

## Correlating Persons Instead of Tests: My Favorite Stephenson Article

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I first read a Stephenson article thirty-three years ago at Iowa. Along with others active in the Q community – notably Len Barchak and Rob Logan – I was a member of Dr. Albert Talbott's seminar in multivariate research methods and design. It was the fall of 1974. Al Talbott handed us a stack of articles, most of them from *Psychological Record*, to read before Dr. Stephenson's first visit. He had agreed to come up from Columbia, Missouri, one week a month to lead the seminar. Our job was to read and think and discuss and question.

Ah, yes, as they say, those were the days, but, frankly, after thumbing through that stack of papers I was scared: studying journalism at Berkeley may have been tough enough, but now I had to tackle the strange and eccentric lingo of psychology. Stephenson was not like any writer I had read before. And it was not only the vocabulary, the jargon, the tied-down-tight-to-scholarly-references style, but the simple fact that the concepts were mostly unknown to me. But, I was an editor by training and soon noticed that Stephenson's style of presentation followed a logic, although a logic I had not encountered. My only hope lay in collaborating with my fellow seminarians; I prayed they would be in better condition. Sadly they were nearly as mystified as I but also just as determined. As I remember it, our cohort took that seminar nine times, and it was only toward the end that I began to feel at ease with Stephenson's writing. (At ease? No, this is not exactly the feeling. It was more like being in the cage with trained but not tamed lions. Sometimes one identified with the beasts and sometimes with the tamer! One must be ever vigilant, keeping the eyes peeled for any movement, holding on to the cage for dear life – or the chair and whip, as the case may be!) We did survive.

My copy of *Study of Behavior* shows that I bought it in the spring of 1975, and my favorite Stephenson article is mentioned on page 8, "Correlating persons instead of tests," *Character and Personality* (Vol. IV, Sept, 1935. This is the correct citation; in the list of references in *Study of Behavior* the volume number is incorrectly stated as being volume VI). He

quotes from it and comments at some length on how Q and R function. Even though I have read that passage more than once over the years, I actually looked up and read the article for the first time in 2005! So, one might wonder, what took you so long? Well, I backed into it while preparing a talk on Q, but more on that a little later. A better answer would be to say that my ignorance, in reading *Study of Behavior*, had drawn me into thinking that the heart of “Correlating persons instead of tests” was the Q vs. R argument, but I think differently now. I want to explain how this article influenced my thinking.

1. It is the first article about Q to be published after the initial letter to *Nature*; it was written for specialists in factor analysis in psychology.
2. It is the first published report of a Q study, coming before Stephenson had named his invention Q methodology.
3. It puts Q firmly in place as an advancement of science.
4. It emphasizes the study of behavior through experiments and assigns mathematics to a role of servant to science.
5. It is not overly simplified, but is written in a matter of fact style, almost journalistic in tone, never shying away from central issues.
6. It provides a straight-forward critique of R, not by way of dwelling on the errors but by drawing attention to the limitations.
7. It establishes a pattern of writing up results of a Q study still used today, namely, establish a theoretical base, report a Q study as an experiment with this base, then comment on these results.
8. It speaks to every component required to produce a Q study. (This alone makes it a must read for students.)

Now, I do not have the space here to properly deconstruct the article, although there are several pedagogical motives for doing so. Let me instead zoom in on three paragraphs in support of the above reasons.

Stephenson begins with these words: “This is not going to be a statistical article. Instead, I am to introduce a new general technique to readers of this journal, one which should be of greatest interest to them, because its evident use will be in the study of human personality.”

In almost journalistic fashion he tells us what he is going to say by telling what he is not going to do! He writes in the third person, present tense, matter-of-factly. For a neophyte, this must come as a relief.

But then comes, “The technique is a complete inversion of all previous factor techniques.”

Stephenson has written to an audience of skilled specialists and can thus assume they will know what he is talking about. Indeed almost all of his writing is intended for specialists. Here he utilizes this fact and establishes a tone that could be referred to as “the inside dopest”, one seeking to be in the know, the name Wilma Crumley (1963) gave to a factor in her thesis on newsreading behavior in the 1960s. But, journalists in the U.S. use a catty phrase when this approach does not work out: “talking inside baseball,” meaning that the phraseology will raise more questions than it answers. So, it is easy to imagine the neophyte saying, “Uh, oh, ‘inversion’?, ‘all previous factor techniques’? What do these words refer to?” This is the point where collaboration is called for.

A little later in the article, Stephenson offers up his new technique as a way for psychology to bring factor work into the main line of science: “Its result [i.e., Q’s] is to tell us first how people are universally *alike*, and thereupon to allow us to measure them for the processes in which they are alike, because only with such a warranty could we compare them.”

Here is found the true heart of his argument: surely, before we would be able to measure and compare people in terms of individual differences, we should first inquire into their similarities. “Ah, ha”, the neophyte might well say. “Here is the meaning of inversion – instead of a psychology based upon individual differences, let us establish what people have in common.” Thus, in one sentence, Stephenson stood factor work on its head.

Finally, the third example, comes while Stephenson is setting up for an experiment regarding personal taste – a Q study of matters of opinion, fashion, part of one’s personality, and so on. He asks: “What kinds of taste are there? How specific in fact are they? Are they connected one with another? Have tastes a pleasure content, or are they intellectualized only? Are the things we like the same as those we have a taste for?”

Notice the forms of the questions, every one requiring action, i.e. behavior, and the action is to be physically choosing colors, ranking them in terms of pleasure to unpleasure. The experiment is concrete, is grounded in theory, is focused on specific actions. One is reminded that Stephenson was first trained as a physicist, and he set up this experiment accordingly – here is the experimental device, a Q sample of sixty standard colors. What will happen when the device is turned on, i.e., how will the twenty people rank order them? This is precisely how a physicist proceeds: build the device, turn it on, record what happens, analyze the results.

So now, at the end, I come to how I backed into this article. Dr. Diane Montgomery, of Oklahoma State University, had asked me to spend an afternoon with students in her seminar in Q methodology. I wanted them to do a Q sort that could serve as the centerpiece for the session and had settled on asking them to sort pictures of different colored VW Beetles, from most pleasing to least pleasing. As I was putting this together, I remembered that the *Study of Behavior* had a Q study about color, so I opened the book, and

there it was on page 8. (Although, since I was in Brazil and 5,000 miles away from a research library, Steve Brown rose to the rescue and sent the article to me as a PDF file. Many thanks.) Stephenson had found two factors. At OSU, I found four, but I'll have to wait to tell you about those on another occasion!

### References

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