Code N711
Human Factors Laboratory
Naval Training Systems Center
Orlando, FL 32813

Dr. James Algina
University of Florida
Gainesville, FL 32605

Dr. Erling B. Andersen
Department of Statistics
Studiestraede 6
1455 Copenhagen
DENMARK

Dr. Eva L. Baker
UCLA Center for the Study
of Evaluation
145 Moore Hall
University of California
Los Angeles, CA 90024

Dr. Isaac Bejar
Educational Testing Service
Princeton, NJ 08450

Dr. Menucha Birenbaum
School of Education
Tel Aviv University
Tel Aviv, Ramat Aviv 69978
ISRAEL

Dr. Arthur S. Blaiwes
Code N711
Naval Training Systems Center
Orlando, FL 32813

Dr. Bruce Bloxom
Defense Manpower Data Center
550 Camino El Estero,
Suite 200
Monterey, CA 93943-3231

Dr. R. Darrell Bock
University of Chicago
NORC
6030 South Ellis
Chicago, IL 60637

Cdt. Arnold Bohrer
Sectie Psychologisch Onderzoek
Rekruterings- en Selectiecentrum
Kwartier Koningen Astrid
Bruijnstraat
1120 Brussels, BELGIUM

Dr. Robert Breaux
Code N 095R
Naval Training Systems Center
Orlando, FL 32813

Dr. Robert Brennan
American College Testing
Programs
P. O. Box 168
Iowa City, IA 52243

Dr. Lyle D. Broemeling
ONR Code 1111SP
800 North Quincy Street
Arlington, VA 22217

Mr. James W. Carey
Commandant (G-PTE)
U.S. Coast Guard
2100 Second Street, S.W.
Washington, DC 20593

Dr. James Carlson
American College Testing
Program
P.O. Box 168
Iowa City, IA 52243

Dr. John B. Carroll
409 Elliott Rd.
Chapel Hill, NC 27514

Dr. Robert Carroll
OP 01B7
Washington, DC 20370

Mr. Raymond E. Christal
AFHRI/MOE
Brooks AFB, TX 78235

Dr. Norman Cliff
Department of Psychology
Univ. of So. California
University Park
Los Angeles, CA 90007

Director,
Manpower Support and
Readiness Program
Center for Naval Analysis
2000 North Beauregard Street
Alexandria, VA 22311

Dr. Stanley Collyer
Office of Naval Technology
Code 222
800 N. Quincy Street
Arlington, VA 22217-5000

Dr. Hans Crombag
University of Leyden
Education Research Center
Boerhaavelaan 2
2334 EN Leyden
The NETHERLANDS

Dr. Timothy Davey
Educational Testing Service
Princeton, NJ 08541

Dr. C. M. Dayton
Department of Measurement
Statistics & Evaluation
College of Education
University of Maryland
College Park, MD 20742

Dr. Ralph J. DeAyala
Measurement, Statistics,
and Evaluation
Benjamin Building
University of Maryland
College Park, MD 20742

Dr. Dattprasad Divgi
Center for Naval Analysis
4401 Ford Avenue
P.O. Box 16268
Alexandria, VA 22302-0268

Dr. Her Ki Dong
Bell Communications Research
6 Corporate Place
PVA 1K226
Piscataway, NJ 08854

Dr. Fritz Dragow
University of Illinois
Department of Psychology
603 E. Daniel St.
Champaign, IL 61820

Defense Technical
Information Center
Cameron Station, Bldg 5,
Alexandria, VA 22314
Attn: IC
(12 Copies)

Dr. Stephen Dunbar
Cindquist Center
for Measurement
University of Iowa
Iowa City, IA 52242

Dr. James A. Earles
Air Force Human Resources Lab
Brooks AFB, TX 78235

Dr. Kent Eaton
Army Research Institute
5001 Eisenhower Avenue
Alexandria, VA 22303

Dr. John M. Eddins
University of Illinois
252 Engineering Research
Laboratory
103 South Mathews Street
Urbana, IL 61801

Dr. Susan Embretson
University of Kansas
Psychology Department
426 Fraser
Lawrence, KS 66044

Dr. George Engelhard, Jr.
Division of Educational Studies
Emory University
201 Lockburn Bldg.
Atlanta, GA 30322

1988/02/23

University of Tennessee/Samejima

NON GOVT

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German Military Representative
 Altin: Wolfgang Wiedebrue
 Streitkraefteamt
 D-5300 Bonn 2
 4000 Brandwine Street, NW
 Washington, DC 20016

Dr. Bruce Williams
 Department of Educational
 Psychology
 University of Illinois
 Urbana, IL 61801

Dr. Hilda Ming
 NRC GF-176
 2101 Constitution Ave
 Washington, DC 20418

Dr. Martin F. Wiskoff
 Navy Personnel R & D Center
 San Diego, CA 92152-6800

Mr. John H. Wolfe
 Navy Personnel R&D Center
 San Diego, CA 92152-6800

Dr. George Wong
 Biostatistics Laboratory
 Memorial Sloan-Kettering
 Cancer Center
 1275 York Avenue
 New York, NY 10021

Dr. Wallace Wulfeck, III
 Navy Personnel R&D Center
 San Diego, CA 92152-6800

Dr. Kentaro Yamamoto
 Educational Testing Service
 Rosedale Road
 Princeton, NJ 08541

Dr. Wendy Yen
 CTB/McGraw Hill
 Del Monte Research Park
 Monterey, CA 93940

Dr. Joseph L. Young
 Memory & Cognitive
 Processes
 National Science Foundation
 Washington, DC 20550

1 Dr. Robert Guion
 Department of Psychology
 Bowling Green State University
 Bowling Green, OH 43403

1 Dr. P. Mengal
 Faculte de Psychologie
 et des Sciences de l'Education
 Universite de Geneve
 3 fl. de l'Universite
 1201 Geneva SWITZERLAND

1 Dr. Wim J. van der Linden
 Vakgroep Onderwijskunde
 Postbus 217
 7500 EA Enschede
 THE NETHERLANDS

1 Dr. Lutz Horke
 University Duesseldorf
 Erz. Wiss.
 D-4000 Duesseldorf
 WEST GERMANY

1 Dr. Wolfgang Buchta
 8346 Simbach Inn
 Postfach 1306
 Industriestrasse 1
 WEST GERMANY

1 Dr. Albert Beaton
 Educational Testing Service
 Princeton, NJ 08542

1 Dr. Ivo W. Molenaar
 F.S.W.-R.U.G.
 Oude Boteringerstraat 23
 9712 GC Groningen
 THE NETHERLANDS

1 Dr. Chang-I Bonnie Chen
 Graduate School of Psychology
 National Chengchi University
 Taipei, Taiwan
 R.O.C.

1 Dr. Sukeyori Shiba
 Faculty of Education
 University of Tokyo
 Hongo, Bunkyo-ku
 Tokyo, JAPAN 113

1 Dr. Takahiro Sato
 Nippon Electric Co., Ltd.
 C & C Information Technology
 Research Laboratories
 1-1 Miyazaki 4-Chome
 Miyamae-ku, Kawasaki
 Kanagawaken 213, JAPAN

1 Dr. J. Uhlaner
 Perceptronics, Inc.
 6271 Variel Ave.
 Woodland Hills, CA 91634

1 Mr. Kenji Goto
 Ina Nyuhaim #208
 7-2-12 Honcho, Tanashi-shi
 Tokyo 188, JAPAN

1 Dr. G. Gage Kingsbury
 Portland Public Schools
 Evaluation Department
 501 North Dixon Street
 Portland, Oregon 97227

1 Mr. Tadashi Shibayama
 Ono-kohpo #201
 901 Hiregasaki
 Nagareyama-shi
 Chiba-ken, 270-01
 JAPAN

NAVY

1 Mr. Thomas Bryant
 Office of Naval Research
 206 O'Keefe Building
 Atlanta, GA 30332

ARMY

1 Dr. Randall M. Chambers
 U. S. Army Research Institute
 for the Behavioral & Social Sciences
 Fort Sill Field Unit
 P. O. Box 3066
 Fort Sill, OK 73503

University of Tennessee/Samejima

University of Tennessee/Samejima

Dr. Carl Ross
CNET-POCD
Building 90
Great Lakes NIC, IL 60088

Dr. J. Ryan
Department of Education
University of South Carolina
Columbia, SC 29208

Dr. Fumiko Samejima
Department of Psychology
University of Tennessee
3108 AustinPeay Bldg.
Knoxville, TN 37916-0900

Mr. Drew Sands
NPRDC Code 62
San Diego, CA 92152-6800

Lowell Schoer
Psychological & Quantitative
Foundations
College of Education
University of Iowa
Iowa City, IA 52242

Dr. Mary Schratz
Navy Personnel R&D Center
San Diego, CA 92152-6800

Dr. Dan Segall
Navy Personnel R&D Center
San Diego, CA 92152

Dr. W. Steve Sellman
OASD (MRA&L)
28269 The Pentagon
Washington, DC 20301

Dr. Kazuo Shigemasa
7-9-24 Kugenuma-Kaigan
Fujisawa 251
JAPAN

Dr. William Sims
Center for Naval Analysis
4401 Ford Avenue
P.O. Box 16268
Alexandria, VA 22302-0268

Dr. H. Wallace Sinaiko
Manpower Research
and Advisory Services
Smithsonian Institution
801 North Pitt Street
Alexandria, VA 22314

Dr. Richard E. Snow
Department of Psychology
Stanford University
Stanford, CA 94306

Dr. Richard Sorensen
Navy Personnel R&D Center
San Diego, CA 92152-6800

Dr. Paul Speckman
University of Missouri
Department of Statistics
Columbia, MO 65201

Dr. Judy Spray
ACI
P.O. Box 168
Iowa City, IA 52243

Dr. Martha Stocking
Educational Testing Service
Princeton, NJ 08541

Dr. Peter Stoloff
Center for Naval Analysis
200 North Beauregard Street
Alexandria, VA 22311

Dr. William Stout
University of Illinois
Department of Statistics
101 Illini Hall
725 South Wright St.
Champaign, IL 61820

Dr. Hariharan Swaminathan
Laboratory of Psychometric and
Evaluation Research
School of Education
University of Massachusetts
Amherst, MA 01003

Mr. Brad Sympson
Navy Personnel R&D Center
San Diego, CA 92152-6800

Dr. John Langney
AFOSR/NL
Bolling AFB, DC 20332

Dr. Kikumi Iatsuoka
CERL
252 Engineering Research
Laboratory
Urbana, IL 61801

Dr. Maurice Iatsuoka
220 Education Bldg
1310 S. Sixth St.
Champaign, IL 61820

Dr. David Ihssen
Department of Psychology
University of Kansas
Lawrence, KS 66044

Mr. Gary Thomasson
University of Illinois
Educational Psychology
Champaign, IL 61820

Dr. Robert Tsutakawa
University of Missouri
Department of Statistics
222 Math. Sciences Bldg.
Columbia, MO 65211

Dr. Ledyard Tucker
University of Illinois
Department of Psychology
603 E. Daniel Street
Champaign, IL 61820

Dr. Vern W. Urry
Personnel R&D Center
Office of Personnel Management
1900 E. Street, NW
Washington, DC 20415

Dr. David Vale
Assessment Systems Corp.
2233 University Avenue
Suite 310
St. Paul, MN 55114

Dr. Frank Vicino
Navy Personnel R&D Center
San Diego, CA 92152-6800

Dr. Howard Warner
Division of Psychological Studies
Educational Testing Service
Princeton, NJ 08541

Dr. Ming Mei Wang
Lindquist Center
for Measurement
University of Iowa
Iowa City, IA 52242

Dr. Thomas A. Warm
Coast Guard Institute
P. O. Substation 18
Oklahoma City, OK 73169

Dr. Brian Waters
Program Manager
Manpower Analysis Program
HumRR0
1100 S. Washington St.
Alexandria, VA 22314

Dr. David J. Weiss
N660 Elliott Hall
University of Minnesota
75 E. River Road
Minneapolis, MN 55455

Dr. Ronald A. Weitzman
NPS, Code 54Wz
Monterey, CA 92152-6800

Major John Welsh
AFHRL/MOAN
Brooks AFB, TX 78223

Dr. Douglas Witzel
Code 12
Navy Personnel R&D Center
San Diego, CA 92152-6800

Dr. Rand K. Wilcox
University of Southern
California
Department of Psychology
Los Angeles, CA 90007

University of Tennessee/Same time

University of Tennessee/Same time

Dr. Michael Levine
Educational Psychology
210 Education Bldg.
University of Illinois
Champaign, IL 61801

Dr. Charles Lewis
Educational Testing Service
Princeton, NJ 08541

Dr. Robert Linn
College of Education
University of Illinois
Urbana, IL 61801

Dr. Robert Lockman
Center for Naval Analysis
4401 Ford Avenue
P.O. Box 16268
Alexandria, VA 22302-0268

Dr. Frederic M. Lord
Educational Testing Service
Princeton, NJ 08541

Dr. George B. Macready
Department of Measurement
Statistics & Evaluation
College of Education
University of Maryland
College Park, MD 20742

Dr. Milton Marier
Center for Naval Analysis
4401 Ford Avenue
P.O. Box 16268
Alexandria, VA 22302-0268

Dr. William L. Maloy
Chief of Naval Education
and Training
Naval Air Station
Pensacola, FL 32508

Dr. Gary Marco
Stop 31-E
Educational Testing Service
Princeton, NJ 08541

Dr. Clessen Martin
Army Research Institute
5001 Eisenhower Blvd.
Alexandria, VA 22333

Dr. James McBride
Psychological Corporation
c/o Harcourt, Brace,
Jovanovich Inc.
1250 West 6th Street
San Diego, CA 92101

Dr. Clarence McCormick
HQ, MEPCOM
MEPC1-P
3500 Green Bay Road
North Chicago, IL 60064

Dr. Robert McKinley
Educational Testing Service
20-P
Princeton, NJ 08541

Dr. James McMichael
Technical Director
Navy Personnel R&D Center
San Diego, CA 92152

Dr. Barbara Means
Human Resources
Research Organization
1100 South Washington
Alexandria, VA 22314

Dr. Robert Mislevy
Educational Testing Service
Princeton, NJ 08541

Dr. William Montague
NPRDC Code 13
San Diego, CA 92152-6800

Ms. Kathleen Moreno
Navy Personnel R&D Center
Code 62
San Diego, CA 92152-6800

Headquarters, Marine Corps
Code MPI-20
Washington, DC 20380

Dr. W. Alan Nicewander
University of Oklahoma
Department of Psychology
Oklahoma City, OK 73069

Deputy Technical Director
NPRDC Code 01A
San Diego, CA 92152 6800

Director, Training Laboratory,
NPRDC (Code 05)
San Diego, CA 92152 6800

Director, Manpower and Personnel
Laboratory,
NPRDC (Code 06)
San Diego, CA 92152 6800

Director, Human Factors
& Organizational Systems Lab,
NPRDC (Code 07)
San Diego, CA 92152 6800

Fleet Support Officer,
NPRDC (Code 301)
San Diego, CA 92152 6800

Library, NPRDC
Code P201L
San Diego, CA 92152-6800

Commanding Officer,
Naval Research Laboratory
Code 2627
Washington, DC 20390

Dr. Harold F. O'Neill, Jr.
School of Education - MPH 801
Department of Educational
Psychology & Technology
University of Southern California
Los Angeles, CA 90089-0031

Dr. James Olson
WICAT, Inc.
1875 South State Street
Orem, UT 84057

Office of Naval Research,
Code 1142CS
800 N. Quincy Street
Arlington, VA 22217 5000
(6 Copies)

Office of Naval Research,
Code 125
800 N. Quincy Street
Arlington, VA 22217-5000

Assistant for MPI Research,
Development and Studies
OP 01B7
Washington, DC 20370

Dr. Judith Urasanu
Army Research Institute
5001 Eisenhower Avenue
Alexandria, VA 22333

Dr. Jesse Urlansky
Institute for Defense Analyses
1801 N. Beauguard St.
Alexandria, VA 22311

Dr. Randolph Park
Army Research Institute
5001 Eisenhower Blvd.
Alexandria, VA 22333

Wayne M. Patience
American Council on Education
GED Testing Service, Suite 20
One Dupont Circle, NW
Washington, DC 20036

Dr. James Paulson
Department of Psychology
Portland State University
P.O. Box 751
Portland, OR 97207

Administrative Sciences Department,
Naval Postgraduate School
Monterey, CA 93940

Department of Operations Research,
Naval Postgraduate School
Monterey, CA 93940

Dr. Mark D. Reckase
ACT
P. O. Box 168
Iowa City, IA 52243

Dr. Malcolm Ree
AFHRL/MP
Brooks AFB, TX 78235

Dr. Harry Kiegethaupt
HumRRO
1100 South Washington Street
Alexandria, VA 22314

University of Tennessee/Samejima

University of Tennessee/Samejima

Dr. Benjamin A. Fairbank
Performance Metrics, Inc.
5825 Callaghan
Suite 225
San Antonio, TX 78228

Dr. Pat Federico
Code 511
NPRDC
San Diego, CA 92152-6800

Dr. Leonard Feldt
Lindquist Center
for Measurement
University of Iowa
Iowa City, IA 52242

Dr. Richard L. Ferguson
American College Testing
Program
P.O. Box 168
Iowa City, IA 52240

Dr. Gerhard Fischer
Liebiggasse 5/3
A 1010 Vienna
AUSTRIA

Dr. Myron Fischl
Army Research Institute
5001 Eisenhower Avenue
Alexandria, VA 22333

Prof. Donald Fitzgerald
University of New England
Department of Psychology
Armidale, New South Wales 2351
AUSTRALIA

Mr. Paul Foley
Navy Personnel R&D Center
San Diego, CA 92152-6800

Dr. Alfred R. Fregly
AFOSR/NL
Bolling AFB, DC 20332

Dr. Robert D. Gibbons
Illinois State Psychiatric Inst.
Rm 529M
1501 W. Taylor Street
Chicago, IL 60612

Dr. Janice Gifford
University of Massachusetts
School of Education
Amherst, MA 01003

Dr. Robert Glaser
Learning Research
& Development Center
University of Pittsburgh
3939 O'Hara Street
Pittsburgh, PA 15260

Dr. Bert Green
Johns Hopkins University
Department of Psychology
Charles & 34th Street
Baltimore, MD 21218

Dipl. Pad. Michael W. Habon
Universitat Dusseldorf
Erziehungswissenschaftliches
Universitätsstr. 1
D-4000 Dusseldorf 1
WEST GERMANY

Dr. Ronald K. Hambleton
Prof. of Education & Psychology
University of Massachusetts
at Amherst
Hills House
Amherst, MA 01003

Dr. Delwyn Harnisch
University of Illinois
51 Gerty Drive
Champaign, IL 61820

Dr. Grant Henning
Senior Research Scientist
Division of Measurement
Research and Services
Educational Testing Service
Princeton, NJ 08541

Ms. Rebecca Hetter
Navy Personnel R&D Center
Code 62
San Diego, CA 92152-6800

Dr. Paul W. Holland
Educational Testing Service
Rosedale Road
Princeton, NJ 08541

Prof. Lutz F. Hornke
Institut fur Psychologie
RWTH Aachen
Jaegerstrasse 17/19
D 5100 Aachen
WEST GERMANY

Dr. Paul Horst
677 G Street, #184
Chula Vista, CA 90010

Mr. Dick Hoshaw
OP-135
Arlington Annex
Room 2834
Washington, DC 20350

Dr. Lloyd Humphreys
University of Illinois
Department of Psychology
603 East Daniel Street
Champaign, IL 61820

Dr. Steven Hunka
Department of Education
University of Alberta
Edmonton, Alberta
CANADA

Dr. Huynh Huynh
College of Education
Univ. of South Carolina
Columbia, SC 29208

Dr. Robert Jannarone
Department of Psychology
University of South Carolina
Columbia, SC 29208

Dr. Dennis E. Jennings
Department of Statistics
University of Illinois
1409 West Green Street
Urbana, IL 61801

Dr. Douglas H. Jones
Thatcher Jones Associates
P.O. Box 6640
10 Trafalgar Court
Lawrenceville, NJ 08648

Dr. Milton S. Katz
Army Research Institute
5001 Eisenhower Avenue
Alexandria, VA 22333

Prof. John A. Keats
Department of Psychology
University of Newcastle
N.S.W. 2308
AUSTRALIA

Dr. G. Gage Kingsbury
Portland Public Schools
Research and Evaluation Department
501 North Dixon Street
P. O. Box 3107
Portland, OR 97209-3107

Dr. William Koch
University of Texas-Austin
Measurement and Evaluation
Center
Austin, TX 78703

Dr. James Kraatz
Computer-based Education
Research Laboratory
University of Illinois
Urbana, IL 61801

Dr. Leonard Kroeker
Navy Personnel R&D Center
San Diego, CA 92152-6800

Dr. Daryll Lang
Navy Personnel R&D Center
San Diego, CA 92152-6800

Dr. Jerry Lehnus
Defense Manpower Data Center
Suite 400
1500 Wilson Blvd
Rosslyn, VA 22209

Dr. Thomas Leonard
University of Wisconsin
Department of Statistics
1210 West Dayton Street
Madison, WI 53705

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