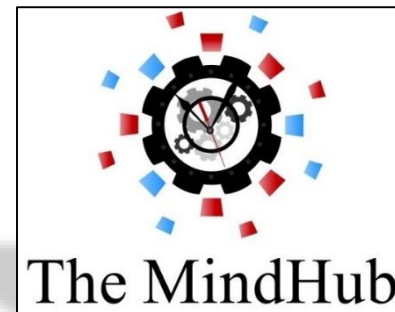


# “Intelligent” intelligence testing with the WJ IV cognitive battery

---

Kevin S. McGrew, PhD

Institute for Applied Psychometrics  
& University of Minnesota



Links to more  
complete sets of  
handouts and/or  
PPT slides will be  
provided the day of  
the workshop



# Kevin S. McGrew, PhD.

## Affiliations and Disclosures



- **Institute for Applied Psychometrics (IAP)**-Director
- **University of Minnesota** - Visiting Professor (Educ. Psych.)
- **Interactive Metronome** - Director of Research and Science (External Consultant) \*
- **Darhma Berkmana Foundation** (YDB; Indonesia) – Intelligence expert for development of first Indonesian CHC-based intelligence battery for children

\* Conflict of interest disclosure: Financial relationship and interest in IM; Coauthor of WJ III and WJ IV (royalty interest)



# “Intelligent” intelligence testing with the WJ IV cognitive battery

---

- General introduction and workshop logistics
- Intelligence testing in the “big picture” context
- Brief overview of Kaufman’s “intelligent” testing approach
- Foundational empirical knowledge– “romancing the stones” (tests)
  - The WJ IV/CHC Periodic Table of Cognitive Test Elements
  - WJ IV variation and comparison procedures - brief
  - Test/cluster score difference (% base rate) rules-of-thumb



# “Intelligent” intelligence testing with the WJ IV cognitive battery

---

Will be  
covered  
concurrently  
with aid of  
case study

- WJ IV published & new supplemental/clinical test groupings
- WJ IV assessment trees
  - Within-CHC domain assessment trees (“drilling down”)
  - Academic domain referral-focused assessment trees
- Miscellaneous topics and tidbits
- Conclusions and Q/A

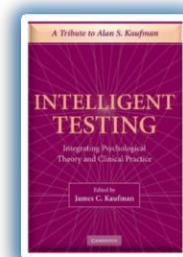
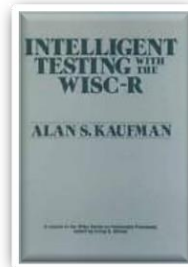


# Waves Of Intelligence Test Interpretation

(Kamphaus et al., 1997)

---

- Wave 1 - Quantification of a General Level ( $g$ )
- Wave 2 - Clinical Profile Analysis
- Wave 3 - Psychometric Profile Analysis
- Wave 4 - Applying Theory to Intelligence Test Interpretation

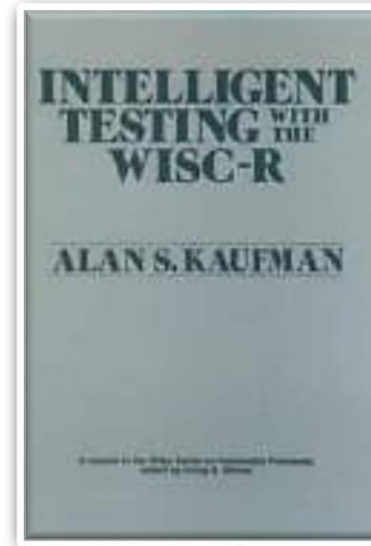




## Wave 3: Psychometric Profile Analyses

Cohen, J. (1959). The factorial structure of the WISC at ages 7-6, 10-6, and 13-6, Journal of Consulting Psychology, 23, 285-299.

Kaufman, A. S. (1979). Intelligent testing with the WISC-R. New York: Wiley-Interscience.





## Picture Completion

### *Empirical Analysis*

#### Reliability:

Split-half .77

Test-retest .81

*g* loading .60 (Fair)

Subtest specificity  
vs. error variance 39% vs. 23%  
(Ample)

#### Most related to:

Block Design .52

Object Assembly .49

#### Least related to:

Coding .18

Digit Span .25

#### Proportion of Variance Attributed to:

Factor 1. Verbal Comprehension 14%

Factor 2. Perceptual Organization 28%

Factor 3. Freedom from Distractibility 1%

Factor 4. Processing Speed 1%

Abilities other than the 4 factors 33%

Error 23%

#### Proportion of Variance When 2 Factors Are Rotated:

Factor 1. General Verbal Ability 15%

Factor 2. General Nonverbal Ability 25%

### **Abilities Shared with Other Subtests (Unique abilities are asterisked)**

#### INPUT

Visual perception of meaningful stimuli (people—things)

## INTEGRATION/STORAGE

Perceptual Organization (Factor Analysis: 4-Factor and 2-Factor)

Gv—Broad Visual Intelligence (Horn)

Holistic (right-brain) processing

Cognition and Evaluation of figural stimuli (Guilford)

Spatial (Bannatyne)

Simultaneous processing

Distinguishing essential from nonessential details

Visual organization without essential motor activity

\*Visual recognition and identification (long-term memory)

#### OUTPUT

Simple motor (pointing) or vocal

#### *Subject to Influence of:*

Ability to respond when uncertain

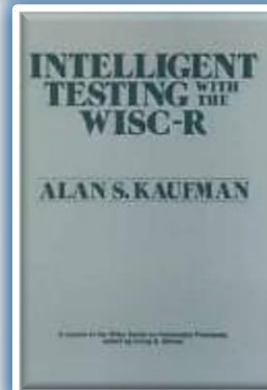
Alertness to the environment

Cognitive style (field dependence—field independence)

Concentration

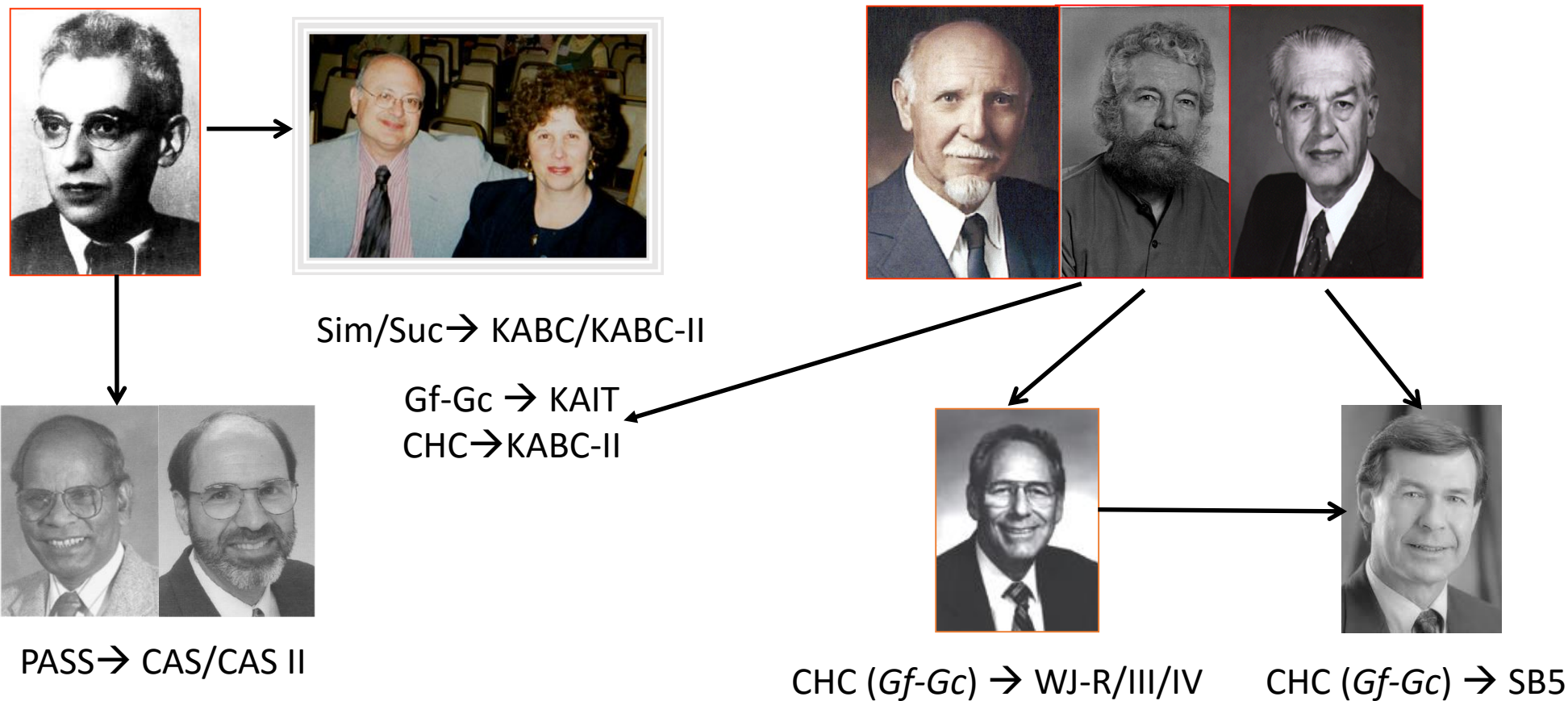
Negativism (“Nothing’s missing”)

Working under time pressure

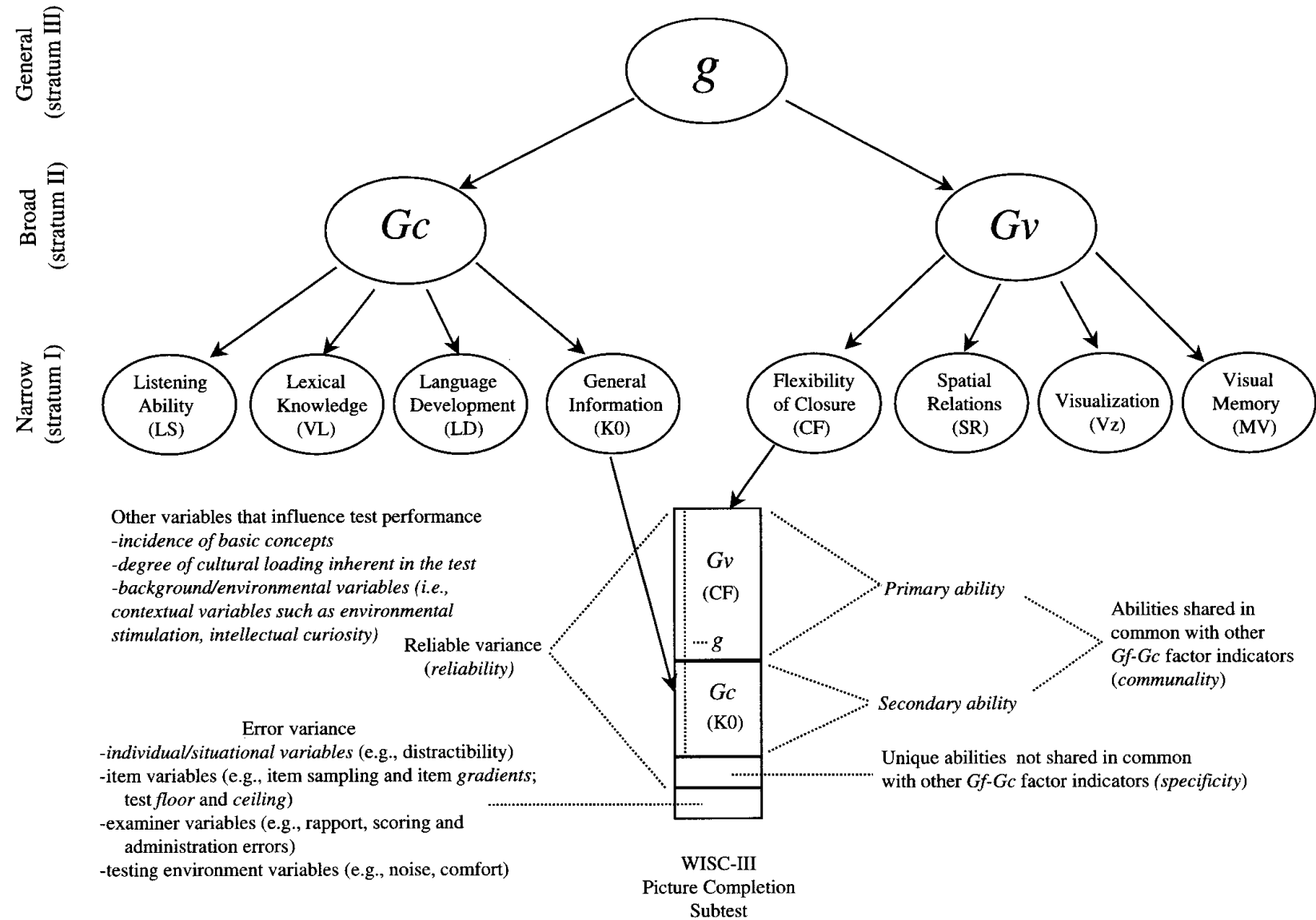
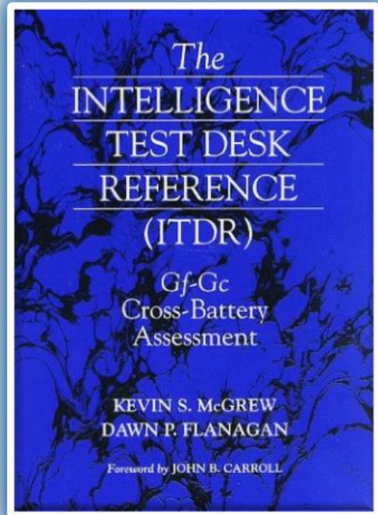




## Wave 4: Applying Theory to Test Interpretation (and research & development)










**FIGURE 4.1 A Conceptual Model of the Variables Considered in Test Interpretation (WISC-III Picture Completion Example)**

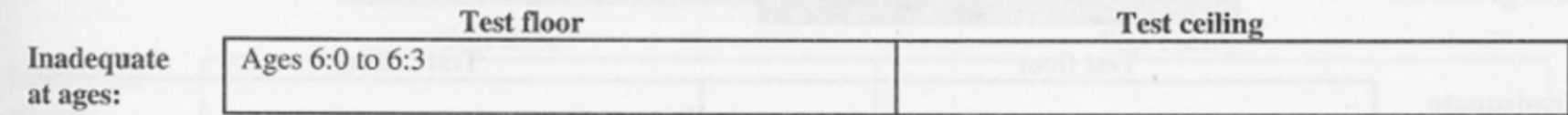
*Note:* There are additional narrow abilities in the domains of  $G_c$  and  $G_v$  that are not included in this figure; the rectangle represents the total score variance of the WISC-III Picture Completion test; the italicized terms represent the test characteristic information that is presented for the Wechsler Scales in Table 4.2 and in the Wechsler Scale summary pages.

[illegible]

**Age Range: 6 to 16 years**

**BASIC PSYCHOMETRIC CHARACTERISTICS**

Low		Poor	(Item gradients only)
Medium		Fair	
High		Good	



# Sample ITDR summary page

## *Gf-Gc CLASSIFICATIONS (Broad:stratum II / Narrow:stratum I)*

**Visual Processing (Gv):** The ability to generate, perceive, analyze, synthesize, manipulate, transform, and think with visual patterns and stimuli (Empirical: strong).

- *Spatial Relations (SR):* Ability to rapidly perceive and manipulate visual patterns or to maintain orientation with respect to objects in space (probable).
- *Visualization (Vz):* Ability to mentally manipulate objects or visual patterns and to "see" how they would appear under altered conditions (possible).

## *OTHER VARIABLES THAT MAY INFLUENCE TEST PERFORMANCE*

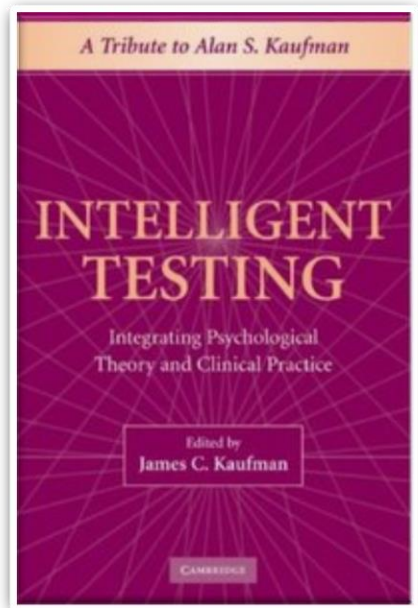
### **Background and Environmental**

### **Individual and Situational**

### **Degree of Linguistic Demand**

- Reflectivity/impulsivity
- Field dependence/independence
- Flexibility/inflexibility
- Planning
- Ability to perform under time pressure

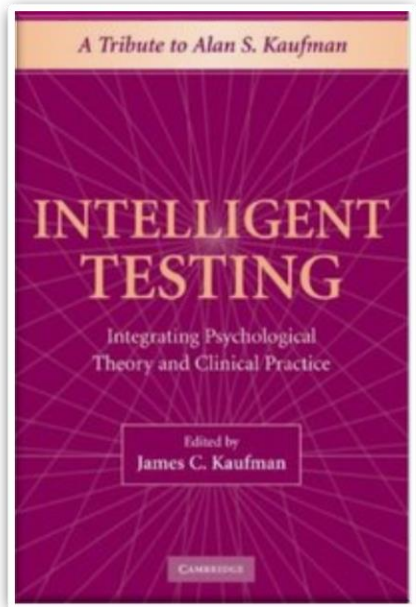
		Degree of Linguistic Demand		
		L	M	H
Degree of Cultural Loading	L			
	M			
	H			



The intent of the intelligent testing model was and remains to “bring together empirical data, psychometrics, clinical acumen, psychological theory, and careful reasoning to build an assessment of an individual leading to the derivation of an intervention to improve the life circumstances of the subject” (Reynolds, 2007, p. 1133) – in Fletcher-Janzen (2009)



# Intelligent Testing: Bridging the Gap between Classical and Romantic Science in Assessment (Elaine Fletch-Janzen, 2009)



- The **gold standard** for clinical-psychometric test interpretation
- Incorporates both quantitative and qualitative analysis
- The first system of test interpretation that **followed scientific principles** and at the same time overtly sought to reduce inappropriate use of obtained test scores
- Demands a very **high standard of clinical expertise**
- The central point of intelligent testing is that the **clinician's judgement** regarding the patient is the central point





“ Tests do not think for themselves, nor do they directly communicate with patients. Like a stethoscope, a blood pressure gauge, or an MRI scan, a psychological test is a dumb tool, and the worth of the tool cannot be separated from the sophistication of the clinician who draws inferences from it and then communicates with patients and professionals”

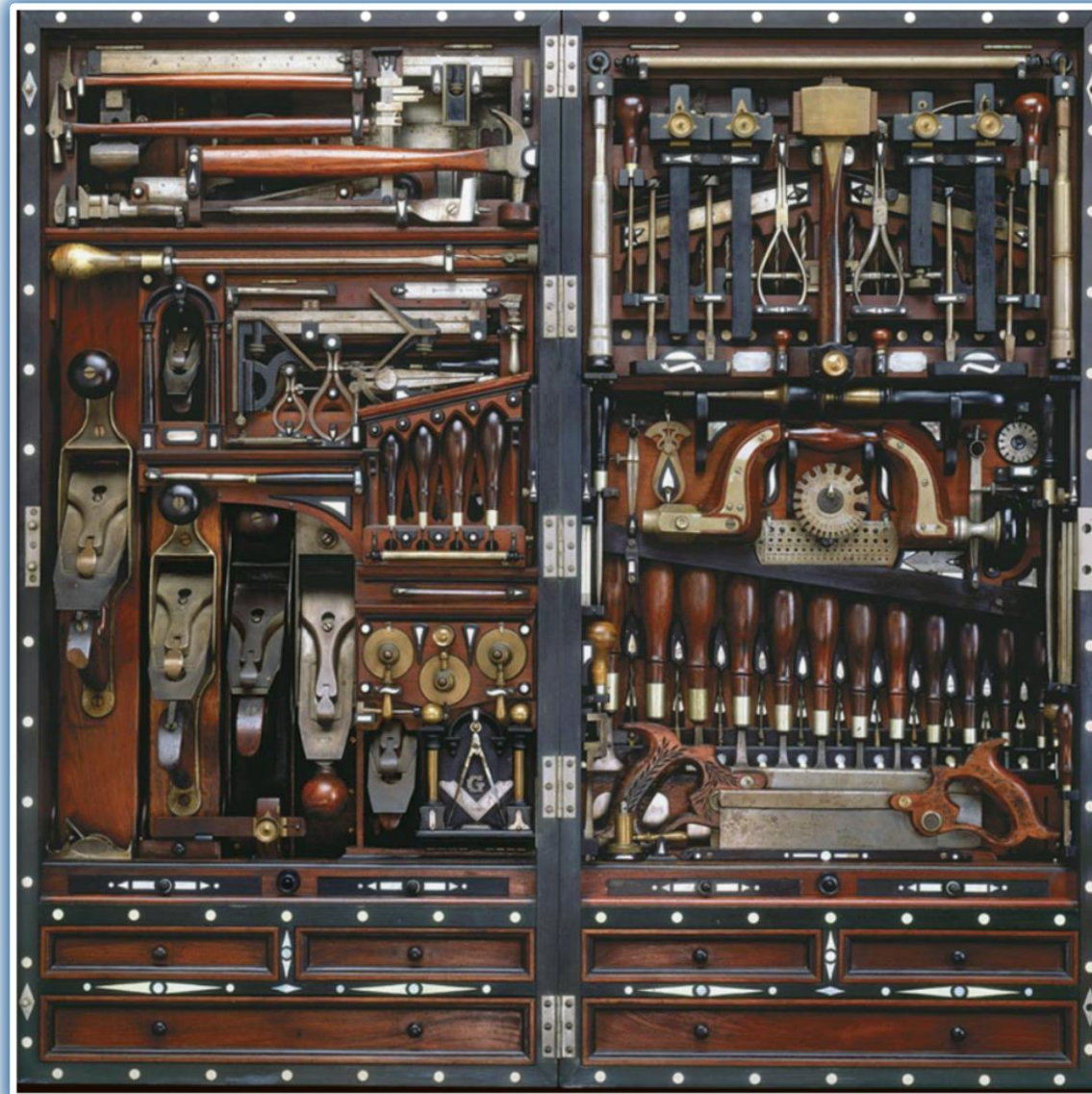
Meyer et al. (2001). Psychological testing and psychological assessment. American Psychologist

If you give a monkey a Stradivarius  
violin and you get bad music.....



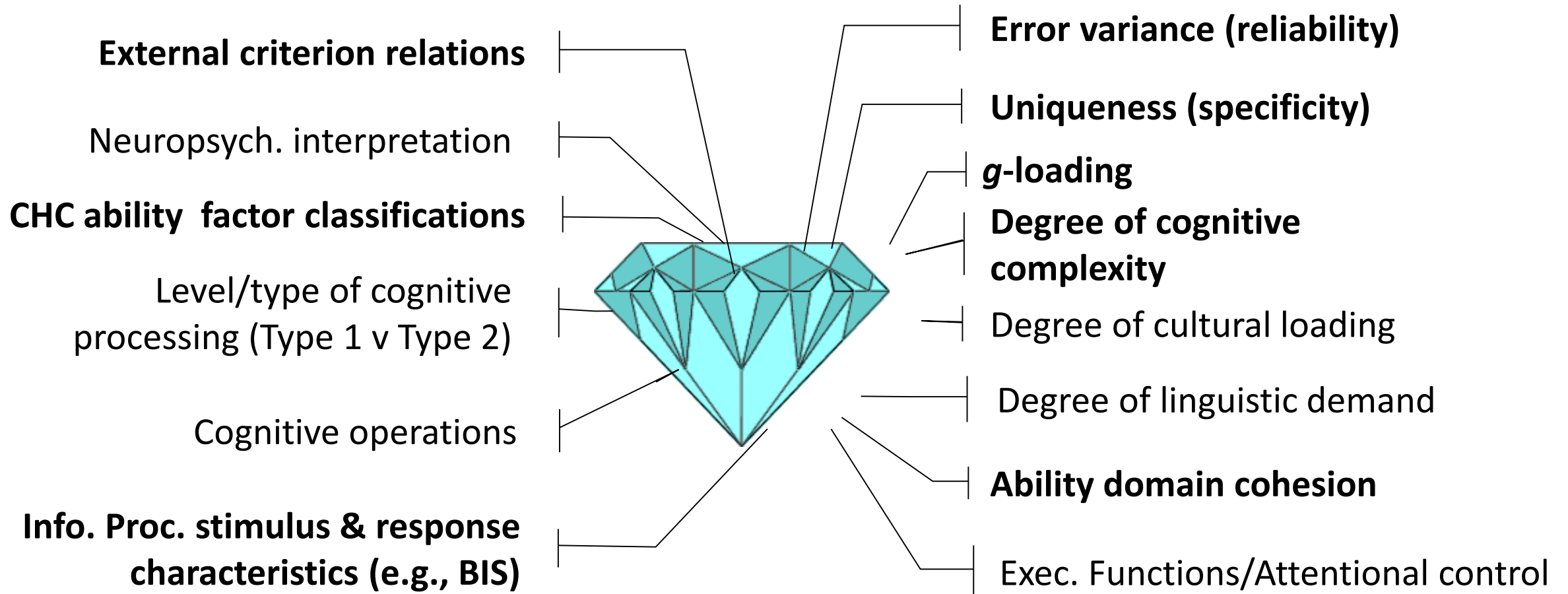
You don't blame the violin !!!!

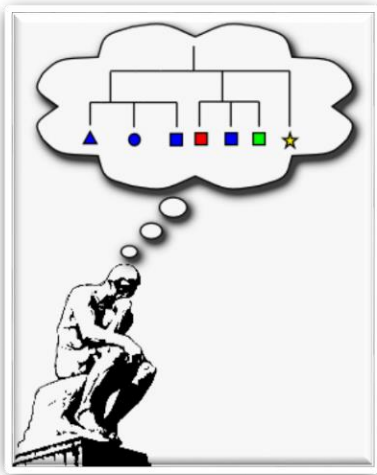
# We are the instrument !!!!



“Intelligent” intelligence testing and interpretation  
requires ... **knowing thy instruments**

An “intelligent” clinician understands and **“romances the  
stones (tests)”** which have different and multiple facets





## The importance of **taxonomies and classification** in science

...most disciplines have a common set of terms and definitions (i.e., a **standard nomenclature**) that facilitates communication among professionals and guards against misinterpretations. In chemistry, this standard nomenclature is reflected in the **Table of Periodic Elements**. Carroll (1993a) has provided an **analogous table for intelligence**.....

(Flanagan & McGrew, 1998)

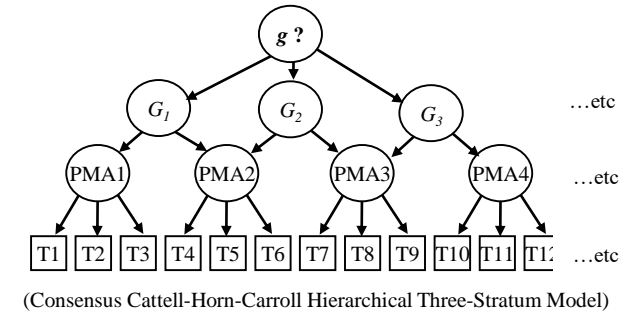


# A Good Taxonomy

# The Periodic Table

howstuffworks.com

<div> <div>1</div> <div>1</div> <div>H</div> <div>hydrogen</div> <div>1.007 94(7)</div> </div> <div> <div>Atomic Number</div> <div>Symbol</div> <div>Name</div> <div>Standard Atomic Weight</div> </div>																	
<div> <div>Metals</div> <div>Transition Metals</div> <div>Metalloids</div> <div>Non-metals</div> <div>Lanthanoids</div> <div>Halogens</div> <div>Alkali Metals</div> <div>Actinoids</div> <div>Noble Gases</div> <div>Alkali Earth Metals</div> </div>																	
2																	18
3	4											13	14	15	16	17	18
Li	Be											B	C	N	O	F	Ne
lithium	beryllium											boron	carbon	nitrogen	oxygen	fluorine	neon
6.941(2)	9.012 182(3)											10.811(7)	12.0107(8)	14.0067(2)	15.9994(3)	18.998 4032(5)	20.1797(6)
11	12											13	14	15	16	17	18
Na	Mg											Al	Si	P	S	Cl	Ar
sodium	magnesium											aluminium	silicon	phosphorus	sulfur	chlorine	argon
22.989 769 28(2)	24.3050(6)											26.981 538 6(8)	28.855(3)	30.973 762(2)	32.065(5)	35.453(2)	39.948(1)
19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36
K	Ca	Sc	Ti	V	Cr	Mn	Fe	Co	Ni	Cu	Zn	Ga	Ge	As	Se	Br	Kr
potassium	calcium	scandium	titanium	vanadium	chromium	manganese	iron	cobalt	nickel	copper	zinc	gallium	germanium	arsenic	selenium	bromine	krypton
39.0983(1)	40.078(4)	44.955 912(6)	47.867(1)	50.9415(1)	51.9961(6)	54.938 045(5)	55.845(2)	58.933 195(5)	58.6934(2)	63.546(3)	65.409(4)	69.723(1)	72.64(1)	74.921 60(2)	78.96(3)	79.904(1)	83.798(2)
37	38	39	40	41	42	43	44	45	46	47	48	49	50	51	52	53	54
Rb	Sr	Y	Zr	Nb	Mo	Tc	Ru	Rh	Pd	Ag	Cd	In	Sn	Sb	Te	I	Xe
rubidium	strontium	yttrium	zirconium	niobium	molybdenum	technetium	ruthenium	rhodium	palladium	silver	cadmium	indium	tin	antimony	tellurium	iodine	xenon
85.4678(3)	87.62(1)	88.905 85(2)	91.224(2)	92.906 38(2)	95.94(2)	[98]	101.07(2)	102.905 50(2)	106.42(1)	107.8682(2)	112.411(8)	114.818(3)	118.710(7)	121.760(1)	127.60(3)	126.904 47(3)	131.293(6)
55	56	57-71	72	73	74	75	76	77	78	79	80	81	82	83	84	85	86
Cs	Ba	La-Lu	Hf	Ta	W	Re	Os	Ir	Pt	Au	Hg	Tl	Pb	Bi	Po	At	Rn
caesium	barium	lanthanoids	hafnium	tantalum	tungsten	rhenium	osmium	iridium	platinum	gold	mercury	thallium	lead	bismuth	polonium	astatine	radon
132.905 451(2)	137.327(7)		178.49(2)	180.947 88(2)	183.84(1)	186.207(1)	190.23(3)	192.217(3)	195.084(9)	196.966 569(4)	200.59(2)	204.383(2)	207.2(1)	208.980 40(1)	[209]	[210]	[222]
87	88	89-103	104	105	106	107	108	109	110	111							
Fr	Ra	Ac-Lr	Rf	Db	Sg	Bh	Hs	Mt	Ds	Rg							
francium	radium	actinoids	rutherfordium	dubnium	seaborgium	bohrium	hassium	meitnerium	darmstadtium	roentgenium							
[223]	[226]		[261]	[262]	[266]	[264]	[277]	[268]	[271]	[272]							
<div> <div>lanthanoids</div> <div>actinoids</div> </div>																	
57	58	59	60	61	62	63	64	65	66	67	68	69	70	71			
La	Ce	Pr	Nd	Pm	Sm	Eu	Gd	Tb	Dy	Ho	Er	Tm	Yb	Lu			
lanthanum	cerium	praseodymium	neodymium	promethium	samarium	euroium	gadolinium	terbium	dysprosium	holmium	erbium	thulium	ytterbium	lutetium			
138.905 47(7)	140.116(1)	140.907 65(2)	144.242(3)	[145]	150.36(2)	151.964(1)	157.25(3)	158.925 35(2)	162.500(1)	164.930 32(2)	167.259(3)	168.934 21(2)	173.04(3)	174.967(1)			
89	90	91	92	93	94	95	96	97	98	99	100	101	102	103			
Ac	Th	Pa	U	Np	Pu	Am	Cm	Bk	Cf	Es	Fm	Md	No	Lr			
actinium	thorium	protactinium	uranium	neptunium	plutonium	americium	curium	berkelium	californium	einsteinium	fermium	mendelevium	nobelium	lawrencium			
[227]	232.038 06(2)	231.035 88(2)	238.028 91(3)	[237]	[244]	[243]	[247]	[247]	[251]	[252]	[257]	[258]	[259]	[262]			



The **Cattell-Horn-Carroll (CHC)** model is the contemporary consensus taxonomy of human cognitive abilities

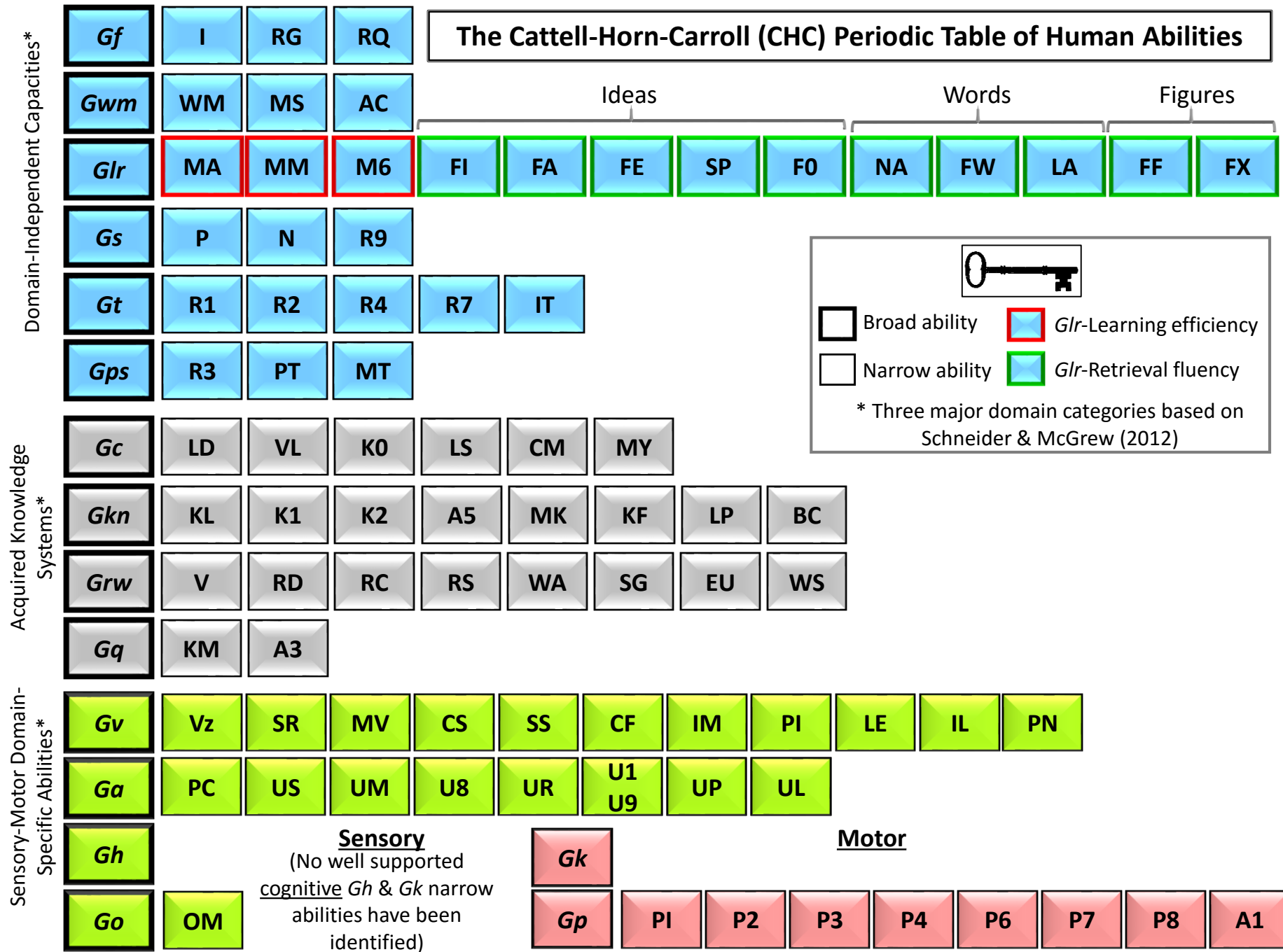
# The verdict is unanimous re: the importance of Carroll's (1993) work

## Richard Snow (1993):

“John Carroll has done a magnificent thing. He has reviewed and reanalyzed the world’s literature on individual differences in cognitive abilities...no one else could have done it... it defines the **taxonomy** of cognitive differential psychology for many years to come.”

## John Horn (1998):

A “**tour de force** summary and integration” that is the “**definitive foundation for current theory**” (p. 58). Horn compared Carroll’s summary to “**Mendelyev’s first presentation of a periodic table of elements in chemistry**” (p. 58).

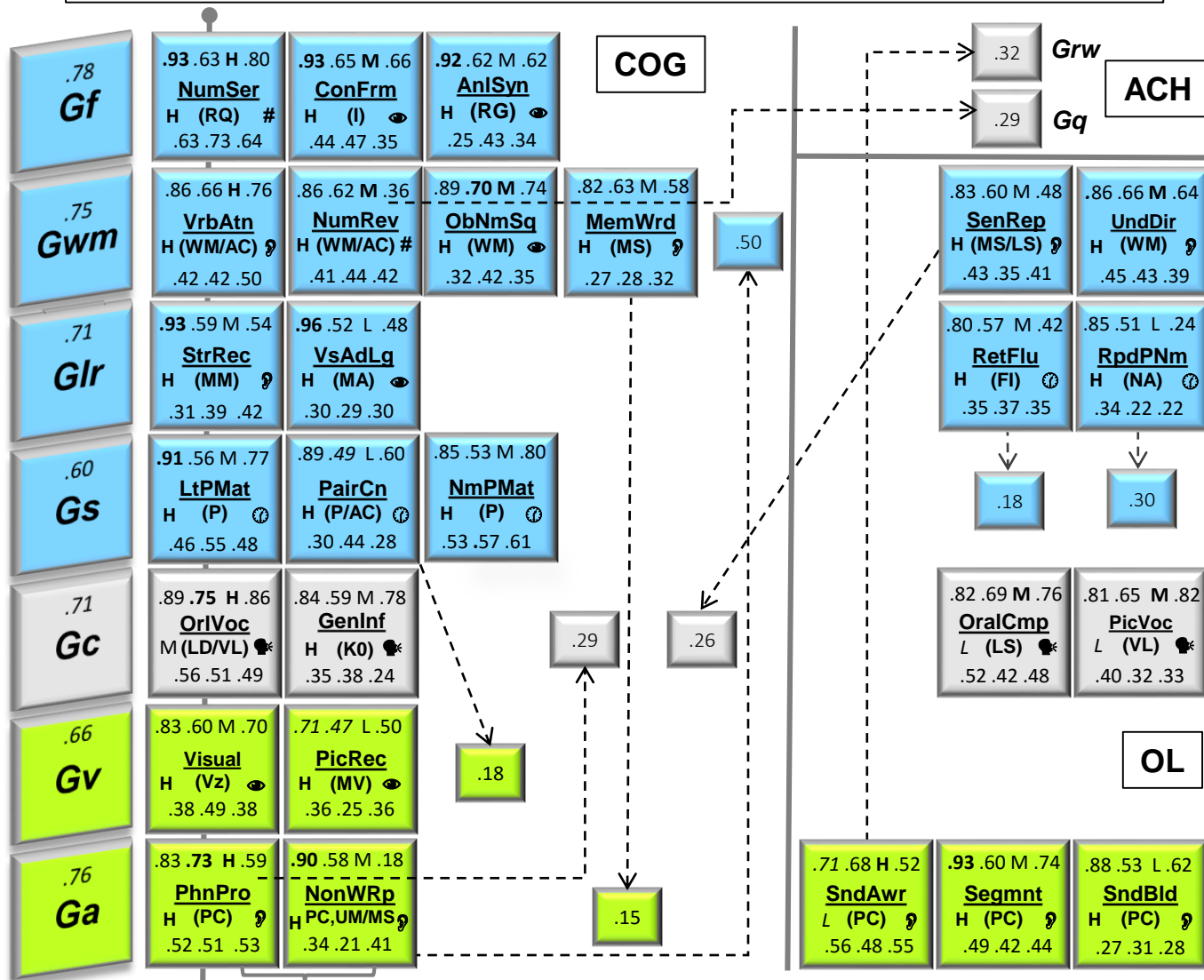


The Cattell-Horn-Carroll (CHC) Periodic Table of Human Abilities

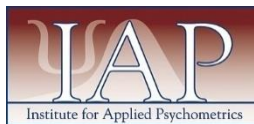


# The WJ IV Cattell-Horn-Carroll (CHC) periodic table of COG/OL test elements: Ages 6 to 19

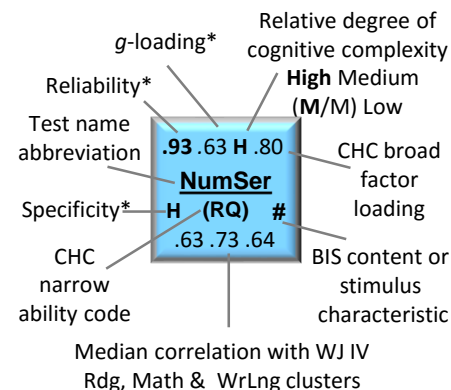
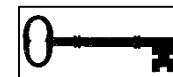
COG CHC clusters and g-loadings



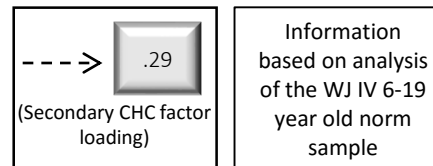
Additional resources available at  
[www.themindhub.com](http://www.themindhub.com) (MindHub™)



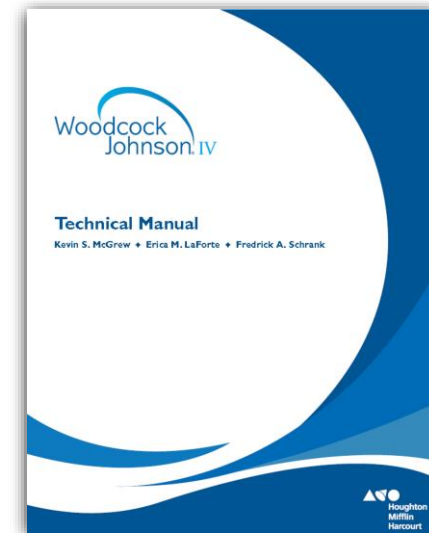
© Institute for Applied Psychometrics (IAP)  
Dr. Kevin McGrew 01-21-16



[\* high, med, low – as per Kaufman (1979) & McGrew & Flanagan (1998)]

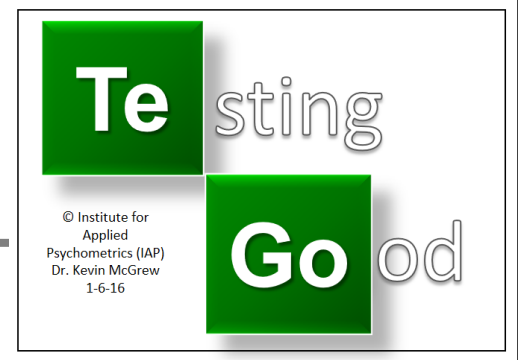


- **Reliability:** The degree to which a test score is free from errors of measurement. Test score precision.
- **Specificity:** The portion of a test's score variance that is reliable and unique to the test.
- **g-loading:** A test's loading on the first unrotated factor or component in factor or principal component analysis.
- **Cognitive complexity:** The relative degree of cognitive information processing load (e.g., resource demands on working memory, attentional control, executive functions) demanded by a test.
- **CHC narrow ability code:** (see back)
- **BIS content characteristic:**
  - Verbal
  - Quant.-numeric
  - Auditory
  - Figural-visual
  - Speed-fluency





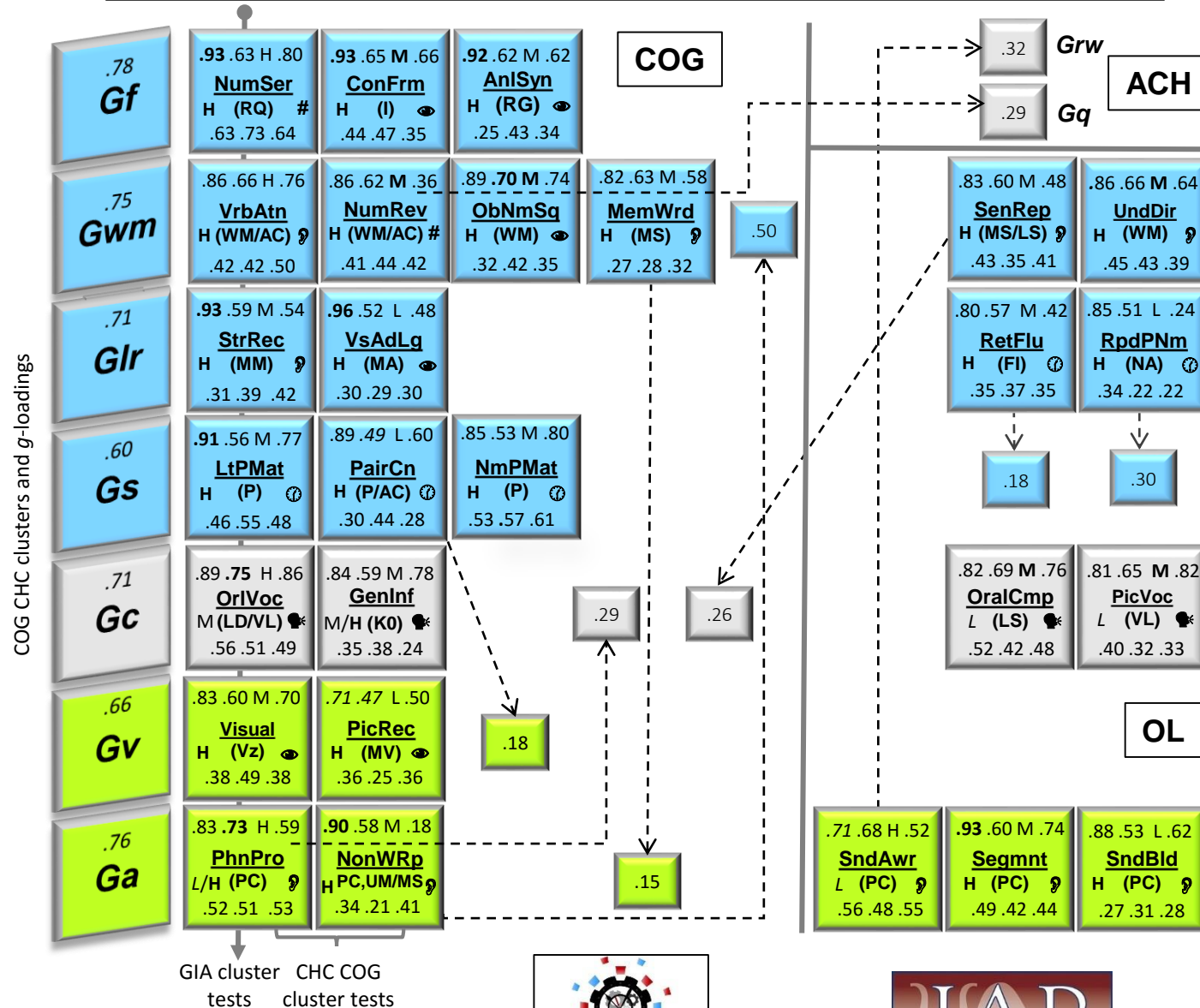
# All information based on analysis of WJ IV norm data from ages 6 thru 19



Reliability*				<u>Relative</u> degree of cognitive complexity: • <b>High</b> Medium ( <b>M/M</b> ) Low
Specificity*		<i>g</i> -loading*		
.93	.63	H	.80	CHC broad factor loading
<u>NmSeries</u>				Test name abbreviation
H	(RQ)	#		BIS content/stimulus characteristic
				CHC narrow ability code(s)
.63	.73	.64		Median correlations with R, M, W clusters

[\* **high**, med, *low* – as per Kaufman (1979) & McGrew & Flanagan (1998)]

# The WJ IV Cattell-Horn-Carroll (CHC) periodic table of COG/OL test elements: Ages 6 to 19



## WISC-V related measures

Matrix Reasoning (I)  
Figure Weights (RQ)  
Picture Concepts (I)  
Arithmetic (RQ; Gq)

Digit Span (MS,WM)  
Letter-Number Seq. (WM)  
Picture Span (WM/MS; Gv-MV?)  
Arithmetic (Gwm-WM)

Naming Speed Literacy (NA)  
Naming Speed Quantity (NA)  
Immediate Symbol Translation (MA)  
Delayed Symbol Translation (MA)  
Recognition Symbol Translation (MA)

Coding (R9/MA?)  
Symbol Search (P/R9; Gv-SS?)  
Cancellation (P/R9)

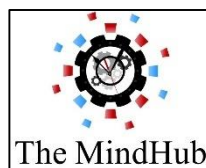
Similarities (VL/LD)  
Vocabulary (VL)  
Information (K0)  
Comprehension (LD/K0)

Block Design (Vz)  
Visual Puzzles (Vz/SR?)

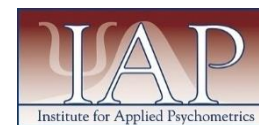
No Ga tests

## WISC-V tests & tentative CHC classifications (based on multiple sources)

*Italic font designates Canivez, Watkins & Dombrowski's (2015) conclusion that Gf and Gv are not separate factors-instead combine as perceptual reasoning*



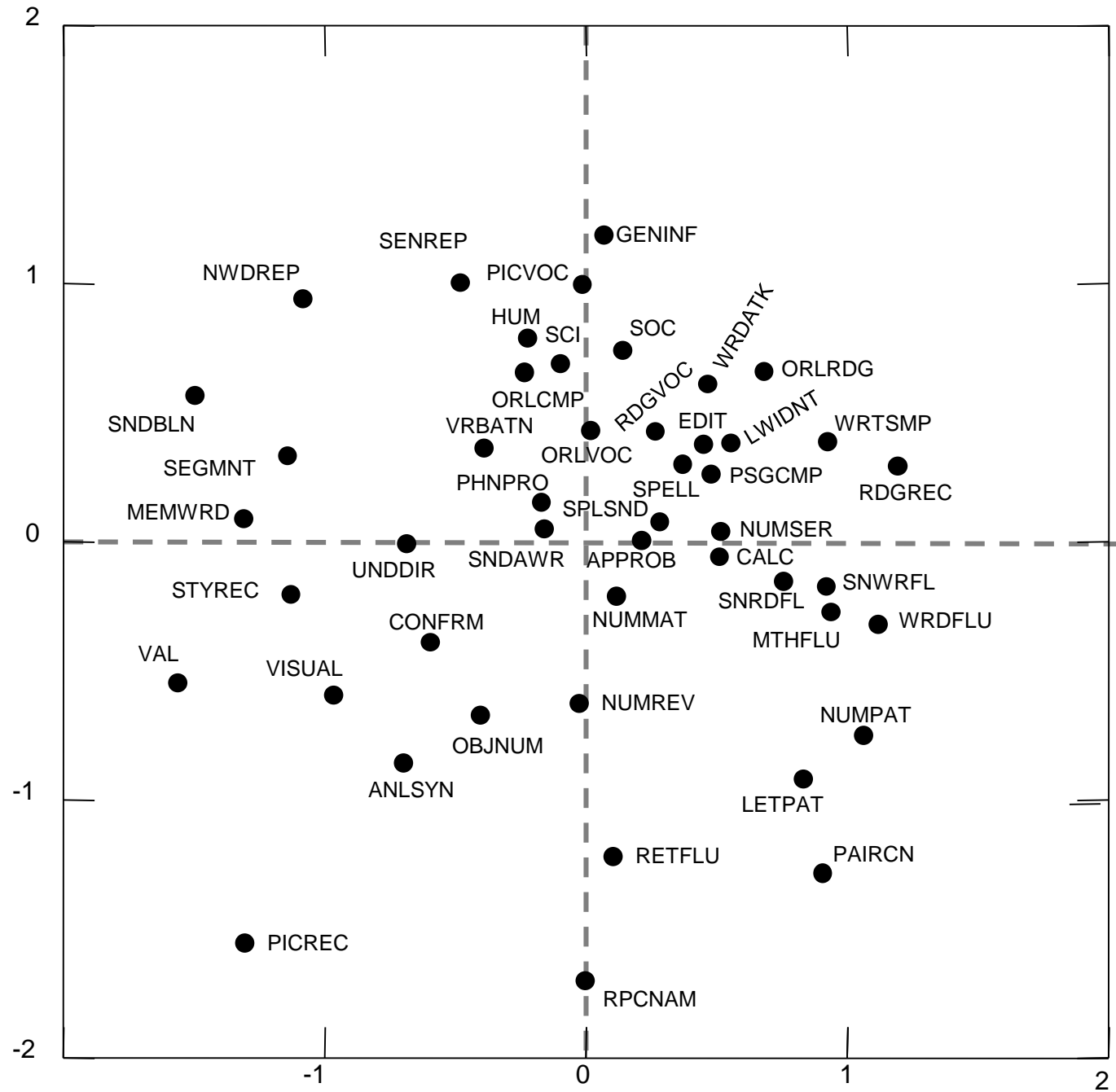
Additional resources available at  
[www.themindhub.com](http://www.themindhub.com) (MindHub™)



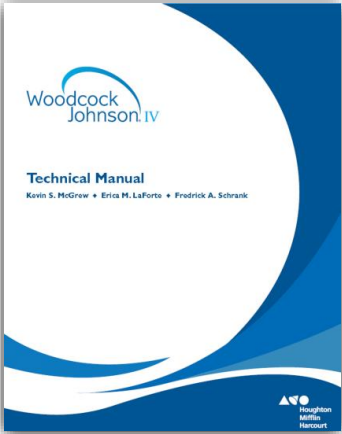
© Institute for Applied Psychometrics (IAP)  
Dr. Kevin McGrew 01-20-16

This is an example ☺

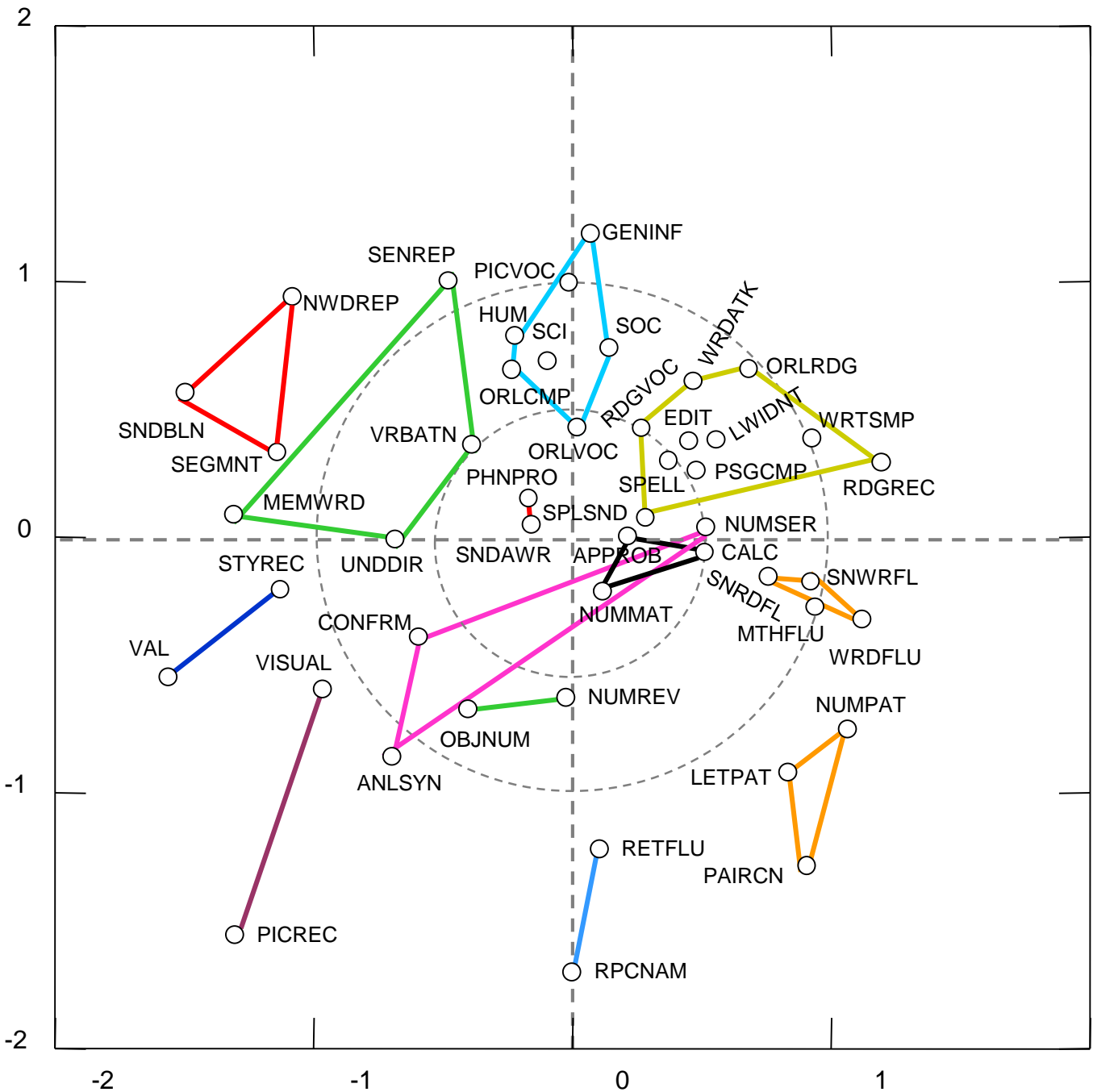
Exploratory MDS  
of WJ IV norm  
subjects ages 6-19



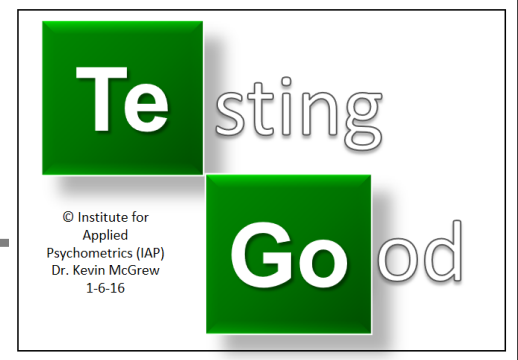
# WJ IV test 2D MDS (Ages 6 to 19; n = 4,082)



[www.iapsych.com/mimap.pdf](http://www.iapsych.com/mimap.pdf)



# All information based on analysis of WJ IV norm data from ages 6 thru 19



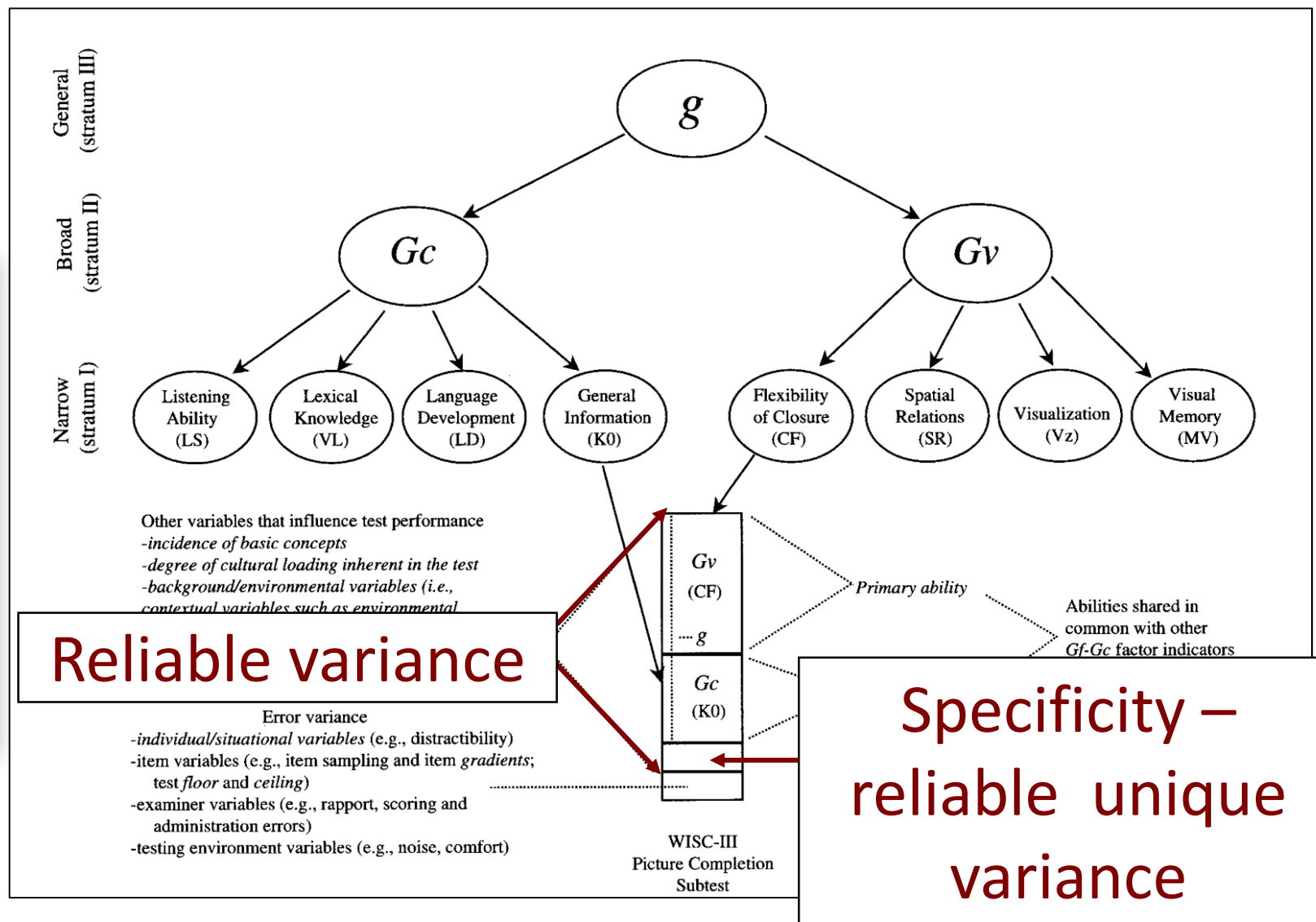
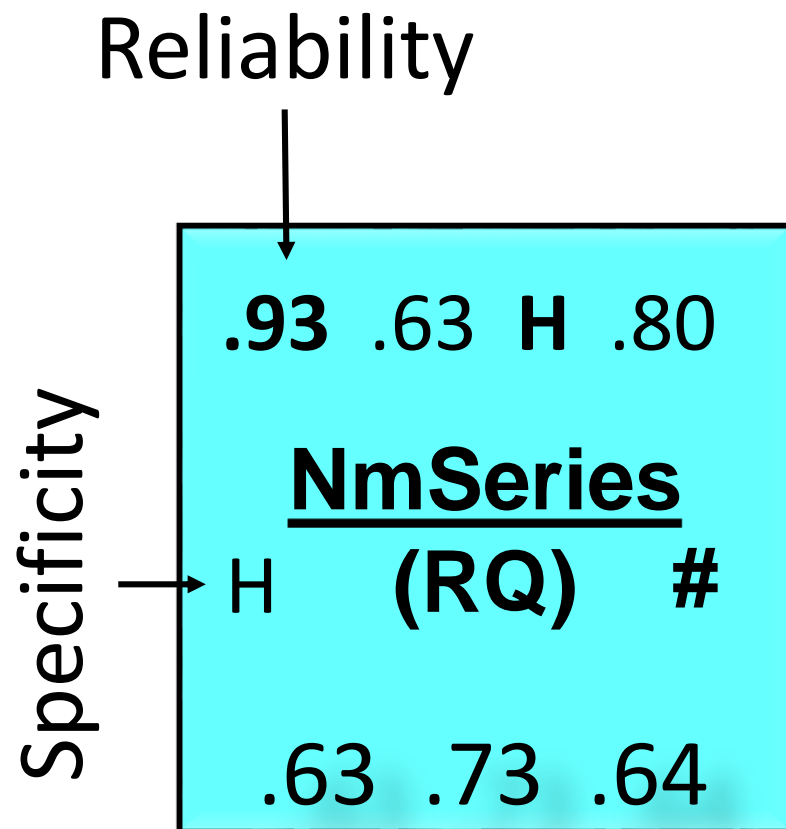
Reliability*				<u>Relative</u> degree of cognitive complexity: • <b>High</b> Medium ( <b>M/M</b> ) Low
Specificity*		<i>g</i> -loading*		
.93	.63	H	.80	CHC broad factor loading
<u><b>NmSeries</b></u>				Test name abbreviation
H	(RQ)	#		BIS content/stimulus characteristic
				CHC narrow ability code(s)
.63	.73	.64		Median correlations with R, M, W clusters

[\* **high**, med, *low* – as per Kaufman (1979) & McGrew & Flanagan (1998)]



<b><u>Reliability</u></b>	The degree to which a test score is free from errors of measurement. Test score precision.	Important for making accurate educational and/or diagnostic decisions.
High	Coefficients of .90 or above.	Test scores are sufficiently reliable and can be used to make diagnostic decisions.
Medium	Coefficients from .80 to .89 inclusive.	Test scores are moderately reliable and can be used to make <u>screening</u> decisions or can be combined with other tests to form a composite with “high” reliability.
Low	Coefficients below .80.	Test scores are not sufficiently reliable and cannot be used to make important screening or diagnostic decisions. Need to be combined with other tests to form a composite with “medium” or “high” reliability.



<b><u>Specificity</u></b>	<p>The portion of a test's score variance that is reliable and unique to the test.</p>	
High	<p>A test's unique reliable variance is equal to or above 25% of the total test variance and it exceeds error variance (1-reliability).</p>	<p>A test with high specificity may be interpreted as measuring an ability distinct within a battery of tests.</p>
Medium	<p>When a test meets only one of the criteria for High.</p>	<p>A test with medium specificity should be interpreted cautiously as measuring an ability distinct within a battery of tests).</p>
Low	<p>When a test does not meet either of the criteria for High.</p>	<p>A test with low specificity should not be interpreted as representing a unique ability but may prove useful in interpretation when it is considered as part of a composite or cluster of other similar tests.</p>



Reliability

Specificity

.93 .63 H .80			
<u>NmSeries</u>			
H	(RQ)	#	
.63 .73 .64			

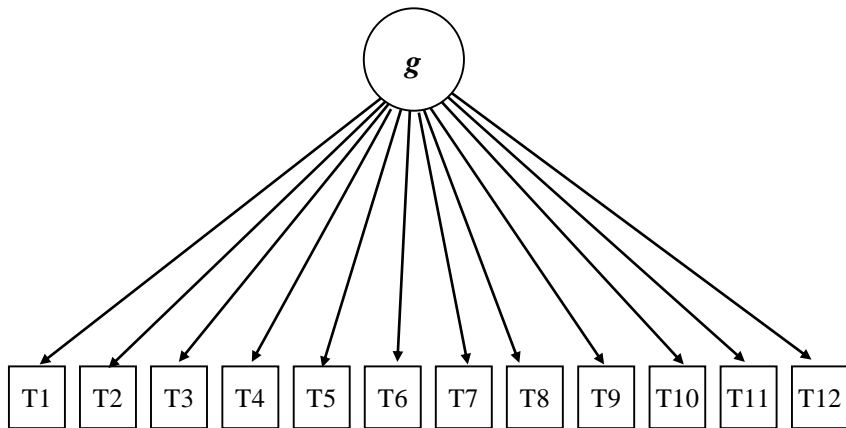
.66	.83 .60 M .70	.71 .47 L .50
<b><i>GV</i></b>	<u>Visual</u>	<u>PicRec</u>
	H (Vz) 	H (MV) 
	.38 .49 .38	.36 .25 .36

<b><u>g-loading</u></b>	Each test's loading on the first unrotated factor or component in principal factor or component analysis with all other tests from a specific intelligence battery.	Important indicator of the degree to which a test of an individual battery measures general intelligence. Aids in determining the extent to which a test score can be expected to vary from other scores within a profile.
High	General factor or g loading of .70 or higher.	Tests with high g loadings are not expected to vary greatly from the mean of the profile and are considered good indicators of general intelligence.
Medium	A loading of .51 to .69.	Tests with medium g loadings may vary from the mean of the profile as tests with this classification are considered fair indicators of general intelligence.
Low	A loading of .50 or lower.	Tests with low g loadings can be expected to vary from the mean of the profile as tests with this classification are considered poor indicators of general intelligence.



# IQ test battery subtest *g*-loadings or saturation

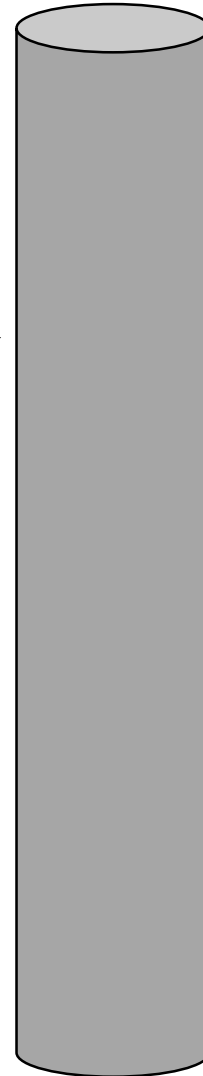
General intelligence (*g*) →



(1a) Spearman's general Factor model

© Institute for Applied Psychometrics; Kevin McGrew 1-18-15

High *g*



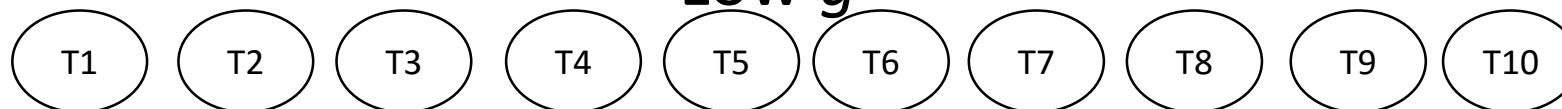
Intelligence test battery  
test *g* (general intelligence)  
*loadings (weights)*

Derived from factor analysis

Think of a **general intelligence pole** that  
is saturated with more *g*-ness (like  
magnetism) at the top and less *g*-ness at  
the bottom

Factor analysis orders the tests on the  
pole based on their **saturation of *g*-ness**

Low *g*



Subtests

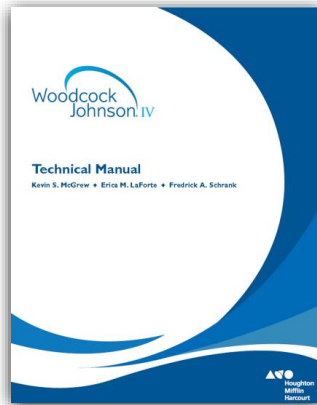
First (unrotated)  
principal component  
for **WJ IV COG & WISC-  
IV tests** ( $n=173$ )

	<u><i>g</i></u>	<u><i>h2</i></u>
Arithmetic	0.81	0.66
<b>Phonological Processing</b>	<b>0.81</b>	<b>0.66</b>
Vocabulary	0.80	0.64
<b>Oral Vocabulary</b>	<b>0.80</b>	<b>0.64</b>
Information	0.79	0.62
<b>Concept Formation</b>	<b>0.78</b>	<b>0.61</b>
Matrix Reasoning	0.75	0.56
Similarities	0.74	0.55
<b>Verbal Attention</b>	<b>0.73</b>	<b>0.53</b>
Block Design	0.71	0.50
General Information	0.71	0.50
<b>Number Series</b>	<b>0.70</b>	<b>0.49</b>
<b>Numbers Reversed</b>	<b>0.69</b>	<b>0.48</b>
Comprehension	0.69	0.48
Letter-Number Sequencing	0.68	0.46
Digit Span	0.65	0.42
<b>Object-Number Sequencing</b>	<b>0.64</b>	<b>0.41</b>
Picture Concepts	0.63	0.40

	<u><i>g</i></u>	<u><i>h2</i></u>
<b>Visual-Auditory Learning</b>	<b>0.62</b>	<b>0.38</b>
<b>Nonword Repetition</b>	<b>0.62</b>	<b>0.38</b>
Symbol Search	0.62	0.38
<b>Analysis-Synthesis</b>	<b>0.61</b>	<b>0.37</b>
<b>Number-Pattern Matching</b>	<b>0.59</b>	<b>0.35</b>
<b>Story Recall</b>	<b>0.58</b>	<b>0.34</b>
<b>Pair Cancellation</b>	<b>0.58</b>	<b>0.34</b>
<b>Visualization</b>	<b>0.55</b>	<b>0.30</b>
<b>Picture Recognition</b>	<b>0.49</b>	<b>0.24</b>
<b>Letter-Pattern Matching</b>	<b>0.48</b>	<b>0.23</b>
Coding	0.47	0.22
Cancellation	0.42	0.18

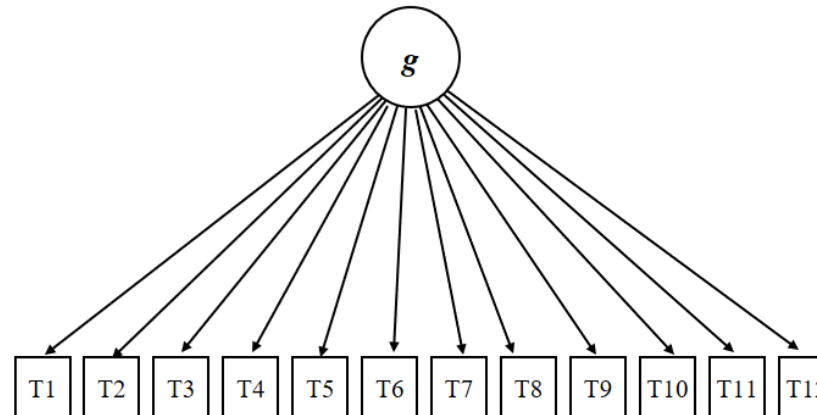
$g$ -loading

<b>.93</b>	<b>.63</b>	<b>H</b>	<b>.80</b>
<b><u>NmSeries</u></b>			
<b>H</b>	<b>(RQ)</b>	<b>#</b>	
<b>.63</b>	<b>.73</b>	<b>.64</b>	



IQ test battery subtest  
 $g$ -loadings or saturation

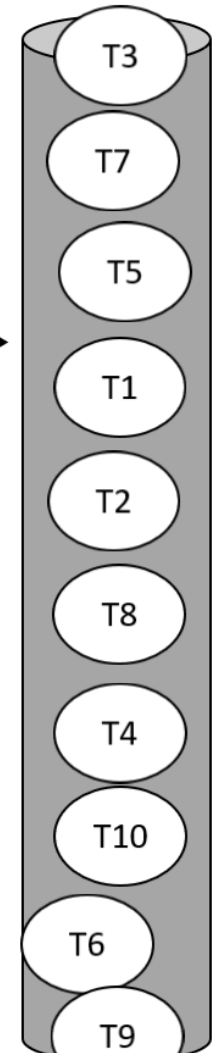
General intelligence ( $g$ ) →



(1a) Spearman's general Factor model

© Institute for Applied Psychometrics; Kevin McGrew 1-18-15

High  $g$



Low  $g$

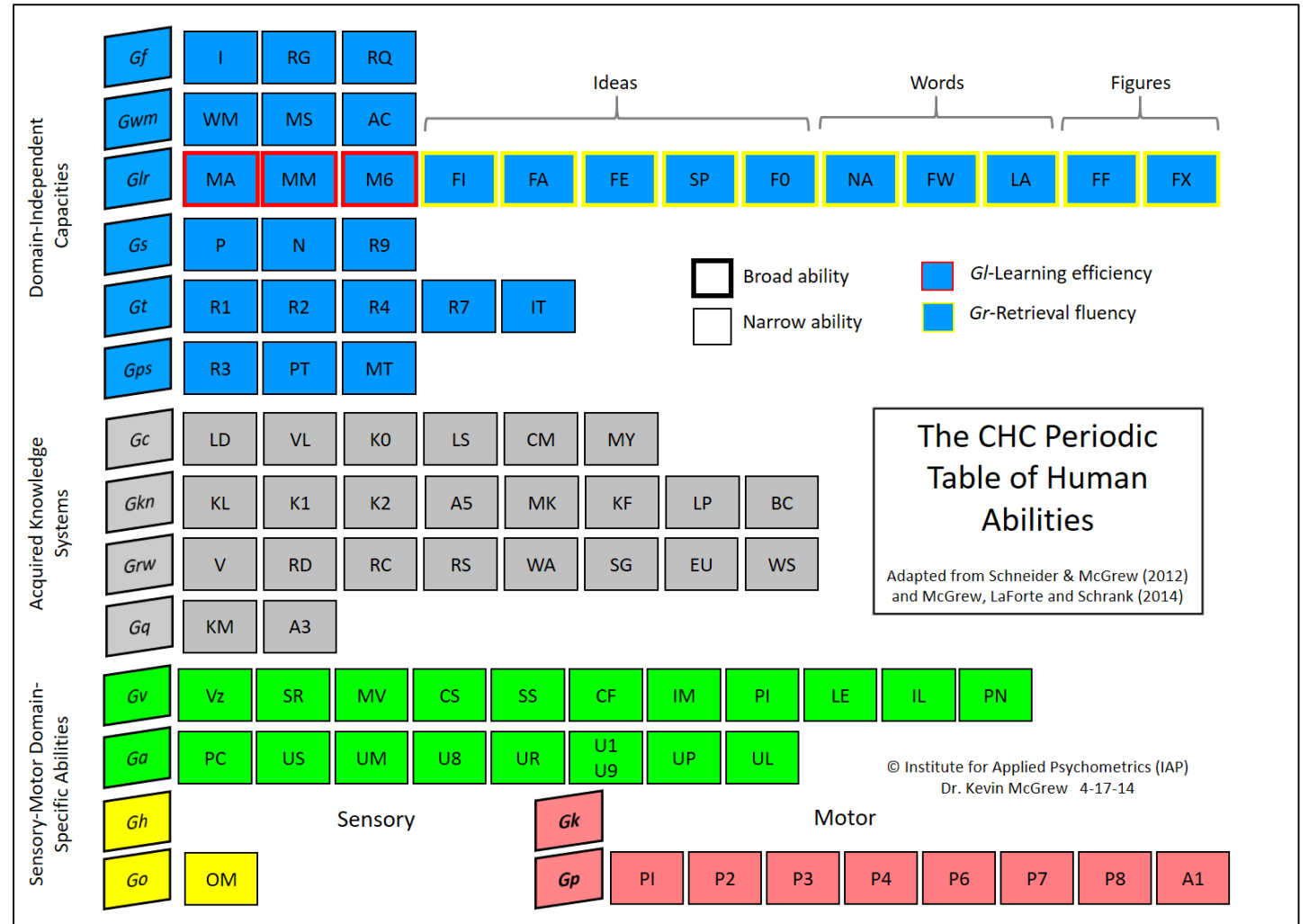
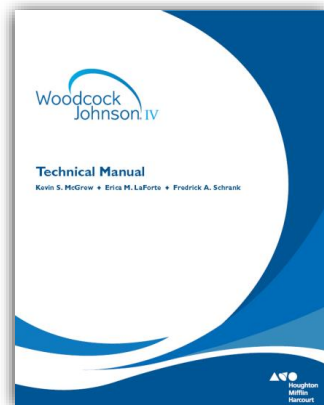
# CHC narrow factor classification

.93 .63 H .80

**NmSeries**

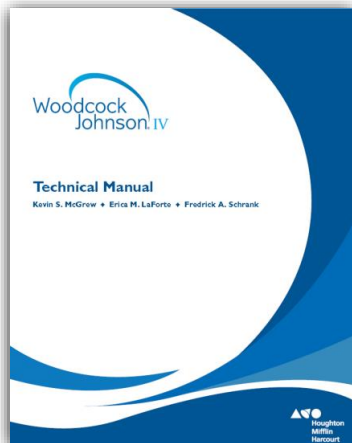
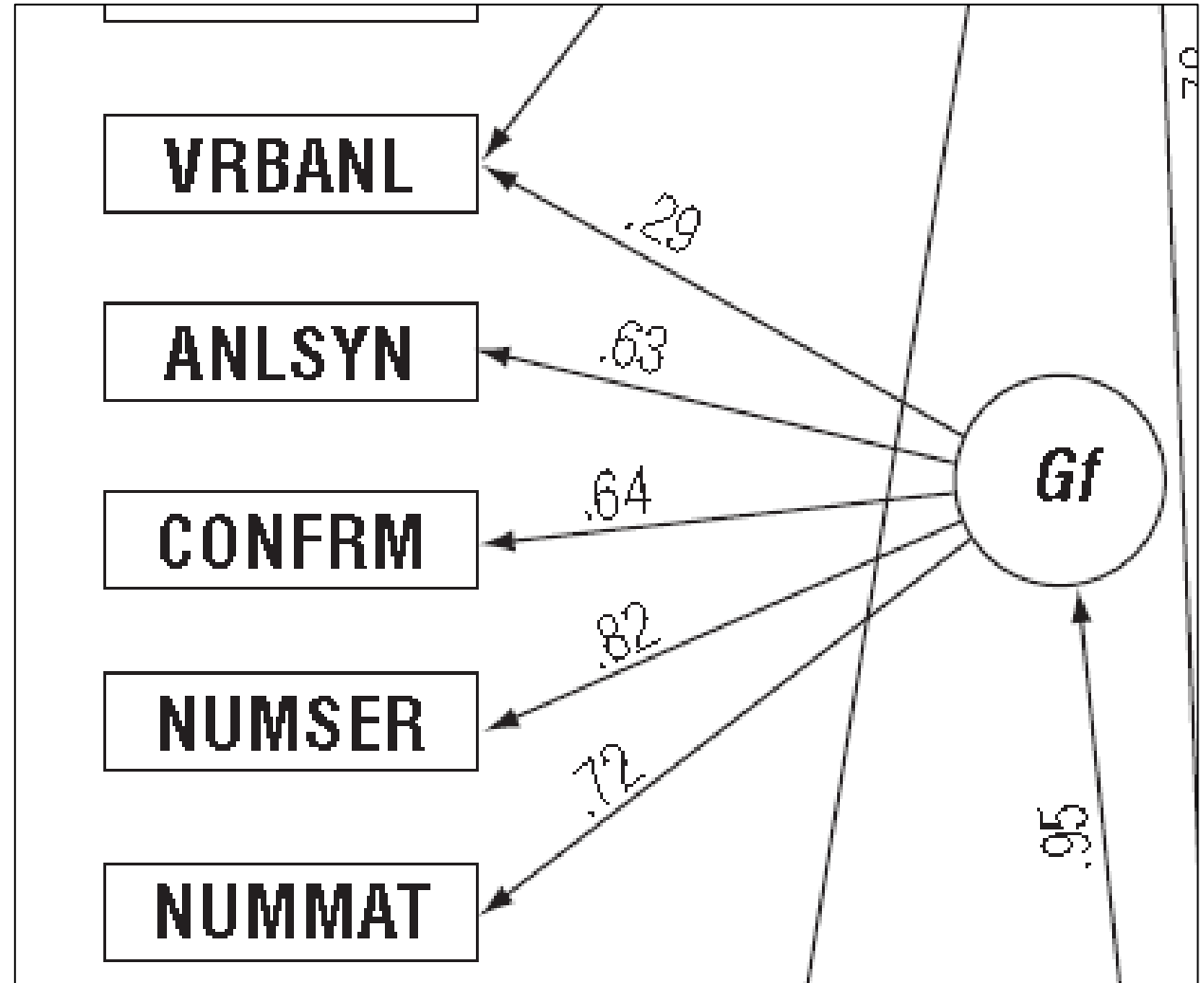
H (RQ) #

.63 .73 .64



<b>.93</b>	<b>.63</b>	<b>H</b>	<b>.80</b>
<b><u>NmSeries</u></b>			
<b>H</b>	<b>(RQ)</b>	<b>#</b>	
<b>.63</b>	<b>.73</b>	<b>.64</b>	

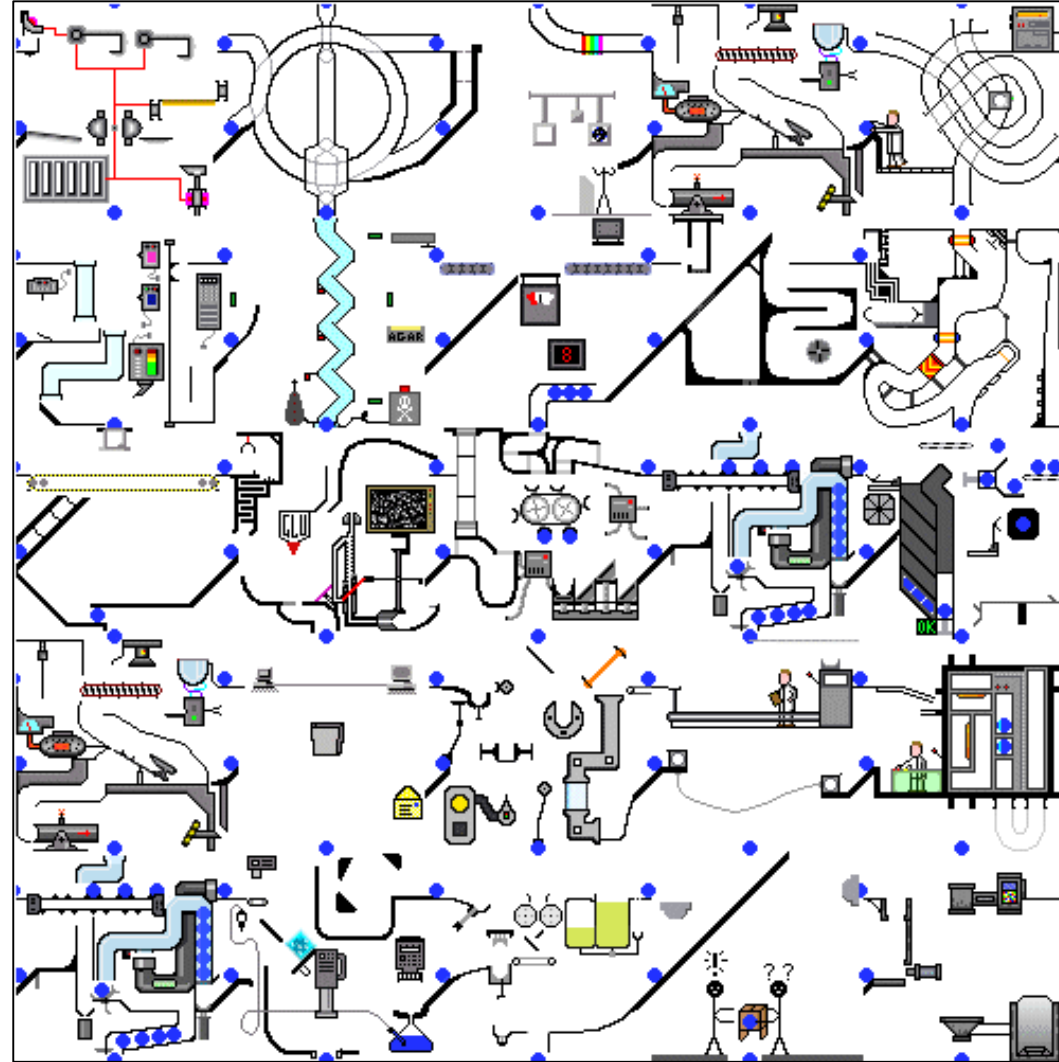
CHC broad factor loading (average)



Ages 9-13 in technical manual



# What is (relational) cognitive complexity?



## Cognitive Variables in Series Completion

Thomas G. Holzman  
Georgia State University

James W. Pellegrino  
University of California, Santa Barbara

Robert Glaser  
University of Pittsburgh

The cognitive determinants of number series completion performance were studied by presenting a systematic set of problems to college adults and to average- and high-IQ elementary-school children. In each group a combination of process and content-knowledge variables accounted for more than 70% of the variance in solution difficulty. Solution difficulty was most affected by the amount of information to be coordinated in working memory while assembling and applying the pattern description rule for the sequence. Adults could effectively coordinate more information than children, but IQ levels did not differ on this component ability. Skill in dealing with unusual, hierarchical relations and arithmetic computation also affected performance and discriminated between age and IQ levels. Comparisons with results from other types of rule-induction tasks suggested some general abilities of importance to rule induction.

### PSYCHOLOGICAL SCIENCE

#### *Research Article*

# How Many Variables Can Humans Process?

Graeme S. Halford,<sup>1</sup> Rosemary Baker,<sup>1</sup> Julie E. McCredden,<sup>1</sup> and John D. Bain<sup>2</sup>

<sup>1</sup>University of Queensland, Brisbane, Australia, and <sup>2</sup>Griffith University, Brisbane, Australia

BEHAVIORAL AND BRAIN SCIENCES (1998) 21, 803-865

*Printed in the United States of America*

## Processing capacity defined by relational complexity: Implications for comparative, developmental, and cognitive psychology

**Graeme S. Halford**

*Department of Psychology, University of Queensland, Brisbane,  
Queensland 4072, Australia*

*gsh@psy.uq.oz.au*

*www.psy.uq.edu.au/people/Department/gsh/index.html*

**William H. Wilson**

*Department of Computer Science & Engineering, University of New South  
Wales, Sydney, New South Wales, Australia*

*bill.w@cse.unsw.edu.au*

*www.cse.unsw.edu.au/~bill.w*

**Steven Phillips**

*Information Science Division, Electrotechnical Laboratory,  
Tsukuba 305, Japan*

*stevep@etl.go.jp*

*www.etl.go.jp/etl/ninchi/stevep@etl.go.jp/welcome.html*

# Two major classes of cognitive complexity theories (Bertling, 2012)

---

- **Empirical:** Post-hoc purely **data-driven** theories (e.g., Marshalek, Lohman & Snow, 1983)
  - *g*-loadings
  - Proximity to center of MDS spatial maps



- **Cognitive theories:** Working memory theories and the **constraints** placed on reasoning (e.g., *Gf*). Increasing processing demands results in an **increase (demand/load) on cognitive resources**



# Two types of **cognitive theories** regarding cognitive complexity

---

**Load** placed on **working memory** by a task

- Focus is on the **sheer number** of elements or element relations in a task

**Relational Complexity theory (RC):** The relational complexity of a task (e.g., Birney et al., 2006); Halford, 1993; Halford et al., 1988; Just & Carpenter, 1992)

- Focus is on the complexity of **the interrelated elements** (pieces of information) that need to be processed in **parallel**



Example of task with **high relational cognitive complexity** (RC)

---

Another example is provided by Sweller (1993), who analysed the following problem: *Suppose five days after the day before yesterday is Friday. What day of the week is tomorrow?* Despite our expertise in reasoning about days of the week, this problem is frustratingly difficult. The reason is that, especially in the first sentence, numerous elements are related to each other and cannot be considered meaningfully in isolation. These relations have to be at least partially processed in order to segment the statement into sub-problems that can be processed serially. The processing load is felt most keenly when we try to plan this procedure.





# More on relational cognitive complexity (RC) theory

---

The **processing load** (demand on resources) imposed by interacting components of a task can be captured with the concept or *relational complexity* (Bertling, 2012; Birney et al., 2006; Halford et al., 1998)

- The key is the **number of interacting variables** (elements; arguments) that must be represented in **parallel** to implement the process
- Conceptually RC is similar to the number of factors in an experimental design



# More on relational cognitive complexity (RC) theory

---

## Processing complexity

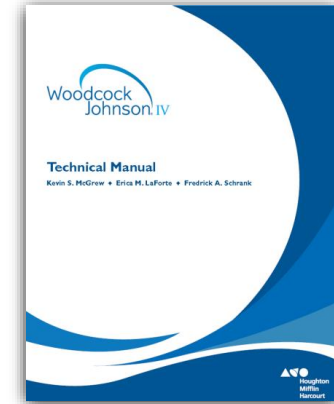
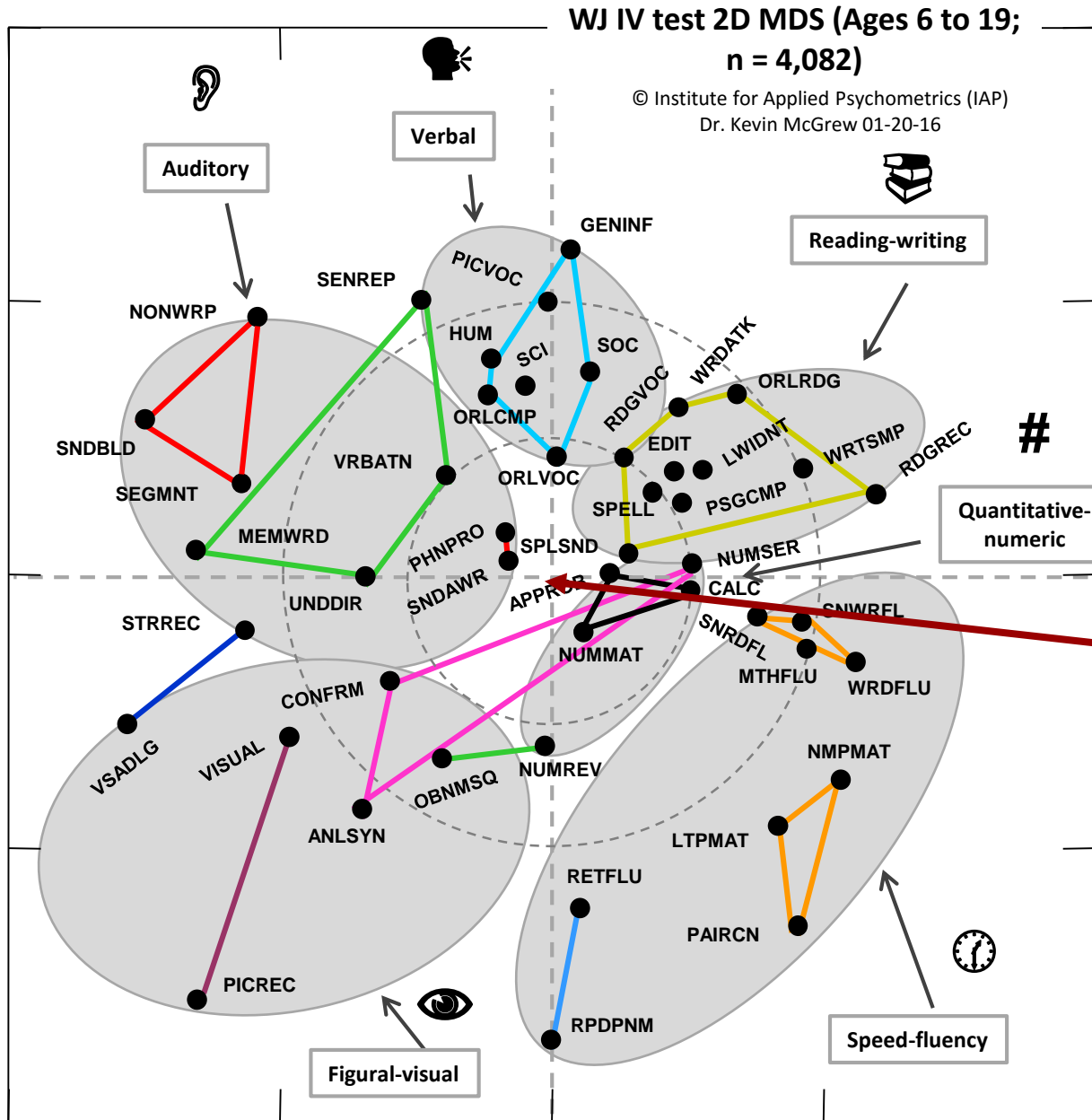
- May depend on **executive functions**.
- The strategy used by a person may differ across people or within the same person at different times
- The optimal strategy may not be the one that is best theoretically or as generated by an artificial intelligence (AI) algorithm
- Individuals operate in ways that are different from theoretically optimal algorithms



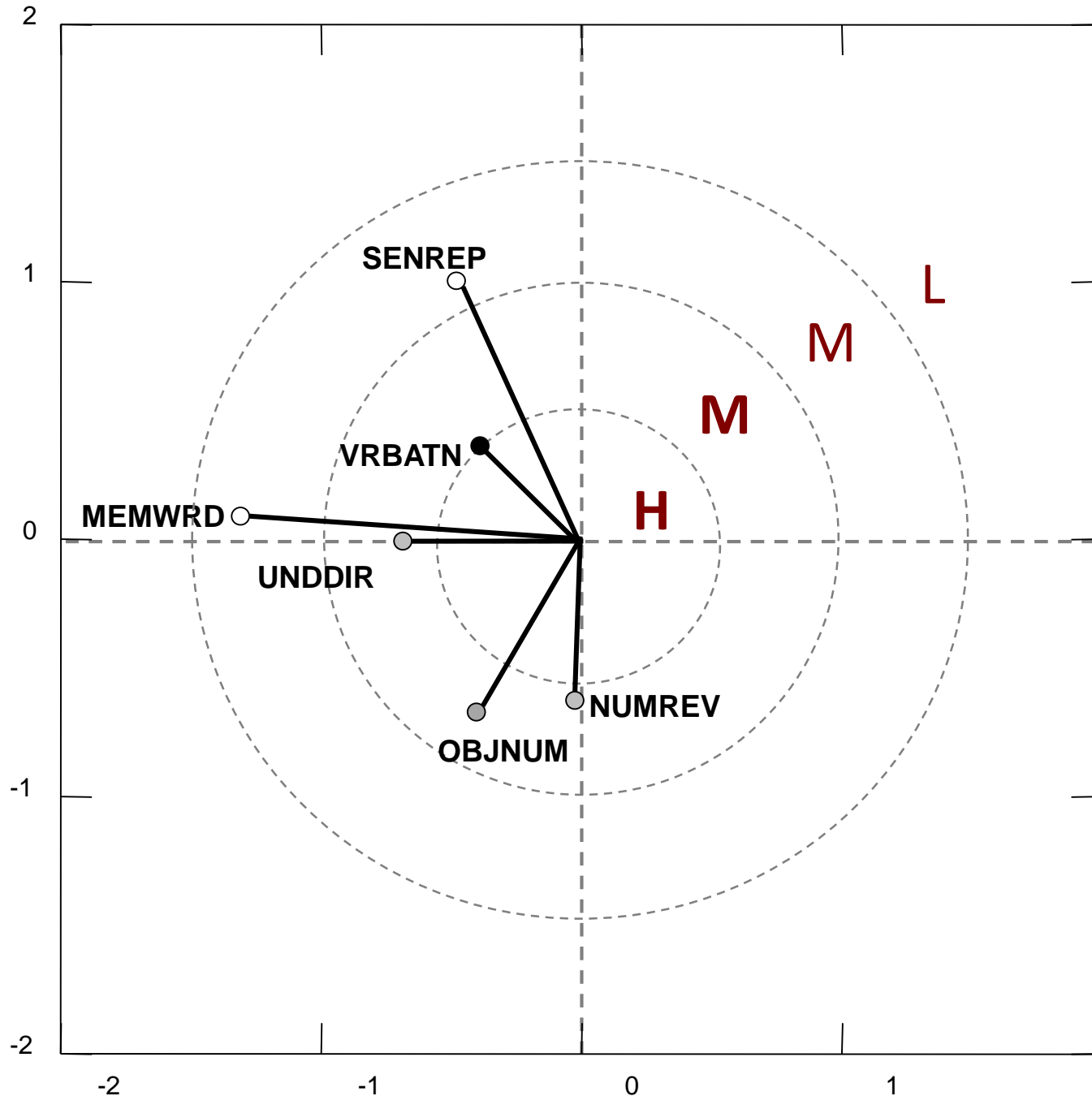
## WJ IV **cognitive complexity design approach** based on work of Lohman & Larkin (2011)

---

- **Increase the information processing demands** of the tests within a specific narrow CHC domain.
- Design tests that place greater demands on:
  - Cognitive information processing (**cognitive load**)
  - Greater allocation of key cognitive resources (**working memory or attentional control**)
  - The involvement of more **cognitive control or executive functions**



Tests closest to the center are considered more cognitively complex

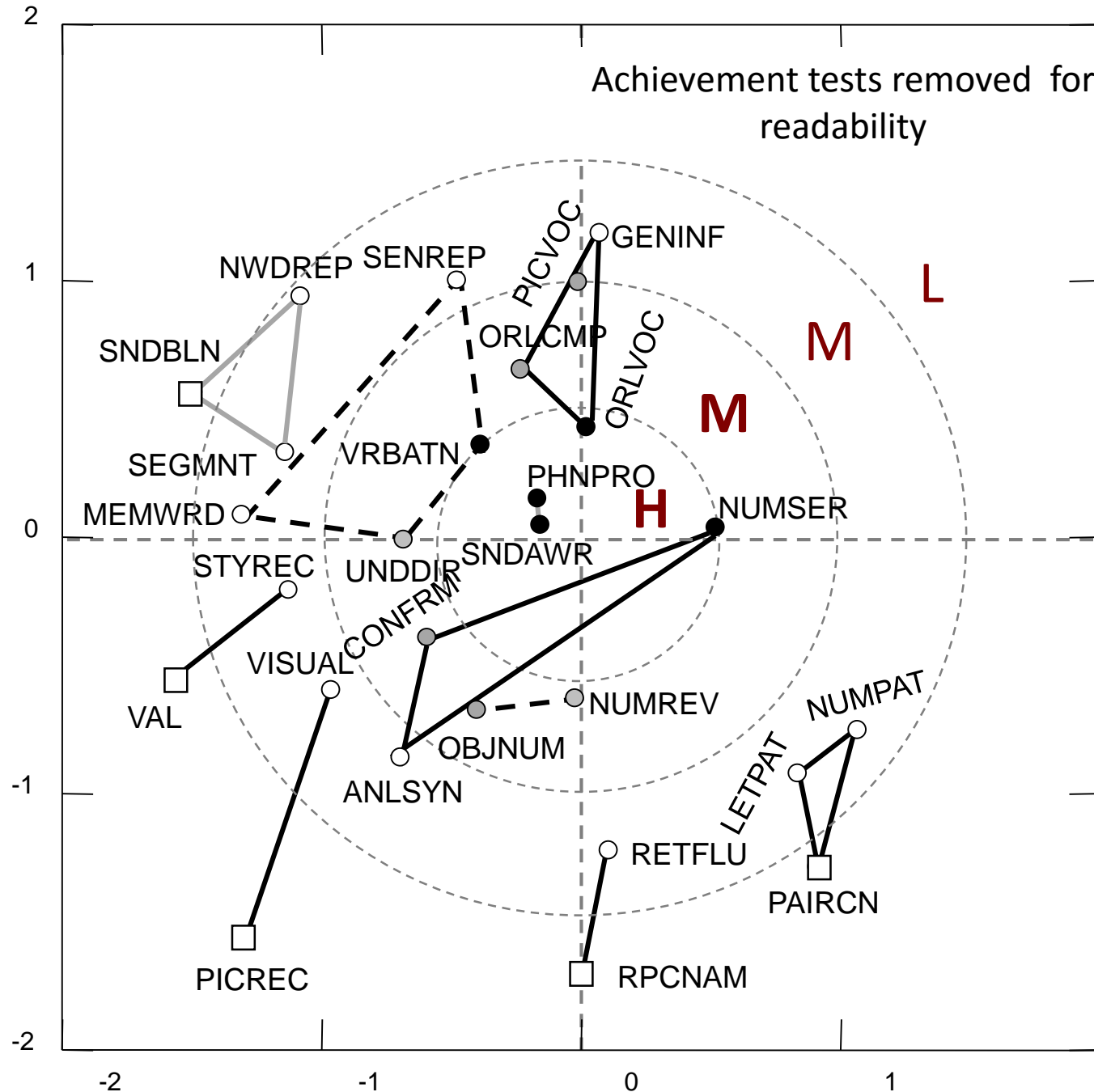


# Cognitive complexity interpretation aid

## Gwm tests

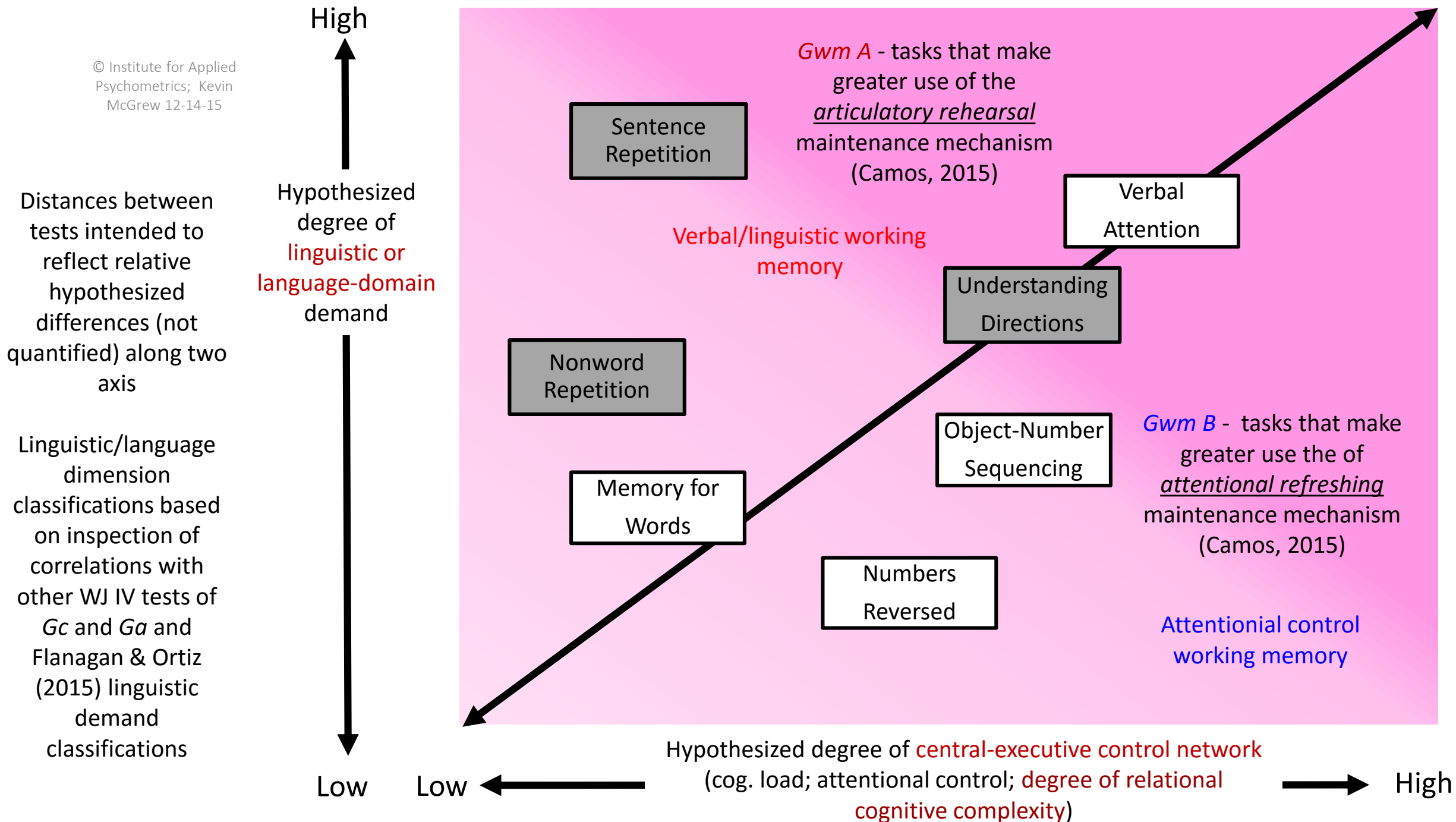
- **H** = High
- **M** = Moderate
- **M** = Low Mod.
- **L** = Low





# Cognitive complexity by CHC domain interpretation aid

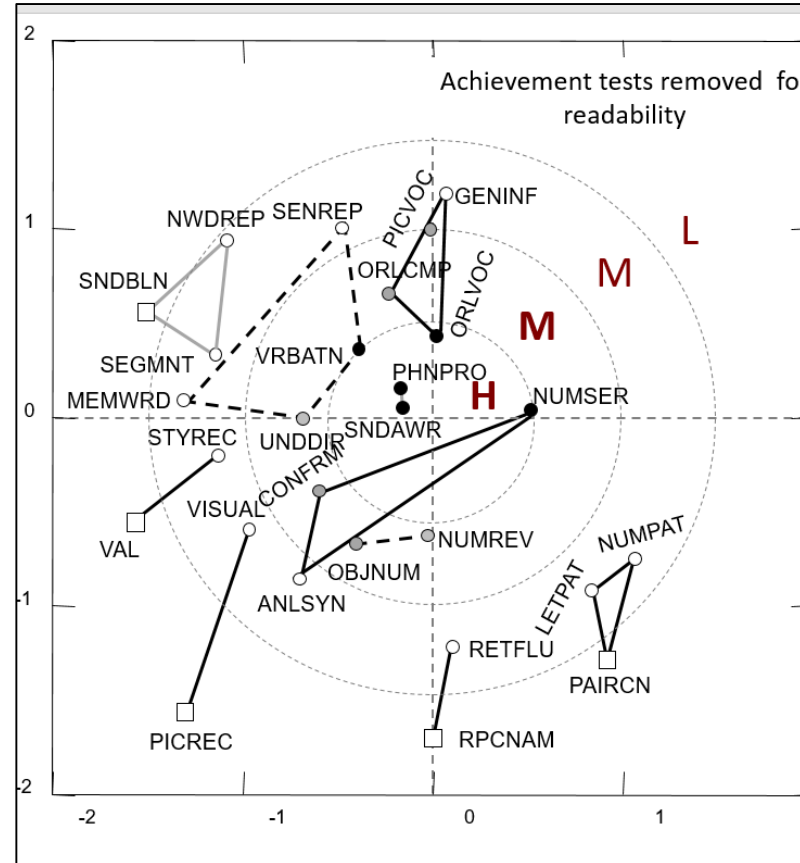
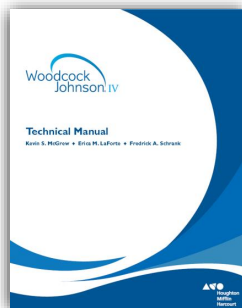
- **H** = High
- **M** = Moderate
- **M** = Low Mod.
- **L** = Low



# Cognitive complexity



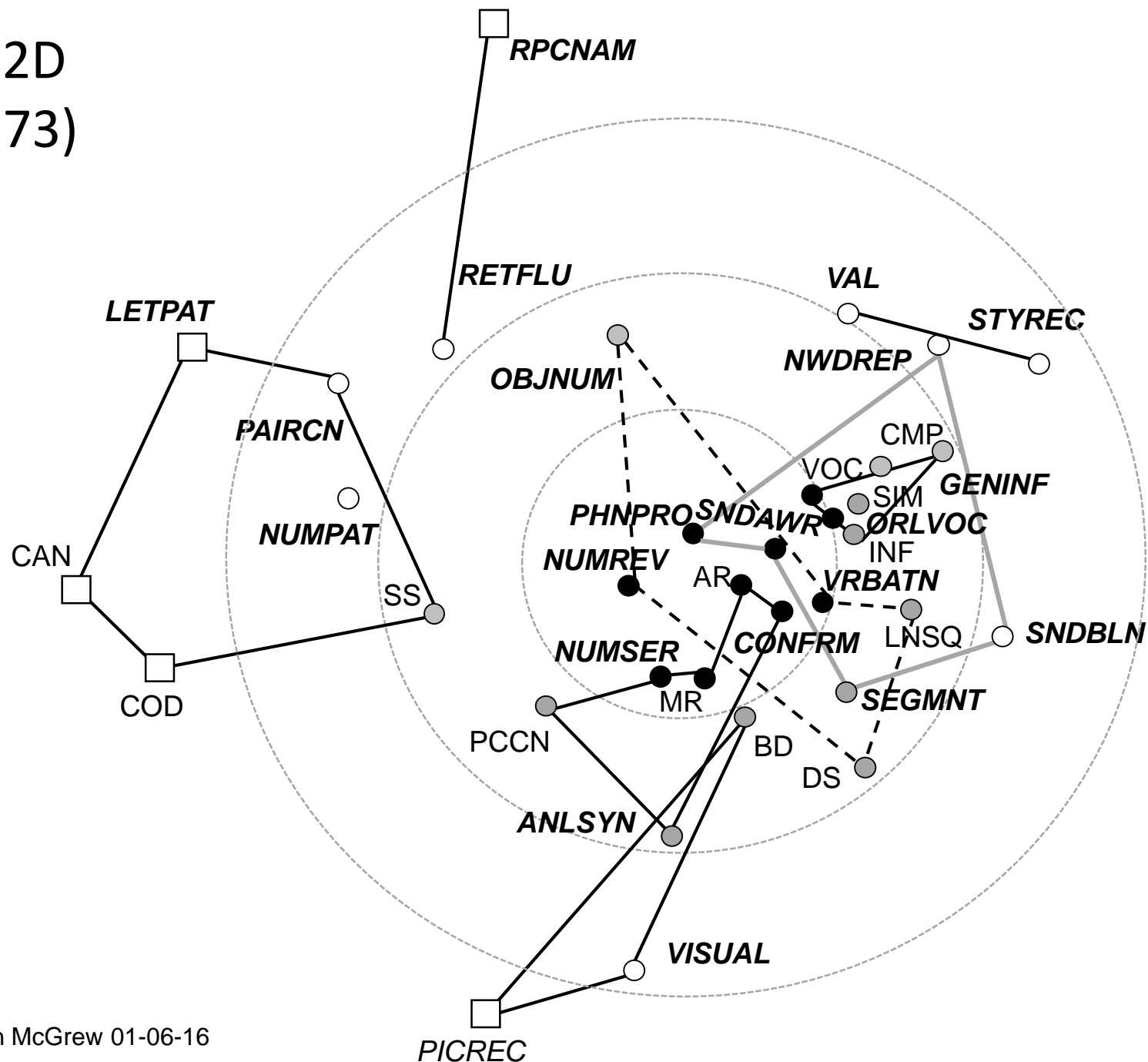
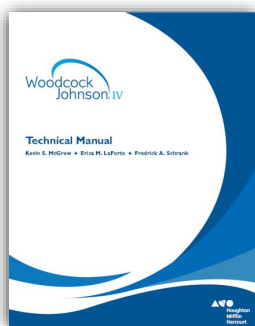
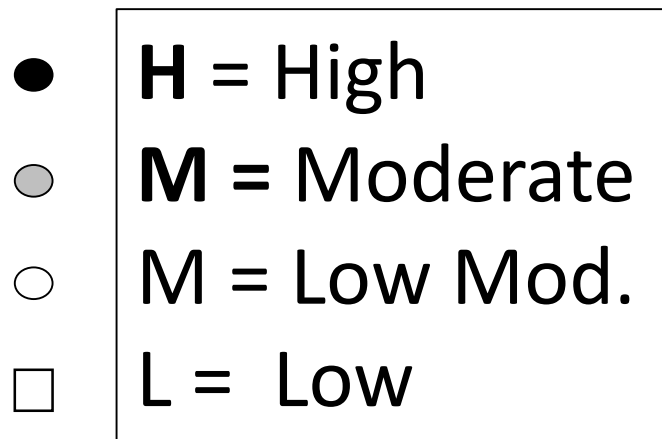
<b>.93</b>	<b>.63</b>	<b>H</b>	<b>.80</b>
<b><u>NmSeries</u></b>			
<b>H</b>	<b>(RQ)</b>	<b>#</b>	
<b>.63</b>	<b>.73</b>	<b>.64</b>	

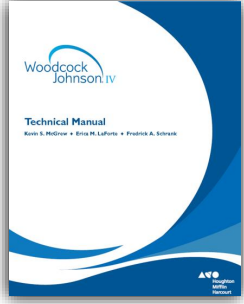


## Cognitive complexity by CHC domain interpretation aid

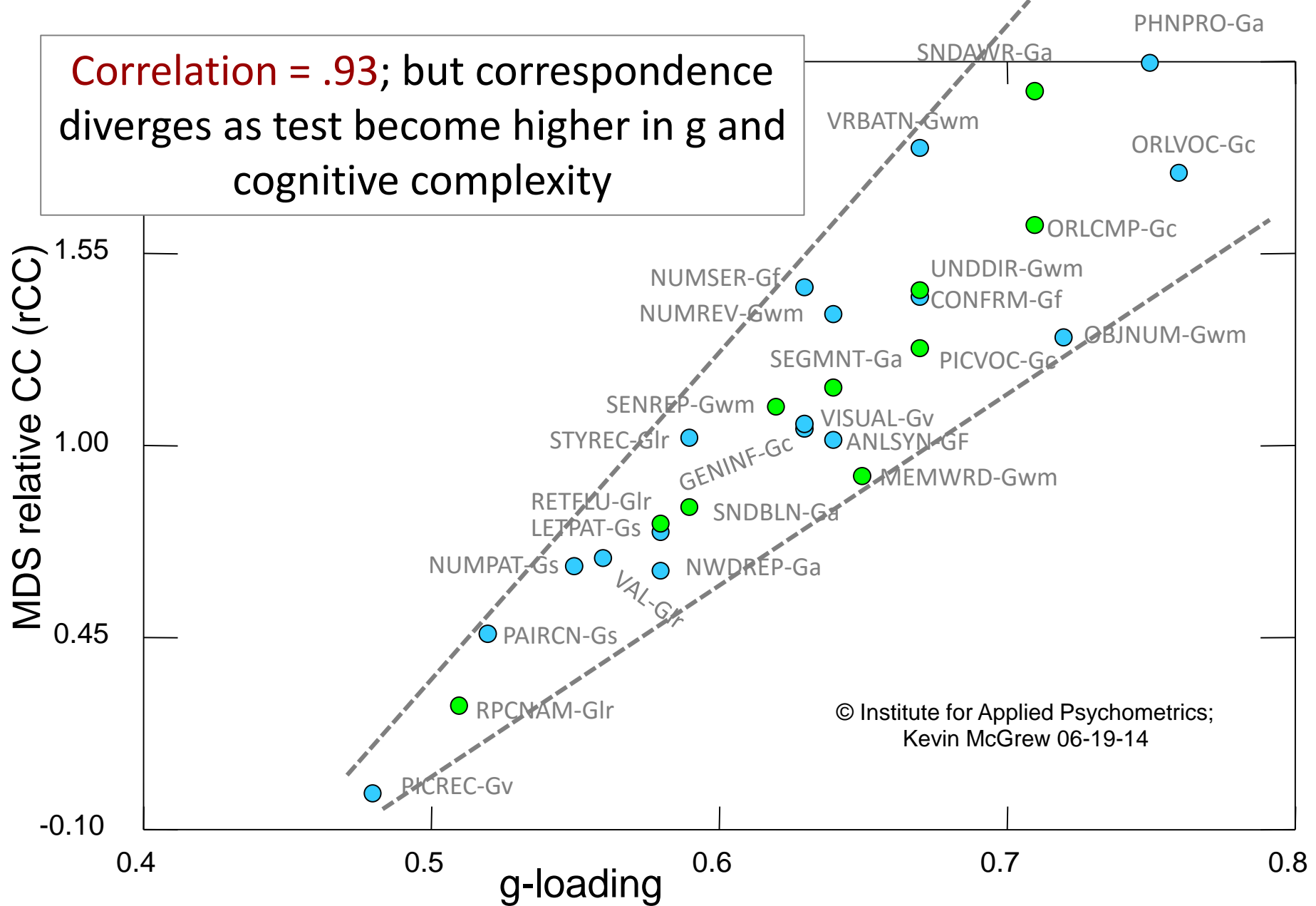
- H = High
- M = Moderate
- M = Low Mod.
- L = Low

# WJ IV and WISC-IV 2D MDS solutions (n=173)





Correlation = .93; but correspondence diverges as test become higher in g and cognitive complexity



© Institute for Applied Psychometrics;  
Kevin McGrew 06-19-14

Relationship between **g-loadings** and MDS-based **relative cognitive complexity (rCC)** for WJ IV COG and OL tests

.93 .63 H .80

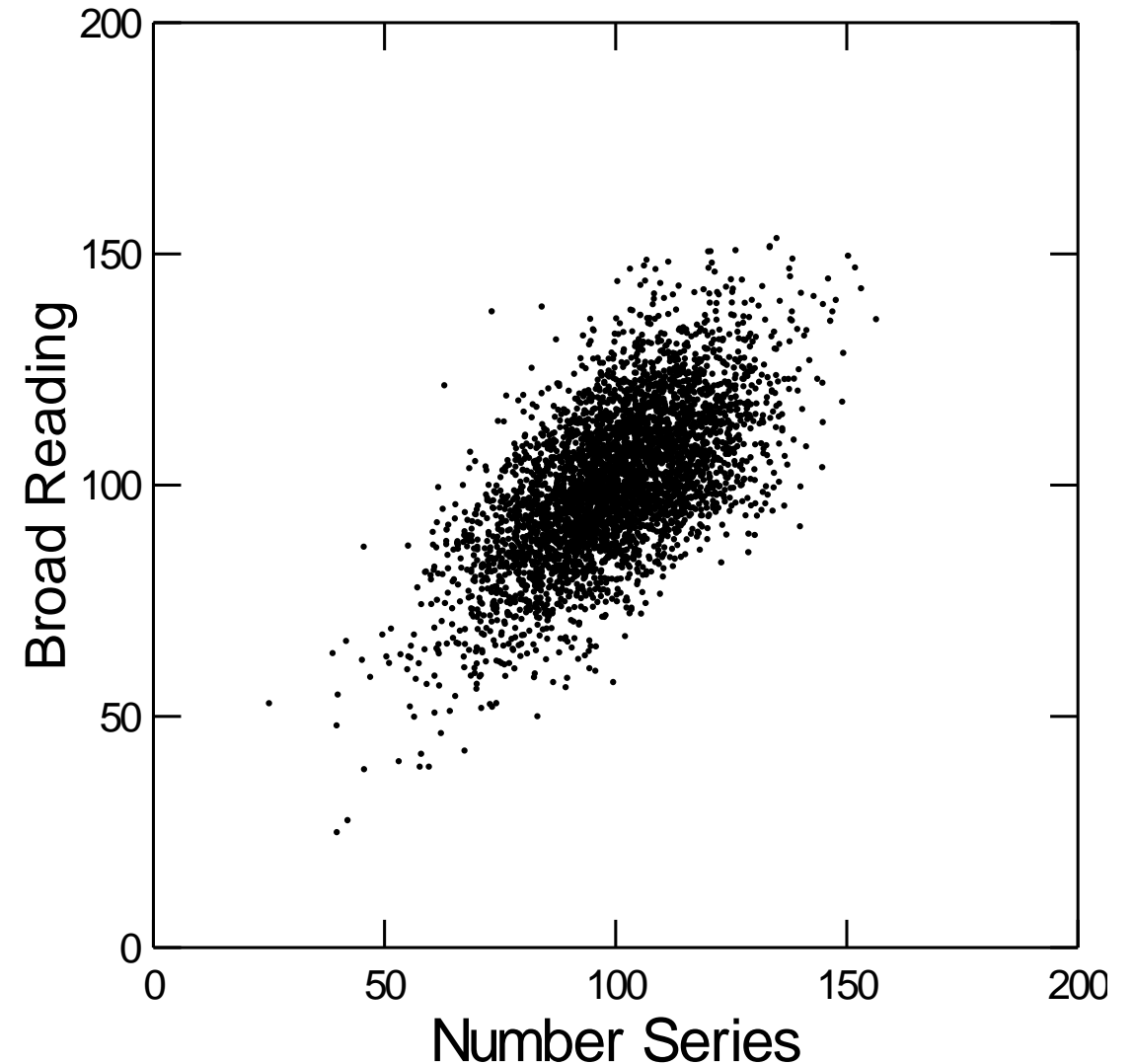
NmSeries

H (RQ) #

.63 .73 .64



Median test correlations  
with R, M, & W  
clusters for ages 6-19  
(not reported in technical  
manual)



For example, correlation of Number Series with  
Broad Reading cluster



## External criterion relations validity

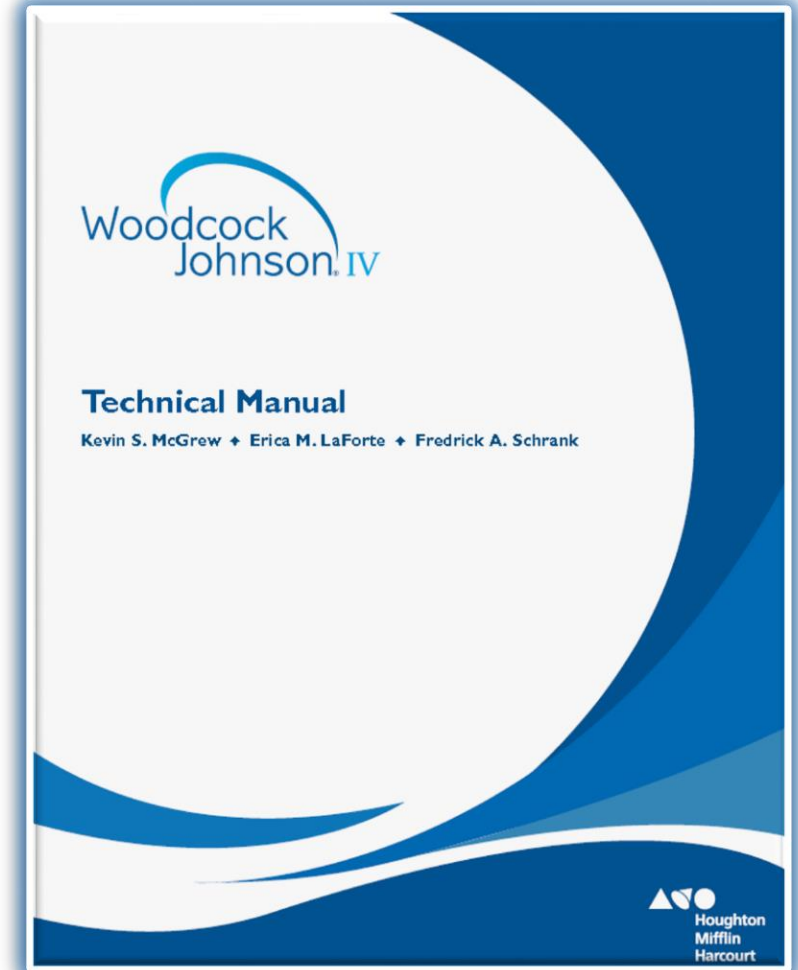
**.93 .63 H .80**

**NmSeries**

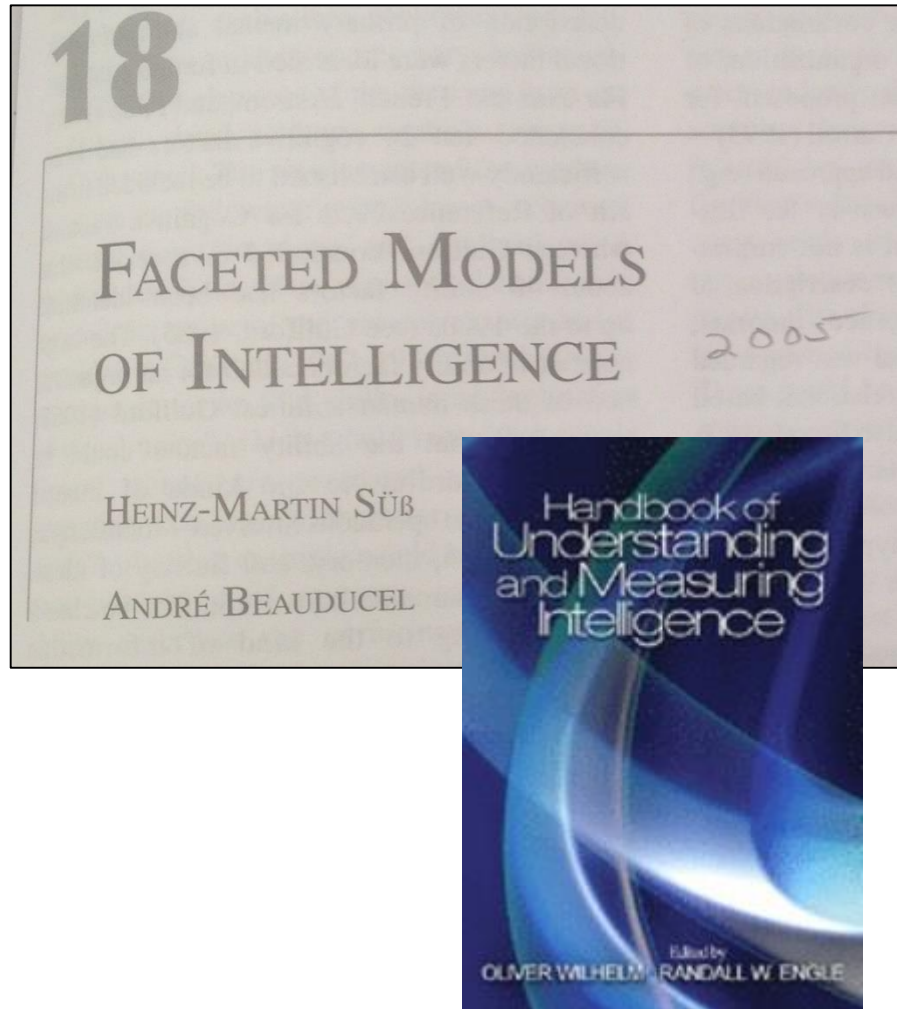
**H (RQ) #**

**.63 .73 .64** ←

Median correlation  
with WJ IV reading,  
math, and written  
language  
achievement clusters  
(ages 6-19)



Auditory has recently been proposed to be added



Faceted models of intelligence

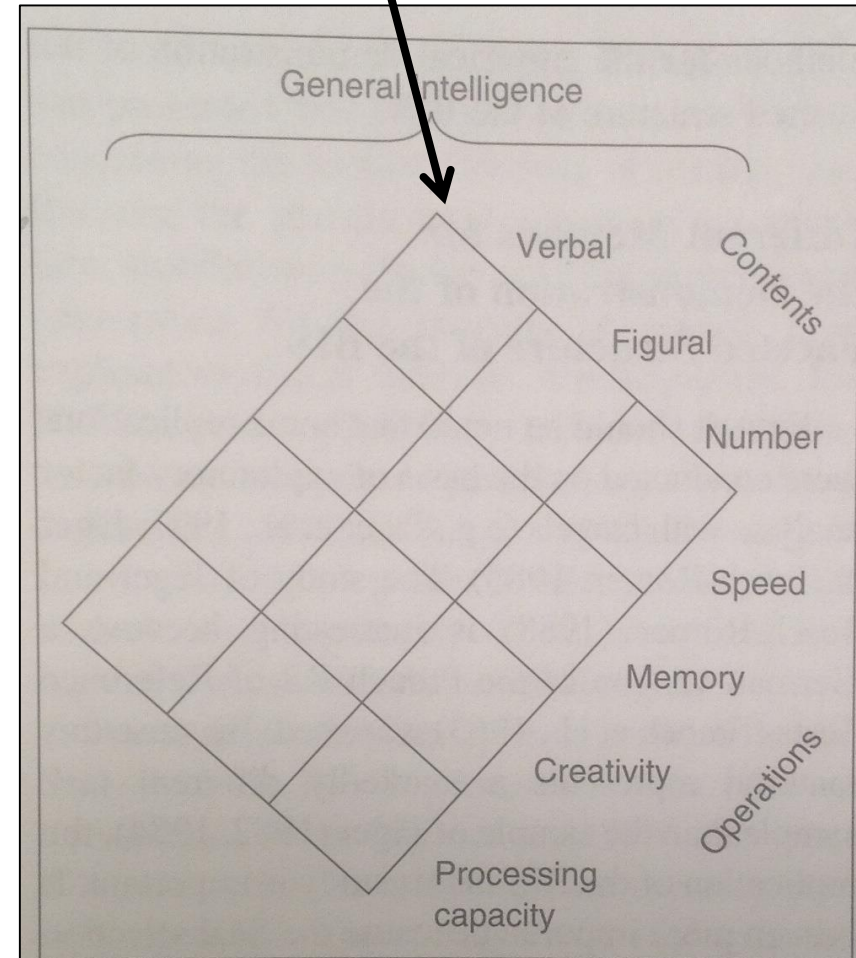


Figure 18.3 The Berlin Model of Intelligence Structure (BIS)

# Fluid and Crystallized Intelligence and the Berlin Model of Intelligence Structure (BIS)

André Beauducel<sup>1</sup> and Martin Kersting<sup>2</sup>



ELSEVIER

*Intelligence* 30 (2002) 261–288



Working-memory capacity explains reasoning ability—and  
a little bit more

Heinz-Martin Süß\*, Klaus Oberauer, Werner W. Wittmann,  
Oliver Wilhelm, Ralf Schulze

# Cognitive **operations** and content **dimensions**

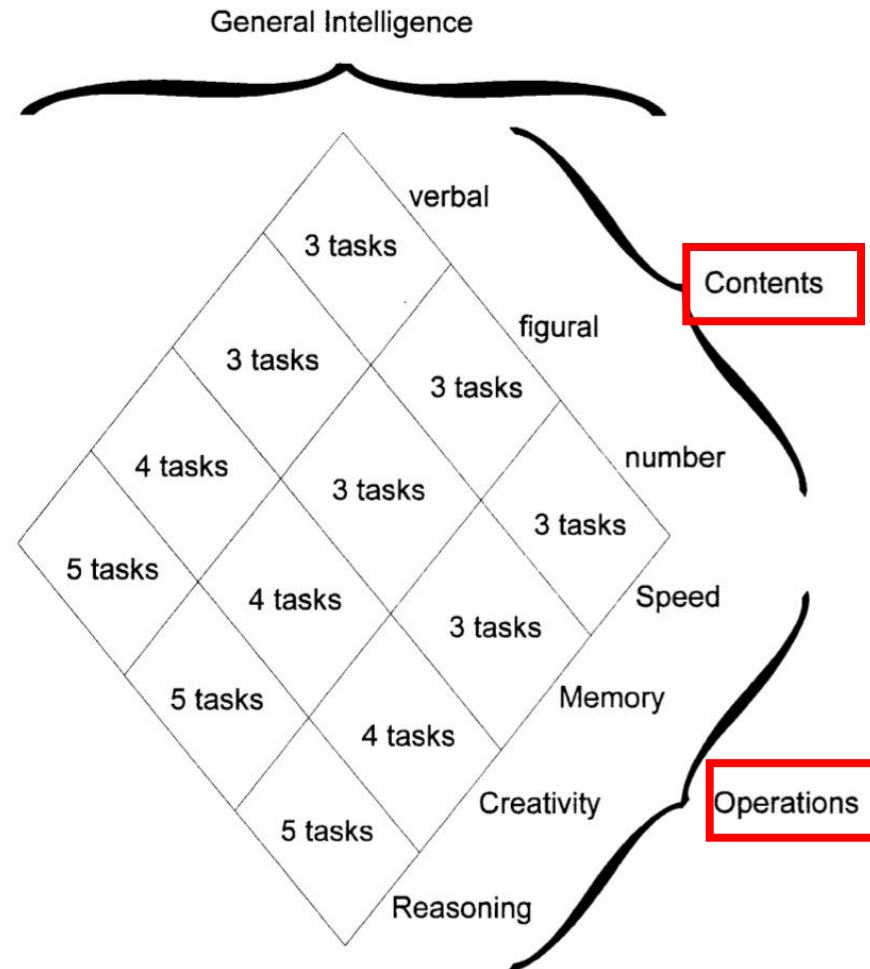


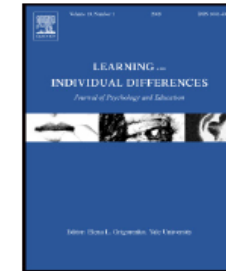
Fig. 1. The BIS. Four functional abilities are cross-classified with three content abilities. General intelligence represents the integral of all operational and content-related abilities, respectively.



Contents lists available at ScienceDirect

# Learning and Individual Differences

journal homepage: [www.elsevier.com/locate/lindif](http://www.elsevier.com/locate/lindif)



## Auditory intelligence: Theoretical considerations and empirical findings



Kristin Conzelmann<sup>a,b,\*</sup>, Heinz-Martin Süß<sup>a</sup>

<sup>a</sup> Department of Psychology I, Psychological Methods, Assessment, and Evaluation Research, Otto-von-Guericke University of Magdeburg, Magdeburg, Germany

<sup>b</sup> Department of Aviation and Space Psychology, DLR German Aerospace Center, Hamburg, Germany

### ARTICLE INFO

#### Article history:

Received 3 May 2014

Received in revised form 15 January 2015

Accepted 28 March 2015

Available online xxxx

#### Keywords:

Auditory intelligence

Academic intelligence

Musical training

BIS model

### ABSTRACT

In the last few years, auditory intellectual abilities have received increased attention in different fields of research. However, most intelligence models have yet to include an auditory factor. This paper aimed to replicate the general auditory factor and examined whether and how the hierarchical and faceted Berlin Intelligence Structure model (BIS; Jäger, 1982) should be extended by adding an auditory dimension. Two studies included 126 students (Study 1) and a heterogeneous group of 175 adults (Study 2). Participants took a broad auditory intelligence test and the BIS test and provided a self-report of musical training. Confirmatory factor analyses revealed two separate auditory content factors: nonverbal and speech. Auditory nonverbal ability was clearly distinct from academic intelligence, whereas auditory speech ability could be completely subsumed under verbal reasoning. We suggest that auditory ability – as represented by auditory nonverbal tests – needs to be added to the BIS as an additional content dimension.



There has been **an explosion of research on auditory abilities** since Carroll's (1993) seminal work (Schneider & McGrew, 2012). A wide-ranging collection of *Ga* characteristics have been related to disorders of reading, speech, and language. For example, ***Ga* abilities are now recognized as playing a pivotal scaffolding role in the development of language and general cognitive abilities** (Conway, Pisoni, & Kronenberger, 2009).



The BIS intelligence  
framework (2016)

Stimulus **Content**



Verbal

**Auditory**

Figural

Numeric

Cognitive Operations

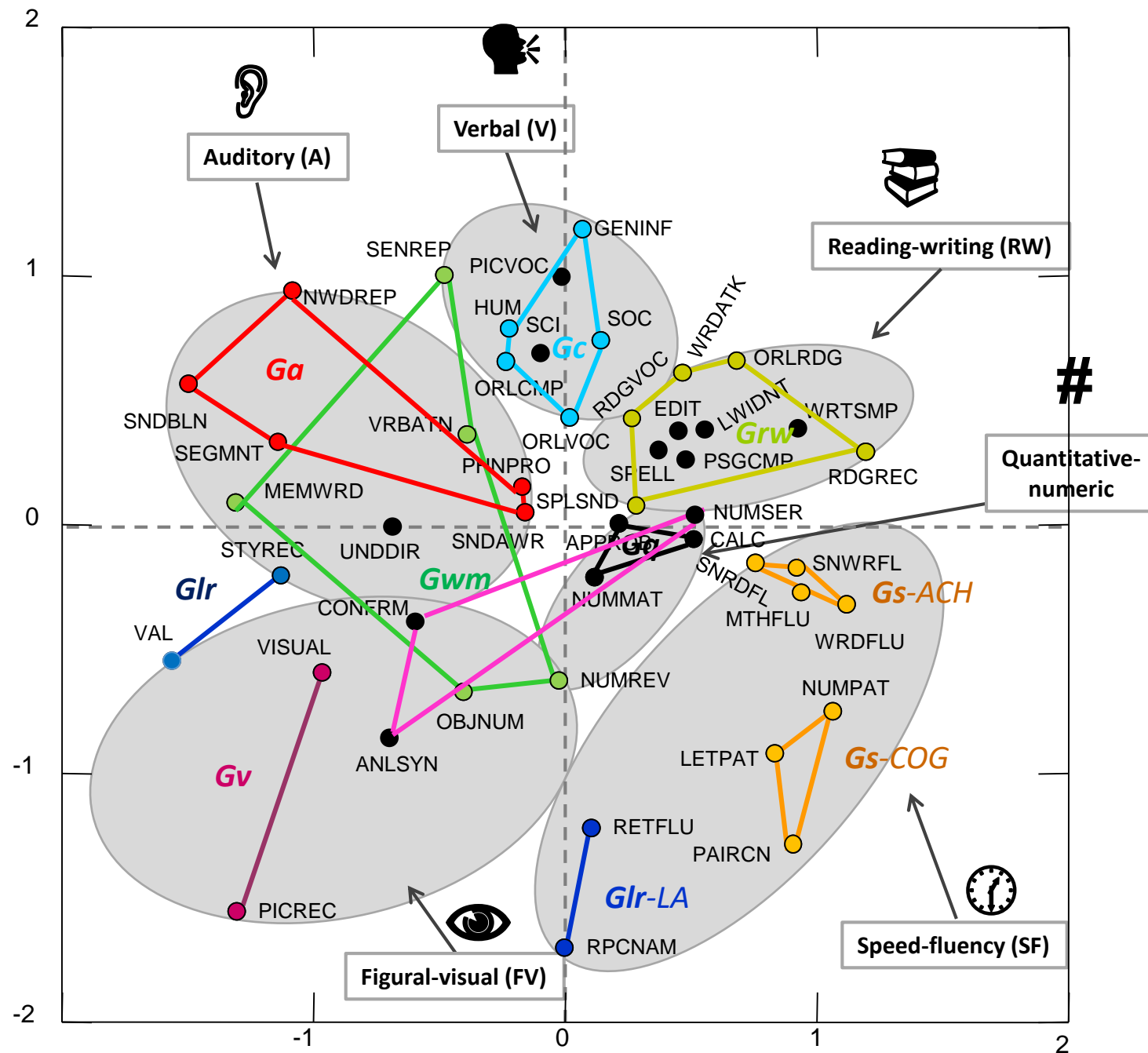
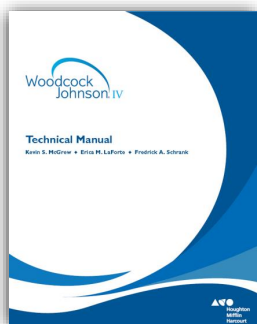
Reasoning

Creativity

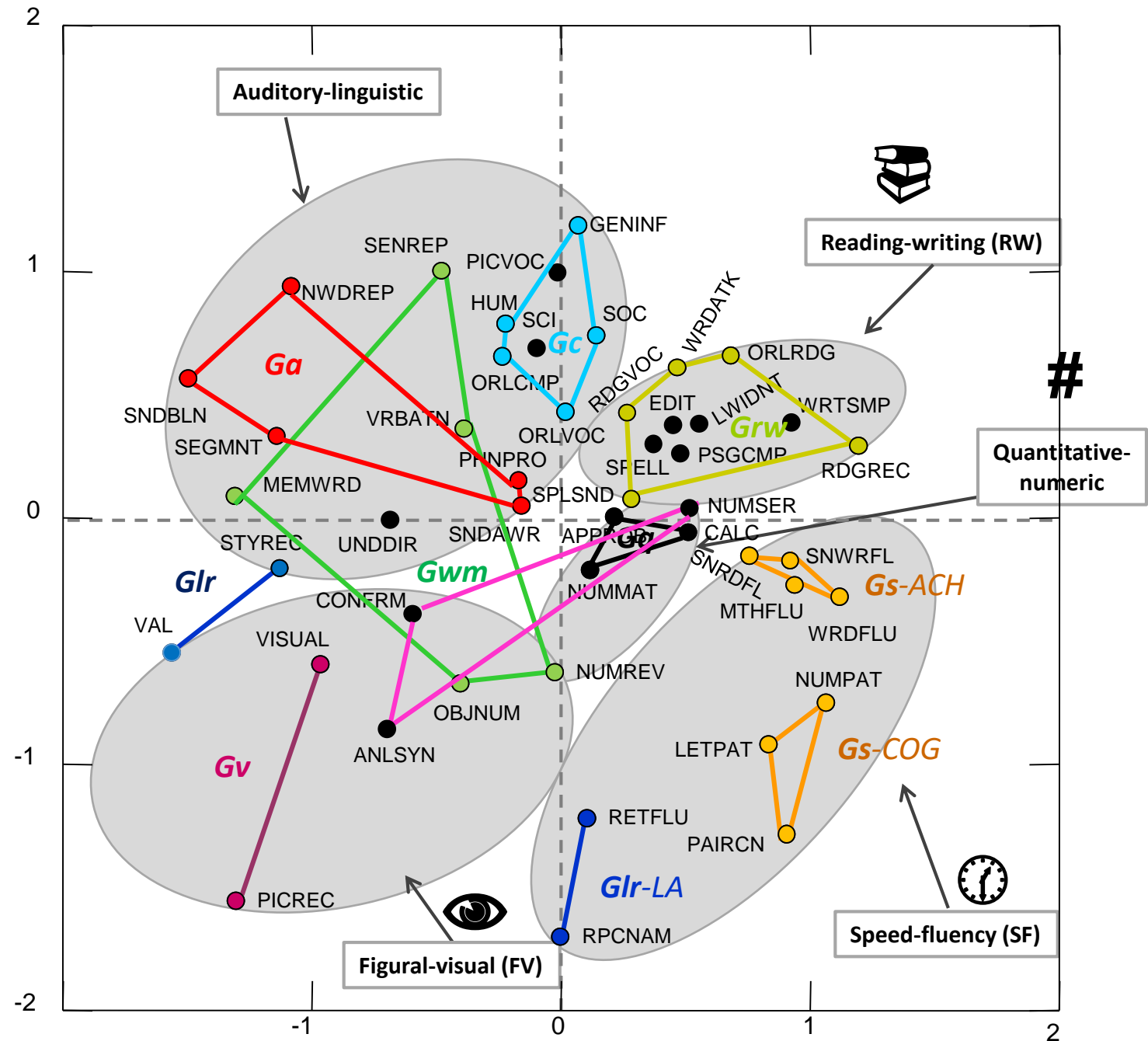
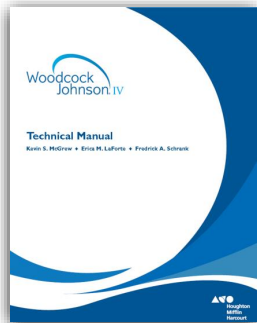
Memory

Speed

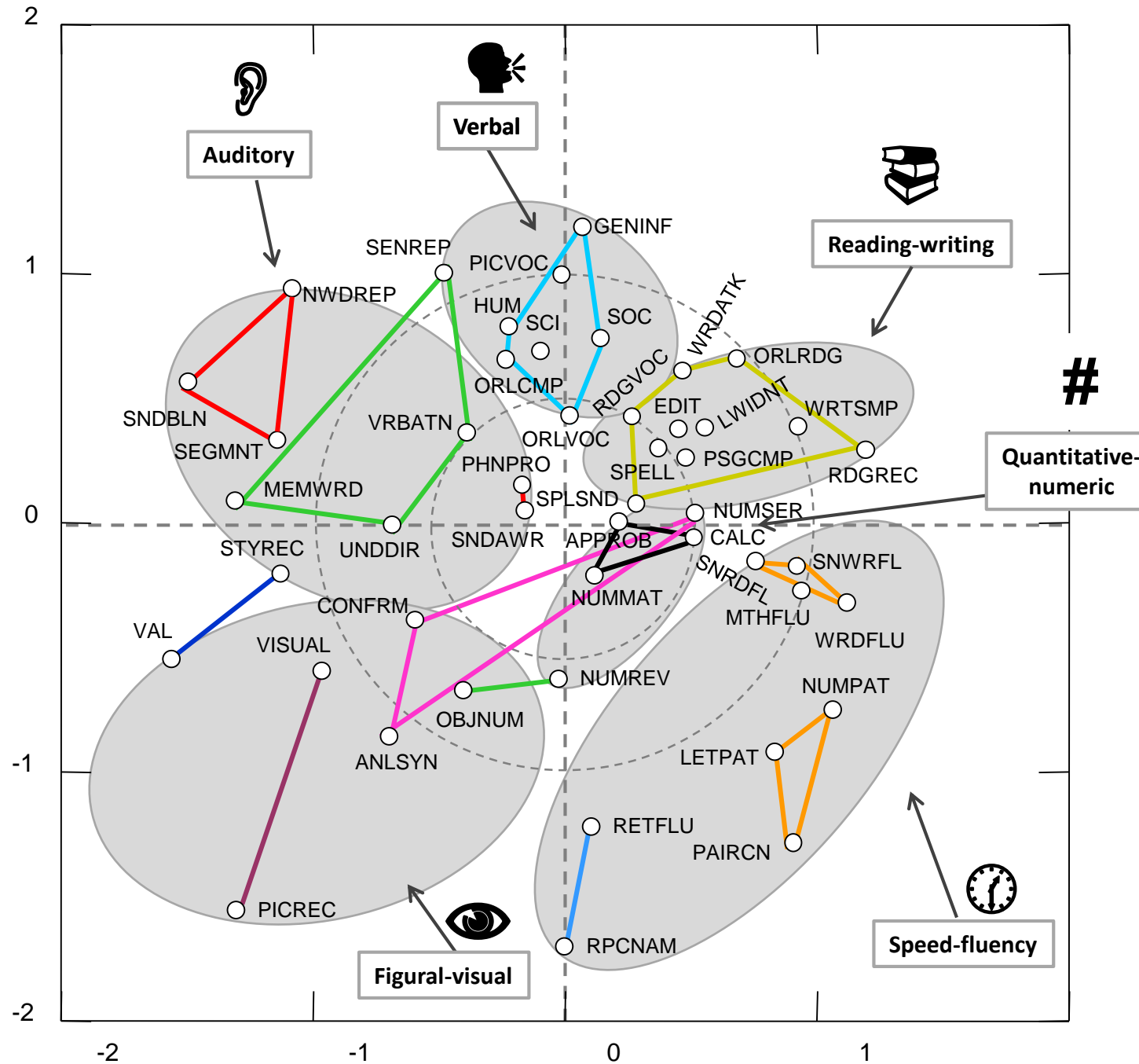
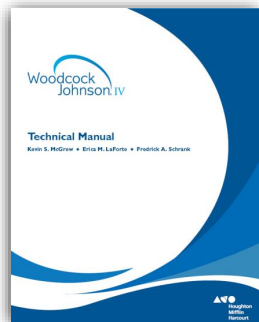

Another  
perspective:  
**BIS framework:**  
The stimulus  
content  
dimension  
  
Ages 6-19



Another  
perspective:  
BIS framework:  
The stimulus  
content  
dimension  
Ages 6-19



# WJ IV test 2D MDS (Ages 6 to 19; n = 4,082)



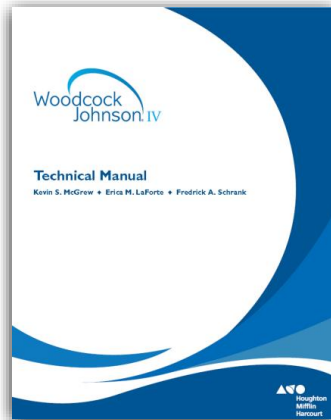
.93 .63 H .80

NmSeries

H (RQ) #

.63 .73 .64

← BIS content/stimulus characteristic



The BIS intelligence framework (2016)

Stimulus Content

Cognitive Operations

Reasoning

Creativity

Memory

Speed



Verbal



Auditory






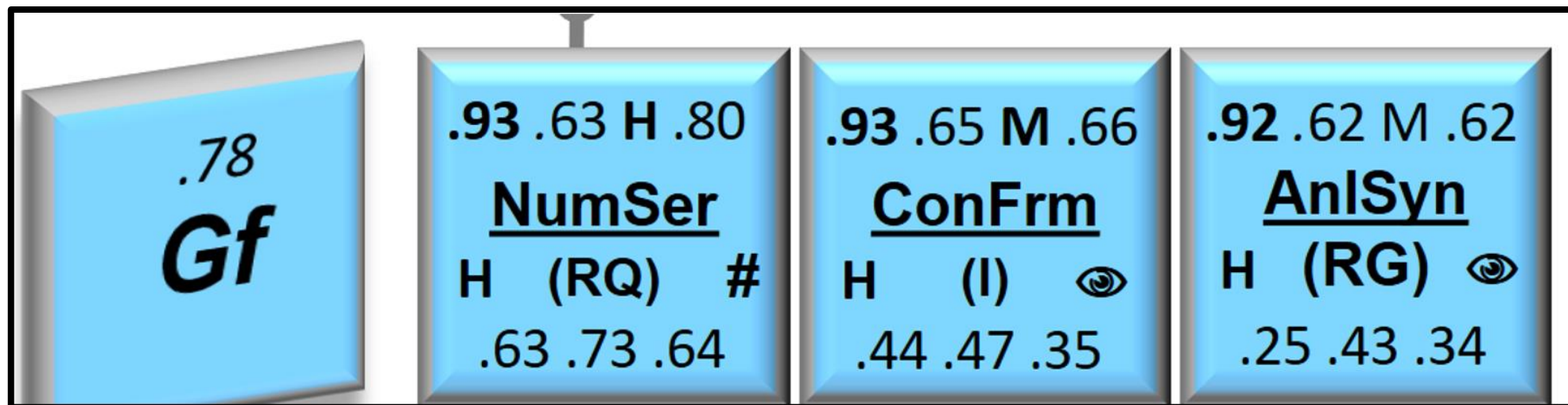
Figural



Numeric

	Verbal	Auditory	Figural	Numeric
Reasoning				
Creativity				
Memory				
Speed				

The BIS intelligence framework (2016)		<u>Stimulus Content</u>			
					#
		Verbal	Auditory	Figural	Numeric
<u>Cognitive Operations</u>	Reasoning				
	Creativity				
	Memory				
	Speed				





# How to evaluate the **unusualness (base rate)** of WJ IV cluster or test score differences

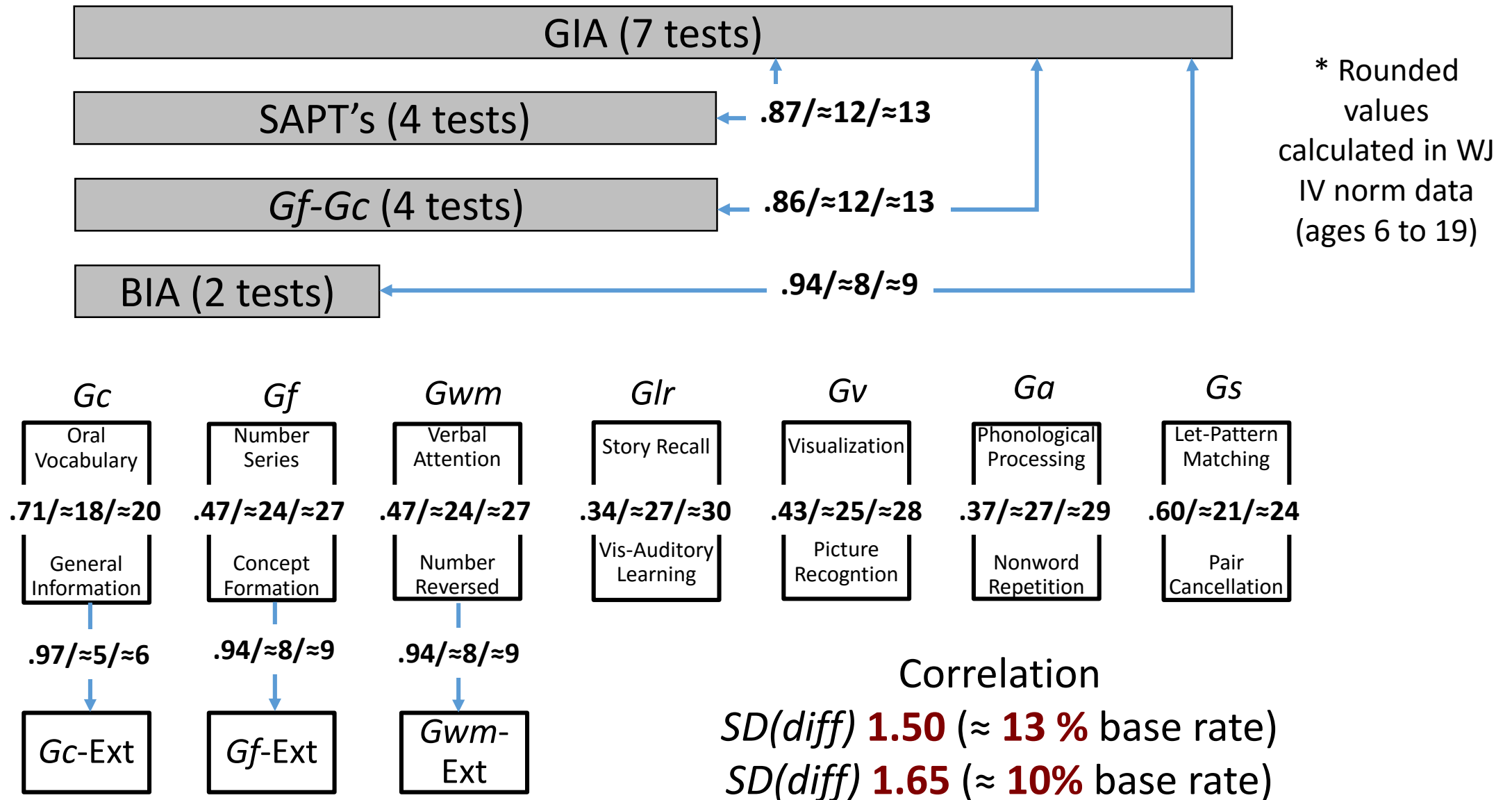
Kevin McGrew, PhD.  
Educational/School Psychologist  
Director  
Institute for Applied Psychometrics (IAP)

---



It's a **pleasure** when you use the  
correct **measure**

# Select WJ IV COG cluster/test score significance values (ages 6-19) \*





Domain-Independent Capacities*				Acquired Knowledge Systems*												Sensory-Motor Domain-Specific Abilities*											
				Ideas						Words						Figures											
<b>Gf</b>	I	RG	RQ																								
<b>Gwm</b>	WM	MS	AC																								
<b>Glr</b>	MA	MM	M6	FI	FA	FE	SP	F0	NA	FW	LA	FF	FX														
<b>Gs</b>	P	N	R9																								
<b>Gt</b>	R1	R2	R4	R7	IT																						
<b>Gps</b>	R3	PT	MT																								
<b>Gc</b>	LD	VL	K0	LS	CM	MY																					
<b>Gkn</b>	KL	K1	K2	A5	MK	KF	LP	BC																			
<b>Grw</b>	V	RD	RC	RS	WA	SG	EU	WS																			
<b>Gq</b>	KM	A3																									
<b>Gv</b>	Vz	SR	MV	CS	SS	CF	IM	PI	LE	IL	PN																
<b>Ga</b>	PC	US	UM	U8	UR	U1 U9	UP	UL																			
<b>Gh</b>																											
<b>Go</b>	OM																										
				<b>Sensory</b> (No well supported cognitive Gh & Gk narrow abilities have been identified)						<b>Motor</b>																	
				<b>Gk</b>																							
				<b>Gp</b>						PI P2 P3 P4 P6 P7 P8 A1																	

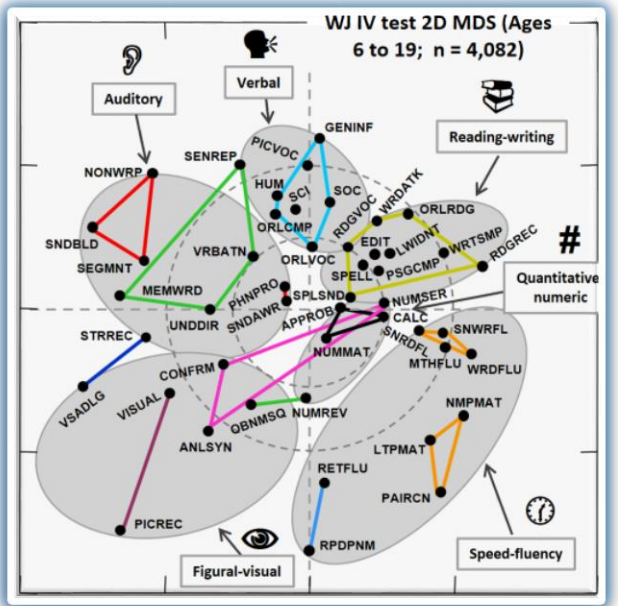
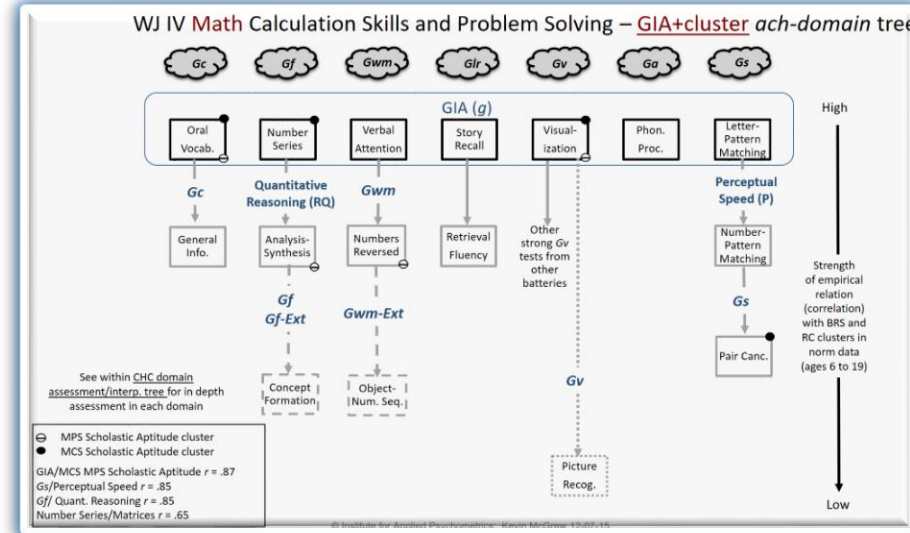
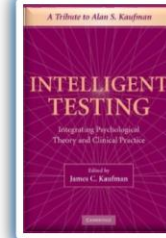
Broad ability

Narrow ability

*Glr*-Learning efficiency

*Glr*-Retrieval fluency

\* Three major domain categories based on Schneider & McGrew (2012)



The WJ IV Cattell-Horn-Carroll (CHC) periodic table of COG/OL test elements: Ages 6 to 19

<b>Gf</b>	<b>78</b>	<b>.93</b>	<b>.63</b>	<b>H</b>	<b>.80</b>	<b>.93</b>	<b>.65</b>	<b>M</b>	<b>.66</b>	<b>.92</b>	<b>.62</b>	<b>M</b>	<b>.62</b>	<b>.32</b>	<b>Grw</b>		
		<b>Number</b>	<b>ConForm</b>	<b>H (R)</b>	<b>AnISyn</b>	<b>H (R)</b>	<b>AnISyn</b>	<b>H (R)</b>	<b>AnISyn</b>	<b>H (R)</b>	<b>AnISyn</b>	<b>H (R)</b>	<b>AnISyn</b>	<b>H (R)</b>	<b>ACH</b>		
		63.73.64	44.47.35		25.43.34												
<b>Gwm</b>	<b>75</b>	<b>.86</b>	<b>.66</b>	<b>H</b>	<b>.76</b>	<b>.86</b>	<b>.62</b>	<b>M</b>	<b>.36</b>	<b>.89</b>	<b>.70</b>	<b>M</b>	<b>.74</b>	<b>.82</b>	<b>.63</b>	<b>M</b>	<b>.58</b>
		<b>VbAttn</b>	<b>NumRep</b>	<b>H (WMAIC)</b>	<b>QbNSyn</b>	<b>H (WMAIC)</b>	<b>QbNSyn</b>	<b>H (WMAIC)</b>	<b>QbNSyn</b>	<b>H (WMAIC)</b>	<b>QbNSyn</b>	<b>H (WMAIC)</b>	<b>QbNSyn</b>	<b>H (WMAIC)</b>	<b>QbNSyn</b>	<b>H (WMAIC)</b>	<b>QbNSyn</b>
		42.42.50	41.44.42		32.42.35												
<b>Glr</b>	<b>71</b>	<b>.93</b>	<b>.59</b>	<b>M</b>	<b>.54</b>	<b>.93</b>	<b>.59</b>	<b>M</b>	<b>.54</b>	<b>.80</b>	<b>.57</b>	<b>M</b>	<b>.48</b>	<b>.80</b>	<b>.57</b>	<b>M</b>	<b>.48</b>
		<b>StrRec</b>	<b>VsAdLg</b>	<b>H (MA)</b>	<b>H (MA)</b>												
		31.39.42	30.29.30														
<b>Gs</b>	<b>60</b>	<b>.91</b>	<b>.56</b>	<b>M</b>	<b>.77</b>	<b>.91</b>	<b>.56</b>	<b>M</b>	<b>.77</b>	<b>.89</b>	<b>.49</b>	<b>L</b>	<b>.48</b>	<b>.80</b>	<b>.57</b>	<b>M</b>	<b>.48</b>
		<b>LIPMat</b>	<b>PairCn</b>	<b>H (PIAC)</b>	<b>NmPMat</b>	<b>H (PIAC)</b>	<b>NmPMat</b>	<b>H (PIAC)</b>	<b>NmPMat</b>	<b>H (PIAC)</b>	<b>NmPMat</b>	<b>H (PIAC)</b>	<b>NmPMat</b>	<b>H (PIAC)</b>	<b>NmPMat</b>	<b>H (PIAC)</b>	<b>NmPMat</b>
		46.55.48	30.44.28		53.57.61												
<b>Gc</b>	<b>71</b>	<b>.89</b>	<b>.75</b>	<b>H</b>	<b>.86</b>	<b>.89</b>	<b>.75</b>	<b>H</b>	<b>.86</b>	<b>.84</b>	<b>.59</b>	<b>M</b>	<b>.78</b>	<b>.81</b>	<b>.65</b>	<b>M</b>	<b>.82</b>
		<b>OrIVoc</b>	<b>GenInf</b>	<b>H (RQ)</b>	<b>H (RQ)</b>												
		56.51.49	35.38.24														
<b>Gv</b>	<b>66</b>	<b>.83</b>	<b>.60</b>	<b>M</b>	<b>.70</b>	<b>.83</b>	<b>.60</b>	<b>M</b>	<b>.70</b>	<b>.71</b>	<b>.47</b>	<b>L</b>	<b>.50</b>	<b>.80</b>	<b>.58</b>	<b>M</b>	<b>.18</b>
		<b>Visual</b>	<b>PicRec</b>	<b>H (RQ)</b>	<b>H (RQ)</b>												
		38.49.38	36.25.36														
<b>Ga</b>	<b>76</b>	<b>.83</b>	<b>.73</b>	<b>H</b>	<b>.59</b>	<b>.83</b>	<b>.73</b>	<b>H</b>	<b>.59</b>	<b>.80</b>	<b>.58</b>	<b>M</b>	<b>.18</b>	<b>.80</b>	<b>.58</b>	<b>M</b>	<b>.18</b>
		<b>PhnPro</b>	<b>NmWRg</b>	<b>H (PCI)</b>	<b>NmWRg</b>	<b>H (PCI)</b>	<b>NmWRg</b>	<b>H (PCI)</b>	<b>NmWRg</b>	<b>H (PCI)</b>	<b>NmWRg</b>	<b>H (PCI)</b>	<b>NmWRg</b>	<b>H (PCI)</b>	<b>NmWRg</b>	<b>H (PCI)</b>	<b>NmWRg</b>
		52.51.53	34.21.41														

GIA cluster tests CHC COG cluster tests

The MindHub

Additional resources available at

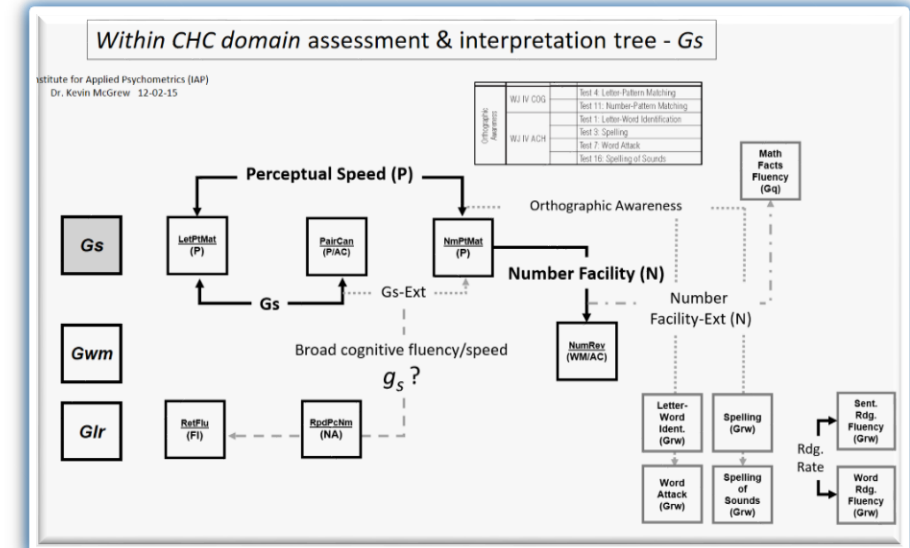
© Institute for Applied Psychology (IAP)

g-loading\* Relative degree of cognitive complexity  
High Medium Low  
(M/M) Low  
Reliability\* Test name abbreviation  
Specificity\* CHC narrow ability code  
BIS content characteristic  
Median correlation with WJ IV Rdg, Math & Writing clusters

[\* high, med., low – as per Kaufman (1979) & McGrew & Flanagan (1998)]

Information based on analysis of the WJ IV G-19 year old norm sample  
(Secondary CHC factor loading)

- Reliability:** The degree to which a test score is free from errors of measurement. Score precision.
- Specificity:** The portion of test score variance that is reliable and unique to the test.
- g-loading:** A test's loading on the first unrotated factor or component in factor or principal component analysis.
- Cognitive complexity:** The relative degree of cognitive information processing load (e.g., resource demands on working memory, attentional control, executive functions) demanded by a test.
- CHC narrow ability code:** (see back)
  - Verbal
  - Quant-numeric
  - Auditory
  - Figural-visual



School Psychology Quarterly, Vol. 9, No. 3, 1994, pp. 209-221



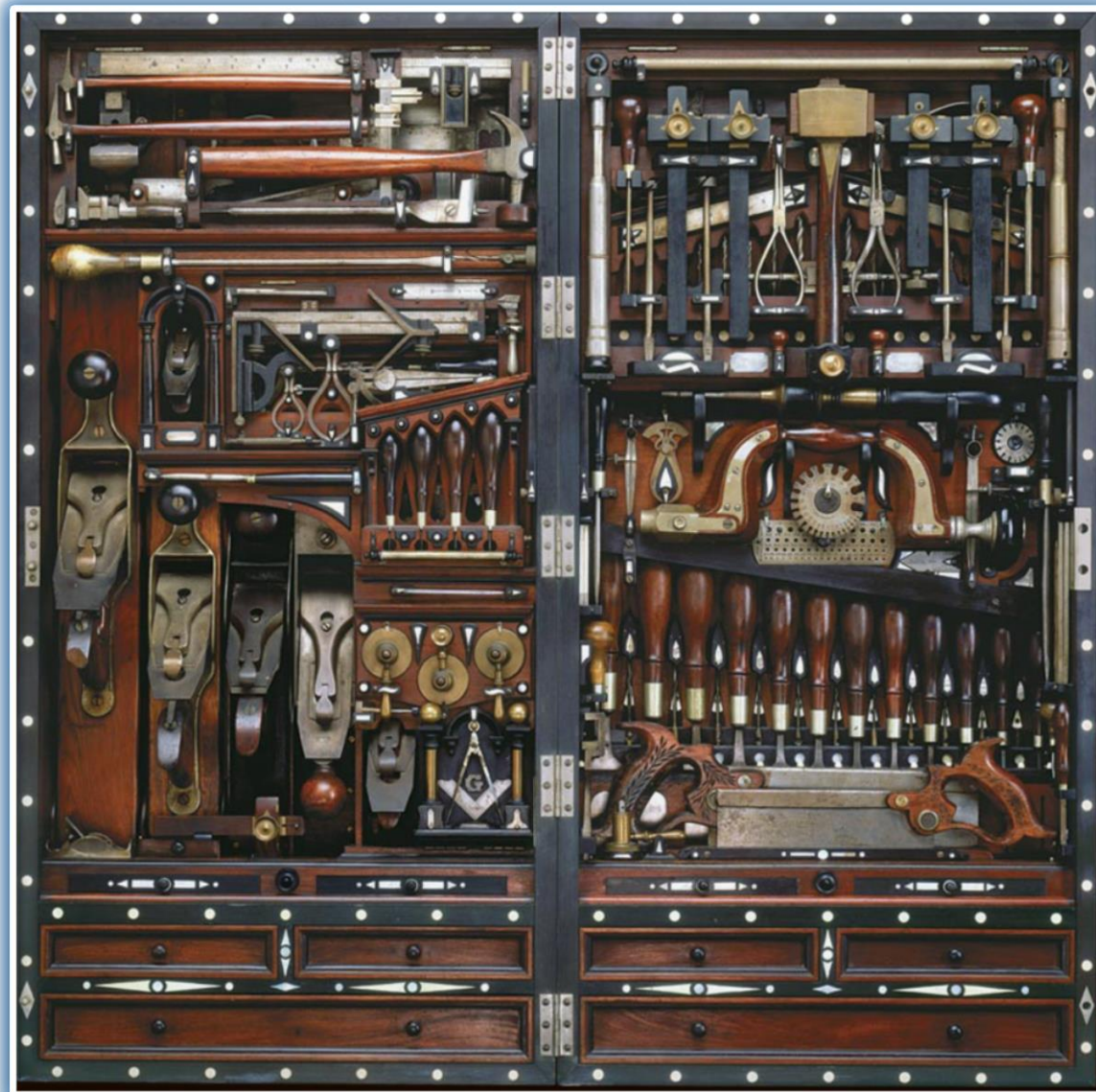
## **Intelligence *is* Important, Intelligence *is* Complex**

Timothy Z. Keith  
*Alfred University*

....and....."intelligent" intelligent testing is complex....and important



# We are the instrument !!!!



In the remainder of this presentation I will **model** “**intelligent**” **intelligence test interpretation** for the WJ IV COG+OL

Will provide you with some **aids and templates** to organize thinking and test data

**Not** to be used as cookbooks