

# Implementing Classroom Assessment Techniques – Project 1

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ILT 5830 - Workshop: Assessment and Technology

Greg Lea

## Project Overview

I recently developed a course for my organization called *Reading Payment Histories*. This two hour course will be delivered to approximately 97 employees in the Default Call Center in multiple sessions. In deference to the assessment methods discussed in IT 5830, I have decided to enhance *Reading Payment Histories* by integrating Classroom Assessment Techniques (CATS) into the course content.

## Motivation

Part of my instructional design philosophy is that learning will increase if students are engaged and active. Students should be active physically and cognitively. I want the students to get up out of their seats and learn by thinking and doing, rather than just listening (or not). Until now, my best effort at promoting engagement has been limited to reinforcement of course content with activities that simulate job specific tasks and procedures. While I will continue that practice, I have a new tool for my learning toolbox: Assessment AS learning. Assessment AS learning inserts assessments into instruction to promote engagement, higher order thinking, and learning. CATs are an example of Assessment AS learning.

## Procedures

*Reading Payment Histories* is an existing course that has been delivered three times in the previous month. I will implement three additional assessments using the following techniques:

- **Background Knowledge Probe:** Our learners are existing employees with a broad range of knowledge and experience. Each participant performs the same job, but the range of experience could be from as little as two months to multiple years. I will develop a five question pre-test which will be used to provide the trainer and the participants with an idea of what the participants know and where instructor and participant attention should be focused.

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- **Application Cards:** After discussing the payment history hierarchy (see the attachment), participants will describe how the payment history hierarchy can be applied to their jobs, citing specific instances where it may be useful. Responses will be written anonymously on index cards, handed to the instructor, and discussed with the group.
- **Muddiest Point:** Prior to the course's final activity and post-test, each participant will record one key point for which he or she is least clear. Responses will be written anonymously on index cards, handed to the instructor, and discussed with the group.

## Obstacles

As an instructional designer, my responsibilities include designing and developing course content which is then delivered by a trainer. This creates an environment in which new concepts and strategies may not be fully understood, accepted, or implemented by the trainer. The CATs that will be integrated into *Reading Payment Histories* present these risks because they are new and unfamiliar. To ensure that our trainers understand the purpose of the CATs and the process for their implementation, I will conduct a one hour train-the-trainer session prior to their debut. Additionally, I will observe the initial training session, providing guidance if necessary.

## Findings

I observed two sessions for this class. The added CATs were well received and initiated discussion and provided variety.

**Background Knowledge Probe:** This was an effective method of establishing course goals and relevance.

Most of the participants answered most of the questions incorrectly. When a participant missed a question, he or she would often request immediate feedback. I think this piqued the participants' interest in the course by establishing that the course contained useful information with which the participants were unfamiliar.

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**Application Cards:** During the initial portion of the class, the discussion was dominated by three participants. The cards helped to extract contributions from all participants. Additionally, the application examples submitted by the participants generated more class discussion than the lecture portion of the course. The initial discussion was often followed by requests for clarification, which then generated further discussion.

**Muddiest Point:** This assessment was very effective. Participants responded favorably to the anonymity of using index cards. The cards also generated clarifying questions about specific course content and related topics that may have been indirectly addressed in the course. In one example a participant asked, “What is ‘suspense?’” This probably was not asked during the class because it is a basic concept that an experienced agent should know. Even though this was off topic, it was an important topic and the opportunity to clarify that question was a useful sidebar.

## Conclusion

The CATs inserted into this course were excellent instructional tools and catalysts for deeper discussion of key topics. Overall, participants and trainers responded favorably to the activities. After experiencing these activities the trainers (and I) better understood just what CATs are capable of providing: engagement, discussion, and focus. The next steps are to:

- Explore other types of CATs that may be useful
- Look for opportunities to insert CATs into other courses offered by my organization
- Educate other trainers and instructional designers about CATs

## Background Knowledge Probe

1. Which Fidelity Screen would you view first to most easily identify the most recent payment applied to a loan?
  - a. P309 – Mortgage Loan History screen
  - b. PHST – Payment History screen
  - c. DLQ2 – Repayment Plan Payment History screen
  - d. DLQH – Delinquency Loan Financial History screen
2. What level of detail is provided on Fidelity screen SER1/HPMT? Choose all that apply.
  - a. Tran Code Description
  - b. P&I are displayed separately
  - c. Displays the escrow balance after each transaction
  - d. Displays late charge assessments
3. What screen would you choose to quickly locate general information about fees assessed, paid, or waived on a loan?
4. If a customer asks you to identify the specific portions of her payment that changed causing her payment to increase, which Fidelity screen would you view?
  - a. DLQH – Delinquency Loan Financial History screen
  - b. PCH1 – Payment Changes screen
  - c. P309 – Mortgage Loan History screen
  - d. SER1/ARM1 – ARM Loan Change History screen
5. Select the three screens below that you believe are the most useful for answering general payment history questions such as when a payment was received.
  - a. DLQH, P309, DLQ1
  - b. DLQH, SER1/HPMT, SER1/HIST
  - c. DLQH, P309, SER1/HIST
  - d. DLQH, P309, SER1/HPMT
  - e. DLQH, PCH1, SER1/ HPMT