Morris Learning Design

Working with Subject Matter Experts:

Strategies for Learning Design Success

March 30, 2023

1:15 – 2:00 pm

Morris Learning Design

Overview

- Introduction
- What is a Subject Matter Expert (SME)?
- SME Touchpoints: Project Discovery to Course Launch
- Pitfalls and Strategies
- Questions?

Morris Learning Design

Introduction

- Morris Learning Design (2017 – present)
  - Projects range from new online course design and development to live facilitator training modules.
  - Clients include corporate, start-up, non-profit, and small businesses.
- Manager of Training and Partner Enablement, edX (2014-2017)
- Director of Training and Learning Consultant for Fortune 500 companies (2002-2014)

Morris Learning Design

What is a Subject Matter Expert (SME)?

- A subject matter expert has specialist skills, knowledge, and experience in a particular field.
  (December, 2017, The Journal of Pipeline Engineering)

- The **main** resource for providing, reviewing, and approving course content.

- Varieties of Experts:
  - Client
  - Team member
  - Someone who works at the organization, not on the team
  - Someone who is hired from outside

Morris Learning Design

The Subject Matter Expert is integral to the success of your project.

Morris Learning Design

Challenges of Working with SME’s

- Busy people in high demand
- Don’t know/not aligned with project goals
- Their content is still in development
- Change their mind about relevant content
- Overly invested in the outcome
- Not invested enough in the outcome

Morris Learning Design

Content Management + Positive SME Relationship =

Successful Learning Design

Morris Learning Design

SME Touchpoints at Each Project Stage

1. Project Discovery
2. Statement of Work
3. Course Design
4. Course Develop
5. Course Build/QA
6. Course Launch

Morris Learning Design

1. Project Discovery

SME Touchpoint

- Build credibility – describe examples of similar projects
- Show "Active Listening" by asking clarifying questions and providing a project synopsis
- Build rapport by finding common ground through shared connections, work, etc.

Morris Learning Design

Project Discovery Template

I. Goals

- *Describe course goals (What is the criteria for a successful course?)*

II. Audience Analysis

- *Describe Intended Audience (both current and future audience, and estimated number of learners)*

III. Learner Motivation

- *Why do learners want to take this course? (career growth, pathway to credit, credit-bearing, etc.)*

IV. Content

- *What content is available for the course? What content is missing?*

V. Platform Requirements

- *Describe the LMS, e-commerce, other platform tools for the course.*

Morris Learning Design

2. Statement of Work

SME Touchpoint

- Set expectations on the level of effort to complete the project
- Describe team members’ roles and responsibilities including who provides final approval if working with a team of SME’s
- Explain financial and timeline incentives for client to remain within scope and minimize project changes
- Identify risks to the project and suggest solutions

Morris Learning Design

Statement of Work Content

- Deliverables + Time Estimate (curriculum map, course script, course build, facilitator training, etc.)
- Project milestones (signoff on project deliverables)
- Project team roles and responsibilities
- Any project changes to be discussed and mutually approved by client and vendor
- Assumptions: Format of deliverables, content management approach, availability of client and vendor, platform requirements.

Morris Learning Design

3. Course Design

SME Touchpoint

- Confirm project goals haven’t changed from initial discovery session
- Partner with SME on developing learning objectives, assessment approach, and curriculum map
- Review existing content, identify gaps for SME to provide
- Set expectations around project timing

✓ **Get signoff on two milestones: Project Plan and Curriculum Map**

Morris Learning Design

Course Design Template
(Based on Backwards Design)

VI. Learning Objectives: *Describe the course learning objectives (What is it that learners should **know** and be able to **do** by the end of the course?)*

- *Reference Bloom's Taxonomy: Remember, Understand, Apply, Analyze, Evaluate, Create*

VII. Assessment Strategy: *How will you know learners have achieved the learning objectives?*

- *Assessment types, auto-graded, instructor-graded, etc.*

VIII. Curriculum Map: *Develop lessons based on learning objectives.*

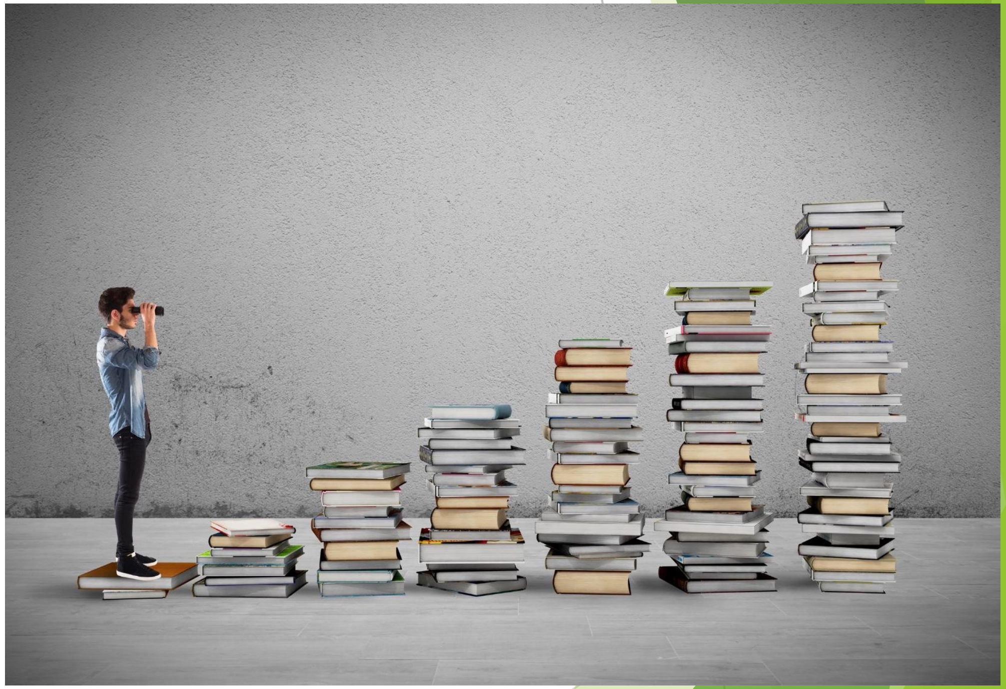
Learning Objective	Lesson Name	Assessment	Course Content	Lesson Description

Morris Learning Design

4. Course Develop

SME Touchpoints

- Available to field questions on course script, based on agreed-upon content from curriculum map
- Organize questions for SME one lesson at a time – instead of constant barrage of questions
- If appropriate or possible, provide new content ideas or suggestions for SME to review
- Share each module with SME for review and approval, while simultaneously working on next module
- **Get signoff on one milestone: Course script**



Course Development Template

Morris Learning Design

<Client Name>
<Course Title>

Course Script Key
Blue = Module Title (Section)
Green = Lesson Title (Subsection)
Lesson = Page of Content (Unit)
White = Course Content (Components)
Text in Itals = Type of Content

Left Menu Bar	**Course Content**
Module 1	
Lesson 1: **Introduction**	**Lesson 1**
	Text/Graphic
	Video
	Assessment
	Discussion Question

Morris Learning Design

5. Course Build/QA

Client/SME Management

- Provide first module for SME to QA first - to ensure the design is aligned with their expectation
- Share the whole course to QA when complete

Morris Learning Design

Course Launch Checklist - Part 1

Course Design	
	Course Introduction: Include high-level course description and intended audience, link directly to custom page.
	Videos include short text description above, no "widow" videos.
	Add course about info. on home page.
General Course Setup	
	Confirm start date, end date, enrollment start date and enrollment end date.
	Add course about info. in course settings.
	Add course banner image in course settings.
	Update "days early for beta testers" in advanced settings if applicable.
	Add Custom Page for course info., and turn off Wiki page
Custom Page	
	Course syllabus/outline, intended audience, course pre-requisites, time commitment, any deadlines, and modality (self-paced vs. instructor-paced).
	Grading policy, learner participation expectations and/or certificate requirements explained.
	Any special tools/features described such as Notes, etc.
	Discussion forum guidelines on a custom page or prominently placed in course outline.
	Instructions for learners on where to get technical support and/or content help.
	Instructor(s) and/or course moderators biographies on a custom page, or prominently placed in the course outline.

Morris Learning Design

Course Launch Checklist - Part 2

Grading Policy & Assessments	
	Confirm number and type of assessments, and passing score are set up correctly in grading policy.
	Confirm correct subsections are graded.
	Set up certificate assets and functionality, if needed.
	Confirm graded assessment questions are set up with correct settings such as number of points per question (typically 1 unless more complex), 3 allowed attempts, no reset button, etc.
	Confirm ungraded assessments allow unlimited attempts, with reset button, etc.
Discussion Forum	
	Disallow "anonymous posts" in advanced settings.
	Add course team members and discussion forum moderator roles, as needed. *Note course moderators need to be added even if you are a course staff or course admin.
	Change course wide "General" discussion to "General Course Content Questions", add new one called "General Course Technical Questions" and "Learner Introductions"

Morris Learning Design

6. Course Launch

Client/SME Management

- Get final client approval for course going live
- Provide training and/or support for course facilitation and/or management
- Celebrate launch!

Open edX Facilitator Guide

Welcome to the quick guide to facilitating courses on Open edX!

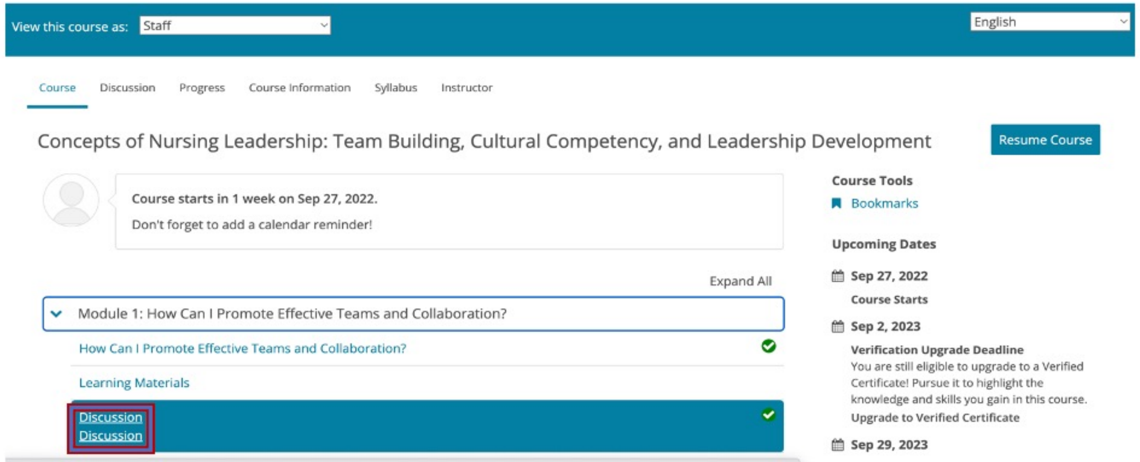
There are three main areas to focus on when facilitating a Regis course in Open edX:

1. Monitoring the discussion replies and new posts.
2. Grading the discussion replies and new posts.
3. Grading the written assignments.

I. Discussion Posts

There are two ways to access the discussion areas. The first, is from the course outline, and is the preferred way as you can access the assessment tool. Another way to access all the discussions is from the course top menu bar, but you do not have access to the assessment tool if you use the top Discussion tab.

1. Let's start with reviewing posts from the course outline. Navigate to the course, open module 1, and click on the Discussion link in the course outline.



Scroll to the Discussion section and click the drop-down menu for "Show All Posts," "Unread Posts," or "Unanswered Posts." Choose "Unread Posts" to filter out the ones you have already read, and click on the title to read the response.

Once you are done reading the learner response(s), you are ready to grade the reply to the original post.

Option 2 for Accessing Discussion Posts:

Morris Learning Design

Pitfalls and Strategies

Change of SME mid-project	Strategy: Take the time to review project goals, learning objectives and curriculum map to ensure alignment.
Change in course content mid-project?	Strategy: Recommend or request replacement content that is as close to original as possible. Track project impact.
SME is unavailable	Strategy: Ask client for a replacement, reminding them of project risks.
SME doesn't agree with learning design	Strategy: Remind SME of intended audience and project goals agreed on, explain the design approach with a similar example, ask project sponsor for support, add a survey to capture learner feedback.

Morris Learning Design

Conclusion

- Be flexible
- Be empathetic
- Be professional

Email: morrislearningdesign@gmail.com

https://morrislearningdesign.com

Morris Learning Design

Questions?

- What other challenges have you experienced working with SME's?
- What other strategies have you used with SME's that have been effective?

Thank you!

Email: morrislearningdesign@gmail.com https://morrislearningdesign.com