

Recruiting and Vetting Subject Matter Experts for Workforce Training Development of Standards, Curriculum, and Assessments

Role of the SME

The SME is the direct connection between identifying the skillset that workers need in order to work safely and productively in a job/occupation in industry, and the curriculum that is developed to train individuals for that job/occupation. Whether developed by a technical publisher, industry association, research organization, educational establishment, community college, technical school, or apprenticeship program, the validity and authenticity of resulting curriculum will not be credible if it hasn't been developed using qualified SMEs.

SMEs provide the relevant, accurate, and up-to-date information that matches education, training, and workforce needs. Common Instructional Design processes (examples include: Job Task Analysis or Task Analysis, and Developing a Curriculum - DACUM) are dependent upon identifying and employing qualified SMEs.

Definition of an SME

"Subject matter expert" is a person with direct knowledge of what is done in the job, what knowledge, skills, abilities and other characteristics (KSAOs) are required, and the general background of persons who are able to do the job successfully. These may include those currently doing the job, recent incumbents, those who supervise others doing the job, and other acknowledged job experts. *Rose v. Shinseki*, 2009 U.S. Dist. LEXIS 89656 (S.D. Tex. Sept. 29, 2009) Ref: <https://definitions.uslegal.com/s/subject-matter-expert/>.

An SME will have academic and technical knowledge, and job-specific skills grounded in industry-recognized occupational experience that qualifies that individual at a high level of expertise and excellence in performing a specialized job, task, or skill.

Qualifications to be an SME

- Education and training appropriate for SME to be considered at a high level of expertise for the job or task.
- Possess competent interpersonal skills and be a capable team member.
- Hold industry-recognized degrees, credentials, and certification(s) in the area of expertise.
- Have a minimum 8 years industry experience at a journeyworker level.
- Have a minimum 5 years industry experience at a journeyworker level, directly related to the subject-matter being developed.
- Have a minimum 5 years recency of experience directly related to the subject-matter being developed.
- Be capable of contributing core content and material for item writing.
- Be able to review and utilize source materials, standards, reference items, and supplemental resources.
- Be capable of contributing core content, material, and/or assessments for industry standards.
- Be capable of effectively communicating and helping organize academic and technical knowledge in a format that is conducive to curriculum production.
- Have the time necessary to meet the commitment required. Meet all agreed-upon turnaround times for deliverables and deliverable reviews.

Two Resources: 1) SME Project Description Form (Sample) and 2) SME Application Form

The following page is an information form that can be used to describe the project you are recruiting SME's for.

The last page is the SME application form.

Subject Matter Expert - Project Description Form (Sample)

Following is information on a project that we hope you will consider participating in.. If, after reviewing the project information, you meet the expectations within this document, please consider becoming an SME by completing the application on the following page.

Project

Note: Project Description, Products-Deliverables and Work Breakdown Structure should be modified to accommodate the project.

General Information

| | | |
|--------------|------------------|-------------------|
| Project Name | Entity in Charge | Contact Person |
| Author | Date | Organization Name |
| Phone Number | E-Mail | |

General Project Description and Expectations of the Project.

Occupational Classification System(s) numbers: SOC; RAIPS; CIP.

SME Statement of Work – Detailed description of duties and responsibilities, specific work, deliverables, and estimate of time involved.

| <i>Products-Deliverables (To be listed and numbered as project framework requires)</i> | <i>Work Breakdown Structure (WBS) (Activities, Task, or Sub-Task)</i> | <i>Start Date</i> | <i>End Date</i> |
|--|---|-----------------------|---------------------|
| 1.1 (Note: modify numbering as needed) | 1.1.1 (Note: modify numbering as needed) | | |
| | 1.1.2 | | |
| | 1.1.3 | | |
| 1.2 | 1.2.1 | | |
| | 1.2.2 | | |
| 2.1 | 2.1.1 | | |
| | 2.1.2 | | |
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Business Terms / Conditions

SMEs should complete an approved application that should be part of the data system. Following is an example:

| SUBJECT MATTER EXPERT (SME) QUALIFICATION APPLICATION | |
|---|-----------------------------|
| Name: | Work #: |
| Email: | Subject(s) of Interest: |
| Employer: | Classification: |
| SME, Representing: <input type="checkbox"/> Apprenticeship <input type="checkbox"/> Education <input type="checkbox"/> Industry Association <input type="checkbox"/> Apprenticeship <input type="checkbox"/> Employer <input type="checkbox"/> Other | Please identify the entity: |
| INDUSTRY EXPERIENCE | |
| Please explain how you have used your education, training, knowledge, skills, abilities in applications similar to what is of an SME in this project. | |
| Please provide detailed information concerning your experience, which directly relates to the subject matter of the course being developed or modified. Please attach additional sheets, if necessary. | |
| EDUCATION/TRAINING EXPERIENCE | |
| Please explain how you have used your education, training, knowledge, skills, abilities in any education and training applications similar to what is of an SME in this project. | |
| Please list industry-recognized degrees, credentials, and certification(s) in the area of expertise: | |
| ADDITIONAL QUALIFYING EXPERIENCE | |
| Specialized Training | |
| *PLEASE ATTACH RESUME AND ANY SUPERVISORY REFERENCES ALONG WITH YOUR APPLICATION.* | |

Signature: _____ Date: _____