



EUROPEAN COMMISSION

DIRECTORATE-GENERAL TAXATION AND CUSTOMS UNION

Directorate R: Information and management of programmes

## **B-TRAIN2 TAXUD/2011/CC/103**

### **B-TRAIN2 eLearning Process Overview**

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# 1. Introduction

## 1.1 Structure of the document

The document is structured in chapters.

In this **first chapter “Introduction”**, we define the structure and list all relevant documents (Reference documents) for this elearning process and we clarify some elements of terminology (i.e. abbreviations, acronyms and definitions)

### Chapter Structure:

1. Introduction
2. Process Overview
3. Roles and Responsibilities
4. Building Quality into our Process

## 1.2 Terminology - Abbreviations and Acronyms

*A list of the principal abbreviations and acronyms used is provided here for a better understanding of this document.*

Abbreviations / Acronym	Description
CDC	Contractor Content Development Centre
ID	Instructional Design
LMS	Learning Management System
MS	Member States
PLB	Preliminary Learning Brief
QA	Quality Assurance
QP	Quality Plan
RfA	Request for Action
RfE	Request for Estimate
SCORM	Sharable Content Object Reference Model
SfA	Sent for Acceptance
SfR	Sent for Review
SME	Subject Matter Expert
RE	Release Event

*Table 1 – Abbreviations and Acronyms*

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## 2. Process Overview

### 2.1 The Four Phase Development Process

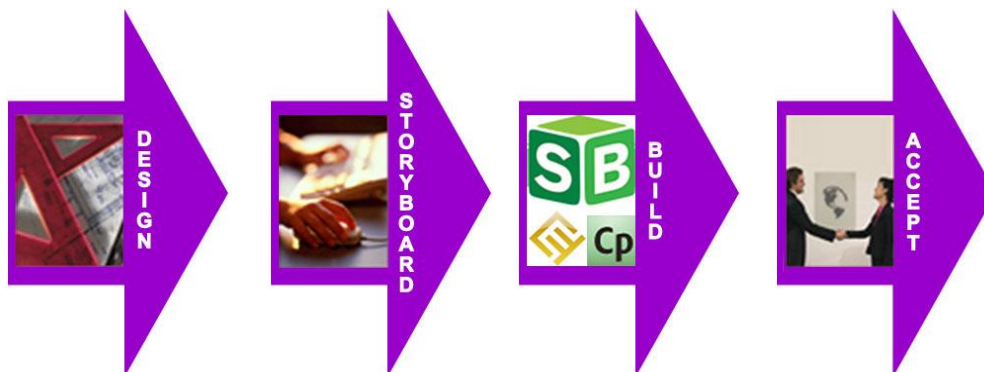


Figure 1 - The Four Phase Development Process

Prior to the four-phase process, DG TAXUD and the Contractor Project Manager will perform certain tasks as a part of project planning, and after the process the Contractor may be asked to work with the National Administrations as a part of post-release deployment. These activities are described in this section in addition to the four phases.

The Design, Storyboard, and Accept phases each end with a contractual deliverable, as outlined in table 2 below. The Build phase ends with an agreement by the SMEs and DG TAXUD that the course is deemed to be 'ready for pilot', but this is not a contractual deliverable.

There will normally be a total of 3 contractual deliverables as part of the Development Process:

Phase Reference	Deliverables <sup>1</sup>	Description	Review Cycle
Design	DLV-2-1-1-1 – DLV-2-2-1-1 – DLV-2-3-1-1 – DLV-2-4-1-1 – DLV-2-5-1-1 – DLV-2-6-1-1 – DLV-2-7-1-1 * DLV-2-1-2-1 - DLV-2-2-2-1 – DLV-2-3-2-1 – DLV-2-4-2-1 – DLV-2-5-2-1 – DLV-2-6-2-1 – DLV-2-7-2-1 DLV-2-1-2-3 - DLV-2-2-2-3 – DLV-2-3-2-3 – DLV-2-4-2-3 – DLV-2-5-2-3 – DLV-2-6-2-3 – DLV-2-7-2-3	Instructional Design Map	7/5/5
Storyboard	DLV-2.1.2-2 - DLV-2.2.2-2 – DLV-2-3-2-2 – DLV-2-4-2-2 – DLV-2-5-2-2 – DLV-2-6-2-2 – DLV-2-7-2-2	Storyboard	7/5/5
Accept	DLV-3.1.1 – DLV-3-2-1 DLV-2-1-2-6 - DLV-2-2-2-6 – DLV-2-3-2-6 – DLV-2-4-2-6 – DLV-2-5-2-6 – DLV-2-6-2-6 – DLV-2-7-2-6	Built course ready for deployment	7/5/5

Table 2 List of Deliverables

**Note:** Formal signoff for the ID Map as a deliverable is optional and may be merged with storyboard signoff, if specified in the RFA for any particular course development. In all cases the relevant SMEs will be asked to sign off the ID Map, regardless of the formal review process.

<sup>1</sup> The deliverable references relate to the BT2 FWC and may be different from the BT3 references.

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## 2.1.1 Planning in advance of the Four Phases

### **Responsibility: DG TAXUD**

The output from planning is a form of the RfA that contains key development inputs as outlined in the table below. In order to create a complete RfA document, DG TAXUD will work with key stakeholders, Member State (MS) SMEs, and liaise with the Contractor Project Manager to confirm scoping.

	Task	Responsible
Input:	Learning need ratified	DG TAXUD project manager
Key events:	RfE issued. RfA issued with PLB attached	DG TAXUD project manager, with Contractor project manager
Outputs:	<ol style="list-style-type: none"> <li>1. Planned Scope (to be confirmed with SMEs)</li> <li>2. Named SMEs</li> <li>3. Defined content domain (to be confirmed by SMEs)</li> <li>4. Planned Target Audience (to be confirmed by SMEs)</li> </ol>	Normally supplied by DG TAXUD and Contractor project manager
	Project Schedule, incl staffing plan	Contractor development team with DG TAXUD

*Table 3 - Planning – Key Events*

\*If for the development of new eLearning courses or add-on modules to existing courses, already existing course elements (eg design concepts, mascots/avatars, visuals, templates etc.) are frequently re-used, no “Set-up and generic development costs” deliverable would be required.

Each of the eLearning course types referred to in the list above sets out specific requirements (WP.2.1 through WP.2.7) which allow for their distinction in terms of development complexity and interactivity (see 7. Annexes).

The complexity and interactivity level requirements (individual or combination of levels) will be stipulated in the RfE and RfE response.

Standard review cycle of 7/5/5 for eLearning development applies. Any deviation to the standard review cycle will be clearly outlined in the specific offer. Any deviation to the standard review cycle during the project will only be accepted upon mutual agreement of DG TAXUD and the Contractor indicating the impact on the project deployment date and/or financials.

Once the SMEs have approved the above listed deliverables at this specified stage DG TAXUD will also conduct a review and will be required to contractually approve the deliverable in order for the project to move to the next phase.

## 2.2 Phase One - Design Phase

**Responsibility: Contractor, Project Manager**

	Task	Responsible
<b>Input:</b>	RfA	DG TAXUD
<b>Key events:</b>	Design Workshop (Brussels) Signoff of Instructional Design Map	Contractor
<b>Outputs:</b>	'Instructional Design Map' consisting of <ol style="list-style-type: none"> <li>1. Course Learning Objectives</li> <li>2. Definition of Target Audience</li> <li>3. Course Scope Definition</li> <li>4. High-Level Course Design (interim)</li> <li>5. Detailed Pedagogical Map</li> <li>6. Overall Visual Approach</li> </ol> And Pilot/Release Event Plan	Contractor

Table 4 - Design – Key Events

During this phase a Project Group will be formed consisting of SMEs from different Member States (MS), Trade or other business units, DG TAXUD representative/s members from the Contractor's *Content Development Centre* and the Contractor's *Project Manager*.

The output from the design phase is an instructional design map consisting of the Course Learning Objectives, Definition of Target Audience, Course Scope Definition, High-Level Course Design (interim), Detailed Pedagogical Map, Overall Visual Approach and Pilot/Release Event Plan.

The ID Map and Visual Approach are authored by the Instructional Designer in collaboration with the MS Subject-matter Experts (SMEs) and in consultation with the DG TAXUD project manager. DG TAXUD representatives have the final decision about the content and structure of the course and can overrule the inputs of national SMEs.

The key inputs to the design phase are the content and SMEs (from the Member States) and the RfA (from DG TAXUD). The contractor will draft a high-level course design ready to be resent to DG TAXUD and the SMEs ahead of a Design Workshop. During the Design workshop (optionally held face-to-face at DG TAXUD offices in Brussels) the high-level Course Design, duration, objectives, topics, case studies and source material will be reviewed and the allocation of content, SME responsibilities, and the balance of the course (weighting of topics, flow of course, fidelity of courseware) will be agreed. The contractor will then develop the detailed Pedagogical Map and then migrate the course structure into the development tool (SmartBuilder) ahead of storyboarding.

The contractor will set up an online project environment, normally utilising TACTIC, and will introduce SMEs to the online environment during this phase.

Meetings and virtual calls will be arranged, dependent on need, before the phase is completed – this is most likely to take the form of one-to-one calls to discuss detailed design in certain content areas.

The detailed Pedagogical Map and Visual Approach will be compiled, informally verified with all the relevant SMEs and then sent to DG TAXUD for final verification. Online discussions, mails or phone calls may be used for the purpose of verification with all relevant SMEs .

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The Visual Approach will be aligned to target audience and learning objectives, and provide the project with the visual framework within which the team will operate when developing and reviewing detailed screen elements during production.

The Instructional Design Map may or may not be a contractual deliverable within individual projects. In all cases it will be important to have a sign off by DG TAXUD before proceeding further, whether or not the IDM is a contractual deliverable for the project.

A small amendment phase usually takes place prior to sign off.

During the Design phase DG TAXUD will normally work with the contractor to identify pilot participants.

Deliverables <sup>2</sup>	Description	Review Cycle
DLV-2-1-1-1 – DLV-2-2-1-1 – DLV-2-3-1-1 – DLV-2-4-1-1 – DLV-2-5-1-1 – DLV-2-6-1-1 – DLV-2-7-1-1 *  DLV-2-1-2-1 - DLV-2-2-2-1 – DLV-2-3-2-1 – DLV-2-4-2-1 – DLV-2-5-2-1 – DLV-2-6-2-1 – DLV-2-7-2-1  DLV-2-1-2-3 - DLV-2-2-2-3 – DLV-2-3-2-3 – DLV-2-4-2-3 – DLV-2-5-2-3 – DLV-2-6-2-3 – DLV-2-7-2-3	Instructional Design Map	7/5/5

Table 5 - List of deliverables

\*If for the development of new eLearning courses or add-on modules to existing courses, already existing course elements (eg design concepts, mascots/avatars, visuals, templates etc.) are frequently re-used, no “Set-up and generic development costs” deliverable would be required.

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<sup>2</sup> The deliverable references relate to the BT2 FWC and may be different from the BT3 references.

## 2.3 Phase Two – Storyboard Phase

**Responsibility: Contractor**

	Task	Responsible
<b>Input:</b>	ID Map	Contractor
<b>Key events:</b>	Part 1: Pre-Storyboard Content Consolidation Part 2: Author Storyboard	Contractor
<b>Outputs:</b>	Storyboard Ready for Build	Contractor

*Table 6 - Storyboard – Key Events*

The Storyboard phase begins when the ID Map is agreed. This phase has two distinct tasks; Pre Storyboard Content Consolidation and Authoring the Storyboard.

The Contractor anticipates that the B-TRAIN2 collaborative environment – currently PICS – and the development tool – SmartBuilder – will be used during the storyboard phase to support these tasks, except where certain technical assets require specialist tools such as application simulations, media elements in flash, or audio/video creation and manipulation.

Detailed informal communications between SMEs and the Contractor developer will take place during the storyboard phase. For example online discussions before the storyboard is sent for formal review and sign off (SfR/SfA).

### 2.3.1 Phase Two, Part 1 - Pre-Storyboard Content Consolidation

Before storyboarding can begin, the content must be 90% defined. Therefore, a period of content Consolidation may take place between the design phase and the start of the storyboard build.

The Project Manager and the Contractor will setup a structure within the collaborative environment (TACTIC) that matches the course design, and will facilitate the creation and validation of content with the SMEs that were allocated during the Design phase. The Contractor will monitor the volume and consistency of materials, and raise any issues related to scope or timeline with DG TAXUD.

The contractor will actively interrogate the SMEs about the subject matter and build content based on SME inputs in line with the terms of the contractual agreement for the project. The nature of the content must comply with the complexity levels and the interactivity requirements set out in the BTRAIN2 contractual documentation. It is a joint responsibility for the SMEs and the contractor to ensure that all aspects of the topic are fully explored and discussed with SMEs to ensure that the content is correct, complete and suited for use across all European countries.

The contractor will ensure that the content is fully suitable for translation into numerous languages and contains no material that may present problems for translators.

The Contractor and DG TAXUD will together facilitate content signoff prior to storyboarding starting. It is conceivable that in larger efforts, storyboarding for some modules may proceed while other modules are still in content creation, but this should be the exception rather than the norm.

The Glossary of terms is collected via the collaborative environment and referenced throughout all three parts of the Production phase to ensure consistent user of terminology.

The Contractor will confirm the schedule for the subsequent phases when the content creation phase is considered to be 90% complete.

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### 2.3.2 Phase Two, Part 2 - Author Storyboard

The storyboard will not be drafted until the ID Map is signed off during Design Phase and the content creation phase is considered to be 90% complete.

The storyboard is authored by the Contractor Instructional Designer in collaboration with the SMEs. Certain technical elements will be documented rather than built, to allow designers and SMEs to alter elements efficiently – for example detailed graphical elements, or screenshots of systems still in production at this stage.

The main purpose of this stage of the production phase is to ensure that the content is complete and accurate, the flow of the course meets the priorities of the design, and the treatment is feasible within the technology available, prior to the project expending effort on the more costly elements of the course development.

SMEs will be asked to review the storyboard and approve the draft screens and content prior to work on the Build starting. This review will normally be conducted using the SmartBuilder review capability. Other tools may also be considered.

Once the SMEs have approved the content at this stage DG TAXUD will also conduct a review and will be required to contractually approve the deliverable in order for the project to move to the next phase.

Deliverables <sup>3</sup>	Description	Review Cycle
DLV-2.1.2-2 - DLV-2.2.2-2 – DLV-2-3-2-2 – DLV-2-4-2-2 – DLV-2-5-2-2 – DLV-2-6-2-2 – DLV-2-7-2-2	Storyboard	7/5/5

Table 7 – List of Deliverables

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<sup>3</sup> The deliverable references relate to the BT2 FWC and may be different from the BT3 references.

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## 2.4 Phase Three - Build Course

**Responsibility: Contractor**

	Task	Responsible
<b>Input:</b>	Storyboard	Contractor
<b>Key events:</b>	Build course Technical review for pre-pilot SME Course Review to approve as 'Ready to Pilot'	Contractor
<b>Outputs:</b>	Built Course Ready for Pilot/Release	Contractor

*Table 8 - Build – Key Events*

The build of the course is undertaken by the Contractor using the SmartBuilder authoring tool and is reviewed by SMEs and DG TAXUD. Storyboard sections may be shared out amongst SMEs (specific to their expertise).

The courseware will be built according to the agreed storyboard, with technical, interactive, and media elements as described in the storyboard.

SMEs will be asked to review the built course within the development tool and signoff that the courseware matches the intention as agreed in the storyboard prior to the Acceptance phase being started. This review will normally be conducted using the SmartBuilder review capability. Other tools may be considered.

Once the SMEs have had an opportunity to review and signoff, DG TAXUD will be asked to approve that the project proceeds to Acceptance. It is envisaged that in some cases the project will proceed with conditions (a 'snag list' of minor items) that can be resolved during Acceptance while not invalidating the pilot.

Once the SMEs have approved the built course, at this stage DG TAXUD will also conduct a review and will be required to contractually approve the deliverable in order for the project to move to the next phase.

The 'built course in English' is a key contractual deliverable in all projects and the project cannot proceed further until DG TAXUD contractually accepts the built course in English.

The details on this deliverable are listed in the section below 2.4.1 Course Structure for Learning Objects.

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### **2.4.1 Course Structure for Learning Objects**

*The Contractor and DG TAXUD will agree the technical course structure at the start of the Build step, indicating whether each course is to be a single Sco or multiple Sco course.*

*The most visible implication to this decision is that a single-Sco course will require an Internal course menu whereas a multi-Sco course will need to use the menu generated by the host LMS. In addition, in terms of design and implementation a multi-sco object cannot have deep-level links between Sco modules (learners must be directed to use the LMS menu to switch to a different Sco).*

*Each of the eLearning course types referred to in the list above sets out specific requirements (WP.2.1 through WP.2.7) which allow for their distinction in terms of development complexity and interactivity.*

*The complexity and interactivity level requirements (individual or combination of levels) will be stipulated in the RfE and RfE response.*

*Standard review cycle of 7/5/5 for eLearning development applies. Any deviation to the standard review cycle will be clearly outlined in the specific offer. Any deviation to the standard review cycle during the project will only be accepted upon mutual agreement of DG TAXUD and The Contractor indicating the impact on the project deployment date and/or financials.*

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## 2.5 Phase Four - Acceptance of the Built Course

### **Responsibility: Contractor, DG TAXUD**

Phase Three, the Acceptance Phase, consists of piloting, testing and formally accepting the built course.

During this phase pilot and release events will normally be held:

- a) to test the course as implemented achieves the objectives and business aims as stated in the Instructional Design Map and
- b) to confirm the course relevance for the target audience.

### 2.5.1 Pilot

The pilot will usually be conducted remotely using a published version of the courseware, normally hosted on a password-protected web server provided by the Contractor. A separate feedback tracker (in Excel) will normally be used to capture all issues and suggestions including those relating to ease of translation/localisation/use across EU etc.

The Contractor will collate the feedback and categorise in the following manner:

- **Editorial issues** (typographical errors, grammar, clarity of meaning).
- **Technical issues** (including issues specific to deployment in particular contexts).
- **Content Issues** (superfluous or missing content, ambiguity or conflict within the course, misleading or incorrect content).
- **Relevance Issues** (for example appropriate for target audience, pre-requisite training, issues with the design or intent of the course).

It is anticipated that the pilot will result in a prioritised list of issues with recommended actions. Approximately 5% of development budget will be withheld to apply to these changes, and if the scope of changes exceeds this assumption, the course will be deemed to have 'failed' the pilot.

#### **Respond to 'failed' pilot**

1. Identify the reasons for failure
2. Identify timeline requirements for delivery for each key audience segment
3. Identify the options for delivery (scope vs timeline) for each key audience segment
4. Identify and agree the risks associated with each option
5. Negotiate the funding for each option, and determine the preferred option
6. Announce new scope, budget, and timeline

#### **Identify the Reasons for failure**

##### **Purpose:**

The most immediate need following the recognition of a failed pilot is to hold an inquiry meeting. This meeting needs to avoid allocating blame – rather it needs to review the list of 'out of scope' changes and compare with various components that were signed off in previous phases to identify where the problems first arose. A decision will be taken on the scope of the solution envisaged, the extent to which a solution was foreseeable, and the funding and contractual implications.

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**Inputs:**

- ID Map signed off in Design
- Storyboard
- Risks and Issues log from immediately prior to the pilot
- Pilot Plan
- Out-of-scope change list from the post-pilot debrief meeting

**Outputs:**

- Agreement on the possible causes for the misunderstanding(s) that caused the pilot audience’s reaction.
- If possible, an agreed ranking on which of these issues were a greater cause than others.

**2.5.2 Release Event (optional)**

At DG TAXUD’s discretion, a release event may occur at this time. Should this event trigger change requests, DG TAXUD and the contractor will coordinate the scope and impact on a case-by-case basis.

The Contractor will supply the course in any of three formats as requested by DG TAXUD: ready for upload to a webserver, distributable via ZIP file, and on one master CDROM ready for duplication.

Once all changes have been implemented, DG TAXUD will be sent the course as a formal deliverable in the agreed-upon deployable formats. DG TAXUD will formally accept the course as complete when the quality reaches the agreed requirements.

Deliverables <sup>4</sup>	Description	Review Cycle
DLV-3.1.1 – DLV-3-2-1 DLV-2-1-2-6 - DLV-2-2-2-6 – DLV-2-3-2-6 – DLV-2-4-2-6 – DLV-2-5-2-6 – DLV-2-6-2-6 – DLV-2-7-2-6	Built course ready for deployment	7/5/5

*Table 9 – List of Deliverables*

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<sup>4</sup> The deliverable references relate to the BT2 FWC and may be different from the BT3 references.

### 3. Audio Process

The phases below outline the steps that need to be undertaken if audio voice-over is to be incorporated.





			
<ul style="list-style-type: none"> <li>▪ Define needs.</li> <li>▪ Define character role/s.</li> <li>▪ Define languages.</li> </ul>	<ul style="list-style-type: none"> <li>▪ DG TAXUD approves sample voice/s.</li> <li>▪ Recruit voice artist/s for post pilot recording.</li> <li>▪ Write/approve draft audio script.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Finalise audio script</li> <li>▪ 'in-house' audio recorded.*</li> <li>▪ Audio integrated into eLearning prior to pilot.</li> <li>▪ Confirm recording acceptable for pilot.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Pilot using draft voice/s.</li> <li>▪ Confirm no technical issues.</li> <li>▪ Audio script approved as ready for professional recording.</li> <li>▪ Professional artist/s records final audio.</li> <li>▪ Integrate final audio into eLearning.</li> <li>▪ Approve final audio.</li> </ul>

Table 10 - Audio Process

\*It is usual that a draft voice is produced 'in-house' by the Contractor developer and then re-recorded after the pilot by a professional voice-over artist. The development and review of the audio script is an integral part of normal course development, and is folded into the process described above. The draft should be of adequate quality for the pilot. Pronunciation checks will be carried out with SMEs for abbreviations and specialised terms etc.

Audio review and signoff process will follow independently of the signoff for the rest of the course, due to the need for the course text to be finalised prior to final audio being recorded. This results in the course itself having a second, minor SFA1 cycle that happens at the same time as the audio's final SFA cycle (as it is conceivable that audio tweaks may also result in course text/screens being altered to match the audio).

Should audio fail the final review/QA due to errors in production (eg incorrect files, audio quality poor in places, and similar), the review process will simply pause until the production issues are resolved, rather than the audio causing a rejection of the course effort at such a late stage. Reviews will be resumed once the specified audio issues are fixed.

For these reasons, the decision as to whether to use the 'in-house' or professional audio for the Release Event will be taken as a part of the decision making process post-pilot on a case-by-case basis. By default, the timelines will assume that professional audio is required for the Release Event unless the decision is taken otherwise.

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## 4. Translation Process

The translation process is detailed in the separate process document for translations. The high-level process for translation is shown in this diagram

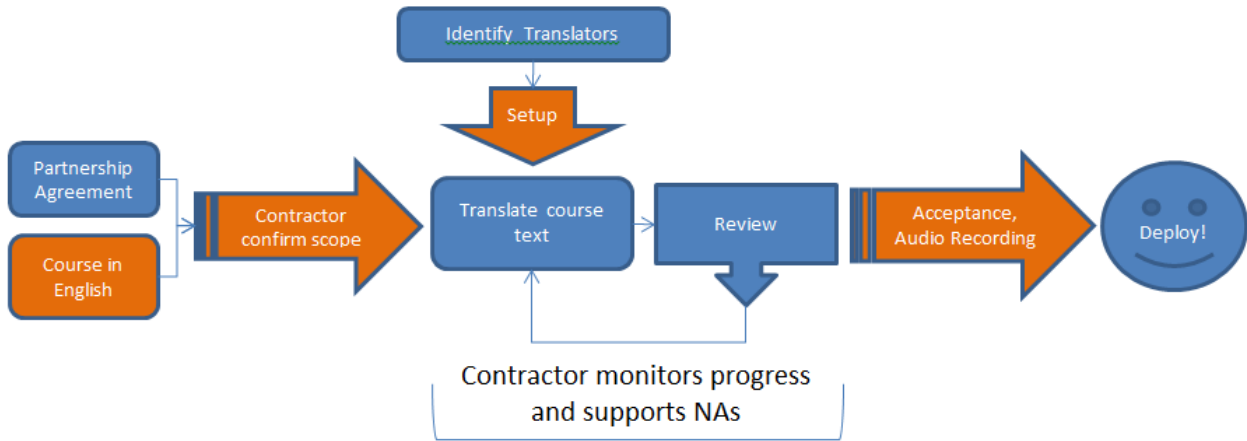


Table 11 - Translation Process

Audio for translated courses follows a similar process to English courses, with the exception that the National eLearning Localisation Managers will be required to play a greater role in QA for production and technical issues, due to the language issue. Thus RfA for audio may require more interaction between the National eLearning Localisation Manager, the Contractor, and the audio artist to get the issue resolved.

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## 5. Approach – Roles and Responsibilities

### 5.1.1 DG TAXUD/SME - Role and Responsibilities

Our approach is to involve SMEs as part of the development team. Our ability to work together will determine the success of any training development effort. The role of a SME on the team is to provide not only content expertise, but also the experience.

SMEs will be responsible for the following:

- Provide all SME recommended source material, access to systems and software (if necessary) and client-specific perspective to the team throughout the development process.
- Confirm the course content is targeted at the proper audience.
- Confirm the course content can be used throughout Member States.
- Validate that the course is focused on achieving the agreed upon learning objectives and is comprehensive in its coverage.
- Confirm that policy procedures and official guidelines and legislations are represented in the course.
- Share relevant personal work experiences that will help make the content relevant and meaningful to the participant.
- Contribute actively to the building of work-based scenarios and case studies
- Review outputs proposed by the contractor throughout the project
- Work with other SMEs to devise and agree content
- Use the online content creation and review tools
- Assist in the consolidation of post-pilot feedback.
- Be a true partner on the team—share ownership of the course to make it a success.

If multiple SMEs are engaged on the project it will be the responsibility of the attendees of the design workshop to identify at the first meeting which SMEs are responsible for each learning unit or lesson or element of the course. The contractor will set up and then manage the online communications to reflect these agreed responsibilities.

The role of the DG TAXUD key stakeholders will be to oversee SME activities to govern, support and co-ordinate at key stages throughout development and to make final decisions on all aspects of the project.

## 5.2 Contractor Role and Responsibilities

The Contractor produces quality eLearning products incorporating best instructional design techniques. The Contractor is also responsible for translating team ideas into courses such that they meet the learning objectives.

Specifically, the Contractor is responsible for the following:

- Facilitating and managing a dialogue with the SMEs and DG TAXUD throughout the project to devise and revise the course until it is of satisfactory standard to meet the objectives of the project.
- Reviewing supplied source material, checking against agreed learning objectives, identifying gaps and agreeing solution with SMEs.
- Applying instructional design standards to course development.

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- Contributing towards policing the client branding and linguistic standards.
- Advising on design decisions that could impair the use of XTM as a translation server that could make the course more difficult to translate.
- Using terminologies that can be easily understood by translators.
- Ensuring that the complexity level of the course, including the learner interactivity is in accordance with the agreed requirements.
- Bringing knowledge of relevant existing course material to discussions and incorporate where appropriate.
- Logically organising course content so participants comprehend new material more easily.
- Aligning learning objectives to target the intended audience to develop the appropriate skills.
- Incorporating assessment mechanisms relevant to the level of the course.
- Be true partners on the team – sharing ownership of the course to make it a success.

### 5.3 Shared Team Responsibility

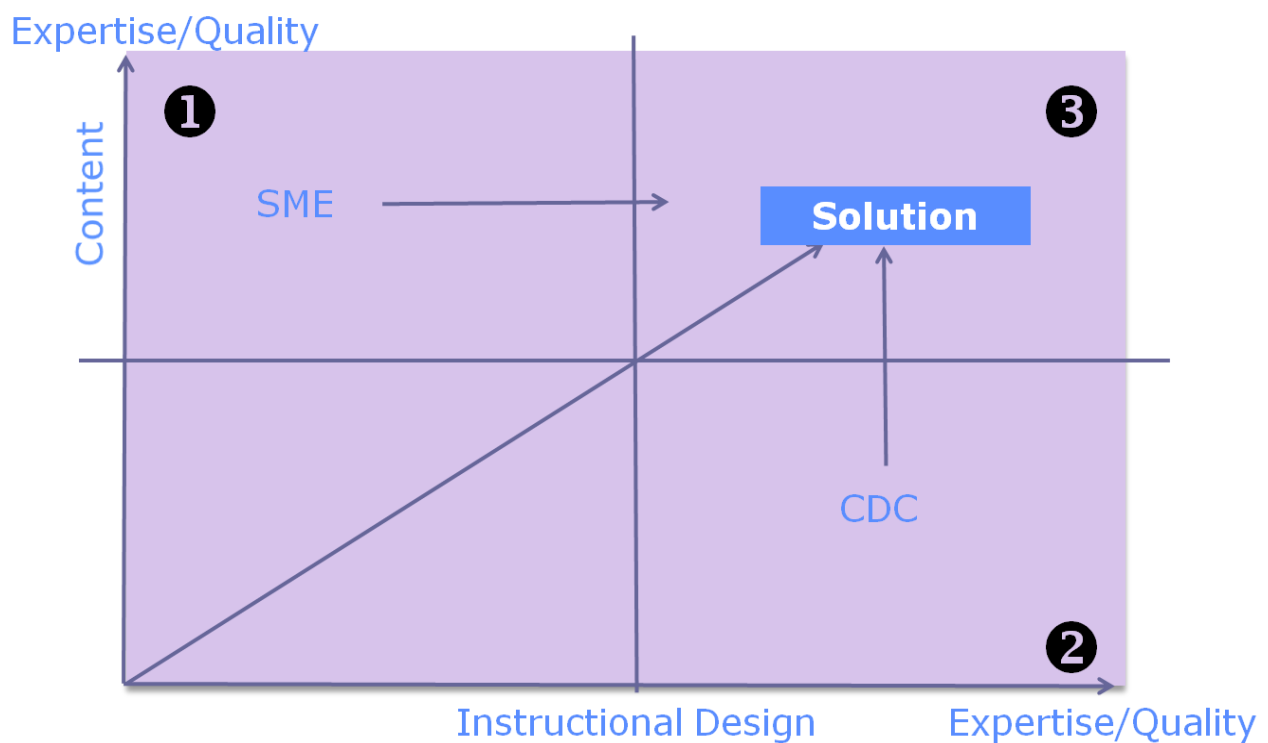


Figure 2 - Shared Team Responsibility

#### 5.3.1 Gated philosophy

Instructional Designers will be in close contact with DG TAXUD SMEs throughout the development lifecycle of the courseware, for each phase. Stakeholders need to stay consistent during courseware development in order to streamline the development process and stay on course for a timely deployment. Missed Stakeholder commitments to the signoff gates may impact the overall development timeline. Once a signoff has been completed, the Contractor will move forward with the next phase.

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### 5.3.2 Proposed Communication Methods

The communication methods will vary dependent on what needs to be discussed.

Face-to-face meetings will be required if the nature of the discussion is likely to take several hours or the issue is too complex to resolve by other means of communication. Otherwise conference calls/screen sharing and collaboration sites such as TACTIC will be employed. For example:

- Kick-off meetings will be face-to-face. (DG TAXUD, SMEs and the Contractor).
- Collaboration server (TACTIC) for conducting and moderating discussions with SMEs on content and informal reviews of key learning elements, for example case studies, scenarios, checkpoint questions/distracters .).
- Contractual deliverables need to be processed via formal Sfr/SfA process requirements. .
- SmartBuilder (or relevant tool) reviewer access for build reviews.
- Screen share for graphics—method TBD (Microsoft Lync 2010 under consideration, also webcam from the contractor’s Yarnfield location).

The above techniques will be supplemented with phone and emails for smaller informal day-to-day reviews such as sharing sections of information with the SMEs on an informal basis to get agreement on the exact wording.

## 6. Building Quality into our Process

Quality is embedded throughout the process and has been fully documented in the Generic Quality Plan.

## 7. Annexes<sup>5</sup>

### 7.1 eLearning Development requirements

Requests for development of eLearning modules under the Framework Contract will be made according to the quantitative and qualitative criteria as outlined in tables 6 and 7 of Annex I of the ToR of the Framework Contract.

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<sup>5</sup> The annexes relate to the BT2 FWC and may be different from the BT3 annexes.

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