

Open science \Leftrightarrow open methods + open data

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personality-project.org/sapa

Outline

Open science as a goal

The long history of the measurement of cognitive ability

- An abbreviated history

- Proprietary measures

An example of open source cognitive ability measures

- ICAR development

- The ICAR project

The example of the R project for open source software

- Proprietary software slowed the development of new methods

- Open source software leads to open science and asking new questions

Examples of EFA and IRT using the *psych* package with the ICAR data

Summary and Conclusions

Abstract

There are two complementary approaches to the open science of ability measurement:

1. The development of the International Cognitive Ability Resource (ICAR), an international collaboration to develop, validate and distribute an open source measure of cognitive ability.
2. The second development which has facilitated international research in ability is the use of the open source statistical system, R and the more than 16,000 packages developed with R.

Using ICAR items from an open source database as an example, I will show how various R packages can be used for classical and IRT based assessment of ability.

Open Science: A new idea or a long term tradition?

1. Science is a process for asking questions that have answers
 - Our questions and our answers need to be open and shared.
 - Our way of addressing these questions should be open to all.
 - Our results are for everyone, not just those who can afford to pay for journals.
 - Our results need to be trusted and trustworthy.
2. This is not a new idea, sharing ideas, methods and results is as old as the British Royal Society from 1660.
 - The Royal Society was an 'invisible college' of natural philosophers and physicians.
 - Royal Society's motto 'Nullius in verba' is taken to mean 'take nobody's word for it'. (We might now say, does it replicate?)
3. The study of cognitive ability can and should become an example of open science.
 - Traditional studies have been well powered and replicable, but unfortunately, have been proprietary.
 - However, there is now a growing tendency to use open and shared materials.

Open science involves materials, methods, and publications

Open science means sharing our questions, our methods, our materials, and our publications. I address these issues with two examples:

1. Open materials for the assessment of cognitive ability: the [International Cognitive Ability Resource](#) (ICAR) project.
2. Open software for statistical analysis of data: particularly the [psych](#) package for the the [R project](#).

Individuals differ in cognitive ability

1. Ever since antiquity, people have used measures of cognitive ability for selection and prediction.
2. Plato stated that that leaders should show exceptional ability.
3. Theophrastus depicted those with low ability (“the stupid man”) as slow in speech and action.
4. Confucius classified people on the basis of intelligence as to whether they were of great wisdom, average intelligence, or of little intelligence.
5. Mencius’s saying that “scaling makes it possible to understand weight, measurement makes it possible to understand length; these are true for all things, especially true for the mind” may be seen as “a clear and important statement of the importance of quantitative measurement of the human mind” (p 102, [Zhang, 1988](#)).

Cognitive Testing: the first 2000 years

1. Most American scholars attribute the first measurement of cognitive ability to Binet and Simon ([Binet & Simon, 1905](#)) and subsequently to Louis Terman ([Terman, 1916](#)).
2. However, earlier work in the UK was that of Francis Galton ([Galton, 1869](#)) (see [Jensen, 2002](#), for details).
3. Some of the most influential work was done in the UK by Charles Spearman who developed not just factor analysis but also a general theory of intelligence ([Spearman, 1904](#)).
4. Much earlier use of cognitive assessment for personnel selection was found starting with the Han Dynasty of China in approximately 200 BCE ([Bowman, 1989](#); [Urbina, 2014](#); [Zhang, 1988](#)).
5. Some of us attribute an even earlier use of sequential assessment to Gideon, whose story is told in the Hebrew Bible (Judges 7) as well as to Plato in *Republic* (VII: 534, 537).

Cognitive testing the 20th century

1. Until 1915, with the exception of the Chinese assessments for the Civil Service (Zhang, 1988) assessments of ability required one on one assessments.
2. In response to the need to select millions of men for the U.S. Army, Yerkes and his colleagues (Yoakum & Yerkes, 1920) developed paper and pencil forms (the *Army Alpha*) to screen potential recruits for training.
3. These procedures for military assessment were expanded for recruit classification in the Second World War (Dubois, 1947; Murray, MacKinnon, Miller, Fiske & Hanfmann, 1948).
4. Other large scale, proprietary measures were developed for college (the SAT and ACT) and graduate (GRE) and medical school admission (MCAT) (Kuncel & Hezlett, 2007).

Validity and prediction studies

1. That these tests work has been well established (Deary, 2012; Haier, 2016; Hunt, 2010; Sackett, Lievens, Van Iddekinge & Kuncel, 2017; Sackett & Kuncel, 2018).
2. Measures taken in childhood and early adolescence are stable over at least 7 decades, and predict life expectancy (Deary, 2008), success in school, job performance, marital stability, and social mobility (Gottfredson, 1997).
3. Ability tests taken in high school predict occupational status 50 years later (Damian, Spengler, Sutu & Roberts, 2019; Spengler, Damian & Roberts, 2018).
4. Highly able 10-12 year olds have very successful life time careers (Terman & Oden, 1947, 1959).
5. Adolescents whose scores on the SAT are equivalent to those several years older go onto stellar careers in the humanities and sciences (Lubinski & Benbow, 2006; Lubinski, Benbow, Webb & Bleske-Rechek, 2006).

Unfortunately, all of these tests have been proprietary

1. From the very beginning of modern testing, the tests were developed by government or large industries and were not open to broad use.
2. For security reasons, test developers kept the items confidential.
3. For profit reasons, tests were limited to qualified administrators.
4. Tests were given as paper and pencil to groups or individually.
5. Researchers had to pay to get access to these tests.
6. Even the quasi open ETS “French Kit” charged \$0.15 per copy for graduate students which limited sample sizes.
7. Studying cognitive ability was thus limited to a select few with adequate funding and resources.
8. The web has changed all of this (Revelle, Dworak & Condon, 2020).

The International Cognitive Ability Resource (ICAR)

1. Combining the items from an honors thesis project (Liebert, 2006) with prior work on geometric analogies (Leon & Revelle, 1985) and the development of 3D rotation items, the International Cognitive Ability Resource (ICAR) was born (Condon, 2012; Condon & Revelle, 2014).
2. The original test development was part of the personality-project.org and was an early application of our Massively Missing Completely at Random (MMCAR) design (Revelle, Wilt & Rosenthal, 2010; Revelle, Condon, Wilt, French, Brown & Elleman, 2016).
3. Items were designed to be “Google resistant” (answers could not be looked up) and to be self administered over the web (i.e., including cell phones).
4. Further improvements to the web design and item set followed and the test moved to sapa-project.org (Condon, 2018).
5. Following a public release of the original pool of 60 items (Condon & Revelle, 2014), an international consortium was formed to further develop the item set.

A brief history of the ICAR

1. Original test development had 60 items spanning four constructs (Condon, 2012):
 - Verbal reasoning
 - Letter and number series
 - Matrix reasoning
 - Three dimensional rotations
2. As described by (Condon, 2012) this test was validated against self reported SAT/ACT scores ($N = 34,229$) and the 16 item sample test against the Shipley-2 measure of cognitive functioning (Shipley, 2009) ($N = 137$).
3. Sample items are given in the original article (Condon & Revelle, 2014). Please do not reproduce these with the answers!
4. I show examples of the four item types, and their factor structure (Revelle, 2020a)
5. For a more detailed history of the development (Condon, 2012; Condon & Revelle, 2014) and use of the ICAR, see (Revelle et al., 2020).

Sample ICAR Verbal Reasoning

VR.4

What number is one fifth of one fourth of one ninth of 900?

(1) 2 (2) 3 (3) 4 (4) 5 (5) 6 (6) 7

VR.16

Zach is taller than Matt and Richard is shorter than Zach. Which of the following statements would be most accurate?

(1) Richard is taller than Matt (2) Richard is shorter than Matt (3) Richard is as tall as Matt (4) It's impossible to tell

VR.17

Joshua is 12 years old and his sister is three times as old as he. When Joshua is 23 years old, how old will his sister be?

(1) 35 (2) 39 (3) 44 (4) 47 (5) 53 (6) 57

VR.19

If the day after tomorrow is two days before Thursday then what day is it today?

(1) Friday (2) Monday (3) Wednesday (4) Saturday (5) Tuesday (6) Sunday

Sample ICAR Letter Number Reasoning

LN.7

In the following alphanumeric series, what letter comes next? K N P S U

(1) S (2) T (3) U (4) V (5) W (6) X

LN.33

In the following alphanumeric series, what letter comes next? V Q M J H

(1) E (2) F (3) G (4) H (5) I (6) J

LN.34

In the following alphanumeric series, what letter comes next? I J L O S

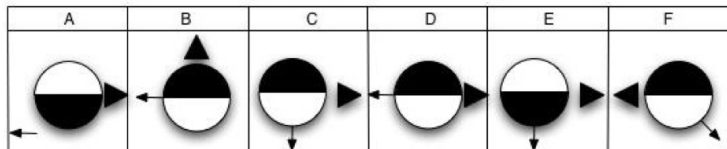
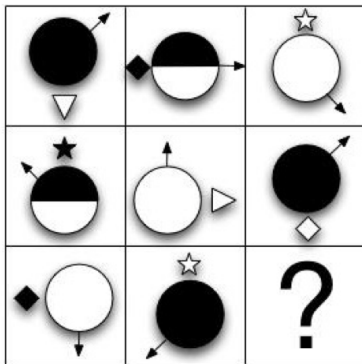
(1) T (2) U (3) V (4) X (5) Y (6) Z

LN.58

In the following alphanumeric series, what letter comes next? Q S N P L

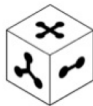
(1) J (2) H (3) I (4) N (5) M (6) L

Sample ICAR Spatial Analogies



Sample ICAR 3 Dimensional Rotation ability

R3D.3 All the cubes below have a different image on each side. Select the choice that could represent a rotation of the cube labeled X.



X



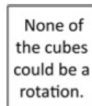
A



B



C



D



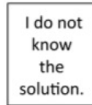
E



F



G



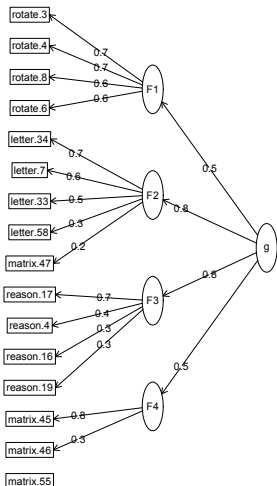
H

Sample data sets are publicly available

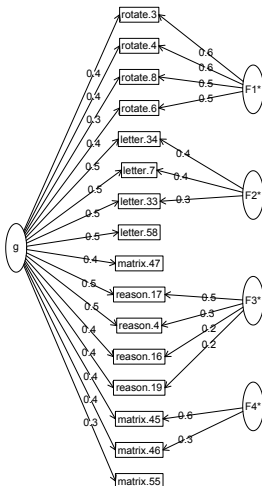
1. 4,000 cases for the 16 items from the ICAR sample test are included in the *psychTools* package ([Revelle, 2020b](#)).
2. 96,958 cases for the 60 items were discussed in ([Condon & Revelle, 2014](#)) and are available for download from the *Journal of Open Psychology Data* ([Condon & Revelle, 2016](#)).
3. Factor structures of these items show a fairly clean four correlated factors with a higher order 'g'.

Hierarchical and SL transformations of the ICAR sample test

Hierarchical (multilevel) Structure



Schmid Leiman Transformed



The ICAR project

The International Cognitive Ability Resource project

1. With funding from 3 different countries coordinated by the ORA plus in Europe, the ICAR project was born and received funding for three years. It continues as an open science consortium.
2. Principal investigators included
 - Philipp Doebler from TU Dortmund University, and Heinz Holing from the University of Munster (funded by the DFG)
 - John Rust, David Stillwell, and Luning Sun from Cambridge University in the UK. (Funded by the ESRC)
 - William Revelle and David Condon from Northwestern University and the University of Oregon in the US (NSF)
3. International collaborators included Professor Fang Luo from Beijing Normal University and Ricardo Primi from the University of Sao Francisco, Brazil.
4. Other investigators are welcome to join us at the [International Cognitive Ability Resource \(ICAR\)](#) (Condon, Doebler, Holling, Gühne, Rust,

Further developments available on ICAR

Members and associates of the ICAR team have been developing a total of 19 item types and have administered over 1,000 different items.

1. An automated perceptual maze test ([Loe & Rust, 2017](#))
2. Automated number series item generator ([Loe, Sun, Simonfy & Doebl, 2018](#))
3. Online Spatial Network Measures ([Loe, 2020](#))
4. Dynamic Propositional Reasoning ([Gühne, Doebl, Condon, Luo & Sun, 2020](#))
5. A sample of Item types still being validated
 - Automatic Compound Remote Associates
 - Two-Dimensional Rotations
 - Figural Analogies
 - Emotion recognition
 - Arithmetic
 - Face-detection (aka the the Mooney Test)
 - A situational judgement task.

Many different researchers have started using the ICAR items and tests

1. As of January, 2020, 79 publications from many different investigators had administered ICAR items ([Dworak, Revelle, Doeblér & Condon, 2020](#)).
2. This number has increased over the past year with investigators sometimes using just a few ICAR items ([Sobkow, Olszewska & Traczyk, 2020](#)), and sometimes selecting larger subsets ([Svenson, Guillén & others, 2020](#)).
3. An independent study was a further validation and reported the correlation of the total score of the 16 item sample test with the full score from the WAIS was .81 with a latent factor correlation of .94 ([Young & Keith, 2020](#)).
4. The most important point of all of these studies is that the ICAR items are freely available and can be self administered over the web.

A few representative studies

1. MTurk samples do not seem to differ from the original web based derivation sample (Merz, Lace & Eisenstein, 2020).
2. ICAR used in a national panel study (“How nuts are the Dutch”) (Krieke, Jeronimus, Blaauw, Wanders, Emerencia, Schenk, Vos, Snippe, Wichers, Wigman & others, 2016)
3. Genetic association with healthy behaviors (Liu, Rea-Sandin, Foerster, Fritsche, Brieger, Clark, Li, Pandit, Zajac, Abecasis & others, 2017).
4. Numerous correlational studies with non-cognitive outcomes using ICAR as a cognitive control.

Proprietary software slowed the development of new methods

Proprietary software

1. Just as ability tests were sold for a profit, so were statistical systems profit making.
2. The history of computing in the social sciences shows that although the major statistical systems originally were developed at universities to solve specific statistical problems, they soon were spun off into profit making ventures ([Revelle, Elleman & Hall, 2020](#)):
 - BMDP was developed for biomedical research
 - SAS[®] for agriculture research
 - SPSS for statistics in the social sciences ([SPSS, 2008](#))
 - S⁺ for general statistics
 - Systat for general statistics and graphics
3. Advanced statistics for structural equation modeling was also proprietary
 - LISREL
 - MPLUS

Open source software leads to open science and asking new questions

The open source revolution

1. In 1992 Ross Ihaka and Robert Gentleman, at the University of Otago in New Zealand, adapted S to work on Macs and called their resulting product, R.
2. R incorporated the list oriented language Scheme and emphasized object-oriented programming.
3. Most importantly, they shared the design specifications with other interested developers around the world
4. They intentionally did not copyright the code.

Thus was R born and become the amazing resource it is today (R

Core Team, 2020)

Open source software leads to open science and asking new questions

The power of R

1. The real power of R is that because it is open source, it is extensible.
2. Anyone can contribute packages to the overall system. These packages are then distributed through [CRAN](#).
3. R is a statistical system as well as an efficient object oriented programming language. Much of R is written in R.
4. That, and the power of the General Public License (GPL) and open source software movement has led to an amazing effect.
5. From the original functions in R and the ones written by the R Core Team ([R Core Team, 2020](#)), more than 16,734 packages have been contributed to [CRAN](#), the Comprehensive R Archive Network, and at least more than 34,000 packages are available on GitHub.
6. R runs on most computing platforms (Unix and Unix likes, PCs, Macs, the web).

Open source software leads to open science and asking new questions

A sample of useful packages to analyze the big data of education

1. *psych* (Revelle, 2020a) is a “Swiss Army Knife” that can do many things for basic descriptive and inferential data analysis and psychometrics (e.g., EFA, IRT, α , β , ω_h , ω_t) but is not the best for any one thing. As of November, 2020, it has \approx 160K monthly downloads with 7.5M total downloads.
2. *lavaan* (Rosseel, 2012) is the definitive package for Confirmatory Factor Analysis and Structural Equation Modeling. It has \approx 37K downloads/month and 1.3M total downloads
3. *GPArotation* (Bernaards & Jennrich, 2005) is the go to package for factor/component rotations. It has \approx 23K downloads/month and 788K total downloads.
4. *mirt* (Chalmers, 2012) is a powerful package for univariate and multivariate Item Response Theory analyses. It has \approx 9K downloads/month and 315K total downloads.

Open source software leads to open science and asking new questions

Most packages come with ‘vignettes’ that describe how to use them

Vignettes for the *psych* package include:

1. An introduction to the *psych* package: part I
2. An introduction, part II: scale construction and psychometrics
3. How to use the *psych* package for factor analysis
4. Using R to score personality scales
5. Using R and the *psych* package to find ω
6. How to do mediation/moderation/regression analysis
7. How to install R and the *psych* package

Others have helpful web pages e.g., [lavaan](#).

Open source software leads to open science and asking new questions

Open Source Code

1. All package and the base R code are open source and may be read, modified, and reused.
2. The 16K+ packages on [CRAN](#) and their associated functions can be adapted for your own use if you choose to do so.
3. R is open to all who want to contribute, is relatively easy to use and is growing. Providing R code in a manuscript or even creating a new package leads to the rapid adoption of new methods.
4. The advantages of open source is that when bugs are found (and they will be), a report to the package's author will lead to a documented fix to the code.
5. Packages keep getting added to [CRAN](#), revisions are made to the base R roughly every six months, revisions are made to packages sporadically (e.g., psych about three times a year).
6. Always check the version number you are using.

psych is intentionally easy to use; one to three lines do it

1. Find four factors for the ICAR sample test using the `fa` function,
2. Draw the solution using `fa.diagram`
3. Find a higher order solution using the `omega` function
4. Report various reliability statistics (Revelle & Condon, 2019)
5. Show the item information curves from an irt analysis of the ability data set.

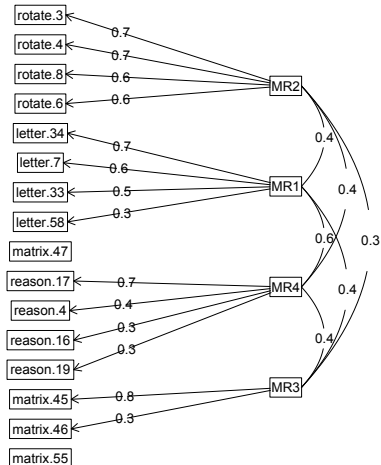
R code

```
f4 <-fa(ability,4)#use the EFA function fa to find 4 factors
fa.diagram(f4,main="Four factors of the ICAR 16")#display them
om <- omega(ability,4) # Find a hierarchical factor solution
summary(om) #give the reliabilities
plot(om,sl=FALSE,main="Hierarchical solution of the ICAR 16")

icar.irt <- irt.fa(ability) #show the item information
plot(icar.irt,type="test") #show the test information
```

Four factors for the ICAR sample test

Four factors of the ICAR 16



```
#use the EFA function fa  
    to find 4 factors  
f4 <-fa(ability,4)
```

```
# Display results with  
    fa.diagram
```

```
fa.diagram(f4,main="Four  
    factors of the ICAR 16")
```

Reliability estimates for the ICAR 16 from the omega function

R code

```
om <- omega(ability,4)
summary(om)
```

```
omega(m = ability, nfactors = 4, main = "A Schmid Leiman solution")
```

```
Alpha: 0.83
```

```
G.6: 0.84
```

```
Omega Hierarchical: 0.66
```

```
Omega H asymptotic: 0.77
```

```
Omega Total 0.86
```

```
With eigenvalues of:
```

```
g F1* F2* F3* F4*
3.05 1.31 0.47 0.40 0.53
```

```
The degrees of freedom for the model is 62 and the fit was 0.05
```

```
The number of observations was 1525 with Chi Square = 70.96 with prob < 0.2
```

```
The root mean square of the residuals is 0.01
```

```
The df corrected root mean square of the residuals is 0.02
```

```
RMSEA and the 0.9 confidence intervals are 0.01 0 0.019
```

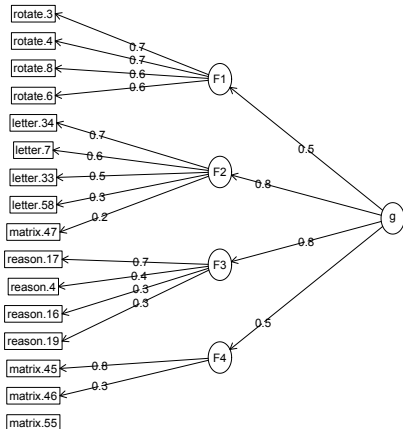
```
BIC = -383.48 Explained Common Variance of the general factor = 0.53
```

```
Total, General and Subset omega for each subset
```

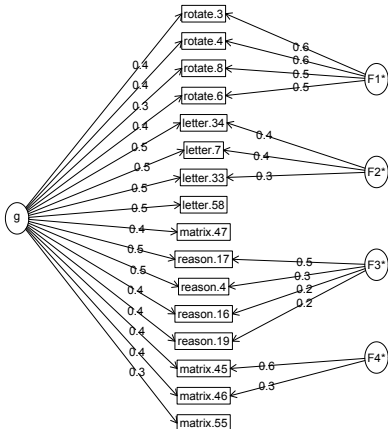
	g	F1*	F2*	F3*	F4*
Omega total for total scores and subscales	0.86	0.77	0.69	0.64	0.52
Omega general for total scores and subscales	0.66	0.24	0.52	0.47	0.27
Omega group for total scores and subscales	0.13	0.53	0.17	0.17	0.25

Hierarchical and SL transformations of the ICAR sample test

Hierarchical (multilevel) Structure



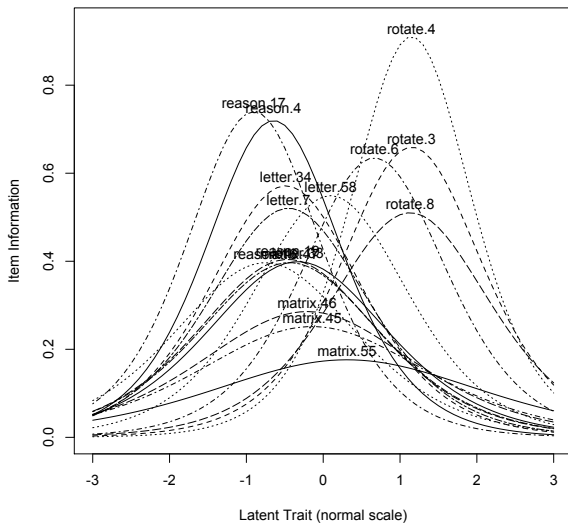
Omega with Schmid Leiman Transformation



```
om <- omega(ability,4) #draws the Schmid Leiman solution
plot(om,sl=FALSE,main="Hierarchical solution of the ICAR 16")
```


Item information from factor analysis for the ICAR sample test

Item information from factor analysis

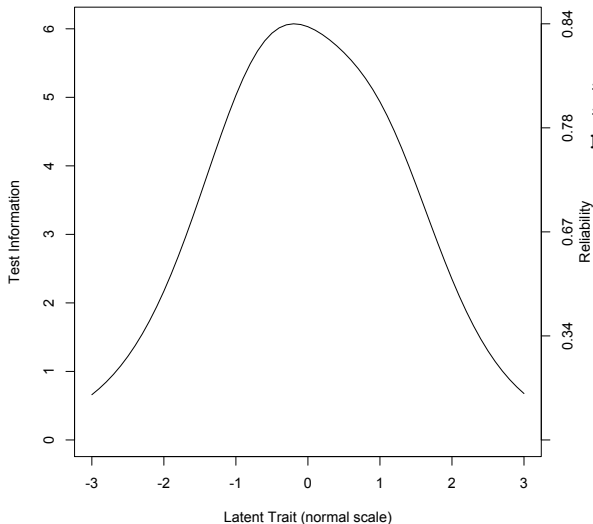


```
#Do a factor analysis of  
tetrachoric correlations  
#Convert the output to  
IRT format  
#display the item  
information curves
```

```
icar.irt - irt.fa(ability)
```

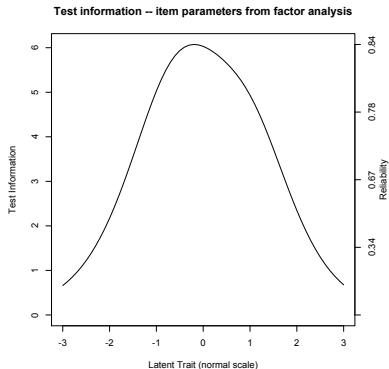
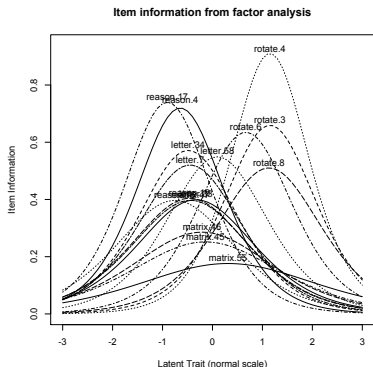
Total test information (and reliability) varies by score

Test information -- item parameters from factor analysis



```
#Use the previous result  
#show the test information  
plot(icar.irt,type="test")
```

Item and test information curves for the ICAR sample test



IRT approach considers item difficulty and discrimination and be found from conventional factor analysis of the tetrachoric correlation matrix, with the addition of a difficulty parameter.

The Open Science Movement has a long history and a great future

1. Open science allows us to ask our questions in a manner that can be examined publicly.
2. Science is not just for the rarefied experts, it is for everyone.
3. Science will be trusted when it is not a secret shared among the elite but when all of mankind can contribute.
4. The **ICAR** and **R** are examples of open science.
5. The study of cognitive ability allows us to identify potential leaders as well as to identify missing variables in our research.
6. With the **International Cognitive Ability Resource** the study of cognitive ability is now open to all investigators.
7. With open source software, e.g., **R**, computation and analysis is open to anyone who is willing to learn.

These slides and supplementary material are available at
personality-project.org/sapa

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