



# Register of Competence in Occupational Testing

## General Information Pack

---

Certificate of Competence in  
Occupational Testing (Level B)

---

Psychological Testing Centre  
St Andrews House  
48 Princess Road East  
Leicester LE1 7DR, UK

Tel 0116 252 9530  
Fax 0116 247 0787  
E-mail [rcot@bps.org.uk](mailto:rcot@bps.org.uk)  
[www.psychtesting.org.uk](http://www.psychtesting.org.uk)

Incorporated by Royal Charter  
Registered Charity No 229642



Psychological Testing Centre  
[www.psychtesting.org.uk](http://www.psychtesting.org.uk)

The Society has recently established a Psychological Testing Centre to consolidate its activities in the areas of psychological testing. As part of the services offered by the Centre the Society is developing a website which will provide information, guidance and links to test takers, test users and test publishers alike. The website can be found at <http://www.psychtesting.org.uk>

---

**Level A covers general foundations of testing, and the performance skills associated with test administration and interpretation of ability tests.**

**Level B complements Level A. It increases the scope of the scheme to cover personality assessment, and the interpretation and use of personality tests.**

**Together, Level A and Level B provide a set of standards which define the competent user of psychological tests in occupational settings.**

**Details of Level B are available from the Society or on our website.**

**Other relevant FREE publications are available on our website or by contacting the Society:**

- *Psychological Testing: A Users Guide*
- *Non-evaluative list of UK test publishers*
- Leaflet describing the *BPS Review of Ability and Aptitude Tests (Level A) for use in Occupational Settings*
- Leaflet describing the *BPS Review of Personality Assessment Instruments (Level B) for use in Occupational Settings*

**The Society holds no other information on Tests, other than those which appear in the above two Reviews.**

---

# Contents

	Page
<b>Level B standards in Occupational Testing</b>	4
Level B modularity	4
Description of Level B	4
Beyond Level A	4
The standards in context	5
The structure of the Level B standards and qualifications	5
Quality assurance and verification of assessors' methods	6
<b>Statements of Competence in Occupational Testing Level B</b>	6
<b>Certificates of Competence in Occupational Testing Level B</b>	6
Training	6
Eligibility for an Intermediate Certificate	7
Eligibility for an Intermediate Plus Certificate	8
Routes to Level B Full	9
Chart showing the concept of sufficiently different instruments	10
Eligibility for upgrading to a Full Certificate	11
Integrated assessment of Units 6-9 (Module B4) plus Diary Record and Project Report (Module B5)	11
Portfolio Evidence	11
The Diary Record	11
The Project Report	11
The relationship between the Diary Record and the Project Report	11
<b>The Register of Competence in Occupational Testing</b>	13
Continuing Professional Development	13
<b>Notes for Assessors</b>	13
<b>The Level B Units of Competence</b>	13
<b>The Code of Good Practice for Occupational Testing</b>	18
Application form for Level B Intermediate Certificate (separate sheet)	
Application form for Level B Intermediate Plus Certificate (separate sheet)	
Application form for Level B Full Certificate (separate sheet)	

# Level B Standards in Occupational Testing

Level B has been designed to complement Level A. Together they provide a set of standards which define the competent user of psychological tests in occupational settings. While Level A covers general foundations of testing and the performance skills associated with test administration and interpretation for group ability tests, Level B is intended to increase the scope to cover personality assessment and the interpretation and use of personality tests.

## Level B Modularity

The Level B Verifiers' Group have resolved that Level B would comprise five modules as indicated below:

Modules B1 and B2 covering LB Units 1–5 for one personality measure – Intermediate Level B.

Module B3 covering LB Units 3–5 for a second personality measure – Intermediate Plus Level B.

Module B4 covering LB Units 6–9 and Module B5 Diary Record and Project Report – Full Level B.

## Description of Level B

The Full Level B standards define:

- a broad knowledge base with expertise sufficient to evaluate a range of approaches;
- use of at least two appropriate instruments in a range of contexts;<sup>1</sup>
- an actual appreciation of the role of formalised personality assessment procedures in occupational assessment;
- the ability to make informed recommendations and choices among instruments as to their suitability for use in various occupational settings.

### Three Level B qualifications are available:

- an **Intermediate** level of qualification (Intermediate Level B) for people with sufficient foundation knowledge and expertise in the use of one appropriate instrument;
- an **Intermediate Plus** qualification for people with sufficient foundation knowledge and expertise in the use of a second or subsequent appropriate instrument;
- a **Full Level B** qualification signifying a level of general competence significantly broader than that of the person who has been trained only in the use of one specific personality assessment instrument.

As the nature of the instruments at Level B are more diverse than that of those at Level A, there are difficulties designing an all-encompassing general qualification. For these reasons Level B indicates (a) breadth of relevant knowledge and possession of certain core skills, together with (b) practitioner competence in the use of at least one (Intermediate Level B) or at least two (Full Level B) specific instruments.<sup>2</sup>

The knowledge and understanding relating to personality assessment has been divided into two broad aspects of competence for Level B: Foundation knowledge, and the knowledge and understanding required for Test Choice and Evaluation. Foundation knowledge is deemed to underpin the acquisition of competence in the use of specific instruments. Ideally, coverage of these foundation units would take place before, or as part of, test-specific training courses. However, the competence criteria do not make any formal stipulations about how competence is acquired or in what order elements are covered.

The knowledge and understanding required for Test Choice and Evaluation build on the foundation knowledge and the expertise in the use of assessment instruments. In training terms, coverage of these Units would most effectively follow on from training in the use of two or more specific instruments, usually after a period spent in gaining experience with those instruments.

## Beyond Level A

Level A covers the basic underpinning knowledge of psychometrics and practical skills associated with the use of tests (administration, scoring and analysis). The practical elements of Level A focus on tests of 'maximum performance'. Level B extends this to include tests of 'typical performance' – especially those requiring interpretation in terms of psychological theories or models.

Level B is considered to incorporate and build on Level A. It is not an alternative qualification: the Level B standards do not, therefore, repeat elements contained in Level A except where matters covered at Level A need to be reconsidered in relation to issues associated with tests of 'typical performance', or where the basic issues of test choice and evaluation have to be faced.

---

1 In general, an appropriate instrument is one, the use of which, can provide evidence of competence sufficient to cover all elements contained in Units 3, 4 and 5.

2 Competence in the use of at least two instruments is necessary but not sufficient for a Full Level B qualification.

Although the main focus in the standards is on instruments designed to assess personality, most of the practical – and many of the knowledge-based – elements of Level B cover a broader domain (e.g. measures of interest, motivation, values, beliefs and attitudes).

Level B encompasses a number of broad issues, which build on the content of Level A:

- What makes the assessment of personality and interests different from that of ability/aptitude?
- How and why is personality assessment used?
- How can we ensure that assessment tools are used in an ethical and professional manner with due regard for their limitations and for the rights and responsibilities of assessor, candidate and client?

Some of these issues require broader, deeper knowledge, for example:

- the concept of a small number of common underlying dimensions of personality which are found across a wide range of self-report inventories
- the links between theories of personality and measures of personality.

Others are concerned with:

- extending practices;
- the role and use of feedback;
- ways of reporting information about personality and interests;
- ethical issues.

### The standards in context

While the standards have been defined in generic terms, it needs to be recognised that they have to be ‘realised’ or contextualised in relation to specific instruments.

It is important here to distinguish between knowledge of various instruments and competence in the use of those instruments. For Level B, people should:

- Have knowledge of a broad range of different types of instrument – to provide a good frame of reference within which to locate particular ones (this knowledge is covered initially in Foundation Units 1 and 2 and developed further in Test Choice and Evaluation Units 6 to 9).
- Be able to demonstrate competence as a practitioner through their skill in using specific instruments (covered mainly in Test Use Units 3 to 5).

Clearly, the specific instruments used in training need to be of a sufficient standard to enable the competences to be met. Anyone who has trained people to meet the standards set out for Level B should then find it very difficult to persuade them to purchase poorly constructed or poorly validated tests! Thus, rather than specify actual instruments, the elements specify specific competences which can be evidenced through use of one or more particular instruments.

In short, the standards specify the generic competences. Evidence that someone meets these standards will need to be obtained from performance with appropriate specific instruments (together with relevant background and underpinning knowledge).

### The structure of the Level B standards and qualifications

Level B follows a rather different pattern to that adopted for Level A. The Level B standards are divided into nine units grouped into three broad aspects of competence: Foundation knowledge; Test use; Test choice and evaluation.

With Full Level B the emphasis is on experience in the use of personality testing in a range of contexts i.e. the application of broad, in-depth knowledge skills and attitudes (e.g. ethical and equal opportunity considerations) across a range of occupational contexts.

For this reason it is necessary to submit additional evidence of practice and application of knowledge in the form of a Diary Record and Project Report.

Through the accumulation of relevant Units, people can obtain either the Level B Intermediate Certificate or the Level B Intermediate Plus Certificate or the Level B Full Certificate.

The Units define three broad aspects of competence:

- The **Foundation units** (Units 1 and 2 – Module B1) focus on the broad knowledge of assessment issues relating to personality which underpin competent use of personality assessment instruments. Units 1 and 2 cover the main body of knowledge and understanding required as a foundation for using personality assessment.

- The **Test Use units** (Units 3, 4 and 5 – Module B2) (and B3 in the case of a second instrument) concern the practical skills relating to using personality assessment in occupational settings. Unit 3 deals with test administration, Unit 4 with interpretation and Unit 5 with feedback. It is in relation to these units that evidence of competence in relation to at least two different appropriate instruments is necessary for the Level B Full Certificate, while one may be sufficient for the Level B Intermediate Certificate.
- The **Test Choice and Evaluation units** (Units 6 to 9 – Module B4) concern the knowledge and skills required for evaluating tests and the practical skills associated with making choices among them as to their fitness for purpose. Units 6 and 7 are more knowledge-based, dealing with measurement issues, test construction, reliability and validity. Unit 8 focuses on issues associated with computer-based assessment and Unit 9 with a practical appreciation of the situations under which personality assessment methods can be used and their limitations.

The Diary Record & Project Report constitute Module B5:

- The **Diary Record** consists of a record of activities and events in which the candidate has been involved and which are felt to contribute towards his/her competence at Level B Full. The Diary Record is a device in which the candidate shows a breadth of coverage of Units 6-9;
- The **Project Report** consists of a description of a work-based project (or projects) completed by the candidate since qualifying for the Intermediate and Intermediate Plus Certificates. The project work is broadly intended to enable the candidate to demonstrate the practical utilisation of the competences defined in Units 6-9, together with a depth of understanding in relation to issues that they raise. The requirement for project work also implies, and should enable the candidate to display, the integrated application of the competences to practical problems.

### Quality assurance and verification of Assessors' methods

The verification system for Level A provides the mechanism necessary for assuring standards for assessment of competence for Level A. The same mechanism is used with Level B. *Guidance for Assessors Level B Units 1–5* and *Guidance for Assessors Level B Units 6–9* have been developed as part of the implementation process.

As with Level A, Chartered Psychologists wishing to assess people for Level B need to register with the Society as Assessors and agree to be subject to the verification and quality control procedures adopted by the Society.

One potential difficulty with the Level B Test Use Units will be the question of whether or not competence in use of a particular instrument can provide sufficient evidence of competence. This may be controversial in the case of some instruments. Wherever questions of adequacy of coverage, quality or quantity of evidence arise, such matters will need to be dealt with by negotiation, in the first instance, through the verification process. In due course, 'case law' will help establish a clear set of precedents.

However, it is important to stress that the focus for Level B Certification is on the evidence of competence provided by the test user and not on the technical merits or demerits of the test they are using to provide evidence of that competence. The latter will be addressed by the test reviewing process (e.g. the *BPS Review of Personality Assessment Instruments (Level B)*).

## Statements of Competence in Occupational Testing Level B (grandparenting)

Statements of Competence in Occupational Testing (Level B) were issued only as an interim arrangement to enable the establishment of the Certificate, and *they are no longer available*.

## Certificates of Competence in Occupational Testing Level B (see Figure 1)

### Training

To obtain a Level B qualification you must first undertake a training course at the appropriate level, and then have your competences assessed and affirmed by an Assessor (that is a Chartered Psychologist whose assessment methods have been verified by the Society).

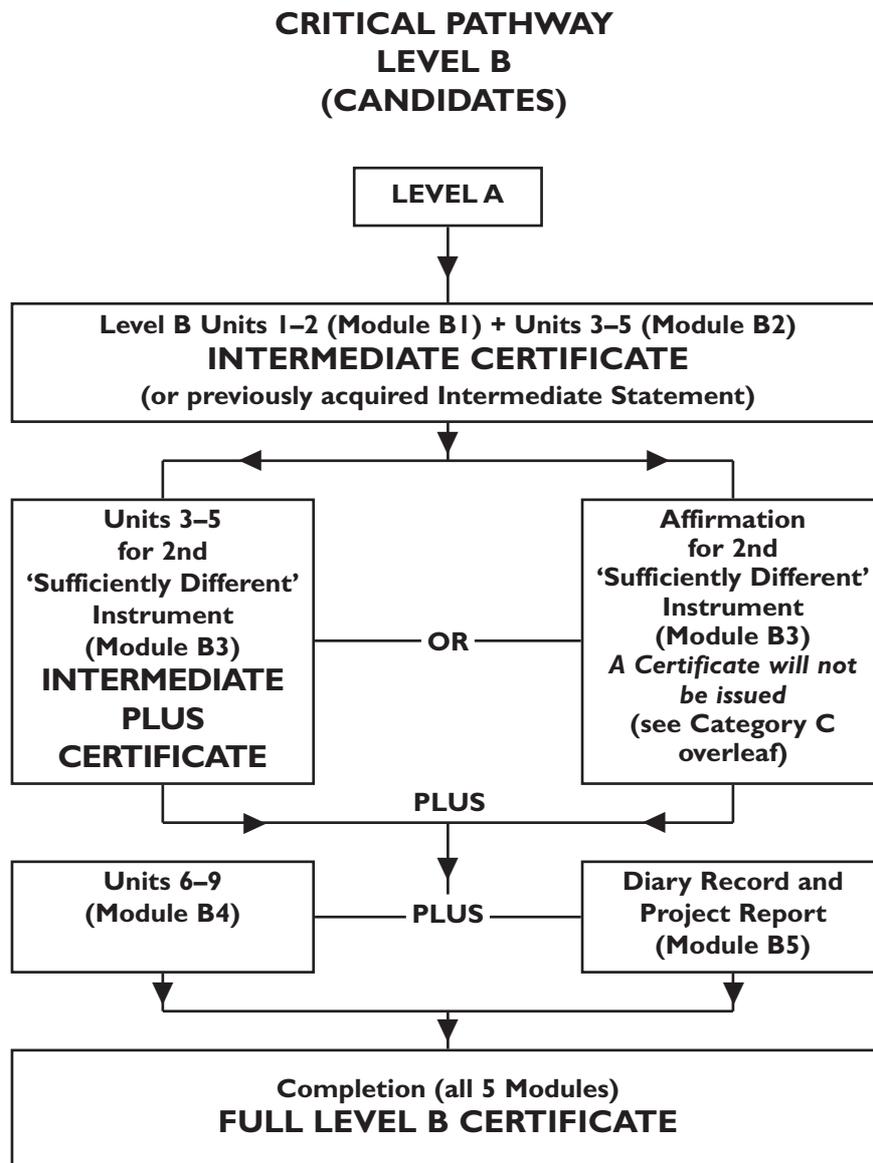
In many cases Trainers are also Assessors, but not necessarily so.

A list of training courses is published in each issue of the *Selection and Development Review* (SDR). Lists of Level B Intermediate and Level B Full Assessors are available from the Society’s website ([www.psychtesting.org.uk](http://www.psychtesting.org.uk)) or through the Society’s office by contacting the RCOT Desk on direct line no. 0116 252 9530.

Before starting any training, you should check with the Trainer that the course will lead to eligibility for the issue of the appropriate Certificate and that the Assessor holds a current Assessor’s Certificate. The Certificate is available to those who have had their competences affirmed by Assessors who in turn have had their assessment methods verified for the appropriate Units of Competence.

**Eligibility for an Intermediate Certificate**

- Hold a Statement/Certificate of Competence in Occupational Testing Level A.
- Provide sufficient evidence to a Verified Assessor of competence across Units 1–5 of the Level B Units (Modules B1 and B2).



For detailed guidance on Modules B4 and B5 see *Guidance for Assessors Level B (Units 6–9)*

Figure 1

## Eligibility for an Intermediate Plus Certificate

- Hold a Statement/Certificate of Competence in Occupational Testing Level B Intermediate (Modules B1 and B2).
- Provide sufficient evidence to a Verified Assessor, of competence in Units 3–5 of the Level B Units (Module B3).

Please see Figure 2 and Figure 3 for routes to Level B Full.

### ROUTES TO LEVEL B FULL

CATEGORY	APPLICANT	ASSESSOR
<b>A.</b> Intermediate Certificate or Statement holder – application form has or had <b>one instrument</b> , or family of instruments.	Specifies what the instrument was.  Chooses a second instrument which is <b>*‘sufficiently different’</b> and applies for Intermediate Plus Certificate.	Assesses and affirms Units 3–5 for Intermediate Plus Certificate.
<b>B1.</b> Intermediate Certificate holder – application form has <b>two instruments</b> which are <b>*‘sufficiently different’</b> and <b>signed off on two separate occasions</b> .	Nominates what they want their first instrument to be. Specifies the second instrument and applies for an Intermediate Plus Certificate.	No action required by Assessor.
<b>B2.</b> Applicant assessed by the same Assessor on two <b>*‘sufficiently different’</b> instruments on one affirmation form.	Nominates what they want their first instrument to be. Requests the Assessor to sign off Units 3–5 for a second instrument which should be <b>*‘sufficiently different’</b> and applies for Intermediate Plus Certificate.	Ensures applicant has been fully assessed and affirmed on both instruments.
<b>C.</b> Intermediate Statement holder whose application was <b>based on two or more *‘sufficiently different’ Level B instruments</b> .	Nominates what they want their first instrument to be.  Seeks affirmation of current and competent use of the second instrument. Sends completed affirmation to the Society Office (see Affirmation Form for Category C).  <b>NB: An Intermediate Plus Certificate will not be issued.</b>  If no Assessor is able to do this, candidate should seek <b>assessment</b> and affirmation (a training course is not necessarily essential). Applies for an Intermediate Plus Certificate.	Affirms current and competent use of second instrument for Units 3–5.  (See Affirmation Form for Category C).  Assesses and affirms competent use of a second instrument for Units 3–5 (a training course is not necessarily essential).

Figure 2

In all cases applicants will need to seek assessment and affirmation for Units 6–9, Diary Record and Project Report following any required training.

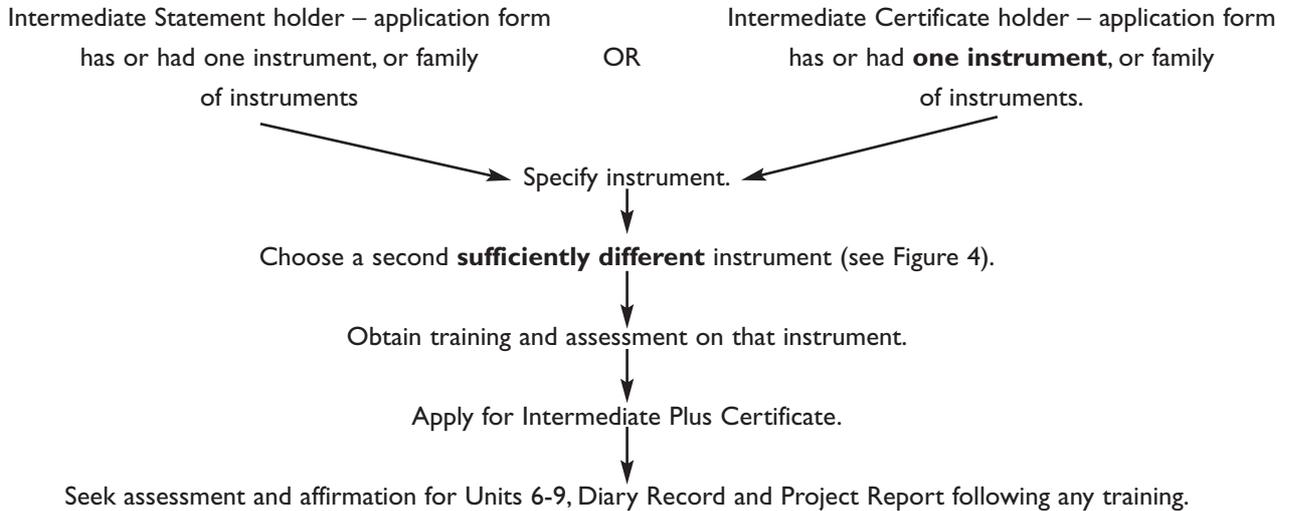
\*Figure 4 on page 9 demonstrates the concept of ‘sufficiently different’ instruments.

# ROUTES TO LEVEL B FULL

## Upgrading from Level B Intermediate Statement or Certificate to Level B Full.

1. All assesseses need to decide which category (A, B or C on page 7) applies to them.

### 2. If Category A



### 3. If Category B

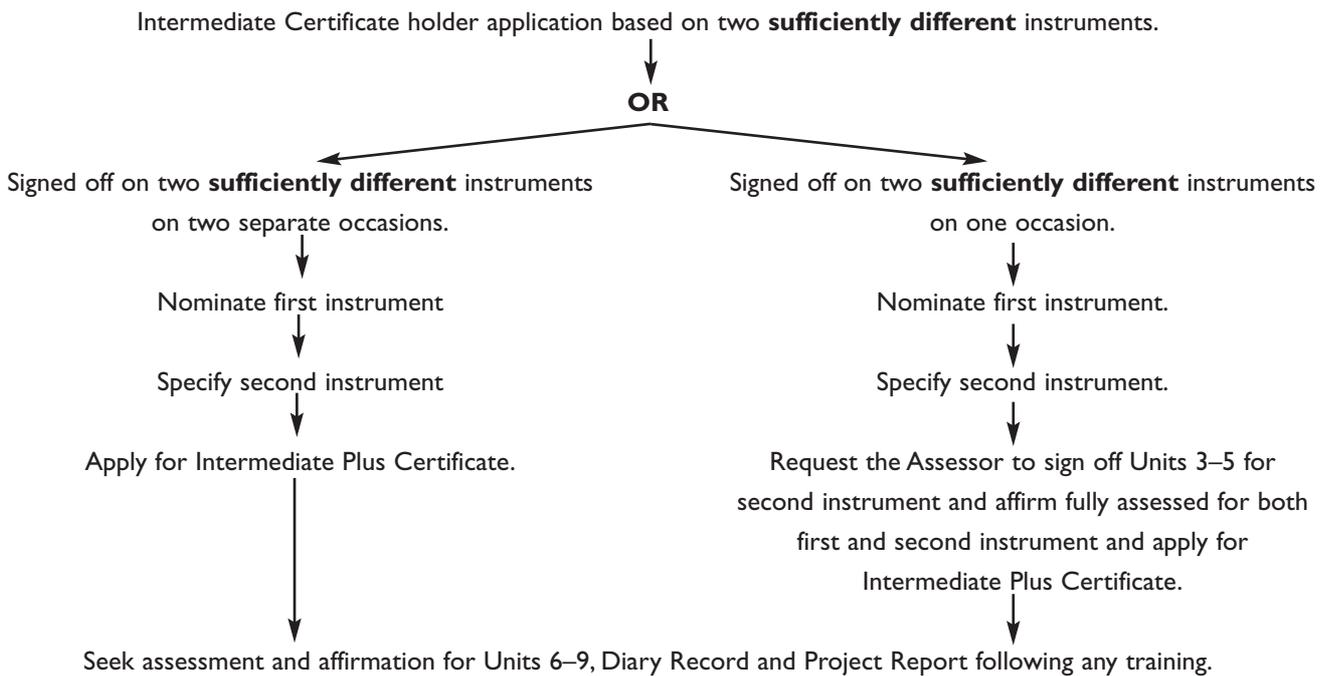
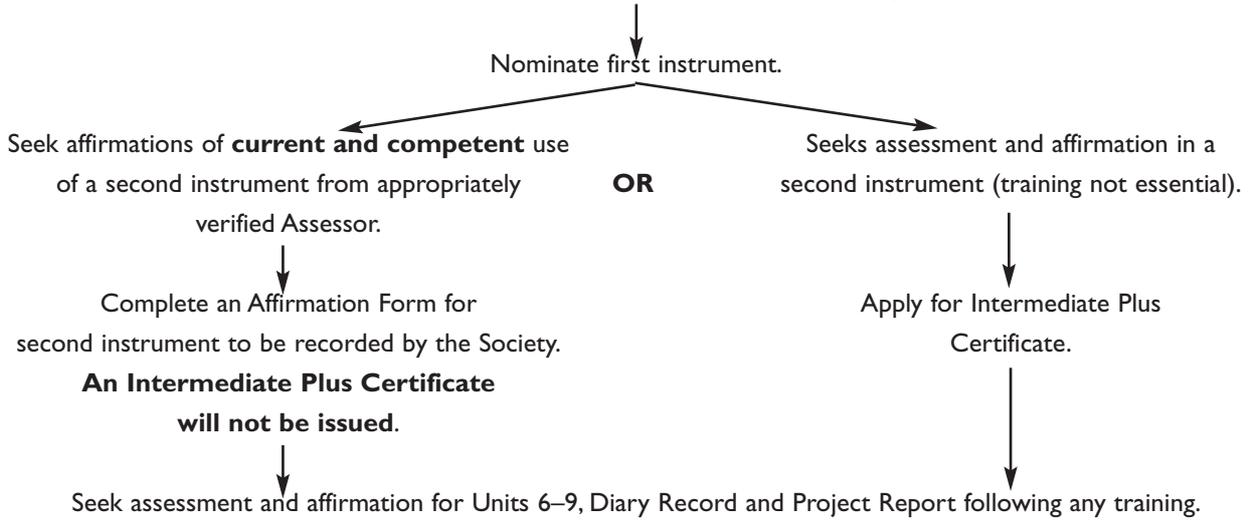


Figure 3

**4. If Category C**

Intermediate Statement holder – application based on two or more **sufficiently different** Level B instruments.



**Figure 3 (continued)**

**Chart showing the concept of ‘Sufficiently Different’ Instruments**

You may not offer an instrument from the same ‘family’ as your second instrument.

**Classification criteria: Please circle all that apply for each instrument**

<b>Nominated first instrument</b>	<b>Second instrument</b>
Small scale/multi-scale (more than five)	Small scale/multi-scale (more than five)
Orthogonal/oblique	Orthogonal/oblique
Normative/non-normative	Normative/non-normative
Type/trait	Type/trait
Data driven/construct based	Data driven/construct based
Self report/report by others	Self report/report by others
Specific occupational focus/ more general psychological focus	Specific occupational focus/ more general psychological focus
Individual/group	Individual/group
Personality/Personality plus cognitive style/motivation/values/ interests/beliefs/other	Personality/Personality plus cognitive style/motivation/values/ interests/beliefs/other

**Figure 4**

For any two instruments to be regarded as sufficiently different, the applicant is required to show differences on at least two criteria.

Measures belonging to the same 'family' would not usually be considered sufficiently different. Similarly, full and short forms of the same measure would not usually be considered sufficiently different.

**The Assessor** will need to affirm to the Society that the applicant is currently using the nominated second instrument and is competent to do so.

*NB:* In the event of any discovery that applicants have fabricated any evidence of competence, they will be excluded from applying for a Full Level B Certificate. Further action may be taken if and when any code of conduct for Certificate holders is introduced.

Chartered Psychologists who are Assessors are reminded that under the Society's Code of Conduct they will be subject to disciplinary proceedings should they act beyond their verified competence.

Where there is any ambiguity regarding any aspect of the affirmation process, Assessors should contact the Senior Verifier for guidance.

### Eligibility for upgrading to a Full Certificate

- Hold a Statement/Certificate of Competence in Occupational Testing Level B Intermediate (Modules B1 and B2).
- Hold an Intermediate Plus Certificate of Competence in Occupational Testing Level B (Module B3 ) or has obtained a signed Affirmation for a second sufficiently different instrument (see Affirmation form for Category C).
- Provide sufficient evidence to a Verified Assessor of competence in Units 6–9 (Module B4) plus a Diary Record and Project Report (Module B5).

### Integrated assessment of Units 6–9 (Module B4) plus Diary Record and Project Report (Module B5)

Level B Intermediate is designed to provide practitioners with the minimum competence necessary to use a particular instrument for specific purposes. Full Level B is designed to produce competent decision makers. Full Level B represents considerable added value for test takers who need to be able to make evaluative judgements about personality based tests and testing across a full range of instruments and approaches and who need to be able to question and justify decisions in a rational and informed manner.

In addition, Full Level B is also necessary for those who wish to make appropriate and competent use of computerised administration and report generating systems.

### Portfolio Evidence

Apart from evidence of competence in Units 6–9 candidates will also need to submit evidence that they have completed a portfolio which has also been assessed. The portfolio consists of two elements: the Diary Record and Project Report.

### The Diary Record

Each of the relevant events and activities recorded in the record is given a date and described. As well as a simple, factual description, the candidate is required to reflect upon the learning which has taken place and record this along with its relationship to Units 6–9 (see Figure 2).

### The Project Report

This may be based upon the completion of one major project, a number of minor projects or a combination of the two. The difference between a major and minor project is not simply one of scale, although this is likely to be a distinguishing feature. A major project is also likely to involve competences spread across a number of Units, while a minor project is more likely to be focused on one or two. Despite this difference, the Project Report as a whole provides an opportunity for the candidate to demonstrate a depth of understanding in relation to the Units.

### The relationship between the Diary Record and the Project Report

The Diary Record is likely to contain, among other things, reference to the stages involved in completing the work associated with the Project Report. The Project Report itself, however, is likely to be more detailed, reflective and discursive than the Diary Record. Whereas the Diary Record provides a broad picture of the candidate's relevant experience since completing Intermediate Level B, together with a description of how this maps onto the competences, the Project Report is a method which enables the candidate to 'spotlight' and amplify specific aspects of their experience. By completing both, the candidate

has the potential to show that their practical activity since Intermediate Level B reflects both the breadth and depth of their understanding of Units 6–9.

### An illustration of the Diary Record – sample page

Time period	Activity*	Personal learning outcome (summary of reflections on new learning)	Relationship to units and elements of competence	Project Report page reference (if relevant)
April 14	Attended 1 day workshop on computer-based assessment. Covered administration and report writing software. Different approaches to narrative writing compared.	Gained understanding of different approaches adopted by narrative systems and consolidated in note form: gained clearer grasp of ethical issues arising in different uses of narrative reports. Action point: intend to develop company policy to cover range of acceptable uses of narrative, and intend to write this up as minor project for Full Level B.	8.1, 8.2, 8.3, 8.4	To be decided
May 25	Assessed 4 candidates for a senior position (Sales Director) using range of ability tests and personality questionnaire (I6PF). Selected I6PF from 3 possible options. Wrote reports for both the candidates and the selection panel. Gave feedback to candidates on all psychometric measures used. Discussed outcomes of testing session with panel; advised on fit of candidates to job description and person spec provided. Discussed implications of choice of norms and equal opportunities issues.	Developed and wrote up rationale for selection of I6PF in this exercise. Main other advantage was to enable me to gain 'flying hours' in feedback and report writing. Two of the profiles associated with high MD scores – gained more experience for probing for work related evidence in these cases. Action point: need to work on presentation of scales to ensure value free descriptions offered. Action point: following discussion and request, need to provide guidance to HR Director on implications of mixed gender norming. Write this up as 2 minor projects – one on test choice, and one on policy development.	7, 9.1, 9.2  3, 4, 5 (2nd measure)  7.11	To be decided
	Read article '.....' on validity of personality questionnaires.	Wrote up summary of the issues in the validity debate re 'fishing expedition' concept. Action point: ask Full Level B Assessor for some input re 'hypothesis driven approach'.	7.5, 6, 7, 8	

\* Activities may include relevant learning experiences such as attending a conference, participating in a training workshop, formal study, informal reading or any practical activity relevant to Units 6 to 9. Some of these activities will be described in greater detail in the candidate's Project Report.

Figure 5

# The Register of Competence in Occupational Testing

The Society makes positive efforts to encourage employers only to use competent test users, and the Register is their basic source guide to check the credentials of individuals they intend to consult or employ.

*Selection and Development Review (SDR)* is published six times a year under the aegis of the Society's Division of Occupational Psychology. The annual fee for entry to the Register is £20. Registrants automatically receive *SDR* free and are encouraged to contribute to the publication. The Register is the best way for competent test users to keep in touch with developments in the field.

There is no facility for advertising tests, courses or services beyond the existing paid listing of appropriate upcoming courses in *SDR*.

Other services for registrants will be developed over time and as numbers increase.

Registrants' details are held on the Society's database. Details are available to enquirers who mention a person by name, but not available as part of a more general listing.

Names and addresses of Chartered Psychologists who appear on the Register and whose verification methods have been confirmed by the Society appear on the appropriate list of Assessors.

If you wish to check if a person is or is not on the Register, please contact the RCOT Desk on direct line no: 0116 252 9530. For a list of Assessors visit our website at [www.psychtesting.org.uk](http://www.psychtesting.org.uk) or contact the RCOT desk.

## Continuing professional development

Being on the Register is the best way for competent test users to keep in touch with developments in the field. Individuals not already on the Register, when awarded any Level B Certificate, will have to join the Register and will be expected to remain on it unless they inform the Society otherwise in writing.

## Notes for Assessors

At Level B, *Guidance for Assessors* is published in two volumes:

- *Guidance for Assessors Level B Units 1–5* (Modules B1–B3)
- *Guidance for Assessors Level B Units 6–9* (includes Diary Record & Project Report) (Modules B4 and B5)

Each costs £20 and may be ordered from the Society.

No formal training requirements have been defined.

Affirmations of competence for Certificates must be carried out by Chartered Psychologists who hold a Certificate or Statement of Competence in Occupational Testing Level B and who have had their assessment practices Provisionally Verified or Confirmed. Verification information packs (Intermediate, Intermediate Plus and Full) may be obtained from the Society's Office.

The Assessor must initial each item on the Checklist. Where all the items on the Checklist for each UNIT have been initialled, the Affirmation of Competence in that UNIT should be signed and dated.

## The Level B Units of Competence

The following are designed as an outline specification of assessment requirements; and hence they stress understanding the processes required to achieve relevant performance outcomes and not just the outcomes themselves.

Some general guidance on the level of competence expected is given in the introduction to each of the three aspects of competence.

The terms 'client' and 'candidate' are used as follows:

- Client – the person or organisation for whom the assessment is being carried out; generally, the person who has sponsored the assessment, who pays for it and who requires access to the information produced.
- Candidate – the person who is the subject of the assessment process.

Note that in some assessment contexts, the candidate and the client will be the same person (for example, in personal guidance on career development). In most other instances, the client and candidate will be different people.

## Foundation Units 1 and 2 (Module B1)

The foundation units cover the general theory and underpinning knowledge deemed necessary to provide users with the breadth of understanding of personality assessment necessary to place the use of individual instruments in an appropriate context.

### Foundation LB Unit 1. Personality theory

The assessee can:

- 1.1 Define 'personality' and explain the differences between implicit (personal, or everyday) and explicit (empirical, psychological) models.
- 1.2 Differentiate between temperament (personality), motivation (needs, interests and aspirations) values, attitudes, beliefs and ability.
- 1.3 Discuss ways in which genetic and environmental factors (such as culture and education) affect personality.
- 1.4 Describe the key differences between the psychometric, psychoanalytic, social-learning and humanistic approaches to describing and explaining differences in personality.
- 1.5 Describe and illustrate the type and trait based approaches to personality and explain the limitations of each.

### Foundation LB Unit 2. Personality assessment

The assessee can:

- 2.1 Describe the main advantages and limitations of the main approaches to assessing personality and give an example of the type of measure obtained from each.
- 2.2 Outline the main sources of and opportunities for 'sabotage' or 'distortion' in assessment, associated with each approach.
- 2.3 Describe how such problems of bias can be controlled and/or limited.
- 2.4 Explain how problems of bias also apply to informal methods of personality assessment (e.g. in everyday social interaction, in interviews and so on).
- 2.5 Give examples of trait and state measures and explain the ways in which they differ.
- 2.6 Describe the 'Big Five' factor model of personality and give examples of how scales from two tests can be mapped onto the five factor model.
- 2.7 Define ipsative scaling and identify two instruments which use it.
- 2.8 Explain the dangers of reliance on spurious validity through, for example, 'Barnum effects', using the candidate's self-assessment of the validity, literal interpretation and acceptance of scale labels.
- 2.9 Give examples of pseudo-scientific assessment procedures which have high acceptability ('face validity') or appear convincing to the lay-person but which have little or no proven validity. Illustrate the dangers associated with their use.

Range: Coverage of approaches to personality assessment should include:

- (a) self-report procedures;
- (b) reports by others;
- (c) group or individual situational assessments;
- (d) projective measures;
- (e) observations of behaviour;
- (f) task performance measures (that is, 'objective' measures of personality);
- (g) physiological measures;
- (h) repertory grids.

## Test Use: LB Units 3, 4 and 5 (Module B2 for first instrument and B3 for subsequent instrument(s))

Competence relating to Test Use should be assessed in relation to a specific substantive instrument or instruments. The focus of the assessment is on the assessee's competence as a practitioner to demonstrate a good understanding of the strengths and weaknesses of the instrument, to make appropriate use of it in different assessment contexts and to weight information obtained from it appropriately with other information about the candidate.

Test Use Units 4 and 5 require evidence of competence in interpretation and providing feedback to both clients and candidates in each of two types of context:

**Client-oriented, assessment contexts** (where the prime reason for the assessment is to provide the client or client organisation with information about the candidate):

- report to a client organisation for selection, promotion or inclusion/exclusion in a team;
- feedback to candidate(s) on the above.

**Candidate-oriented assessment contexts** (where the prime reason for the assessment is to provide the candidate with information about him or herself):

- report to a client on the development/career potential etc of a candidate;
- report to candidate(s) on the above.

It is realised that candidate-oriented situations may arise (a) where it is not appropriate to provide feedback to the client organisation, or (b) where the distinction between client and candidate does not apply as they are the same person.

The evidence obtained must cover both of these types of context and include instances of verbal feedback to a candidate and instances of written feedback both to a client and to a candidate. The evidence should be collected under realistic working conditions.

### Test Use LB Unit 3: Administration

The assessee can:

- Properly inform the candidate about the nature of the assessment, why it is being used, the conditions under which it will take place and the nature of the feedback they can expect to receive.
- Provide assurances about the confidentiality of the data, how it will be used and how it will be stored.
- Ensure that the candidate's informed consent has been obtained.
- Obtain relevant background information from the candidate.
- Demonstrate the ability to administer the instrument, showing due awareness of the need to establish positive rapport with the candidates, encourage the adoption of an honest open response and set an appropriate pace for the administration.
- Maintain appropriate records and data for audit and research purposes, ensuring that all personal identifiers are removed from publicly accessible data.
- Ensure that assessment data are not used for purposes other than those to which the candidate has given their consent.

### Test Use LB Unit 4: Issues associated with Interpretation

The assessee:

- Can outline in non-technical terms the rationale underlying the instrument and the approach adopted and the stages gone through in its construction.
- Does not over-interpret 'chance' significance in tables of correlations produced from an instrument with a large numbers of scales.
- Shows an awareness of the issues involved in choosing suitable norm groups for the interpretation of scale scores.
- Interprets scale score profiles with due regard to the technical qualities of the instrument.
- Can comment on the effects of using: norms based on broad based samples versus those based on narrow ones (small variance); mixed gender or ethnic group versus single gender or ethnic group norms; occupationally-related versus general population norms.
- Relates the interpretation given to a score appropriately to the information provided about the instrument being used and to the nature of the scale and its mode of construction.
- Corroborates information about personality obtained from the instrument with information obtained from other sources.
- Makes appropriate use of any other relevant information (such as reports from other assessments of the candidate, self-assessments, peer-assessments etc) to aid the interpretation of results.

## Test Use LB Unit 5: Providing feedback

The assessee:

- Demonstrates sufficient knowledge of the instrument to provide competent interpretation and oral feedback to at least two candidates in each case and to produce balanced written reports for:
  - (a) the candidate, and
  - (b) the client – where the assessment is being carried out for a third party.
- Provides non-judgmental oral feedback of results to candidates with methodical use of the feedback interview to help confirm/disconfirm hypotheses generated from the pattern of individual test results.
- Provides an indication to the candidate and to the client (when there is a third party involved) of the status and value of the information obtained and how it relates to other information about the candidate's personality.
- Produces written reports which integrate the information on personality with that on ability and other relevant aspects of the person to provide an overall balanced view related to the context for which the information is sought.
- Ensures that neither organisational nor personal decisions are based solely upon the interpretation of data from one personality inventory.

Range of assessment functions:

*Client/organisation oriented:* e.g. Selection, Promotion, Redundancy/Outplacement.

*Candidate oriented:* e.g. Individual personal development, Team development, Career Guidance, Counselling.

## Test Choice and Evaluation LB Units 6, 7, 8 and 9 (Module B4)

These Units cover the knowledge and understanding deemed necessary for test users to make informed choices between instruments as to their suitability for various purposes. The focus in Unit 6 on test construction assumes a level of knowledge sufficient to make an informed evaluation of an instrument on the basis of reviews and information presented in its technical manual. The level of understanding and the practical skills required to design and construct tests are not required for Level B.

Unit 7 extends the coverage of reliability and validity issues dealt with in Level A and – as with all the Level B Units – assumes an underlying competence at Level A.

For Unit 9, evidence should be provided that the assessee has a knowledge base on which to make choices which is broader than that covered by the specific instruments on which their Test Use Units are based.

## Test Choice LB Unit 6: Approaches to personality assessment and test construction

The assessee can:

- Give an example of an instrument based on each of the following approaches and describe how the instrument and approach are related: psychometric; psychoanalytic; social-learning and humanistic approaches to personality.
- Explain the implications of situationalist theories on the use and construction of personality measures and on the argument that generalised 'stable' dispositions can account for behaviour in different settings.
- Describe the role of personality theories in the design and interpretation of occupational interest inventories.
- Identify self-report questionnaires based on each of the following approaches: type, trait, humanistic. Describe the advantages and disadvantages of each one.
- Give examples of three different methods used to assess or control for 'sabotage' or 'distortion' effects in assessment and describe how these are used in practice.
- Describe (in non-mathematical terms) the general principles underlying factor analysis and explain its strengths and limitations as the basis for test construction.
- Give an example of one instrument which uses scales constructed using factor analysis and one which uses scales constructed using 'rational' criteria (e.g. on the basis of item content).
- Give an example of one instrument which is based on traits which are assumed to be correlated with each other and one which assumes the underlying traits are independent.
- Describe the evidence supporting the 'Big Five' factor model of personality and give examples of scales from different tests which either do or do not fit the model.
- Explain how profiles produced by ipsative instruments are affected by the number of scales on which they are based and illustrate with examples of two different tests.
- Explain in non-technical terms the main issues involved in the 'ipsative-normative' debate concerning when ipsative measures should and should not be used.

## Test Choice and Evaluation: LB Unit 7. Validity and reliability issues

The assessee can:

- Explain the difference between dependability, stability and internal consistency.
- Explain how internal consistency is affected by trait breadth and explain the relative advantages and disadvantages of highly homogeneous versus broad scales.
- Explain the need for periodic reassessment and why information about personality may become 'outdated'.
- Describe the factors which contribute to unreliability in personality assessment, distinguishing between factors which affect variability in scores and factors which affect variability in the interpretations given to those scores.
- Provide a reasoned consideration of the evidence for validity associated with two different instruments in relation to their:
  - (a) content (i.e. internal) validity,
  - (b) construct validity, and
  - (c) criterion-related (i.e. external) validity.
- Give examples of two substantive criterion-related validity studies associated with personality or interest assessment instruments used in one or more areas of occupational assessment.
- Explain the relative merits of information obtained about the validity of a scale from validation against local criteria and from validity generalisation meta analysis.
- Understand issues associated with the validation and interpretation of (a) linear and (b) non-linear relationships between individual personality scales and external criteria.
- Describe examples of composite scores based on weighted combinations of scales (e.g. adjustment specification equations; criterion-referenced prediction equations; and so on) and show a clear appreciation of the difference between those which are actuarial (based on empirical data) and those which are clinical (conceptual or based on judgements about scale contents).
- Explain the importance of corroborating information about personality obtained using one type of instrument with information obtained from other sources to avoid misinterpreting 'method-variance' as 'trait-variance'.
- Discuss how current legislation and guidelines relating to fairness in the use of tests affect the use of personality measures in occupational settings.

## Test Choice and Evaluation: LB Unit 8. Computer-based assessment and computer-generated reports

The assessee can:

- Discuss issues of test equivalence, reliability and test-taking attitude in relation to differences between paper-and-pencil and computer-based test administration procedures.
- Compare the relative advantages and disadvantages (in relation to reliability, validity, acceptability, cost and usability) of computer-generated interpretative reports with those written by human experts.
- Explain in outline the main techniques used by computer-based report generators to produce their reports.
- Describe how the validity of computer-generated personality reports can be formally assessed.
- Outline the practical and professional issues associated with the use of computer-generated reports:
  - (a) as an aid for the test user;
  - (b) as a report to the client; and
  - (c) as a report to the candidate.

## Test Choice and Evaluation: Unit 9. When and how to use personality and interest assessment instruments

The assessee can:

- Evaluate the applicability and limitations of two instruments in relation to each of the range of assessment functions. In each case:
  - Discuss factors which limit the practicality and appropriateness of using various different types of instrument (ipsative, non-ipsative; self-report, behavioural etc).
  - Explain how and why information about personality and/or interests should and should not be used.
- With reference to at least three different assessment functions, for each one:
  - Identify and justify the use of one personality and/or interest assessment instrument.
  - Describe what corroborative information about personality and/or interests could be collected using other methods.
  - Discuss how current legislation and guidelines relating to fairness in the use of tests relates to the use of the instrument.

Range of assessment functions:

- (a) Selection;
- (b) Promotion;
- (c) Redundancy/Outplacement;
- (d) Individual personal development;

- (e) Team development;
- (f) Career Guidance;
- (g) Counselling.

## Diary Record and Project Report (Module B5)

Diary Record

Project Report

# Code of Good Practice for Occupational Testing

People who use psychological tests in occupational settings are expected by The British Psychological Society to:

- Take steps to ensure that they are able to meet all the standards of competence defined by the Society for the relevant Certificate(s) of Competence in Occupational Testing, and to endeavour, where possible, to develop and enhance their competence as test users.
- Monitor the limits of their competence in psychometric testing and not to offer services which lie outside their competence nor encourage or cause others to do so.
- Use tests only in conjunction with other assessment methods and only when their use can be supported by the available technical information.
- Administer, score and interpret tests in accordance with the instructions provided by the test distributor and to the standards defined by the Society.
- Store test materials securely and to ensure that no unqualified person has access to them.
- Keep test results securely, in a form suitable for developing norms, validation, and monitoring for bias.
- Obtain the informed consent of potential test takers, making sure that they understand why the tests will be used, what will be done with their results and who will be provided with access to them.
- Ensure that all test takers are well informed and well prepared for the test session, and that all have had access to practice or familiarisation materials where appropriate.
- Give due consideration to factors such as gender, ethnicity, age, disability and special needs, educational background and level of ability in using and interpreting the results of tests.
- Provide the test taker and other authorised persons with feedback about the results in a form which makes clear the implications of the results, is clear and in a style appropriate to their level of understanding.
- Ensure test results are stored securely, are not accessible to unauthorised or unqualified persons and are not used for any purposes other than those agreed with the test taker.

# THE SOCIETY

---

The British Psychological Society was founded in 1901 and incorporated by Royal Charter in 1965.

## Its principal objects are to:

- promote the advancement and diffusion of a knowledge of psychology pure and applied;
- promote the efficiency and usefulness of Members of the Society by setting up a high standard of professional education and knowledge;
- maintain a Code of Conduct for the guidance of Members;
- compel the observation of strict rules of professional conduct;
- maintain a Register of Chartered Psychologists.
- provides an information service for the news media and the public;
- has an Ethics Committee;
- provides service to the Disciplinary Board;
- maintains a Register of more than 9,500 Chartered Psychologists;
- prepares policy statements on matters of social policy;
- holds conferences, workshops, continuing professional development and training events;
- recognises distinguished contributions to psychological science and practice through individual awards and honours.

## The Society has more than 34,000 members and:

- has branches in England, Northern Ireland, Scotland and Wales;
- accredits nearly 700 undergraduate degrees;
- accredits nearly 100 postgraduate professional training courses;
- accredits higher degrees, in partnership with the Open University Validation Service;
- confers Fellowships for distinguished achievements;
- confers Chartered Status for professionally qualified psychologists;
- awards grants to support research and scholarship;
- publishes 10 scientific journals;
- publishes books, CD-ROMS, videos and other educational resources;
- publishes *The Psychologist* each month;
- publishes newsletters for its constituent groups;
- maintains a website;
- has international links with psychological societies and associations throughout the world;

## The Vision Statement of the Society plans that by 2006:

- there will be 50,000 members;
- the Society will have offices in the major constituent parts of the United Kingdom;
- the public at large will have a clear understanding of psychology as both a research and applied discipline;
- the Society will seek to influence public policy on matters relating to education, health, the family and the community;
- all its members will contribute so that the strengths and diversity of its membership are fully utilised.

The British Psychological Society  
St. Andrews House  
48 Princess Road East  
Leicester LE1 7DR.

Tel: 0116 254 9568  
Fax: 0116 247 0787

E-mail: [mail@bps.org.uk](mailto:mail@bps.org.uk)  
Web: [www.bps.org.uk](http://www.bps.org.uk)