S-061: Statistical and Psychometric Methods for Educational Measurement
Syllabus, Harvard Graduate School of Education – Fall, 2021

Class meets Mondays and Wednesdays, 10:30-11:45 Eastern Time
Course website: https://canvas.harvard.edu/courses/95335
Instructor: Andrew Ho
Andrew_Ho@gse.harvard.edu
Teaching Fellow: Lily An
lily_an@g.harvard.edu

Weekly drop-ins with Andrew: To be scheduled based on availability.
Weekly drop-ins/sections with Lily: To be scheduled based on availability.

Description

This course covers statistical and psychometric methods for improving the design and use of educational and psychological measurements. Students will learn classical and modern measurement techniques, including reliability, generalizability theory, validation, differential item functioning, item response theory, scaling, linking, standard setting, and adjustments for measurement error. Contexts of assessments include small-scale educational and psychological measures for targeted research studies as well as large-scale district, state, and national assessments for formative, summative, and evaluative purposes. In the first two thirds of the course, students will learn and apply methods in class and complete data analytic assignments. In the remainder of the course, students will read and critique recent research in educational measurement. Students will also develop and present a research proposal that has promise for advancing the field.

Prerequisite: S-052 or at least two semesters of applied statistics that includes estimation and interpretation of logistic regression coefficients. Experience with multilevel models is encouraged but not required. This course complements S-043 and S-090, and students may enroll in these courses in any order. Students who do not meet the prerequisite may enroll instead in S-011, which provides a nontechnical introduction to educational measurement.

Grading

The requirements of the course include synchronous engagement (5%), active and effortful participation in asynchronous activities (“learning checks” and “learning submissions,” 15%), satisfactory completion of 4 assignments (35%), an in-person “conversational celebration of learning” (CCL, 15%), and satisfactory completion and in-person presentation of a full research outline/project (30%). These weights are approximate—the final course grade may factor in improvement over time and exemplary performance on one or more dimensions. Students may complete the first assignment individually or in pairs and the remaining three assignments in pairs. The CCL will be held via Zoom with me and Lily in late November.

This course is letter-grade-only. If students would strongly prefer to take this course on a Satisfactory/No Credit basis, I am happy to discuss this possibility with them on a case-by-case basis. Registered students must submit a course evaluation form at the end of the semester to fulfill the requirements of the course. Auditors may not attend this course synchronously—all synchronous attendees must be registered students.
Additional Meetings with Lily and Andrew
Your TF, Lily, will schedule weekly meeting times by appointment. She may also offer optional discussion sections as necessary. These may be most common before assignment due dates. I will hold, “please drop by my office” hours at a regular time to be determined based on all out availability. No pre-set agenda or questions are necessary. Just drop by! For those who wish additional scheduled meetings, these are often available after class meetings or by appointment though my assistant, Wendy Angus, at Wendy_Angus@gse.harvard.edu.

The Weekly Rhythm of S-061

S-061 has a weekly rhythm as follows:

- **Friday and Saturday:** I will post asynchronous modules to Canvas that review the coming week’s topics and material. These are interspersed with “learning checks,” short questions requiring brief answers. Solutions are available immediately thereafter.

- **Saturday through Tuesday:** Students watch asynchronous modules and skim central readings at their own pace. Students complete learning checks at their own pace, throughout, as collaboratively as they would like.

- **Monday:** At an optional “Launch Session” during scheduled class time, I will take a moment to introduce the week’s material, then yield space to students to ask questions. Launch sessions are optional and recorded. Attendance will be hybrid or entirely online.

- **Wednesday:** At a required “Emphasis Session” during scheduled class time, I will emphasize key concepts from the week’s material using parallel examples and, where appropriate, activities. There may be two separate Emphasis Sessions to accommodate in-person and online-only learners.

- **Wednesday through Saturday:** Students complete the week’s “learning submission” or “assignment,” alternating weeks. Learning submissions are moderate and ungraded, whereas assignments are more extended. Learning submission solutions are available immediately upon submission, whereas assignment feedback is provided later the next week. Learning submissions must be submitted individually, although collaboration with any fellow student is welcome. Assignments must be submitted in pairs, and collaboration is only permitted within the partnership. Weekly submissions are due at 5pm on Saturdays. However, there is always a flexible deadline of 24 hours granted automatically without any need to notify us, until Sunday at 5pm.

Timing and Purpose of S-061 Assessments

<table>
<thead>
<tr>
<th>Assessment Type</th>
<th>Length</th>
<th>Completion Time</th>
<th>Collaboration</th>
<th>Feedback</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Learning Checks</td>
<td>Brief</td>
<td>Between asynchronous modules</td>
<td>Collaboration with anyone is encouraged. Ultimately, individual submission.</td>
<td>Correct answers provided immediately.</td>
<td>Formative</td>
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<tr>
<td>Learning Submissions</td>
<td>Moderate</td>
<td>Due 5pm ET Saturdays (with a flex day), in Weeks 2, 4, 6...</td>
<td>Collaboration with anyone is encouraged. Ultimately, individual submission.</td>
<td>Correct answers provided immediately.</td>
<td>Formative</td>
</tr>
<tr>
<td>Assignments</td>
<td>Extended</td>
<td>Due 5pm ET Saturdays (with a flex day), in Weeks 3, 5, 7...</td>
<td>Collaboration only with partners. Partnered submission required.</td>
<td>Detailed, approximately 1 week later.</td>
<td>Formative and summative.</td>
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CALENDAR
(I expect this calendar to change slightly as I accommodate the pace and preferences of the class)

**September 2021**

<table>
<thead>
<tr>
<th>Sunday</th>
<th>Monday</th>
<th>Tuesday</th>
<th>Wednesday</th>
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<th>Friday</th>
<th>Saturday</th>
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<tbody>
<tr>
<td>29</td>
<td>30</td>
<td>31 – Q&amp;A Session, 3:30</td>
<td>1</td>
<td>2</td>
<td>3 – Course Registration</td>
<td>4</td>
</tr>
<tr>
<td>5 – Week 1 Validation</td>
<td>6 – HOLIDAY</td>
<td>7</td>
<td>8 – Emphasis Session (req.)</td>
<td>9</td>
<td>10</td>
<td>11 – No Assignment</td>
</tr>
<tr>
<td>12 – Week 2 Reliability</td>
<td>13 – Launch Session (opt.)</td>
<td>14</td>
<td>15-Emphasis Session (req.)</td>
<td>16</td>
<td>17</td>
<td>18 – Week 2 LS Due 5pm</td>
</tr>
<tr>
<td>19 – Week 3 G Theory 1</td>
<td>20 – Launch Session (opt.)</td>
<td>21</td>
<td>22-Emphasis Session (req.)</td>
<td>23</td>
<td>24</td>
<td>25 – Week 3 AsgnDue5p</td>
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<tr>
<td>26 – Week 4 G Theory 2</td>
<td>27 – Launch Session (opt.)</td>
<td>28</td>
<td>29-Emphasis Session (req.)</td>
<td>30</td>
<td>1</td>
<td>2 – Week 4 LS Due 5pm</td>
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**October 2021**

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<tr>
<th>Sunday</th>
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<tbody>
<tr>
<td>3 – Week 5 IRT Models</td>
<td>4 – Launch Session (opt.)</td>
<td>5</td>
<td>6-Emphasis Session (req.)</td>
<td>7</td>
<td>8</td>
<td>9– Week 5 AsgnDue5p</td>
</tr>
<tr>
<td>10 – Week 6 IRT, Applied</td>
<td>11 – HOLIDAY</td>
<td>12</td>
<td>13-Emphasis Session (req.)</td>
<td>14</td>
<td>15</td>
<td>16– Week 6 LS Due 5pm</td>
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<tr>
<td>17 – Week 7 IRT &amp; GRM</td>
<td>18 – Launch Session (opt.)</td>
<td>19</td>
<td>20-Emphasis Session (req.)</td>
<td>21</td>
<td>22</td>
<td>23– Week 7 AsgnDue5p</td>
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<tr>
<td>24 – Week 8 Linking</td>
<td>25 – Launch Session (opt.)</td>
<td>26</td>
<td>27-Emphasis Session (req.)</td>
<td>28</td>
<td>29</td>
<td>30 – Week 8 LS Due 5pm</td>
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**November 2020**

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<tr>
<th>Sunday</th>
<th>Monday</th>
<th>Tuesday</th>
<th>Wednesday</th>
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<th>Saturday</th>
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</thead>
<tbody>
<tr>
<td>31 – Week 9 Bias and DIF</td>
<td>1 – Launch Session (opt.)</td>
<td>2</td>
<td>3-Emphasis Session (req.)</td>
<td>4</td>
<td>5</td>
<td>6– Week 9 AsgnDue5p</td>
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<tr>
<td>7 – Week 10 Accountability</td>
<td>8 – Launch Session (opt.)</td>
<td>9</td>
<td>10-Emphasis Session (req.)</td>
<td>11</td>
<td>12</td>
<td>13– Week 10 LS Due 5pm</td>
</tr>
<tr>
<td>14 –Week 11 Review</td>
<td>15 – Launch Session (opt.)</td>
<td>16</td>
<td>17-Emphasis Session (req.)</td>
<td>18 – Convrs. Celebration!</td>
<td>19</td>
<td>20</td>
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December 2020

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<th>Sunday</th>
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<th>Thursday</th>
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<tbody>
<tr>
<td>28--Week 13</td>
<td>29 – Launch Session (opt.)</td>
<td>30</td>
<td>1 - Emphasis Session (req.)</td>
<td>2</td>
<td>3</td>
<td>4 – Prelim analyses due</td>
</tr>
<tr>
<td>5 – Week 14 Frontiers</td>
<td>6 – Launch Session (opt.)</td>
<td>7</td>
<td>8 - Emphasis Session (req.)</td>
<td>9</td>
<td>10</td>
<td>11 – Present draft due</td>
</tr>
<tr>
<td>12</td>
<td>13 – Presentations</td>
<td>14</td>
<td>15 – Presentations</td>
<td>16</td>
<td>17</td>
<td>18</td>
</tr>
<tr>
<td>19</td>
<td>20 – Projects Due (5PM)</td>
<td>21</td>
<td>22</td>
<td>23</td>
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READINGS

Central readings that are very technical need not be mastered in detail, but please do pay attention to notation and the underlying motivation of derivations. I intend noncentral readings as additional context and citations for future reference. Links will work on campus and, if you are off campus, if you have a VPN connection. Most readings (LR tag) are available via the library reserves tab here (by week #): [https://canvas.harvard.edu/courses/95335/external_tools/33439](https://canvas.harvard.edu/courses/95335/external_tools/33439)

There are two required textbooks that are both available online, free of charge:

   If you wish to purchase a paper text, you can visit [APA/AERA/NCME](https://www.testingstandards.net/open-access-files.html), where AERA, NCME, or APA members can get a discount ($49.95). The Coop is also an option.


**Week 1: Validation**

Central:

1) Koretz (2008), Chapter 2, pp. 16-34. (required text (LR)

2) AERA/APA/NCME Standards, Chapter 1, pp. 11-31. (required text) (LR)

Supplemental:
4) Koretz (2008), Chapter 9, pp. 215-234. (required text) (LR)

**Week 2: Reliability and Classical Test Theory**

Central:
1) AERA/APA/NCME Standards, Chapter 2, pp. 33-47. (required text) (LR)
2) 2017 MCAS Technical Report Section 3.7: (link) (LR)

Supplemental:
4) Koretz (2008), Chapter 7, pp. 143-178. (required text) (LR)

**Week 3: Introduction to Generalizability Theory**

Central:

Supplemental:
4) Ho, A.D. & Kane, T.J. (2013). *The reliability of classroom observations by school personnel*. Bill & Melinda Gates Foundation. (LR)

**Week 4: Generalizability Theory**

Central:

Supplemental:

**Week 5: Introduction to Item Response Theory**

Central:

2) 2017 MCAS Technical Report Section 3.6: [link](LR)

Supplemental:

5) AERA/APA/NCME Standards, Chapter 5, pp. 95-109, focus on scores, scales, and norms. (required text) (LR)

**Week 6: Item Response Theory**

Central:


Supplemental:


**Week 7: Polytomous IRT and the Graded Response Model**

Central:


Supplemental:


**Week 8: Linking and Equating**

Central:
AERA/APA/NCME Standards, Chapter 5, pp. 95-109, focus on linking. (required text) (LR)
Supplemental:

**Week 9: Bias/DIF and Accommodations**

Central:
1) AERA/APA/NCME Standards, Chapter 3, pp. 49-72. (required text) (LR)

Supplemental:

**Week 10: Accountability Models, Standards, Proficiency, and Growth**

Central:
1) AERA/APA/NCME Standards, Chapter 5 review (beyond the Week 8 reading). (required text) (LR)

Supplemental:
6) Koretz (2008), Chapter 8. (required text) (LR)

**Week 11: Review for the Conversational Celebration of Learning**

No readings
Week 12: Readings useful for projects

Central:

Week 13: Connections to factor analysis and structural equation modeling

Central:

Week 14: Frontiers, Test-Based Accountability

Central:
1) AERA/APA/NCME Standards, Chapter 12 and 13, pp. 183-213. (required text) (LR)
2) Koretz (2008), Chapter 10, pp. 235-259. (required text) (LR)
Supplemental:

The Conversational Celebration of Learning (CCL)

Lily will hold a 20-minute conversational “celebration of learning” with each of you on or around November 18, at time windows to be scheduled. The goal is to encourage you to become fluent enough in the language of measurement and psychometrics that you can speak it actively and accurately in conversation. Questions will be based on the assignments you will have already completed in class. You can hear a bit about the reasoning behind this conversation here: https://vimeo.com/497738911

Course Project

To complete the course, you must develop an original research project, present it to other class members, and submit a final written product. In conducting this research project, you may collaborate with a partner in the class. While my vision of what constitutes a viable project is somewhat contextual and subject to negotiation, there are two broad possibilities:

1. A complete and extended outline of a research paper, including results from data analysis that uses the methods introduced in this course. I will provide more detail on what is meant by “complete and extended outline”, but this will require you to write down the underlying structure of the paper from start to finish. This includes (in order): 1) Introduction / motivation; 2)
Background / literature review; 3) Data and sample; 4) Methods; 5) Results; and 6) Discussion and implications for policy and/or practice. To be clear, while this is less effort than a completed final paper, it also means that you must produce the main tables and figures that you intend to include in a final version of your paper.

2. If producing results is not possible, I will require you to write a “pre-analysis plan”. This is very similar to #1 above, except that the “Results” section will instead require a full list of models that you wish to estimate, a detailed discussion of what you expect to find, and what you might learn from your study (regardless of how the analysis turns out). This option is available primarily for students who are working on a project that has scholarly promise, but also logistical headaches that are beyond your control (for example, if you are collecting data or waiting on the acquisition of a restricted-use data set).

Your grade on the course project will depend on the contribution of the project is and how well you implement it. In addition to the scheduled deadlines on the syllabus, I encourage you to keep me informed on the progress of your project throughout the semester.

The maximum length of the extended outline or pre-analysis plan (not counting references, tables, and figures) is 20 pages of double-spaced 12-point type with one-inch margins. During the course, we will provide explicit guidance and support tailored to each research project. I expect that your course project will eventually (after the course is complete) result in a published research paper that can appear on your Curriculum Vitae.

To help you prepare the presentation of your course project, we will devote class time to discussing the components of a good scholarly talk. We may also be available to help you practice a “dry run” of your presentation. You (and perhaps your research partner) should make an appointment with me to discuss the feedback I provide on your draft. You should also see Lily or me for ongoing support for your project. Prior to any meetings with either of us, please prepare a brief memo describing your agenda for the meeting and email it the day before our meeting. This will help us to help you.

As we evaluate your project, we will ask the following five questions:

1) Have you asked at least one compelling research question motivated and framed by existing literature?
2) Have you answered at least one interesting research question in a cogent and thoughtful manner?
3) Have you articulated your methods clearly enough that readers can replicate them?
4) Have you demonstrated mastery of a measurement concept or technique, including accurate interpretation of analytic results?
5) Have you demonstrated sufficient momentum toward a publishable paper?
Additional optional texts

All students should consider #1, below, for their reference library. Application-oriented students should consider #3 and #6 for Generalizability Theory and IRT, respectively. More technically oriented students should consider #4 and #5. Students interested in practical methods for large-scale testing should consider #2.


3) Generalizability Theory: A Primer. ISBN: 978-0803937451

4) Generalizability Theory. ISBN: 978-1441929389


6) Applications of Item Response Theory to Practical Testing Problems. ISBN: 978-0898590067

Statistical and psychometric computing

Statistical computing is an integral part of S-061. I will be using Stata this year. I assume that everyone is comfortable using a computer to perform basic statistical analysis, although I do not necessarily assume that you have used Stata. All Harvard students have free access to Stata this year.

I do not teach programming during class time, although code is threaded through the lecture slides. We provide resources to help you learn how to program on your own at your own pace. Lily may also cover coding issues in her sections.

I also allow students to complete problem sets and projects in R. For students with equal proficiency and interest in both programming languages, Stata will be the more convenient choice. However, students complete the course in R every year, and we will do our best to support this additional language.
Slack, collaboration, and study groups

We will be using Slack for collaboration and communication in this course. Please access the S-061 Slack channel on the Canvas site here: https://canvas.harvard.edu/courses/95335/external_tools/77742. Standard Slack norms are here:

- Be good citizens of Slack: answer questions, assume best intent, try not to sidetrack conversations.
- Understand public and private channels, and try to communicate with the proper audience.
- Use threads (reply) to organize smaller group discussions around specific topics.
- Use emoji reactions liberally to acknowledge messages while keeping channels from becoming inundated with reaction messages.
- Use the search function to try to find an answer, reducing duplicate questions.
- Manage notifications to reduce information overload and maintain focus.
- Remember that there are situations when it's best to move the conversation off of Slack messaging. Students can meet face-to-face using Zoom or Slack calls.

Many people learn in deeper ways when working in a group, and I encourage collaborative learning. To mimic statistical and psychometric work in the real world and to provide a chance for you to use this language actively, I require completion of assignments in pairs starting from the Week 3.

We mandate collaboration for at least three reasons. First, learning statistical and psychometric methods is like learning a language. To learn it, one must “speak” it actively and in a genuine context with other individuals. Second, collaborative quantitative analysis is the norm and individual work is the exception in the world of practice. Third, my experience has been that, on average, students who work in pairs and groups both perform better and enjoy themselves more than students who work individually. Statistical and psychometric collaboration is a case where the whole is greater than the sum of its parts.

Accommodations
We encourage students needing accommodations in instruction or evaluation to notify us early in the semester. If you have a disability or health concern that may have some impact on your work in this class and for which you may require adjustments or accommodations, please contact Maritza Hernandez at maritza_hernandez@gse.harvard.edu, or the Access and Disability Services (ADS) administrator in Gutman 124. No accommodations can be given without authorization from ADS, or without notice. If you already have a Faculty Contact Form for this course from ADS, please provide us with that information privately in our offices so that we can make those adjustments in a timely manner. All inquiries and discussions about accommodations will remain confidential.

A Note on Plagiarism
Please read the School’s policy on plagiarism in the HGSE Student Handbook, which includes the statement, "Students who submit work either not their own or without clear attribution to the
original source, for whatever reason, ordinarily will be dismissed from the Harvard Graduate School of Education." Attention to this policy is particularly important in a course like S-061, in which collaboration with other students is often required and generally encouraged. If you work closely with other students or partnerships—a process that I encourage and fully support—recognize the other students’ contributions explicitly in your written account (a footnote is fine for this purpose). This helps avoid the natural questions that arise when similarities are detected at grading. **If you have any questions about what constitutes appropriate collaboration, or how to define what constitutes your own work, please see me or Lily.**

**Other Writing Resources**

- HGSE Academic Writing Services: Gutman Library
- APA Online Tutorial: [http://isites.harvard.edu/icb/icb.do?keyword=apaExposed](http://isites.harvard.edu/icb/icb.do?keyword=apaExposed)
- Writing Resources (including *Writing Like an Educator* Course and Reference Materials): [http://isites.harvard.edu/icb/icb.do?keyword=awrs&pageid=icb.page48297](http://isites.harvard.edu/icb/icb.do?keyword=awrs&pageid=icb.page48297)
- Sign-up for Individual Sessions at the Writing Center: [http://www.appointmentquest.com/provider/2030159020](http://www.appointmentquest.com/provider/2030159020)