

Tasks and Roles for Online Training Projects

The table below lists the major tasks that need to be accomplished in a typical online training development (or major revision) project. The columns labeled *ID roles* and *SME roles* describe Instructional Designer (ID) and Subject Matter Expert (SME) responsibilities related to each task.

Task	ID roles	SME roles
1. Project management	<ul style="list-style-type: none"> • Serve as course design lead. • Provide overview of development project tasks. • Work with SME to develop schedule, • Provide project status updates at least bi-weekly. 	<ul style="list-style-type: none"> • Serve as course content expert. • Attend alignment meetings with ID as needed. • Invite any other SMEs that may be involved in the project to attend as needed. • Work with ID to meet project schedule.
2. Prepare for requiring training (note: this task applies only if the course will be System-required)	<ul style="list-style-type: none"> • Provide info to SME about options for handling the training assignment process. • Communicate with System member training coordinators about the requirement (e.g., estimated rollout date, topic, who will be required to take the training) and who will be the local technical contact. 	<ul style="list-style-type: none"> • Complete Request for Requiring Training form • Decide how the training assignment process will be handled. • Identify local SMEs at each System member and serve as the POC for these contacts. For example, for HUB training, the local SMEs are the System member HUB coordinators. • Let the local SMEs know who their training coordinators are. • Ask local SMEs to identify which individuals or positions will be required to take the training.
3. Background research (primarily applies to new courses)	<ul style="list-style-type: none"> • Identify and review existing training materials. • Review background materials and other information provided by SME. • Ask System training coordinators if they are aware of existing training resources. • This task may also involve conducting interviews and making audio or video recordings. • Develop training concept based on content outline and other SME inputs. 	<ul style="list-style-type: none"> • Provide information about existing training resources. • Provide background information to facilitate course development, such as: <ol style="list-style-type: none"> 1. Instructional objectives 2. Common mistakes or misconceptions 3. Real-life anecdotes for use in scenario development. 4. Relevant laws and policies 5. Useful Web pages • Provide content outline to ID (either oral or written format). • Provide ad hoc feedback to ID via e-mail or phone call.

Task	ID roles	SME roles
<p>4. Develop pre-online draft (script and/or storyboard)</p>	<ul style="list-style-type: none"> • Create script and/or storyboard, to include text and descriptions of any multimedia elements (e.g., artwork, photos, audio, or video) that will be added. • Coordinate Office of General Counsel (OGC) review. • Revise as needed based on feedback provided by SME and OGC. 	<ul style="list-style-type: none"> • Review and provide feedback about script and/or storyboards. • Gather feedback from other content reviewers/stakeholders if needed.
<p>5. Locate or create multimedia elements.</p>	<ul style="list-style-type: none"> • Find or create any needed multimedia. 	<ul style="list-style-type: none"> • Assist with identifying appropriate multimedia if needed (most applicable when the content is very subject-specific— e.g., certain types of safety training)
<p>6. Develop online draft.</p>	<ul style="list-style-type: none"> • Create online draft • Coordinate OGC review. • Revise as needed based on feedback provided by SME and OGC. 	<ul style="list-style-type: none"> • Review and provide feedback about online draft. • Gather feedback from other content reviewers/stakeholders if needed.
<p>7. Rollout the training.</p>	<ul style="list-style-type: none"> • Develop end-of-course survey and other evaluation instruments as needed. • Get course approved for CEU/CPE credit, if applicable. • Send announcement to System member training coordinators about the training (e.g., estimated rollout date, topic, nature of requirement) • Activate the training in TrainTraq. • Assist System training coordinators with making training assignments, if needed. 	<ul style="list-style-type: none"> • Remind local SMEs that the training is about to roll out. • Make sure local contacts know who to call if they have questions about the training.
<p>8. Follow-up</p>	<ul style="list-style-type: none"> • Monitor feedback from employees, such as end-of-course survey data. • Meet with SME at least annually to review comments and revise training if needed. 	<ul style="list-style-type: none"> • Monitor feedback from employees, such as end-of-course survey data. • Let ID know about any changes that could impact the course (e.g., revisions to policies or regulations, web page address changes).