

The NERA Researcher

The President's Message



April Zenisky

Dear NERA Colleagues,

As I set out to write this, my last column as President of NERA, I am struck by how quickly a year flies by. In a little over a month many of us will be together in Trumbull, amongst fall leaves and our 46th annual conference.

The theme for this year's conference is *Interdisciplinary Approaches, Collaborating Minds*, a mindset for research and practice that is quite near and dear to me professionally. The idea of drawing on multiple perspectives to investigate issues is not likely to be new to any of us, but it is a concept that does carry especial relevance in the higher-order thinking, standards-driven educational landscape we presently inhabit. To this end, the 2015 Program Co-Chairs and I have sought to carry on the tradition of

excellence that has been the hallmark of the NERA conference program, all the while considering how to integrate this theme into the conference experience for you. From the invited speakers to our pre- and in-conference workshops, to new session formats and highlighted sessions, we are hopeful that you will find this year's meeting to be exceptional in terms of providing you with some new voices, methodologies, and theoretical paradigms to aid you in advancing your scholarly work.

I'd first like to highlight our pre- and in-conference workshops in this regard. This year we are able to offer workshops focusing on programming in both beginner and intermediate R, as well as sessions on a) using person-centered techniques such as mixture modeling and b) structural equation modeling. Each of these sessions is being led by NERA members with considerable expertise in their respective topics, and they are certain to be at once highly engaging and immensely informative. In addition, researchers from the Center for the Study of Boys' and Girls' Lives at the University of Pennsylvania will present on participatory action research in K-12 education, while current NERA board member Felice Billups and past-president Robert Gable have developed a wonderful extended session focusing on mixed methods research. I strongly encourage all of you at the conference to check out one (or more!) of these sessions; perhaps even go to one that is a bit different from where your natural inclination lies.

There are likewise several exceptional sessions organized by the Graduate Students Issues Committee (GSIC) that we hope have particular relevance for student members of NERA. These sessions include a talk on writing effective reports (collaboratively presented by Skip Livingston of ETS, Stephen Sireci of UMass-Amherst, and Dena Pastor of James Madison University) and a panel discussion on career paths and job-seeking skills.

Our keynote speakers and invited talks were likewise chosen with the aim of illustrating elements of our conference theme. On Wednesday night we will hear from Harvard University's Dr. Ronald Ferguson, who has long been a leader in the policy arena specifically relating to achievement gaps. Mid-day Thursday brings us Dr. Nancy Streim from Columbia University Teachers' College, who will speak on "The Power and Pitfalls of University-School Partnerships". To close the conference on Friday at lunch, Dr. Joanna Gorin of Educational Testing Service will offer her thoughts on next-generation performance assessment. These speakers are further complemented by Dr. Preston Green of the University of Connecticut who will bring his perspective on law and educational policy to a discussion of charter schools and accountability mandates, as well as a featured interview with Dr. Ronald Hambleton of the University of Massachusetts, who will share his experiences on the front lines of test development and equating, both within multiple states including Massachusetts and as a member of the technical advisory committee for the PARCC consortium.

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The NERA Researcher

The NERA Researcher is the official newsletter for members of the Northeastern Educational Research Association.

Message from the Editors

Dear NERA Members,

We hope that you've enjoyed a wonderful summer and are gearing up for the 46th annual conference. This issue of *The NERA Researcher* is jam-packed full of conference details, including updates from your conference co-chairs, conference membership and registration information, and conference highlights. Also included are updates and announcements from several of our standing committees. Additionally, we would like to direct your attention to two articles that may be of special interest. The first is a feature article on mixed method designs by Felice D. Billups, Ed.D., providing basic definitions and descriptions of mixed-method designs (see page 14). If this topic is of interest to you, be sure to attend the in-conference workshop: *Using Mixed Methods Research to Tell the Whole Story* facilitated by Felice D. Billups and Robert K. Gable.

The second article delivers the results of *The NERA Researcher* viewing preference survey (see page 18). In general, we received positive feedback on the flipbook version of the newsletter. To accommodate the needs of our members we will continue to provide the newsletter as an online PDF and also post a flipbook version to our website. Thank you to all that took the time to provide feedback through our survey. Please feel free to send us additional feedback on viewing preferences (or any other issue related to the newsletter) via email (theneraresearcher@nera-education.org) so that we can better serve you!

As always, a very special thank you to Barbara J. Helms for providing an extra set of eyes on the newsletter! Lastly, we leave you with this message from Bo Bashkov who has worked on his last issue of *The NERA Researcher*:

It has been such a privilege to serve as co-editor of the newsletter for the past three years. In the process of preparing and publishing each issue I had the opportunity to collaborate with the NERA leadership and many members. Special thanks to former content editor Maureen Ewing and current co-editor Haifa Matos-Elfonte for their mentorship and support. It was a pleasure working with you both! I look forward to continuing my service in the role of webmaster for the next few years.

Bo Bashkov and Haifa Matos-Elfonte
The Editors

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Are you excited yet?

At this point, I must shine a light on the 2015 Conference Co-Chairs—Amanda Clauser, Kimberly Colvin, and Katrina Roohr. I am so appreciative of the thoughtfulness, enthusiasm, and good humor that they each brought to the year-long enterprise of putting on the NERA conference (which goes far beyond the program—they are now meeting planners, customer service experts, information technology gurus, and all-around advanced multitaskers), and I am grateful for the dedication they have brought to this endeavor in light of their other professional responsibilities.

NERA would also not have the meeting that we have without our institutional memberships. At AERA Chicago, I happened to be talking with the president of another AERA-affiliated regional association, and during that conversation I came to understand how different—and fortunate—NERA is. The NERA presidents before me have built relationships with many institutions within and even outside the Northeast that allow us to put on a vibrant conference year-in and year-out, and this year's meeting is no exception. As of this writing, we have at least 20 institutional memberships for 2015-2016 totaling about \$14,000, as well as one individual donation of \$500. These funds are used to support the conference in a variety of ways, from speaker expenses and conference materials to defraying the costs for meals and receptions. I wish to extend a very sincere thank you to all of our new and returning 2015-2016 institutional members.

In the space remaining to me, I'd like to add one more thing to your conference agenda, and that is the NERA Business Meeting, which will be held on Friday morning of the conference. There, while you enjoy a delicious breakfast and reminisce with old and new colleagues about the prior two days of our meeting, you'll also be provided with updates from a number of NERA officers and committees. It is my hope to see you there, as a step in your journey toward becoming further involved in NERA governance in some way. It is likewise an opportunity for you, the membership, to talk with the Executive Committee and the Board of Directors concerning any and all aspects of our organization.

This issue of *The NERA Researcher* is packed to the brim with conference program details, planning and travel logistics, awards committee information, committee updates, and conference sponsors' ads. Please take a moment to page through this issue, and thanks to Haifa Matos-Elfonto and Bo Bashkov for their work on this newsletter!

Questions, comments: contact me at azenisky@educ.umass.edu! I hope to see you in Trumbull.

PS: This September, please keep an eye out for your chance to vote in the NERA elections!

Update from the Nominations Committee

PLEASE VOTE!



Dear NERA Colleagues,

On behalf of the Nominations Committee, I encourage you to vote in this year's election. We have an exceptional slate of candidates who are running:

For President:

Liz Stone, *Educational Testing Service*

Craig Wells, *University of Massachusetts Amherst*

For Director (2):

Andrew Jones, *American Board of Internal Medicine*

Salika Lawrence, *St. John's University*

Ross Markle, *Educational Testing Service*

Jessica York, *Post University*

On September 1st, each member was sent an e-mail with voting instructions. If you did not receive the e-mail or have any questions about the election, please contact me at past-president@nera-education.org. Voting will close on October 1st.

John W. Young
Chair, Nominations Committee

46th Annual Conference Update

October 21-23, 2015
Marriott Hotel, Trumbull, Connecticut

Conference Theme: *"Interdisciplinary Approaches, Collaborating Minds"*

Nearly 200 proposals for papers, posters, roundtables, and data blitz sessions were submitted for the 2015 conference! Thanks to the hard work of more than 100 volunteer reviewers, authors received feedback on their submissions and we are crafting the 2015 program. Thank you to those who submitted their research and work-in-progress and also to those who reviewed. There could not be a conference without you!

We are looking forward to our keynote and invited speakers, Ronald Ferguson, Nancy Streim, Joanna Gorin, and Preston Green (details below). We are also looking forward to a featured interview with Ronald K. Hambleton, report writing with Skip Livingston, Stephen G. Sireci, and Dena Pastor, and learning about effective job-seeking skills with the GSIC's invited panel.

Wednesday Evening Keynote: The Influence of Teaching on Adolescent Agency

Ronald Ferguson, Harvard University

Using Tripod student survey data from 16,000 sixth to ninth grade classrooms, Dr. Ferguson will present new evidence on how components of teaching predict not only basic academic skills, but also a range of agency-related factors. He will suggest that agency-related factors can be effectively cultivated and should be educational priorities alongside the skills that standardized tests measure.

Thursday Mid-day Keynote: The Power and Pitfalls of University-School Partnerships

Nancy Streim, Teachers College, Columbia University

Many colleges and universities claim to have partnerships with public schools in their communities. But what do we mean by partnership? While the primary motivation for higher education is usually teaching and research, the motivation for schools is typically services and expertise. Do research partnerships lead to school improvement? Can university-school partnerships change teaching and learning in K-12 and higher education?

These questions will be addressed in a discussion based on Dr. Streim's twenty-year history with university-school partnerships, with special focus on lessons learned in creating university-assisted community schools in urban areas. Bridging the accountabilities in K-12 and higher education is at the heart of successful university-school partnerships.

Invited Speaker: Next Generation Performance Assessment for Improved Assessment and Learning

Joanna Gorin, Educational Testing Service

As education standards have increasingly emphasized higher-order cognitive processes, assessment developers have responded by including more short and extended constructed-response items, most notably essays, on their high-stakes assessments. Both in terms of face validity and construct validity, the use of performance tasks is appealing because they can be more aligned with the targeted reasoning and higher-order cognitive skills. However, while performance assessments overcome several of the limitations of traditional item types, it is not without costs. Scoring cost and reliability, performance generalizability and person-by-task interactions, and logistical and financial constraints are challenges that have faced the educational testing community as large-scale performance assessments have become more frequently included on student and teacher assessments.

In this talk Dr. Gorin will discuss the opportunities and challenges facing next-generation performance assessments, emphasizing in particular what is new now that may have been insurmountable in past performance assessment movements. She will focus on assessment capabilities that leverage emerging technologies to afford a wider range of examinee interactions, assessment contexts, and real-time process data to support inferences and decisions about the complex skills stakeholders want to measure. She will also review the rigorous research that is needed to address a set of common questions including fairness and bias, generalizability, scoring and scaling, construct representation, utility and validity, data structure and processing, psychometric and statistical modeling, and reporting and validation. Finally, she will provide specific examples of simulation and games-based assessment in a discussion of strategies for building next generation performance assessments and associated validity arguments.

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Invited Speaker: Public Funding, Private Rules: How Charter Schools Have Taken Advantage of Their Hybrid Characteristics

Preston Green, University of Connecticut

Since 1991, forty-two states and the District of Columbia have enacted legislation for charter schools. While charter schools are generally characterized as “public schools,” they are in reality hybrid institutions that exhibit both public and private characteristics. This presentation discusses how charter schools have used their public characteristics to qualify for public funding under state constitutional law, while highlighting their private characteristics to exempt themselves from other laws that apply to public schools. This presentation concludes by discussing how legislatures can design their charter school laws to provide greater protection to the public and to students.

Featured Interview: A Perspective on Equating and Comparability at the State and National Levels

Ronald K. Hambleton, University of Massachusetts Amherst

There are few topics in psychometrics that occupy the space between policy and operational testing in such an interesting, challenging, and consequential way as equating and score comparability. Technical and methodological choices can have an enormous impact on results, and sometimes the context for equating brings in considerations that are well outside the textbook procedures for ensuring test and form equivalence. Professor Ronald K. Hambleton has over twenty years of hands-on experience in this area within the context of the Massachusetts K-12 assessment system and other state testing programs such as those in Alaska, Delaware, New Jersey, Pennsylvania, and Virginia, and for several years he has had a front-row seat for this topic at the national level in his role as a member of the PARCC Technical Advisory Committee. In this featured interview, Professor Hambleton will share his accumulated understanding and insights on large-scale equating in the context of both state testing and PARCC, with a special focus on technical problems, policy implications, and research opportunities.

In keeping with the conference theme, *Interdisciplinary Approaches, Collaborating Minds*, we look forward to facilitating collaborations and new ways for members to connect during the conference. During the meeting we will provide dedicated time for collaborative work as well as opportunities to connect with colleagues across methods, contexts, and paradigms through our workshop offerings.

Pre-Conference Workshop: Introductory and Intermediate R Workshops

Yoav Bergner & Jonathan Weeks, *Educational Testing Service*

Pre-Conference Workshop: Structural Equation Modeling: Modeling Approaches and Considerations

Sara Finney & Kelly Foelber, *James Madison University*

In-Conference Workshop: Getting to the “Action” in Youth Participatory Action Research: Research-Based Student Voice as a Driver of School Change

YPAR team from *Miss Porter’s School & The Center for Study of Boys’ and Girls’ Lives (csbg.org)*

In-Conference Workshop: Making it Personal: The Utility of Person-Centered Analysis in Academic Research

Elisabeth Pyburn, S. Jeanne Horst, Monica Smith, & Heather Harris, *James Madison University*

In-Conference Workshop: Using Mixed Methods Research to Tell the Whole Story

Felice D. Billups and Robert K. Gable, *Johnson & Wales University*

See the NERA Conference Highlights for more information about the conference.

We look forward to seeing you in October!

The NERA 2015 Conference Chairs
Amanda Clauser, *National Board of Medical Examiners*
Kimberly Colvin, *University at Albany, SUNY*
Katrina Crotts Roehr, *Educational Testing Service*

NERAConferenceChairs@gmail.com

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Becoming a NERA Member and Registering for the 2015 Conference

All attendees of the 2015 NERA Conference must also be NERA Members, so you must either renew your membership or join NERA before you can register for the conference. To pay your membership dues and register for the conference, please go to the NERA website <http://www.nera-education.org/>. If you need to renew your membership, you should have received your invoice via email.

Membership Dues (October 15, 2015 – October 14, 2016)

- Professional members - \$40.00
- Full-time Student members - \$15.00
- Retired members - \$15.00

Once you have renewed your membership or become a new member, you can register for the event. Instructions for registration are as follows:

Go to the following link: http://www.viethconsulting.com/members/evr/reg_event.php?orgcode=NERA&evid=12279557

- Once you begin the online registration process, we request that you pay special attention to the section titled "Event Information".
 - * If you are not planning to stay at the hotel, please check the box "estimated meal count (if not staying at the hotel)." We need to get an estimate of how many meals you will have at the hotel, so when you check this box, you will see a list of all possible options. You will not need to pay at this time for your meals, we just need an estimate. If you are staying at the hotel for the conference, you can ignore this part.
 - * If you want to sign up for any pre-conference or in-conference workshops, you must indicate that during the registration process. Click "pre-conference and in-conference workshops" and the "more information" link. A list of all workshops will show up. Click "more information" to read a summary of any of these. Check the box by the workshop(s) you want to attend. This will be your way of signing up. There is limited capacity for the workshops and they are first come, first serve so sign up early to hold your place.
 - * Click the "paperless program" box if you wish to forgo the paper program and simply use the online program.
 - * Click the "new member" box if you are a new member. If someone referred you, please indicate who in the open box that will pop up.
- Please use PayPal to pay your membership.
- Please note that to receive the regular registration rate, **you must register for the conference by October 1st!** After this date, a late fee will be added to the regular rates. As a reminder, the following are the registration fees for this year:

2015 Conference Registration Fees – On or Before October 1st (after October 1st):

- Professional member - \$85.00 (\$100.00)
- Full-time Student - \$30.00 (\$40.00)
- Retired member - \$20.00 (\$20.00)

Reserving Your Room and Meals at the Trumbull Marriott

NERA has negotiated affordable room rates for conference attendees. To receive these special conference rates, **please call (203) 380-6323** between 8:30am – 5:00pm (EDT) Monday – Friday. If you are calling off-hours, please leave your name and phone number and a hotel contact person will call you back. Note that all hotel reservations must be made by calling the number above. You cannot get the room rates through the internet. All reservations must be made by **Wednesday, September 30, 2015**. Please mention that you are attending the NERA Conference when you call the hotel.

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Rates

As with previous years, each night's stay at the hotel on Wednesday, October 21st or Thursday, October 22nd during the conference includes three full meals. Specifically, each NERA hotel guest receives dinner on the night of their stay and breakfast and lunch on the following day. That means if you reserve a hotel room for Wednesday and Thursday nights, all of your meals will be covered from Wednesday dinner to Friday lunch.

- All guest room rates are quoted exclusive of applicable state and local taxes, currently 15%.
- NERA attendees can stay at the hotel the night before the conference for a reduced rate as well, though this night will not include meals.

Pre-conference stay (Tues. Oct 20th)

	Single	Double	Triple	Quad
Tue. Oct. 20, 2015	\$137.00	\$137.00	\$137.00	\$137.00

Conference stays (Wed. Oct. 21st and Thurs. Oct. 22nd)

Occupancy rate is based on number of guests per room and per person (PP) price includes the meals as indicated under the rates.

	Single	Double	Triple	Quad
Wed. Oct. 21, 2015	\$249.00	\$361.00 (\$180.50 PP)	\$473.00 (\$157.67 PP)	\$585.00 (\$146.25 PP)
Thurs. Oct. 22, 2015	\$249.00	\$361.00 (\$180.50 PP)	\$473.00 (\$157.67 PP)	\$585.00 (\$146.25 PP)

For doubles, triples and quads:

Only one person should call and make room reservations and provide all of the roommates' names and their phone numbers under the same reservation. The hotel will call the other roommates to obtain their individual credit card information, so that the hotel will be able to charge the correct amount and furnish individual bills. Upon arrival, each guest must register at the Front Desk to access his/her room and a credit card will need to be swiped or a credit card authorization form must be completed and on file prior to arrival if the individual is not traveling with the credit card.

Graduate student "Quad room"

NERA continues to be an affordable choice for students. The Marriott is offering a special Graduate Student quad rate of \$585.00 per night, which includes meals and accommodations for four students per night, and comes to \$146.25 per student per night. This special rate is available **for students ONLY**. Graduate students are responsible for finding their roommates. One student will have to use a credit card to reserve the room for the quad. Each student must also register for the conference individually. (Conference registration requires a separate online form available through the NERA website, as described previously.)

If you have any further questions, please contact us at NERAConferenceChairs@gmail.com.

Let us know if you have any questions. We look forward to seeing everyone at NERA in October.



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46th Annual Conference: Highlights

Please note that the following represents highlights of the 2015 conference program.

The complete program, with times and dates for all sessions and events, will be available online before the 2015 conference.

Wednesday, October 21

Morning

Pre-Conference Workshops:

- Introduction to Structural Equation Modeling
- Introductory R Workshop
- Intermediate R Workshop

Afternoon

GSIC Panel on Exploring Different Job Areas and Developing Effective Job Seeking Skills

Featured interview with Dr. Ronald K. Hambleton, *University of Massachusetts Amherst*:

A Perspective on Equating and Comparability at the State and National Levels

In-Conference Workshops:

- Getting to the "Action" in Youth Participatory Action Research: Research-Based Student Voice as a Driver of School Change

Special Conference Sessions:

- Identifying and Making Use of Test Consequences
- School Policy & Practice

Evening

Graduate Student Social

Keynote Address with Dr. Ronald F. Ferguson, *Harvard University*:
The Influence of Teaching on Adolescent Agency

NERA 2015 Welcome Reception with Jazz Quartet

Thursday, October 22

Morning

In-Conference Workshop:

- Making it Personal: The Utility of Person-Centered Analysis in Academic Research

Special Conference Sessions:

- Data Blitz!
- The Role of Constructs in Educational Measurement
- Educational Technology
- Policy & School Reform

Thursday, October 22 (cont.)

Afternoon

Keynote Address with Dr. Nancy Streim, *Teachers College, Columbia University*:

The Power and Pitfalls of University-School Partnerships

Invited Speaker Preston Green, *University of Connecticut*:

Public Funding, Private Rules: How Charter Schools Have Taken Advantage of Their Hybrid Characteristics

In-Conference Workshop:

- Using Mixed Methods to Tell the Whole Story

Special Conference Sessions:

- Higher Education
- Assessment Design
- Teacher Preparation

Evening

GSIC Sponsored Session:

How to Write an Effective Research Report with Dr. Skip Livingston, *Educational Testing Service*, Dr. Stephen G. Sireci, *University of Massachusetts Amherst*, and Dr. Dena Pastor, *James Madison University*

Mentoring Program Happy Hour

Presidential Address with Dr. April Zenisky, *University of Massachusetts Amherst*:

Choose Your Own (Data) Adventure: Perils and Pitfalls, and Lots of Promise

Presidential Reception with DJ and Photo Booth

Friday, October 23

Morning

NERA Business Meeting

Special Conference Sessions:

- Subscores and Score Reporting
- Teacher Evaluation and Coaching
- School Culture & Community
- Poster Session

Invited Address with Dr. Joanna Gorin, *Educational Testing Service*

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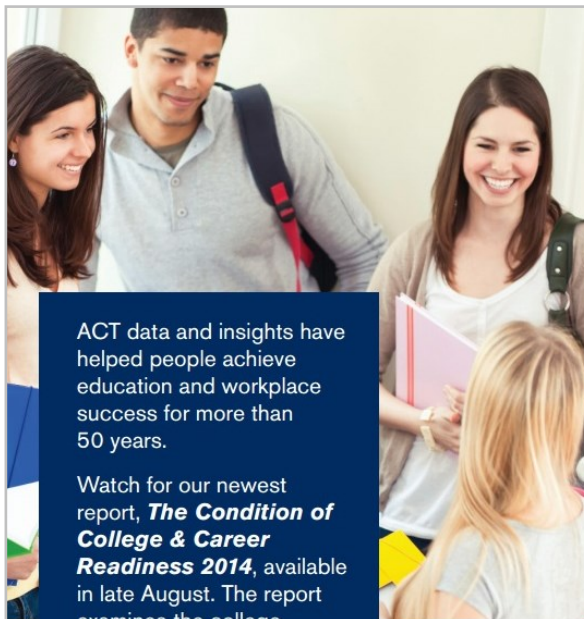
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2390

Growing Mentorship as Part of the NERA Experience

Ross Markle
Educational Testing Service

Jonathan Rubright
American Institute of CPAs

In 2013, the NERA Mentorship Program underwent a substantial renovation to refocus on three key areas. First, the scope of mentoring was expanded to include professional development and career guidance, in addition to research consultation. Second, mentors and mentees were encouraged to extend their interactions beyond the conference. Third, the Program acknowledged that mentoring—and perhaps more importantly, being mentored—is a skill set, and that participants should receive support and guidance in effectively engaging in a mentoring relationship.

This refocus, along with active outreach to the NERA membership, showed immediate gains. In 2013, there were 11 mentoring pairs, up from zero in 2012. A similar level of participation continued in 2014, and early numbers for 2015 are showing notable growth, with 18 mentees and 14 mentors already on board.

One of the keys to the success of the Program has been the commitment of those willing to serve as mentors. Long-time NERA members such as Tom Levine from the University of Connecticut and Felice Billups from Johnson & Wales University have offered their experience and guidance year after year. Through their commitment, these mentors and others have shown impressive service to NERA.

One exemplar of continued mentorship has been Cathy Wendler from ETS. Cathy began working with the NERA mentorship program in 2013, but has been involved with other mentoring experiences through AERA, NCME, and ETS. (In full disclosure, Cathy has mentored one of the authors of this piece since 2009, when he was a fledgling research intern at ETS.) Cathy says that one of the main reasons she pursues mentorship is to give back to the field. “Basically I see it as pay-it-forward,” Wendler recently told us. “Over the course of my career, I’ve had some exceptional mentors. I hope I provide the same to those I mentor. But I also love the experience working with individuals in my field, seeing the enthusiasm they bring.”

We reached out to several mentees who have worked with Cathy as part of the NERA Mentorship Program, each of whom responded with glowing comments about their relationship with Cathy. Kristen Smith, a doctoral student in the Assessment & Measurement Program at James Madison University, said, “After our first mentor meeting, it was evident to me that Cathy was truly invested in helping graduate students become successful professionals.” Others noted Cathy’s willingness to continue engaging year after year, and her ability to provide well informed guidance. As Matthew Swain, a Research Scientist at the Human Resources Research Organization, stated, “You can expect her to clearly answer just about any question you may have.”

Cathy’s work is admirable for many reasons. She is attentive to the needs of her mentees, engaged and available when needed, and invested in helping mentees achieve their goals. As she sees those achievements take place over time, she does so with great pride: “It’s very rewarding to see someone you’ve mentored succeed in their profession. Watching these exceptional individuals make a place for themselves in the measurement field helps me know that the field will continue to be in great hands.”

NERA has always been welcoming to graduate students, new professionals, and developing researchers. As such, mentorship—the ability to provide targeted and thoughtful guidance—is a key part of the NERA mission. Thankfully, with such gracious and accomplished volunteers like Cathy Wendler, NERA is well positioned to serve that mission.

For more information about the NERA Mentorship Program, please contact Ross Markle (rmarkle@ets.org) or Jonathan Rubright (jrubright@aicpa.org).

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Decoding Mixed Method Designs: What Do They All Mean?

Felice D. Billups, Ed.D.
Johnson & Wales University

Mixed methods research is a relative newcomer to the field of educational research. While the quantitative paradigm (QN) has long been established as acceptable, verifiable, and even dominant, the qualitative (QL) and mixed methods (MM) paradigms have suffered from a lack of acceptance, and even dismissal, by many educational researchers. The mixed methods paradigm, known as the pragmatic approach to research, currently reflects this migration from relative obscurity towards eventual legitimacy. The early years of any research paradigm's evolution are typically filled with extensive discourse and this is where we find the current debate about mixed methods, now in a phase of moderate confusion, notable contradictions among researchers and consumers, and a struggle for consensus regarding the use of this important approach.

If you are unsure as to what mixed methods is all about, or how to design a mixed methods study, you are not alone. At the June 2015 inaugural conference of the *Mixed Methods International Research Association* in Boston, several hundred individuals gathered to ask the same questions: what are the current definitions of mixed methods research and how can they best be applied to educational and social sciences research? In a field where educational leaders require a comprehensive perspective to effect change, the mixed methods approach yields a complete story, a story generated by statistics as well as by the words and perceptions of the respondents: the whole is truly greater than the sum of its parts. As noted by Teddlie and Tashakkori (2009), MM designs allow for the mixing of both types of data (QN, QL) in a single study. When used in combination, QN and QL methods complement each other and provide a more complete picture of a complex research problem—its trends, details, and nuances—far better than either approach could accomplish on its own.

Numerous MM texts and articles discuss the challenges of conducting a mixed methods study. Before beginning, however, you must be able to distinguish between the myriad MM designs. In this brief overview I summarize the current MM terminology to provide a framework for further study. While I cannot do justice to the vast amount of extant information on this topic, nor can I hope to be comprehensive in my review, I will attempt to highlight the current definitions of MM designs as a way to encourage your own pursuit of this complex but rewarding research domain.

Mixed Methods Designs, Notations, and Definitions

The constellation of mixed methods designs continues to expand, although the basic designs represent methods that either occur at *the same time* or occur *in sequence*. Essentially, all research designs can be placed on a continuum from completely mono-method (a single paradigm) to a fully mixed method (mixing occurs in all paradigms, in all phases, and at all levels of the study). Initially summarized in a table, and then described narratively, the mixed methods designs listed here represent many points along that research continuum:

Mixed Methods Design Types, Notations, Descriptions, and Timing

MM Design	Notation/Description	Timing
Sequential Explanatory	QN → ql OR QN→QL	QN first, then QL
Sequential Exploratory	QL → qn OR QL → QN	QL first, then QN
Convergent Parallel	QN + QL	QN and QL simultaneously
Convergent Embedded	QN + (ql)	QN dominant, ql nested
Transformative	Any combination of weighting and timing	
Triangulation	Any combination of 3 or more methods/data/theory/researchers	
Mixed Models	Mixing of QL and QN in all phases of the study, integrated	
Multiphase	Combinations of MM designs in a single multiphased OR longitudinal study	
Multilevels	Separate projects with a third phase that synthesizes	
Monostrand	Single paradigm mixed designs study, either QN or QL	

Sequential Designs (formerly known as dominant/less dominant). A first phase informs the development of the second+ phases:

Sequential explanatory (QN→ ql **OR QN→QL)** Seeking to explain a relationship or cause, beginning with the QN phase, followed by the QL phase
(*Ex: Survey questionnaire sent to teachers, followed by classroom observations*).

Sequential exploratory (QL→ qn **OR QL→ QN)** Seeking to explore phenomena, beginning with the QL phase, followed by the QN phase
(*Ex: Focus groups inform development of a subsequent survey questionnaire*).

Convergent Designs (formerly known as concurrent). Both phases of research conducted simultaneously but not typically 'mixed' until the data interpretation stage:

Convergent parallel (QN + QL) Research phases conducted simultaneously
(*Ex: Survey questionnaire + focus groups + interviews + document analysis occur at the same time*).

Convergent embedded (formerly nested) (QN + (ql)) Dominant QN research results inform the nature and scope of the QL phase, where the QL phase cannot stand on its own without relationship to the dominant QN purpose (*Ex: Ex post facto analysis supplemented by elite interviews*).

(Continued on page 15)

Advanced Specialized Designs

Transformative designs use social justice theory as a framework to advocate for an under-served or under-represented group, giving 'voice' to those participants; the design may either be sequential or convergent

(*Ex: Phenomenological interviews and participant journaling + ex post facto data on student achievement using a social justice theory, sequential or concurrent*).

Triangulation designs incorporate 3-4 or more corroboration methods to ensure triangulation in four possible ways: 1) methods triangulation, 2) data triangulation, 3) theory triangulation, and 4) researcher/analyst triangulation

(*Ex: A single population and 2-3 different methods; a single data collection method and 2-3 different populations; a single theory applied to different methods and data collection strategies; or a team of researchers collaborate on a single design; OR some combination of all of the above*).

Combination Specialized Designs

Mixed-Model Designs are conducted as either *within stage* or *across stage* mixing of methods in every phase of a study, such as QN embedded with the QL phase, or QL embedded within the QN phase, convergent and inter-dependent. Every phase of the MM research combines both QL and QN elements

(*Ex: Survey questionnaires include multiple open-ended questions; interview data includes 'quantitizing' elements in the questions and analysis; multiple phases follow this pattern through the entire study*).

Multiphase are multiple methods or longitudinal studies involving recurrent or new levels of mixing to accomplish a baseline or long-term study, where either QL or QN designs are alternated or juxtaposed simultaneously in order to achieve a single research objective **Design** (sometimes known as Multi-methods when **not** designed as longitudinal studies).

(*Ex: NSSE Survey data or data from a large data set are juxtaposed with focus groups, followed by a subsequent administration of the survey, followed by supplemental interviews, and continuing this juxtaposing pattern over a multi-year period*).

Multi-Level Designs occur when two entirely separate projects are conducted, followed by a third phase that generates a report synthesizing the two paradigm approaches, and highlighting the distinct results generated by two individual projects

(*Ex: Survey administration results plus focus groups results, combined via a third report that discusses the different findings and analyzes the results from a different and grounded perspective but without mixing the data or interpretations*).

Monostrand Designs/Single Paradigm Mixed Designs reflect a single paradigm study, all QN or all QL, in either sequential or convergent designs; no mixing of paradigms occurs, just a mixing of designs within a single paradigm

(*Ex: A correlational and ex post facto study, OR a phenomenological and grounded theory, or some combination of any set of QN designs or QL designs typically occurring in a sequence*).

Conclusion

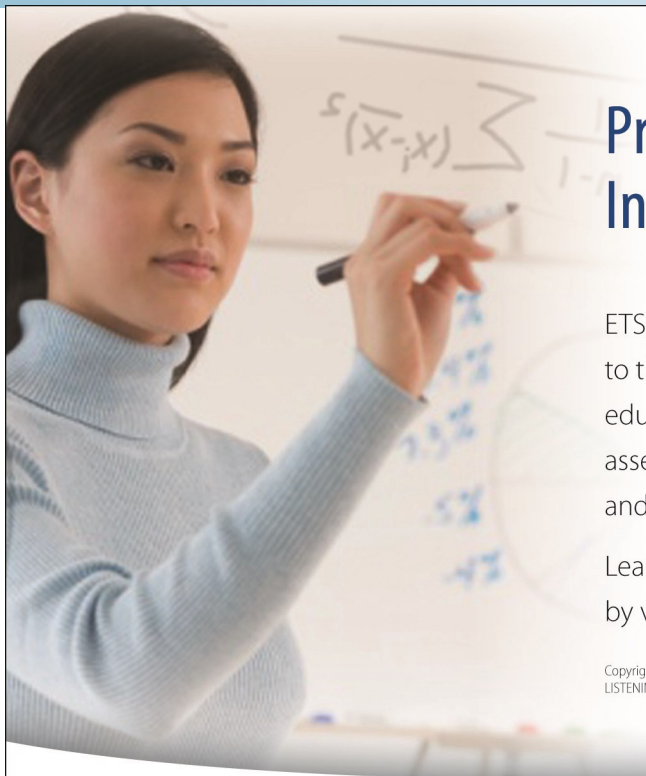
This overview conveys the basic definitions and descriptions of mixed methods designs, and generalizes the applications of this paradigm approach. In reality, the time, resources, and focus required to conduct a MM study are substantive. Researchers must not only distinguish the differences between MM research designs but also be able to understand the various component parts, from crafting research questions, to designing and implementing data collection strategies and data management and analysis, to data interpretation and reporting. This review attempts to begin the conversation—and to encourage researchers to experiment with the different designs in order to find the best approach for their individual studies. As noted by Creswell and Plano Clark (2011), while a mixed methods study may not be the answer for every researcher, or every research problem, its use does not diminish the value of conducting a study which merges the two approaches for a more comprehensive perspective of a problem (p. 13).

References

Creswell, J.W., & Plano Clark, V. (2011). *Designing and conducting mixed methods research*. (2nd ed.). Los Angeles, CA: Sage.

Teddlie, C., & Tashakkori, A. (2009). (2011). *Foundations of mixed methods research: Integrating quantitative and qualitative techniques in the social and behavioral sciences*. Thousand Oaks, CA: Sage.

Note: At the Fall 2015 NERA Annual Conference, Dr. Robert Gable and Dr. Felice Billups will facilitate a Mixed Methods workshop for all interested conference attendees; advance registration is requested. We hope to see you there!



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2015 Lorne H. Woollatt Distinguished Paper Award Announcement

Presenters at the 2015 NERA conference are strongly encouraged to submit a 15-20 page original research paper in competition for the Lorne H. Woollatt Distinguished Paper Award. This award is named in honor of Lorne Woollatt, a distinguished New York state educator who published, *The evolution of state-local governmental relationships in New York State*, in 1948 and was an active member of NERA. The winner of the award receives a \$500 stipend to present it as an invited session of SRERA at the 2016 American Educational Research Association (AERA) conference.

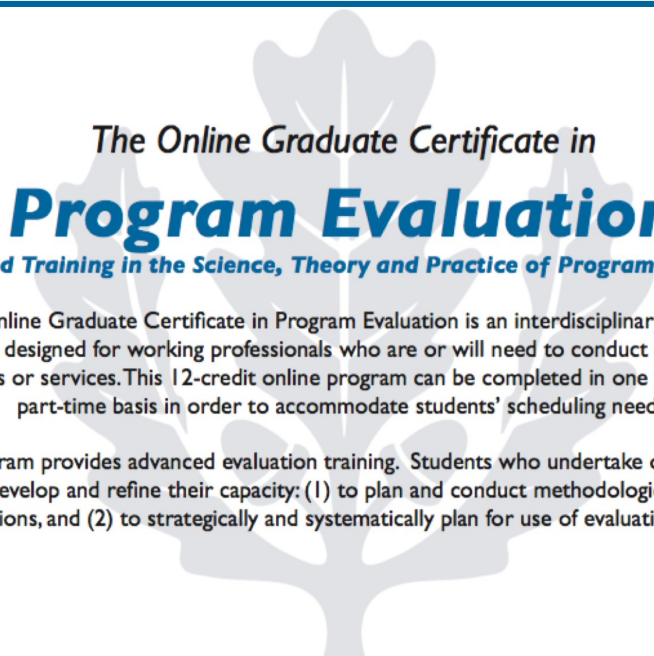
The 2015 winner of this distinguished award was Kathleen Sheehan of Educational Testing Service. Her paper, entitled, ***What Proportion of the High School/college Text Complexity Gap is due to Genre-Based Differential Feature Functioning (DFF)?*** examines the methodology used to estimate the problematic gap between high school and college texts.

The award will be given to the best paper presented by one or more authors at the 2015 NERA conference. Each paper goes through a blind review by the award committee to achieve a maximum number of points within specific categories.

The Lorne Woollatt Distinguished Paper Award committee invites participants at the 2015 NERA conference to enter presented papers meeting the research paper requirements into the contest. Please email two copies by November 7th to the committee Chair, one Blind copy and one copy with your name, affiliation, address, email address and phone number.

We very much look forward to receiving your paper by that date.

For the committee,
Johan W. van der Jagt, Chair
j.w.van-der-jagt@att.net



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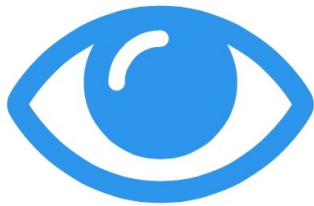
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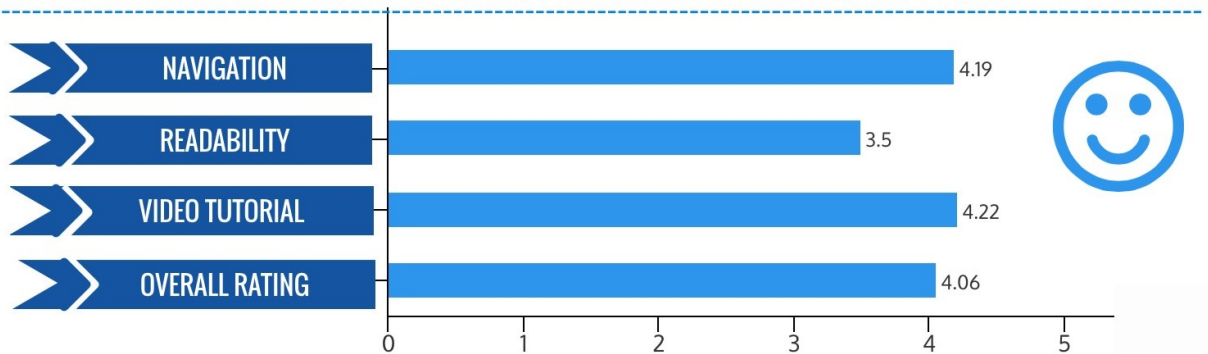
RESULTS FROM THE ONLINE SURVEY

Earlier this year, we launched an enhanced "flipbook" version of the newsletter, along with a short video tutorial showing the features of the new format intended to improve your viewing experience.

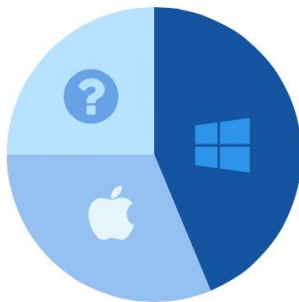
Then we asked you to rate and comment on the enhanced flipbook version of the newsletter as well as the usefulness of the tutorial. In total, 16 members responded to the survey, and their feedback is summarized below.

Based on your feedback, we are keeping both the online PDF and flipbook versions of the newsletter available at http://www.nera-education.org/the_nera_researcher.php.

AVERAGE RATINGS ON A 1-5 SCALE

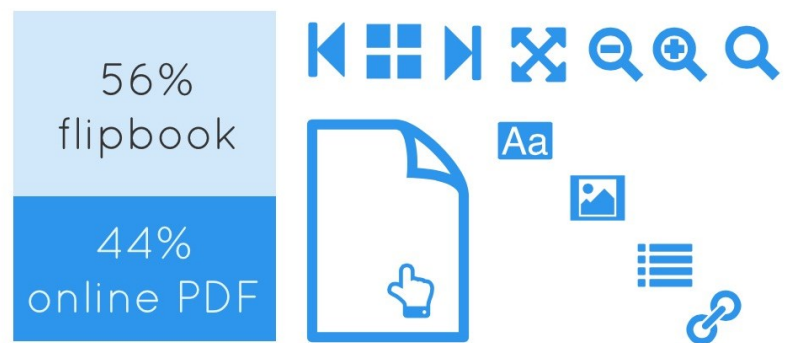


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Age

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SD = 10.2



9 faculty members



5 other professionals

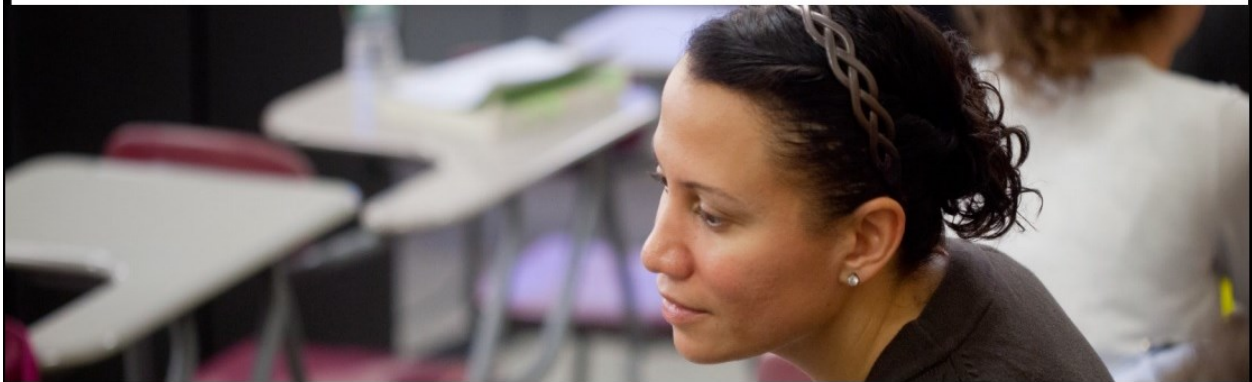


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Communications Committee Update

Jeanne Horst
James Madison University

Hello NERA Members:

I hope this finds you doing well and anticipating the upcoming 2015 NERA Conference. This has been a busy year for the NERA Communications Committee. Thank you for bearing with us as we've learned how to maximize the capabilities of the NERA email system. We experienced several glitches this spring, including our NERA emails being picked up by spam filters. We appreciate your patience as we continue to work at refining NERA communications.

One goal of the Communications Committee is to disseminate useful NERA information to members, while at the same time not flooding members' email inboxes. In order to accomplish this goal, we have set several guidelines for information dissemination. Specifically, official NERA correspondence is the only type of communication disseminated via NERA email blasts. Other information, such as calls for proposals for other conferences, internships or jobs, is posted on our NERA bulletin boards and social media sites. Check out our Twitter, LinkedIn and Facebook pages, as well as the NERA Website Message Board!

The Communications Committee accomplishes its goals through the efforts of six committee members, many of whom have recently transitioned to new roles within the committee. This summer, Bo Bashkov transitioned to Webmaster, replacing Tia Sukin who served in that role for over three years. Chastity Williams-Lasley from Duquesne University has agreed to take over for Bo as the Social Media Coordinator, managing the NERA LinkedIn, Facebook and Twitter accounts. Joshua Marland has faithfully served as email coordinator for the past year and will transition off of the committee when he takes on the role of 2016 NERA Conference co-chair. I am grateful that Jonathan Steinberg provides ongoing guidance to the committee.

If you haven't already joined our LinkedIn and Facebook pages, we encourage you to do so. If you have information that you would like us to communicate, a Communication Request form may be downloaded from the NERA website and submitted. If there are other ways that we can serve you, please feel free to contact me at horstsj@jmu.edu.

S. Jeanne Horst
Chair, Communications Committee



Chastity Williams-Lasley
NERA Social Media coordinator



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Membership Committee Update

Dear NERA Members,

As the 2015 annual conference is quickly approaching, the Membership Committee is working hard to increase NERA membership and conference attendance. The Committee is asking you one more time, if you have not done so yet, to go to the link in the email ("**Bring a Friend to NERA!**") you received recently, and simply click to let us know your students/ colleagues/ friends who might be interested in joining NERA. Refer now and don't wait—we will send them a special invitation to the conference in the fall! Please also feel free to personally invite or refer new members to NERA, whichever way is convenient and easier for you!

The NERA member who brings the most new members will win a prize!

Thank you so much for your continuous support for NERA!

Sincerely,

Nina Deng, *Measured Progress*
Chair, NERA Membership Committee

Member News

The 10th Conference of the International Test Commission (ITC 2016)

Call for Proposals

The 10th Conference of the International Test Commission will be held in Vancouver from July 1-4, 2016. We are happy to announce that the Conference is now open for abstract submission. The 10th Conference theme is "Improving Policy and Practice: Opportunities and Challenges in an International Context." Your participation will contribute to a state-of-the-art experience for everyone at the Conference and will contribute to the field of measurement and assessment. We invite you to submit your proposals through <http://itc2016.educ.ubc.ca/submit>.

Types of Submissions:

- Workshop
- Symposium
- Single paper presentation
- Poster

All types of submissions should be an APA style abstract in text only format of no more than 300 words. The closing deadline for all types of submissions is *December 21, 2015 (except for the workshop, which is October 20, 2016)*.

You can go to our website at <http://itc2016.educ.ubc.ca/call-for-proposals/> for submission information or you can download a PDF version of the guidelines at <http://itc2016.educ.ubc.ca/guidelines>.

All submissions will be subject to a blind review process by at least two independent peers. The ITC Scientific Committee will notify the authors on the decision by *February 28, 2016*. Early bird registration for the conference begins on *November 01, 2015*.

We look forward to seeing you in Vancouver in July 2016!

Seth Kershner is co-author (with Scott Harding) of a new book, *Counter-recruitment and the Campaign to Demilitarize Public Schools* (Palgrave Macmillan). Drawing on dozens of interviews with activists conducted between 2012 and 2014, their book describes the various tactics used to demilitarize public schools in the United States. They also discuss case studies of successful organizing and advocacy to challenge the presence of military programs in educational settings. You can see the book cover on the right.

Mary E. Yakimowski, the current NERA secretary, has been appointed the Assistant Dean of Assessment at Sacred Heart University's Farrington College of Education (FCE) in Fairfield, CT.

Whitney Zimmerman received her Ph.D. from the Educational Psychology Program at Penn State. She is now working in Penn State's Department of Statistics with their online introductory statistics course.

Mathew Swerdloff has been appointed to the position of Executive Director of Educational Support Services in the Hendrick Hudson School District. Formerly the Director of Technology at Hendrick Hudson, Mathew's new role will include instructional technology, professional learning, and human resources for the district.

Whitney Smiley recently obtained her Ph.D. from the Educational Psychology and Research program at the University of South Carolina. She also recently accepted a position with SAS Institute as an Analytical Consultant.





The Graduate Lounge

Xi Wang

University of Massachusetts Amherst

NERA Best Paper by a Graduate Student Award 2014 Winner

The Graduate Student Issues Committee (GSIC) would like to congratulate Elisabeth Pyburn of James Madison University and her co-authors Mary Johnston, S. Jeanne Horst, and John Hathcoat. Elisabeth's paper titled "A Psychometric Evaluation of the Miami University Diversity Awareness Subscales" was selected to receive the 2014 Best Paper by a Graduate Student Award! The GSIC would like to thank the 21 raters who graciously volunteered their time and expertise to select our winner. The names of the authors and an abstract of the winning paper are featured on the [GSIC page](#) of the NERA website.

We encourage all graduate students to submit their papers for this year's 2015 Best Paper by a Graduate Student Award.

Best Paper by a Graduate Student Award 2015

If you are *first author* on a paper you present at NERA (posters included), please consider submitting your paper for the Best Paper Award. The recipient of the award will be given **\$250**. If you want to be considered for the award, papers must be submitted to neragraduatestudents@gmail.com by **Monday, November 2nd**.

NERA 2015 Conference

The GSIC would like to encourage all graduate students to attend the 2015 NERA Conference, which will take place October 21-23 at the Trumbull Marriott Merritt Parkway Hotel in Trumbull, CT. The conference will feature several exciting events geared toward graduate students:

- Two in-conference sessions
 - * Session #1 — *How to Write an Effective Report*
 - * Session #2 — *Exploring Different Job Areas and Developing Effective Job-seeking Skills*
- Graduate Student Social
- Professional Development Workshops
- Poster Session

GSIC Call for New Members:

Serving on the GSIC is a great way to get involved with NERA and build relationships with other graduate students! Responsibilities include collaborating with students from various institutions to plan GSIC sponsored in-conference sessions, and the GSIC student social. New members are selected each year after the NERA Conference. For more information on how to apply and get involved, please contact neragraduatestudents@gmail.com.

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