Working with Subject Matter Experts: Building Validation for your Selection Process and Other HR Activities
Introductions

• Holly Hatada
  Principal Consultant
  CPS HR Consulting

• Vicki Quintero Brashear
  Director of Products and Services
  CPS HR Consulting
Why a Webinar on Subject Matter Experts?

- Lots of utility
- Provide critical validation
- Obtain much-needed expertise and trust
Agenda

• A definition of the term and role
• Description of how they are used
• Important considerations/best practices
• Input from our attendees
What / Who are SMEs?

A subject matter expert, or SME, is a "person with bona fide expert knowledge about what it takes to do a particular job."
What Do They Accomplish?

• **Employment testing**: Job analysis, test development, pass point setting, raters

• **Training**: Curriculum and materials development

• **General HR activities**: job description creation/update, minimum qualifications development
Why Are They Important?

- Provide key technical knowledge
- Give a picture of the pulse and culture
- A critical part of content validation
- Help obtain buy-in
Important Considerations

Confidentiality
- Communication
- Expectations
- Forms
Important Considerations

SME Participation

• Communicate (again!)
  – Use agendas

• Say thank you

• Do your homework
Important Considerations

SME Group Makeup and Planning

• Identify the ideal number of SMEs in advance
• Be flexible
• Build in participation
Important Considerations

SME Group Makeup and Planning (cont.)

• Consider rotations

• Give credit where appropriate
Important Considerations

Train Well!

• Don’t assume SMEs know
• Kick-offs and other meetings
• Provide examples of the final product
Important Considerations

Sources of SMEs

• Internal
• External
• How to obtain
Important Considerations

Facilitating Meetings

- In person
- Virtual
Important Considerations

Reducing and Eliminating Bias
Due to:

• Position

• Experience/tenure
Important Considerations

• Be open and honest about the consequences of serving as a SME
Best Practices

- Selection/recruiting
- Training & integration of SMEs
- Managing personalities
- Leveraging differences in experience
- Facilitating meetings in person
- Facilitating web/remote meetings
- Capturing their input/ideas
Resources

• Sample confidentiality form
• Sample JA flowchart for milestones for SMEs
• Doodle Poll (doodle.com)
Subject Matter Expert Confidentiality Agreement

As a Subject Matter Expert (SME) participating in exam development related services to Cooperative Personnel Services, I accept responsibility for maintaining the strict confidentiality of all examination-related materials.

I will not discuss any aspect of the examination development process with anyone except the CPS examination contact person. This includes, but is not limited to: examination reference materials; examination content areas; and my evaluation of the actual examination scoring process.

I will not retain any examination copies or examination-related materials for my own personal files, nor will I make any copies of examination-related materials. I will ensure that all examination-related materials are kept in a secured location and will return all materials to the person designated to return the materials.

I will comply with State Government Code Section 19680 regarding the confidentiality and security of State examination materials made available for the SME's use or review. Specifically, the SME agrees to not expose examination materials to any unauthorized person(s) or to share in any way information pertaining to examination contents.

I will refrain from any activities which would pose a conflict of interest including but not limited to providing private instruction/training to potential examinees.

I have read and understand the provisions of this confidentiality agreement, and my signature below signifies that I agree to the terms of this agreement without reservation.

Subject Matter Expert Information

Sex (M/F): _______

Ethnic Group: ☐ White ☐ Black ☐ Hispanic ☐ Asian or Pacific Islander
☐ Filipino ☐ American Indian or Alaskan Native ☐ Other

Current Position Title and Number of Years: ________________________________

Total number of years in the field (list prior positions and years held):

Department:_________________________ Section/Division:_____________________

SIGNATURE: ________________________ DATE: ________________________
Job Analysis Steps

Step 1:
- Previous job analyses
- Class specifications
- Job descriptions
- Duty statements
- Procedure manuals
- Training materials
- O&M

Step 2:
- Interviews
- Job observations
- PDQ
- Legal/Discrees
- Critical incidents

Step 3A: Develop Task
- Draft based on information gathered in Steps 1 & 2
- SMEs
- SME focus groups
- Final OMC review

Step 3B: Develop KSA

Step 4:
- Determine method
- Respondent/Intranet
- Determination of data collection/instrument
- Questionnaire Administration

Step 5:
- Task ratings
- KSA ratings
- Demographics
- Work conditions/other aspects of the job

Step 6:
- Data entry/encryption
- Response rates
- Apply appropriate statistical method
- Retention criteria

Step 7:
- Data collection with SMEs
- Analyze data/apply retention criteria

Step 8:
- Background/Objective
- Parties involved
- Methodology
- Results (basis of KSA ratings)
Doodle Poll

This is an example date/time poll.

Learn more ...

Table view  Calendar view

1 participant

Ms. Busy

Your name:

September 2016
Wed 14  Thu 15  Mon 19
12:00 PM – 2:00 PM  9:15 AM – 11:15 AM  2:45 PM
11:15 AM  4:45 PM  9:15 AM – 11:15 AM  2:45 PM – 4:45 PM

0 1 0 1 0 1 1

Cannot make it  Save
Questions?

Holly Hatada – hhatada@cpshr.us
Vicki Quintero Brashear – vbrasheare@cpshr.us
Adalberto Hernandez – aherandez@cpshr.us