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WILD About Testing

A newsletter aimed at certification professionals interested in continuously improving the certification experience for their certificants and other stakeholders (employers or government agencies that might use the certificate).

From the Editor

Dr. Cheryl Wild, President
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Welcome to the fifth issue (already) of **WILD About Testing**. I am delighted to report that during the four months of producing this e-zine I've learned three things. First, people really like and want information on improving quality in testing. Second, my colleagues are generous in their willingness to contribute ideas and content through interviews. People love the idea of the constant input area (right on my website at **www.wildandassociates.com**) 24/7 to let me know what is on their mind and what they want me to write about next. The third thing I've learned is that many more people would like to receive this information than are currently receiving it.

When I attend meetings or workshops, participants are excited to learn about my e-zine and wish they had heard about it sooner. You can help about this – with the new campaign – **Share the Wealth of Information.**

Why do I spend the time writing and distributing this newsletter?

I truly believe that certification and educational testing are critical parts of everyone's lives. In school, tests are used for grades, for placement, and for helping you understand what you know (and what you don't know). As consumers, we depend on certifications and licenses as a way of indicating that the doctors, lawyers, accountants and many others we employ have the basic knowledge and training needed to provide those services. And we use certifications as ways of bolstering our credentials and improving our work prospects.

Because testing is so much a part of our lives **everyone** believes they can develop a test – after all we have all taken tests for years in school and anyone can ask a question!

In the certification field, many certifications are begun by zealots in the field – people who know the subject matter of the certification and believe strongly in the need for certification, but may have no psychometric or process management expertise. That is fine, if the founders understand what they don't know and obtain the expertise elsewhere. **Although tests can do good they can also do harm**. Not everyone in the certification field understands the need for sound psychometric development of tests or process management to assure fair, valid and reliable test results.

I write **WILD About Testing** because I want every certification professional to have the opportunity to learn techniques for producing certification programs that provide excellent benefits to their certificants and other stakeholders and to help avoid risks inherent in developing and delivering tests. Please help me share the wealth of information with others in the certification field

How can you help Share the Wealth of Information?

I am working really hard to make this e-zine relevant and useful. But this information is only useful if others receive and read it. You can help in two ways. Please click the "Forward to a Friend" button on the bottom

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In This Issue

From the Editor *(Continued from Page 1)*

of the e-mail that brings each issue to you, or just spread the word and ask them to go to my web site and subscribe. Second, please continue to help shape the e-zine by reader feedback. Anyone who would like to provide additional feedback may go to **www.wildandassociates.com** to help with the emphasis and content of future issues. (You can also e-mail me at: **cheryl@wildandassociates.com**.)

What is in this month's issue?

One of the top requests for continuous improvement tips from our readers was setting priorities. Last month's tip was on how to use a selection matrix to select improvement projects. Once you have an improvement project, how can you assure that the team will work effectively? Great agendas lead to effective team meetings.

The Benchmarking Code of Conduct is the focus of the benchmarking article for the second month in a row. Last month we sent out a seven item "quiz" to see whether readers understood some *Code of Conduct* issues. Results of the quiz and an explanation of the answers are provided in the benchmarking column this month.

Since I shared my passion about process and psychometrics above, I thought you might be interested in seeing what I have written about my guiding beliefs and values.

Enjoy the newsletter and share it with your colleagues. Please use the "Forward to a Friend" link in and help me reach out and find everyone who can benefit from years of great experience, which I am delighted to share.

Continuous Improvement Tips:

Maximize Meeting Effectiveness with Great Agendas

When we did a pilot of quality improvement tools years ago at ETS, we did a debriefing of all the teams to identify what we learned.

What were the most important tools according to the team members? The first most important tool was the meeting agenda and the second most important tool was meeting minutes (I'll talk about minutes next month).

Soon after conducting that lessons learned session, I went to Intel on a benchmarking assignment and learned that they had required every employee to take a two-day class on conducting effective meetings. I learned that you aren't required to go to a meeting if there isn't an agenda prepared and distributed in advance. What is involved in developing a great agenda that makes it so important?

What is included in an agenda?

An agenda includes the date, time and location of the meeting, who is invited to the meeting, who is calling the meeting, and the agenda topics and how long each will take. I can hear you yawning over the Internet – these are pretty standard, but only the beginning. A great agenda makes sure everyone who is attending knows what they need to do to prepare for the meeting and what their responsibility will be at the meeting. The agenda should have a stated purpose. Each agenda topic should include who is responsible for presenting the topic, what are the expected outcomes of the discussion, and if there is any pre-work, reading or data collection that is expected of participants before the meeting. There should be someone assigned to take notes and write up an action summary of the meeting.

How far in advance should an agenda be prepared?

Out of respect to your invitees and in order to assure that everyone has time to prepare, the agenda should go out at least a week in advance – unless of course this is an emergency. If you are asking for lots of pre-work, you may want to provide additional time. If your organization doesn't have a history of effective meetings, just providing the agenda may not be enough. You may need to talk to participants in advance and remind them what is expected of them at the meeting and ask them to bring any needed information to the meeting. It is especially important for you to discuss your expectations with presenters.

Specify ground rules and stick to them.

What are ground rules? They are agreements that everyone in the meeting has for how the meeting will be conducted. Sometimes organizations have standard ground rules. Sometimes specific teams or groups that meet regularly have their own ground rules. I always want a ground rule that my meetings will start and end on time. Timeliness is a common ground rule, but I worked with one team whose ground rule was that if a meeting started at a certain time, everyone should be there within 15 minutes of the start time. **What is important is that all the participants know the ground rules and agree to them.**

At Intel, a ground rule was that if the convener didn't send out the agenda a week in advance, you didn't have to attend the meeting. This is a strong incentive to plan your meeting!

Other common ground rules are not to interrupt a speaker, to be courteous and respect other team participants, and to come prepared and participate in the meeting.

Ending the meeting.

Many meetings require follow-up actions and often additional meetings. An effective way to organize a meeting is to save the last 10 minutes for a summary of assignments and planning for the next meeting.

Develop a list of who agreed to do what by when. When will the next meeting be and what will be the topics? Who should be invited to the next meeting?

How can you make sure that the decisions made during the meeting are truly decisions and not re-worked over and over again? Prepare a meeting summary. This will be the topic of next month's tip.

Guiding Beliefs or Values

Earlier in this e-zine I got personal and talked about why I spend the time do develop a monthly e-zine. My guiding values and beliefs also influence who I work with and the types of assignments that I accept. Guiding beliefs also influence your organization's selection of improvement projects and even the solutions selected by your improvement teams.

My guiding beliefs are presented below – you may want to consider developing your own list of beliefs and values. They are useful in decision making and explaining yourself to others.

1. **It is my job to share my knowledge and help my clients improve their services to their customers.**

2. **No matter how good your work is, there are always ways to improve.** You need to set priorities – one can't improve everything – but whenever possible I like to see how to improve my work and my client's outcomes.

3. **Process is important.** Defining the process for doing work is important for consistent results and in order to improve your client's customer satisfaction.

4. **Comparing your work processes to how others do their work is an effective way to expand your thinking and improve your services to clients.**

5. **Measurement matters – both measurement of our processes and measurement of people.** (I am a psychometrician after all.) Poorly developed and managed testing programs can misinform both test takers and their employers – leading to misuse and sometimes harm. I will not work with clients who want to cut quality at the expense of their test takers.

6. **Standards for the testing industry are meant to be followed, not filed on the book shelf.** After all, these standards are really minimum standards – ones everyone could agree on.

7. **I believe in independent third-party reviews as a way of ensuring that consumers are receiving testing services that meet standards.** Testing is too complex an endeavor to assume the consumer can judge its quality. ISO 17024, NCCA, and ISO 9001 are all examples of standards that testing organizations can become accredited or certified against as a means of documenting that they are meeting process or testing standards.

Benchmarking: The Benchmarking Code of Conduct

In November and December of 2008, more than 120 members of the Washington Area Certification Network responded to a survey about quality tools and marketing. More than 50% said they use benchmarking.

Since there is so much interest in benchmarking in the certification community, **WILD About Testing** is running a series of how-to articles about benchmarking.

Last month's article was about the *Benchmarking Code of Conduct*. I invited readers to take a brief self-assessment to see if they already understood some of the ethical issues around benchmarking, and to read the June issue to learn the answers!

Did you take the survey – why not take it now before you read the answers?

Quality Tools and Marketing Survey

1. You conducted a benchmarking study about marketing with three other certification organizations. The NOCA program chair calls and invites you to present your results at NOCA. What should you do?

a. Agree to present. It is an honor to be asked.
b. Agree to present but make sure that the information is presented so your benchmarking partners are not identified and the data isn't identifiable by organization.
c. Discuss the appropriateness of presenting your data with your benchmarking partners and abide by their decision.
d. Benchmarking information is proprietary and should not be shared.

2. Your organization has developed software used to manage certificate data bases. You want to compare your software with that of your competitors. Which of the following is NOT an appropriate way to gather information?

a. Hire a software engineer from the major competitor's company who helped develop the software.
b. Interview users of your competitors software and learn what they like and what they don't like.
c. Buy your competitors software packages and compare their performance to that of your software.
d. Review published information about the competitors' software.

3. Which of the following steps are NOT appropriate to prepare for a site visit with your benchmarking partner?

a. Identify the questions you are going to ask and develop an interview guide.
b. Answer the questions from your organizations perspective and identify which answers you are unable to share.
c. Identify the participants from your organization and share their names and backgrounds with your benchmarking partner.
d. Make travel arrangements that will allow you to arrive ahead of time so you can get organized before the meeting.

4. You've presented your benchmarking report to your boss and other high level officers. They are impressed with your benchmarking partner's expertise. Officer Direct would like to call your contacts and ask some more questions. What do you do?

a. Give Officer Direct the names and contact information and ask her to make the calls.
b. E-mail or call each contact and ask permission to share their contact information with Ms. Direct.
c. Offer to make the call for Ms. Direct because it is inappropriate to share your contacts' names.
d. Refuse to share your contacts names and contact information.

5. Your boss would like to see a copy of your competitor's certification test. Which of the following should you do?

a. Call and ask for a sample test.
b. Register your boss under a fake name to take the test.
c. Hire test takers to memorize questions.
d. Pay a competitor's employee to make a copy of the test.

6. Benchmarking studies require sharing. Which of the following would you NOT expect to occur in a benchmarking study?

a. Professional, honest, and courteous behavior.
b. Sharing of information about your own processes.
c. Offering to facilitate a reciprocal visit.
d. Sharing proprietary information.

7. During benchmarking studies you should :

a. Feel free to ask questions related to costs and pricing, even if they might be interpreted as price fixing.
b. Use your own company jargon – it can't be that different from your partner's jargon.
c. Talk about your benchmarking partners with colleagues at professional meetings.
d. Consult with legal council when unsure about information sharing.

The respondents to the questions answered 100% of the questions correctly! I wouldn't keep on writing, except that almost as many people as took the quiz looked at the quiz and didn't respond.

Question 1 relates to the standard of confidentiality. Although everyone at NOCA would love to learn about your benchmarking results, information about benchmarking is confidential unless all your benchmarking partners agree that it can be released, so the key is C.

Question 2 is about ethical methods to benchmark your product against others. It is appropriate to review published information about your competitors' products, buy competitors products and compare them to yours, and to interview your competitors' customers about their products. Hiring someone from a competitor in order to obtain trade secrets is not ethical, so the key is A.

Based on the principle of exchange, you should be willing to provide your benchmarking partner the same type and level of information that you are requesting. So for **Question 3** it is not appropriate to determine which questions you will ask your benchmarking partner that you will not answer (the key is B).

The *Benchmarking Code of Conduct* specifies that contact lists may not be used for purposes other than benchmarking and networking. Therefore, before sharing contact information you must ask each contact if they would allow you to share the information. The key to **Question 4** is B.

This question should have been a give away. The key to **Question 5** is A, obtain a copy of a sample test if you want to see a copy of a test. The Legality standard of the *Code of Conduct* applies here.

The key to **Question 6** is D. Benchmarking partners often request reciprocal visits and expect you to share information about your processes. Your benchmarking partner should not be expected to share proprietary information any more than you expect to share proprietary information with them.

Benchmarking is an important tool to improving your work processes, but it is important to know what is appropriate to share and what is appropriate to ask. You should consult your legal council whenever you are unsure about the appropriateness of information sharing. (The key to **Question 7** is D.) Understanding the *Code of Conduct* helps you to know that it is not appropriate to share information about a benchmarking partner at a conference or elsewhere, unless the partner has agreed to that sharing in advance. It also cautions you against sharing information about costs and pricing and using jargon.

Benchmarking is an ethical and systematic method of learning from our colleagues. The *Code of Conduct* is an excellent tool to make sure everyone in a benchmarking partnership understands and agrees to the rules of the information exchange.

The APQC is a nonprofit organization that sponsors consortium benchmarking studies for their members. The *Benchmarking Code of Conduct: Guidelines and Ethics for Benchmarkers* (2004) is available free at **www.apqc.org** (search the knowledge database). This document is an excellent resource for organizations wishing to conduct benchmarking studies. As APQC suggests, "*adherence to this Code will contribute to efficient, effective and ethical benchmarking.*" Often, organizations request that all participants in a benchmarking study sign an agreement to abide by the *Code of Conduct.*

In The News

Please join me in Brussels September 30th to October 2nd at the **E-ATP Conference on Growing Talent in Europe: Gaining Advantage through Assessment.**

Rohit Ramaswamy and I will be presenting a workshop titled **"Decreasing Assessment Costs by Increasing Quality Assessment."**

For more information or to register for the Conference, go to: **http://eatp.designingeventsonline.com/**

A new blog **http://advancingthenonprofit.blogspot.com** is available and may be of interest to some readers. It is aimed at Executive Directors of nonprofit organizations – which includes many certification bodies. Please join us in discussions.

George Gray did a wonderful book review of *Improving Testing* (a book I edited with Rohit Ramaswamy) in the Spring 2008 issue of CLEAR Exam Review. In the following reprint of his review, he discusses chapters in the book dealing with topics such as standards, calculations to identify cheating, case studies, transitioning from one vendor to the next, accreditation, six sigma, and quality assurance.

CLEAR Exam Review

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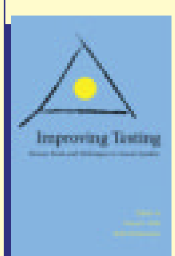

The summary on the back cover of this book states that ***"the primary purpose of this book is to demonstrate how proven quality assurance tools and methods that have been applied successfully in the manufacturing and service industries for the past 20 years can be applied in the testing industry. It ...reviews how three business process concepts – standards, process planning and design, and continuous improvement – can be used to improve the way in which tests are designed, administered, scored and reported so that errors can be eliminated."***

The book consists of eighteen chapters and includes the work of twenty different authors. The book covers many different facets of the application of quality assurance concepts to testing.

Chapters include:

1. The risks and costs of poor quality in testing (Wild)
2. A framework for testing industry quality improvement (Ramaswamy)
3. Leadership in testing (Smith)
4. Standards in the testing industry (Wild and Knapp)
5. The value of accreditation (Bauer)
6. An international case study of accreditation (Kronvall)
7. Accreditation in the certification and licensure sector of the testing industry: current status and future possibilities (Goldsmith and Rosenfeld)
8. Quality systems for testing (Roorda)
9. Designing error-free processes (Ramaswamy)
10. Transitioning between testing contractors (DePascale)
11. Department of education perspective on effective vendor relations (Turner)
12. Project management and computer-based testing (CBT) implementation: a decision-maker's guide (Albertson)
13. Process management in the testing industry (Ramaswamy)
14. Six sigma in testing (Anderson)
15. Using data forensic methods to detect cheating (Foster, Maynes, and Hunt)
16. Detecting exposed test items in computer-based testing (Han and Hambleton)
17. From independent to integrated systems (Dobbs and Kahl)
18. Next steps in improving quality in testing (Wild and Ramaswamy)

As suggested by the range of topics covered in the titles, the book has "something for everyone", but it does not provide a cookbook approach for quality improvement. Some chapters are more conceptual in nature and others focus on specific techniques of case studies. The reader has an opportunity to learn more about the ANSI/ISO/IEC 17024 Standard as well as a brief overview of six computational methods for detecting cheating on tests (data forensics). Readers fond of summation notation, square roots, and moving item standardized residuals will appreciate the chapter on detecting exposed items in CBT.

Some of the most applicable content for the average practitioner in the certification and licensure arena centers on examples and case studies that are used in the chapters. It is important to understand what can go wrong in the testing industry (e.g., scoring errors or a gap in contracts when transitioning testing vendors where no one is scheduled to do the work) or what it takes to achieve high quality. In the latter area, ***Improving Testing*** offers an excellent array of examples. The chapter on accreditation by Bauer provides specific details on how accreditation has added value for the certification offered by the Board of Certified Safety Professionals. Anderson lists a number of possible six sigma projects that might be undertaken in a testing company (the goals of six sigma being less than four errors/defects per million opportunities) and describes results of several actual initiatives. Ramaswamy describes some quality assurance processes that can immediately be used to quantify error rates and improve the quality of workflow.

In summary, *Improving Testing* is a valuable addition to the reference bookshelf which covers a number of topics not well-represented elsewhere in the testing literature.