Risks and Rewards of International Expansion

Anthony Zara, Ph.D., Pearson VUE

Promoting Regulatory Excellence

Unique challenges
- Security
- Cultural differences
- Construct differences
- Data protection issues, statutes
- In-country assets (personnel, hardware, software, data)
- Exam accessibility
- Cost
- Testing Standards
- Localization
- US vs. Indigenous purposes
- Infrastructure Challenges

Kick-off Questions
- Who has expanded internationally?
  - How did it go?
- Who has attempted expanding to international markets?
- Who is interested in international testing?
  - In the near term timeframe
  - In the farther term timeframe
Why are we interested?
- Small world
- Organizational mandate
- Mobility of professionals
- CBT reduces barriers
- Traditional barriers are eroding (e.g., instant communications, stable travel)
- Raising professional standards
- Improving public protection/confidence

Special Issues with Administering Tests Outside your Home Country
- Must ensure validity of the testing process to provide the information for decision-making
- Challenges exist for all test delivery modalities (e.g., PP, CBT, oral)
- Challenges include distance, culture, language, staffing, demand, value of exam, infrastructure, content

Security Challenges
- Time zones, distance
- Relationships with partners
- Facilities
- Legal rules (biometrics)
Security Issues

The key element is control

- Control of test takers
- Control of IP
- Control of testing room
- Control of data transfer
- Control of environment
- Control of staff

Special Issues with Administering Tests Outside your Home Country

Cultural Challenges

- Standardized testing not a local concept
- Accepted testing behavior
- “Sharing” seen as cooperation not cheating
- Individual exercise vs. group

Special Issues with Administering Tests Outside your Home Country

Content Challenges

- Defining purpose
- Defining construct
- Construct translation
Special Issues with Administering Tests
Outside your Home Country

Data Protection Issues
- Data ownership
- Data warehousing
- Data transfer
- Individual country rules

In-country assets
- Personnel
- Real estate
- Hardware
- Software
- Data

Exam availability challenges
- Delivery channel
- Staffing issues
- Overcoming potential cultural differences
- Developing loyalty to the program
- Education/training programs
Requirements for Exam Administration

- Ensuring validity of the testing process provides the framework for decision-making about administration
- Standardized testing conditions for all candidate-examination interactions
- Work to increase your control (including specifications) of the entire testing event

Special Issues with Administering Tests Outside your Home Country

Cost Issues
- US vs. local pricing
- Demand challenges
- Predicting administration volumes
- Need for flexibility in dates and venues

Standards Issues
- ISO 17024
- Guidelines for Adapting Educational and Psychological Instruments (International Test Commission and seven International Organizations EAPA, ETP, IACCP, IAAP, IEA, ILTA, IUPsyS)
- Cultural knowledge
Special Issues with Administering Tests
Outside your Home Country

Localization Challenges
- Language
- Need to translate test content?
- Non-examination content (e.g. instructions)?
- Construct generalization?
- Communicating candidate expectations

Pre-examination Issues
- Candidate Bulletin and other communications
- Telephone support issues
- Registration
- Scheduling
- Directions to test sites
- Machine-generated letters, etc.

Equivalent tests start with adapted communications

Special Issues with Administering Tests
Outside your Home Country

Purpose Challenges
- US vs. indigenous
- Adapting standards (?)
- High-stakes vs. low-stakes
Examination Policy Issues

- Candidate choice of language vs. sponsor choice
- Number of languages possible
- One language at a time or simultaneous changing
- Reporting language choices/uses with scores

Test localization goal = Producing an equivalent test in a second language or culture

8 Steps for Localizing Exams

1. Checking exam content and format equivalence
2. Deciding on the desirability of a translation/adaptation
3. Choosing translators
4. Translating and adapting the credentialing exam
5. Reviewing the adapted version of the exam
6. Conducting a small tryout of the adapted exam
7. Carrying out a more ambitious study of the adapted exam (checking for exam validity)
8. Documenting the process

Test Design

- Determine construct to be measured
  - Review existing practice analysis
  - Conduct job analysis/practice analysis
- Develop test blueprint/test plan
- Develop test validation plan
- Create/review test definition
- Determine the language in which the test will be developed
Special Issues with Administering Tests Outside your Home Country

Infrastructure Challenges
- Need standard conditions
- Electricity, equipment, connectivity, etc.
- Delivery platforms
  - Ipad
  - Smart phone
  - Etc.

Given all the issues outlined earlier, how can we assure success?

Key Element Leading to Success
- Must determine exactly why we want to expand internationally
  - Export U.S. credentials
  - Create local credentials
  - Build international credentials
  - Standardize practice
  - Etc.
What is Important to Your Program?

- Start with the program objectives
  - What is to be accomplished
  - Purpose of the examination
  - Determine actual costs and benefits to the stakeholders
- Operational parameters
  - Results delivery
  - Tests ready on time
  - Appointment availability
  - Data integrity
- Examinee service parameters
  - Examinee experience
  - Communications
  - Data timeliness

Baseline Condition for Success

- Local support of effort
- Collaboration not competition
- Support for local agencies
- Good testing practice

Best Electronic Testing Practices

- Must utilize good testing practice and fundamental psychometric concepts
- Test design must reflect the purpose of the test
- Use technology for its best purposes
Lessons Learned

- Communications Planning is Key
- Define Stakeholders Carefully
- Know Your Audience (Culture)
- Use a Mix of Communications Tactics
- Monitor Stakeholder Attitudes & Behavior
- Be Flexible and Responsive
- Local Content Creation

Lessons Learned (con’d.)

- Stakeholder Messaging Critical (Internal and External)
- New, Electronic Media is Cost Effective
- Effective and Frequent Communications with Stakeholders is Vital to Success
- Allow Adequate Time for Transitions or Major Program Changes

Conclusions

- International testing is a considerable undertaking
- Test localization is a huge task
- Equivalent exams is the correct goal
- Non-content issues need full consideration

*Content is important, but it is only one piece of the puzzle*
Contact information

Anthony Zara, Ph.D.  tony.zara@pearson.com