Working Remotely with Subject Matter Experts (SMEs):
Practical Advice for Virtual Exam Development Meetings

Adopting a virtual approach to exam development proved necessary in 2020 but it can also reduce costs by eliminating travel expenses and potentially expanding the pool of subject matter experts (SMEs) who appreciate the flexibility of shorter meeting times.

SeaCrest gathered feedback from certification programs and test development specialists to assemble practical advice to facilitate virtual exam development activities. Understanding the key challenges and planning carefully are the keys to success.

Anticipate Key Challenges

- Engagement – Volunteers appreciate the flexibility but are easily distracted by their "day" jobs. Breaking activities into smaller time segments helps maintain interest and keep the workload manageable.

- Anticipate extended timeframes – Transitioning from full-day in-person meetings to shorter, online sessions can lengthen the overall timeframe to complete the project.

- In-person is still preferred for some activities – Tasks, such as a job analysis or program re-design, dependent on in-depth discussion still benefit from in-person meetings, when safe and available.

Handle With Care

- Manage fatigue – Provide frequent breaks and give participants the option to turn their cameras off when video is not necessary to the activity.

- Scheduling considerations – Monitor time zones and gather information on availability early in the process to accommodate SMEs as much as possible.

- SME recruitment – While convenient, virtual meetings do not require the same level of commitment as a face-to-face meeting. Participants may fail to show up or stay for the entire meeting. Consider recruiting additional SMEs to buffer the numbers and set the expectations for attendance.

Planning for Security

- Collect signed agreements from participants before granting access to confidential information and build in reminders about the security requirements.

- Keep exam content on a "need to know basis" by controlling access and limiting each SME to only the information essential for their task(s).

- Plan ahead for secure access and storage of confidential materials. For example, work with vendors to provide SMEs with the technology needed to access exam items securely.

Tips to Maximize Virtual Exam Development Activities

- Communicate clear and specific expectations and goals for each meeting to the participants.

- Set task-specific goals for each session and rewards for achieving them to motivate participants. For example, let SMEs know that the meeting will end early if the goal number of items are completed.

- Schedule on-call "office" hours with the psychometrician and/or test developer on an open Zoom call so that SMEs can drop in for feedback or help with assignments during pre-scheduled times.

- Break work into distinct tasks that can be managed during separate, shorter meetings.

- Provide networking opportunities to keep SMEs engaged and working collaboratively—online games, happy hours, and ice breakers can all be effective.

- Provide adequate time between meetings for homework assignments and deliberation.

- Group SMEs together in a large meeting for orientation and general training purposes before dividing them into smaller work groups.

- Record task-specific training for SMEs to watch prior to meetings and to refer to later as needed.

- Communicate clearly with SMEs so they understand how their tasks support the larger project.