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Cultural Measurement Equivalence

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In cross-cultural research, understanding and interpreting the influence of varying individual perspectives on psychosocial scales and standardized tests is the subject of much discussion (Dana, 2000; Irvine & Carroll, 1980; Malpass & Poortinga, 1986; Trimble, Lonner, & Boucher, 1983; van de Vijver & Leung, 1997). Many cross-cultural psychologists further contend, “comparing elements from differing societies leads to inadmissible distortions of reality” (Kobben, 1970, p. 584). Comparative research, on ethnic and cultural levels, is burdened with these concerns of incomparability. Often, due to the frequency with which a scale is used, many have assumed the metric is equal between groups (Kankaraš & Moors, 2010). These assumptions fuel findings that may be not only unjustified but also invalid. Sensitivity toward issues of cultural measurement equivalence has not been thoroughly cultivated throughout psychological discourse. By addressing these matters of cultural equivalence, we may dispel inaccurate notions regarding cultural research.

Cultural equivalence refers “to the problem of whether, on the basis of measurements and observations, inferences in terms of some common psychological dimension can be made in different groups of subjects” (Poortinga, 1983, p. 238). Central to the concerns of equivalence is the fundamental precept that comparisons between ethnocultural groups require that common, if not identical, measurement and assessment processes exist; proposed in more extreme terms, a universal process must be developed to demonstrate and assess ethnocultural group comparability.

Cultural measurement equivalence is similar to item bias. Item bias deals with the similarity or dissimilarity of scale outcomes across ethnic and cultural groups and thus is concerned with “the presence or absence of

validity-threatening factors" (van de Vijver, 2000, p. 89). Item bias, according to Byrne and Watkins (2003, p. 174), "refers to the presence of nuisance factors (and) equivalence refers to the implication of bias on score comparability." In drawing a distinction between the two constructs, van de Vijver and Poortinga (1997) asserted that item bias is associated with construct, instrument, and method bias; item bias differs from cultural measurement equivalence because the latter deals more with the outcomes than the factors that influence validity (van de Vijver & Tanzer, 1997).

Measurement equivalence, specifically, is a rather diverse concept with more than 50 terms captured within its breadth (Johnson, 1998). In relation to analysis of cross-cultural measurement equivalence, researchers typically agree upon the following five primary concepts: functional; conceptual; stimulus; linguistic; and metric equivalence. These five items and their relation to cultural concerns should be considered guidelines for evaluating cultural measurement equivalence.

In accordance with these five items, and specifically functional equivalence, the measured behaviors must serve a similar function between groups to "pre-exist as naturally occurring phenomena" (Berry, 1969, p. 122). Conceptual and stimulus equivalence exists when the meaning of stimuli, concepts, methods, etc., are similar or identical for the culturally different respondents. Linguistic equivalence is similar although the emphasis is placed on the linguistic accuracy of item translations. Metric equivalence or scale equivalence (Poortinga, 1975), probably the most technical and the most difficult to evaluate, "exists when the psychometric properties of two (or more) sets of data from two (or more) cultural groups exhibit essentially the same coherence or structure" (Berry, 1980, p. 10). Although other items have been suggested to discuss matters of equivalence, these five items have received the most attention in cross-cultural research.

Of the five equivalence types, metric or scalar has received the least empirical scrutiny, perhaps because it is the most technical

and/or poorly understood. However, for the psychometrician it may be the most important concern. Prior to administration, a measure must be validated within each ethnic or cultural population it is proposed to measure; then, and only then, can it be used between two or more groups. For example, the use of forced-choice scale alternatives laid out in a linear manner may not fit with the cognitive and evaluative preferences of certain cultural groups; a Likert-type format may work for one group but not for another. Thus the researcher must find a common metric or scalar to pursue comparative measurement studies.

Use of conventional scaling procedures in cultural comparative research has introduced a number of methodological problems, especially in the use of a structured response format (Johnson, 1998). Mounting ethnographic evidence points to the following problems. First, researchers tacitly, and perhaps incorrectly, assume that the numeric intervals between choice alternatives on the continuum are equal and can be assigned an integer value. Second, the number of choice alternatives is presumed, perhaps also incorrectly, to represent the full range of categories that an individual would use to evaluate an item. Third, the dimensions of the scale items may not truly be comparable between cultural groups. Finally, the effects and the outcomes of the categorization process, difficult to define in any group, may be confounded by the possibility that not all cultural groups respond to stimuli in a linear manner.

Response styles of culturally different respondents create problems for scale and questionnaire construction and use. Through years of field research, Trimble found that traditional Alaska Eskimos (Inuit), certain elderly from the Iroquois Nations in northern New York, first generation Koreans and second generation Korean-Americans in southern California have difficulty responding to items that are accompanied with multiple choice alternatives set in fixed, ordered, Likert-type formats. Each of these ethnic and cultural populations expressed concern over these kinds of research procedures. For example, samples

of rural Chinese residing in the southeastern area of the United States preferred to use three categories to evaluate test and survey items. For the items with "yes" and "no" choice alternatives many respondents chose not to respond. According to one informant, a "no response" to this choice format could mean "yes" but not "no." Traditionally-oriented Sioux (Lakota) American Indian children from two reservations in South Dakota were reluctant to complete certain questionnaire items because they wanted first to discuss their choices with others, especially family members.

Choices required by tests and questionnaires are difficult to make in the absence of some perceived consensus – children are taught to respect the knowledge and wisdom of the community and, therefore, one should not act independently. Often respondents will offer their own interpretations that don't necessarily fit the framework provided for the task. Other illustrations and examples could be provided; however, on the basis of these and other observations several points emerge: 1) Not all cultural groups judge, evaluate, and assess stimuli in a linear manner; 2) The number of salient choice options can vary from individual to individual both within and between societal groups; 3) Responses are difficult for some because they don't yet understand what the collective will accept; 4) The conventional psychometric format common to paper and pencil tests and instruments may not work in all cultural and ethnic groups; and 5) The need to capture information through a paper and pencil approach may be inconsistent and unrelated to *emic* styles of information sharing (Trimble & Lonner, 1993).

A number of cross-cultural researchers and psychometricians have put forth a variety of interesting statistical algorithms for assessing the presence of forms of cultural equivalence and culturally bound item bias (Allen & Walsh, 2000). To assess metric equivalence, for example, some researchers have analyzed scales or instruments with principal components or factor analysis. If the structural dimensions of instruments resemble one another,

presumably the scales are equivalent across groups. Strength of the factor-based scales for the respective groups may serve as partial criteria. Factor solutions have been expanded to include congruence coefficients and related manipulations to isolate the nature of the equivalence. Windle, Iwawaki, and Lerner (1987) and Nishimoto (1986), for example, used factor solutions to examine the metric equivalence of personality scales administered to Asian and non-Asian populations. In both studies the factor solutions did not differ. However, the item composition and thus the factor meanings did vary.

Use of factor analysis in psychometric research and testing equivalence is not without criticism (Carter, 1996; Helms, 1996; Kline, 1983; Malhotra & Sharma, 2008). The full range of arguments is multifold and, in some instances compelling, and they will not be included in this entry. Nonetheless, three critical points should be made: 1) factor solutions rarely fit the data completely in cultural-comparative research due, for the most part, to non-random measurement and translation error and unspecified conceptual contributions to the obtained weights; 2) factor solutions are suggestive; and 3) data should be, at a minimum, at the interval level. Most scales and inventories use binary- or ordinal-level response categories with presumed equality of the numerical distances between the alternatives; distortions can exist, thus eroding the strength of the correlation coefficients. Kim and Mueller (1978) pointed out that variables with limited categories are not compatible with factor analytic models. Most forceful of the critics though is Duncan (1984, p. 207) who considered factor analysis a failure in the measurement field because, among other points, "we ... see nothing more than a 'correlational' science of 'inexact constructs.'"

A few cross-cultural researchers recommend use of covariance structural modeling (e.g., LISREL, EQS) or variants of confirmatory factor analysis (CFA) to test for equivalence (Poortinga, 1983; van de Vijver & Leung, 1997). There are limitations associated with the use of

exploratory factor models; the advances in confirmatory factor modeling, however, appear to overcome these limitations. For example, in comparing metric and scalar equivalence of personality traits across Chinese, Greek, and U.S. samples, over half of the items from the Big Five factors were found to function differently across the samples (Nye, Roberts, Saucier, & Zhou, 2008). Although the general personality traits may exist across cultures, the manner by which they are described is likely to vary based on cultural context. By using SEM in accordance with CFA, Byrne and van de Vijver (2010) found that not only may scale items be the source of bias, but also certain countries may not fit within the research model. CFA is one alternative to exploratory factor analysis.

The use of item response theory (IRT) to assess cultural equivalence and item bias has also produced interesting findings. Ellis, Becker and Kimmel (1993) and Ellis (1995) used IRT to test the equivalence of the Trier Personality Inventory originally developed for use in (then) West Germany. The differential item functioning (DIF) index showed that subsequent retranslations of original inventory items reduced the overall content and reduced error due to translations. The lines of research show promise for using IRT to assess equivalence of measures, scales, and tests.

In a comparison of CFA, IRT, and latent class approaches, Kankaraš, Vermunt, and Moors (2011) found traditional CFA was more likely to wrongly indicate inequivalence given certain parameters. Kankaraš & Moors (2010) recommended the use of multi-group latent class analysis (MLCA). In MLCA, the variables are viewed as categorical rather than continuous. This method is more suited for items in a Likert scale as it allows the use of ordinal items. In their study, comparing solidarity attitudes among Europeans, Kankaraš and Moors (2009) found that when taking into account issues of measurement inequivalence, the European countries are not as divided as other models have suggested.

Another creative statistical technique for assessing instrument equivalence has been proposed by van de Vijver and Leung (1997).

The approach calls for use of a two-way analysis of variance where each item in a scale is examined for item bias. Score groups are formed based on the aggregate item summations on the scale. These groups then are analyzed with an analysis of variance statistic. Byrne and Watkins (2003) used the procedure with two culturally different groups to assess measurement invariance among items from a self-description questionnaire; their results indicated that there was evidence of measurement and structural invariance among four subscales of the full scales. Use of analysis of covariance and analysis of variance techniques should be used with caution as Byrne and Watkins (2003, p. 173) emphasize, "(that) the fact remains that neither can fully explain all incidences of noninvariance."

A growing number of researchers recommend a form of latent trait analysis, especially when the scale contains binary scores. The Rasch (1960) one-parameter model can be used; however, Irvine and Carroll (1980, p. 210) reminded us that the model should be used "along-side traditional models as part of another method of looking at the same data." Rasch modeling and analysis is a powerful alternative to factor analysis and analysis of variance in assessing the properties of tests and psychosocial scales. According to Schumacker and Linacre (1996, p. 470), "factor analysis is confused by ordinal variables and highly correlated factors. Rasch analysis excels at constructing linearity out of ordinality and at aiding the identification of the core construct inside a fog of collinearity." Moreover, factor analysis is aggregate based, thus misfitting individuals are a problem and cannot be identified. Rasch modeling provides a fit for each respondent to the model statistics as well as plot respondents and items on the same real number line (scale) so that one can visualize if the cases have higher or lower self-esteem than the items are capable of finding; Rasch measurement modeling assumes that item estimates are sample-free and case estimates are item-free.

Use of Rasch modeling to assess cultural equivalence has not been extensive. The few studies using the approach, for example, have

found that use of negatively worded items with culturally unique populations creates scale problems and item interpretation issues (Gerber et al., 2002). Additionally, Ewing, Salzberger, and Sinkovics (2005) found that for indigenous populations in South Africa, item functioning depended on the type of stimulus presented. Not only may the population of the study change item functioning, the stimulus type may also influence the meaning of certain items. Moreover, Trimble and Mahoney (2002) found gender status and self-defined ethnic group respondents influence scale invariance and item nonequivalence of short scales originally believed to be reliable. Rasch modeling is a useful alternative for assessing cultural measurement equivalence.

To close out this section, attention must be given to the achievement of cultural equivalence through the use of item linguistic translation procedures as they are central to understanding the cultural equivalences of measures. Typically, researchers interested in using a measure with more than one ethnic or cultural group will use a *translation-back translation* (TBT) technique. The TBT technique is straightforward as a researcher first asks a bilingual person to translate the items into the language of the intended research population then asks another linguist to translate the items back into the original language of the measure; items from the translated versions are compared and adjustments are made accordingly. The procedure is repeated until the versions match one another conceptually and functionally (Marin & Marin, 1991). However, use of the conventional TBT technique is flawed and unreliable; thus it is not recommended (Brislin, 1976; McGorry, 2000; van de Vijver, 2000).

Several interesting and plausible alternatives for assuring item and scale equivalence using translations have been proposed and empirically tested. Erkut, Alarcon, Coll, Tropp, and Garcia (1999) developed a dual-focus method that relies more on concept translations than straightforward word-for-word translations. Indigenous researchers are invited to join the full research team and together they work through the meanings of concepts intended of use in the measures. Similarly, Geisinger (1994)

recommended use of an editorial board consisting of bilingual translators who have credentials similar to those of the translator; both collaborate on the translation of items. Finally, Johnson (1998) identified some other interesting approaches to item and scale translations including decentered translation, use of independent bilingual translators who develop alternative versions of the target measure, rank ordering of alternative versions of the measure in the source language, use of cognitive "thinkaloud" protocols, and facet analysis.

In constructing and using psychological instruments and assessment tools in cultural comparative or cultural-sensitive research, the investigator must give serious attention to matters of equivalence. The instrument's content, format, and metric style must be congruent with and comparable across the cultural groups selected for study. Researchers must provide hard evidence that the components of the measurement process meet the standards of functional, conceptual, metric, linguistic, and stimulus equivalence.

SEE ALSO: Back Translation; Construct Bias; Construct Inequivalence; Equivalence; Factor Analysis; Item Bias; Linguistic Equivalence

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Cultural Number Line: See Mental Number Line

Cultural Psychology

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Cultural psychology is a sub-part of general psychology that is built on the axiom that all human cognitive, affective, and behavioral forms of existence are regulated by socially constructed meanings. From that starting point cultural psychology overcomes the limitations of behavioral and cognitive traditions in psychology, restoring the study of higher – intentional – psychological processes to the center of psychological science. It has developed extensively since the 1980s and is currently integrating different sub-fields of psychology (developmental, social). It is a transdisciplinary scholarly project building relations between psychology, anthropology, sociology, and history. Its methodological orientation is that of qualitative analyses, with quantitative methods allowable only if proven conceptually adequate and not eliminative of the phenomena under study.

Four Foundations for the Study of Complex Cultural Phenomena

Cultural psychology today – in all of its branches – follows the general orientation of its nineteenth- and twentieth-century predecessors in their holistic, dynamic, and developmental emphases. The first specific treatments of culture can be traced to the philosophy of language of Wilhelm von Humboldt in the early nineteenth century (von Humboldt, 1836, 1905). Four continental European traditions flourished at the beginning of the twentieth century:

Folk Psychology (Völkerpsychologie)

Like any other discipline, *Völkerpsychologie* in the nineteenth century was filled with disputes between its major promoters – Moritz Lazarus,

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