## 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.

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<tr>
<th>Task</th>
<th>ID roles</th>
<th>SME roles</th>
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| 1. **Project management** | • 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. | • 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)** | • 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. | • 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)** | • 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. | • Provide information about existing training resources.  
• Provide background information to facilitate course development, such as:  
  1. Instructional objectives  
  2. Common mistakes or misconceptions  
  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. |
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| 4. **Develop pre-online draft (script and/or storyboard)** | • 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. | • Review and provide feedback about script and/or storyboards.  
• Gather feedback from other content reviewers/stakeholders if needed. |
| 5. **Locate or create multimedia elements.** | • Find or create any needed multimedia. | • Assist with identifying appropriate multimedia if needed (most applicable when the content is very subject-specific—e.g., certain types of safety training) |
| 6. **Develop online draft.** | • Create online draft  
• Coordinate OGC review.  
• Revise as needed based on feedback provided by SME and OGC. | • Review and provide feedback about online draft.  
• Gather feedback from other content reviewers/stakeholders if needed. |
| 7. **Rollout the training.** | • 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. | • 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. |
| 8. **Follow-up** | • 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. | • 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). |