

NAHRO
***Subject Matter Expert
and Consultant
Manual***

Updated 5/15/2025



PURPOSE

This Subject Matter Expert (SME)/Consultant Manual is intended as a general guide to NAHRO's policies, procedures, and practices as they relate to consultants. The matters described in this manual are subject to change, without notice, at the sole discretion of the association. This manual does not express conditions of employment, nor does it create a contract between consultants and NAHRO.

Subject Matter Experts (SMEs) play a critical role in the success of NAHRO's training and curriculum development efforts. Their expertise ensures that the content we deliver is accurate, up to date, and relevant to our intended audiences. This manual outlines the expectations, responsibilities, and working agreements for SMEs partnering with the NAHRO Professional Development team.

ABOUT NAHRO

To learn about NAHRO, its mission, and its structure, please visit <https://www.nahro.org/about/>.

NAHRO PROFESSIONAL DEVELOPMENT (PD) AND CERTIFICATION (C)

For over half a century, NAHRO has offered trainings, certifications, technical programs, and products that are recognized industry-wide. Our educational services are designed to equip staff, commissioners, and residents with the essential knowledge and practical skills required in today's rapidly changing housing and community development industry. NAHRO's on-site and online trainings, and custom programs, allow us to provide cost-effective educational opportunities. An additional benefit of our on-site programs is that they can be tailored to an agency's specific needs or a particular locale. Our custom programs can be used as a vehicle for agency staff, commissioners, and residents to learn and apply skills and knowledge to work together to help build a strong, healthy community.

NAHRO's training materials and program deliveries are of the highest quality. All our consultants are knowledgeable in their areas of expertise; most work, or have worked, in senior positions in the affordable housing and community development industry. Therefore, they understand agency operations, management, the responsibilities accompanying these duties, and the challenges of providing quality service to those they serve. Additionally, they are selected for their ability to transfer this knowledge to others in a clear, understandable manner. NAHRO's programs are monitored by staff, NAHRO's Professional Development Committee, and the Board of Ethics and Credentialing Trustees (BECT). Every participant evaluation is reviewed for

quality related to the consultant/Faculty/trainer, program materials, and location. NAHRO trainings are developed and maintained by the industry, for the industry.

NAHRO has over a dozen Certification programs. We have two paths to becoming certified (training or experience), and require all individuals to take an ethics training, making NAHRO Certification unique from our competitors. As of January 2025, Ethics training is available on demand and FREE for NAHRO members.

Additionally, NAHRO Certification holders must recertify every three (3) years and continue their learning by obtaining a specified number of Continuing Education Units (CEUs). Starting in January 2026, certification holders will be required to take NAHRO ethics as part of their recertification requirements. To learn more about NAHRO Certification, please visit <https://www.nahro.org/certification-training/nahro-certification/>.

PD'S APPROACH

NAHRO provides inclusive training through short lectures and interactive case studies. NAHRO's case study approach enables the participant to have multiple learning methods through practice examples. These techniques include:

- Leverage the knowledge, skills, and experience of participants.
- Realistic case examples that bring the forms to life and allow for meaningful practice.
- Active engagement of participants through both group and individual exercises.
- Allowing participants to ask questions based on their experiences and addressing issues directly impacting their agencies.
- Allowing participants to explain solutions and how they would apply foundational materials to the case example.

Responsiveness and personal attention are difficult to measure objectively. However, NAHRO strongly feels this is one of the association's strengths. Staff and consultants continually exemplify a spirit of professionalism and dedication to satisfying client needs through superior and truly personalized service.

NAHRO utilizes practitioners as consultants. It is imperative to NAHRO's approach to have industry leaders with lived experience to train our content.

ABOUT NAHRO TRAINING AND CERTIFICATION

NAHRO offers training programs both in person and online. Persons completing a NAHRO training and any affiliated exams can obtain a prestigious NAHRO Certification. All NAHRO Certifications require ethics training, which can be administered to a group either on-site or online or completed by participating in a regularly scheduled NAHRO ethics training. Persons can apply for a NAHRO Certification after completing the training, exam, and ethics training requirements. To view the current NAHRO Certification programs, please visit [here](#).

In addition, NAHRO has three certification programs that do not have specific training requirements and are considered "Premiere Certifications":

- NAHRO Certified Management Executive (CME).
- NAHRO Certified Manager of Property Operations (CMPO).
- NAHRO Certified Manager of Voucher Operations (CMVO).

BENEFITS OF BEING A NAHRO SME

As a NAHRO Subject Matter Expert, you will join a community of nationally recognized industry leaders. In addition, you will receive access to resources (e.g., Direct News, Monitor), free registration to PD trainings, discounted rates to conferences, professional development series and more!

ADMINISTRATIVE POLICIES

INDEPENDENT CONSULTANTS

As referred to in this document, consultants are considered independent contractors, not employees of NAHRO. A consultant's contract and statement of work (stating specific responsibilities, line of authority, and duration) must be completed and signed by the consultant and the Chief Operating Officer (COO). NAHRO asks and expects all consultants to demonstrate the same professional conduct as regular employees when acting on behalf of NAHRO. Since consultants are not NAHRO employees, they are not eligible for overtime compensation or benefits.

NAHRO relies upon the special skills, qualifications, experience, and abilities of consultants. Consultants may not subcontract their responsibilities or assign this agreement or any right or obligation without NAHRO's specific, written consent. Any attempted subcontract or assignment is a violation of the contract provisions and will make the contract null and void.

CONFLICT OF INTEREST

The Conflict of Interest (COI) attestation (**Appendix A**) is designed to assure the highest level of ethical conduct of persons contracted by and involved in the work of NAHRO; it also is intended to avoid public perceptions and financial consequences detrimental to NAHRO that could arise from the misuse, or perception of misuse, of an individual's position or influence. NAHRO's conflict of interest attestation is designed to encourage transparency and careful deliberation in cases where conflicts or perceived conflicts may arise.

Definition: A conflict of interest may be defined as an interest that might affect, or might reasonably appear likely to affect, the judgment or conduct of an individual associated with NAHRO. A conflict of interest may exist when the interests, concerns, or potential interests/concerns of any consultant, or any individual, group, or organization to which one of these people has allegiance, may be seen as competing with the interests or concerns of NAHRO or may impair these people's independence or loyalty to NAHRO.

For example, a conflict of interest may exist if a consultant:

- Solicits customers during the performance of NAHRO work or during NAHRO-sponsored events.
- Has a business or financial interest in any third party dealing with NAHRO.
- Derives remuneration or other financial gain from a transaction involving NAHRO (other than income reported on a W-2, W-9, or salary and benefits expressly authorized by the Board).
- Engages in any outside employment or other activity that will materially encroach on the consultant's obligations to NAHRO; compete with NAHRO's activities; involve any use of NAHRO's content, materials, equipment, supplies, or facilities; or imply NAHRO's endorsement, sponsorship, or support of the outside employment or activity.

Consultants shall not solicit business for their account or for the account of anyone other than NAHRO, whether such solicitation is made verbally, through written or audio/visual means, or by any other means.

CONFIDENTIALITY

NAHRO considers certain information to be confidential and/or proprietary. Such information should not be communicated without proper authorization from NAHRO. Confidential information can include:

- certain business information such as financial and marketing data, training session evaluations, budget information, bid proposals, contract negotiations, and research and development ideas
- personnel actions, such as promotions, demotions, terminations, personnel controversies, compensation, payroll data, performance appraisals, and personal information of an embarrassing nature or that an employee specifically requested be kept confidential;
- information about program recipients or clients of a personal nature; and certain legal advice, opinions, and documents. If you are not sure if the information you are handling is confidential, consult the NAHRO Director of PD+C.

When discussing or transmitting confidential information, please follow these guidelines:

- Make sure that you properly dispose of all confidential information.
- Do not reveal any confidential information except under the direction and approval of NAHRO.
- Make sure that confidential information is properly marked and secured before transmittal.
- Ensure that the recipient of confidential information has a legitimate need to know the information.
- Avoid displaying confidential data where it can be easily observed, including on your computer screen when you are not present.
- Immediately inform the NAHRO Director of PD+C.

- Limit reproduction and distribution of such information.
- Secure confidential documents in locked cabinets or containers when not in use.
- Make sure that you properly dispose of all confidential information after completion of use.
- Transmit confidential or proprietary information such as exams using a secure method (e.g., encrypted email, Dropbox, SharePoint).

COPYRIGHTED CONTENT AND MATERIAL

NAHRO materials may include materials in printed, electronic, or other formats. NAHRO retains all rights, title, and interest, including copyright, in and to the NAHRO materials. NAHRO materials may be used only in connection with providing specified consultant or training services and may not be otherwise copied, reproduced, or distributed to third parties. Upon completion of the services or termination of this agreement — whichever occurs first — the consultant shall immediately return all existing physical and electronic copies or partial copies of all NAHRO materials to NAHRO. Additionally, they shall (if applicable) remove the materials from their computers and certify to NAHRO that all copies or partial copies have been returned. All materials developed by the consultant under their contract with NAHRO fall under that contract's terms and become the property of NAHRO.

TRADEMARKS

The NAHRO name and logo are trademarks of NAHRO and may not be used by a consultant except as authorized by NAHRO. Using NAHRO's name or logo for any other purpose is strictly prohibited. If you need to use NAHRO's logo, please submit this request to the Director of PD+C or any other authorized NAHRO representative.

OTHER POLICIES

HARASSMENT

NAHRO's goal is to operate at the highest professional level, free from discrimination or harassment. Each consultant has the right to work in a professional atmosphere that promotes equal opportunity and prohibits discrimination and harassment. Harassment includes unwelcomed conduct — whether verbal, physical, or visual — based on a person's protected status, such as gender, color, race, ancestry, religion, national origin, age, physical handicap, medical condition, disability, marital status, veteran status, citizenship status, or another protected group status. Any instance of harassment should be immediately reported to the Director of PD+C.

EEO/DIVERSITY STATEMENT

NAHRO is firmly committed to creating a climate that values the different perspectives diversity brings to its work. Attracting and developing a diverse workforce that reflects the communities we serve is at the foundation of our work. Viewing diversity as an asset is essential to cultivating a workforce that reflects the changing face of the United States. It is a continuing policy of NAHRO

to afford equal employment opportunities to recruit qualified individuals without regard to sex, race, ethnicity, color, religion, gender, national origin, sexual orientation, gender identity, marital status, age, disability, veteran status, active military status, genetic tests and information, and an individual's status as a domestic violence victim. This policy encompasses all aspects of the consultant relationship, including application, work assignment, selection for training opportunities, and compensation. Contracting decisions will be based on the principles of equal employment opportunity and with the intent to further NAHRO's commitment to diversity. All consultants may exercise their rights under the policy or federal, state, or local laws at any time.

To learn more about NAHRO's Diversity framework, please visit [here](#).

PERSONAL HEALTH CARE

NAHRO recommends that each consultant pay close attention to their health care needs. Should you have a medical condition that may impact any aspect of your work with NAHRO, please inform NAHRO's Director of PD+C.

NEWS OUTLETS AND SOCIAL MEDIA

INTERACTION WITH THE MEDIA

NAHRO provides training to support the housing and community development field. While providing training events, consultants may be asked to make statements or grant interviews to the media regarding the event and/or a housing authority. Consultants may not speak on behalf of NAHRO and should make clear that they are contractors with NAHRO and not NAHRO employees speaking on behalf of the organization. As a rule, Consultants should **ALWAYS** refer media to [NAHRO's Director of Communications](#) for official follow-up.

SOCIAL MEDIA

Social media is defined as media designed to be disseminated through social interaction, created using highly accessible and scalable publishing techniques. Examples include but are not limited to email, LinkedIn, X, Facebook, TikTok, and YouTube. Both in professional and institutional roles, consultants should follow the same behavioral standards online as they would in real life. The same laws, professional expectations, and guidelines for interacting with others apply online as in the real world.

In general, consultants are personally responsible for the content of all text, audio, or images that are placed or sent over the Internet. Fraudulent, abusive, profane, harassing, or obscene messages are prohibited. No messages with derogatory or inflammatory remarks about an individual's or group's race, religion, national origin, physical attributes, or sexual orientation may be transmitted. Information transmitted should not violate or infringe upon the rights of others. Any personal website, blog, or Facebook interaction should not contain commentary that violates NAHRO's policies on harassment or discrimination. Consultants are solely responsible for any legal liability arising from or relating to the content of their communications.

EXPECTATIONS OF SUBJECT MATTER EXPERTS

ROLE OF THE SME IN THE CURRICULUM DEVELOPMENT PROCESS

SMEs contribute subject matter expertise to support the development of high-quality training content. They are responsible for ensuring the accuracy, clarity, and completeness of information. Decisions related to the design and delivery of the training, including formatting, color schemes, font choices, instructional methods, and platforms, are made by NAHRO's Professional Development team and are not within the scope of SME input.

CONTENT RESPONSIBILITIES

SMEs are expected to:

- Review all assigned materials thoroughly for accuracy, clarity, and alignment with industry standards and current practices.
- Provide clear, constructive feedback and be prepared to identify and fill content gaps by supplying additional information, examples, or guidance.
- Support any corrections, additions, or suggested changes with credible references, regulations, or resources when applicable.
- Understand that not all feedback will be incorporated; NAHRO will default to internal preferences for formatting, tone, and delivery style to maintain consistency and fairness across our portfolio of offerings.
- Complete any required onboarding or professional development trainings assigned by NAHRO Professional Development.

CONTRACTS AND TIME COMMITMENTS

Each project will include a formal SME contract that outlines the specific number of hours allocated for review and input, as well as clear project milestones and deadlines. By accepting the contract, SMEs agree to:

- Use the assigned hours exclusively for content review, development, and refinement.
- Adhere to all outlined deadlines and project timelines.
- Attend scheduled meetings and respond to requests for input within the agreed-upon timeframes.

Failure to meet these contractual obligations, including missed deadlines or insufficient participation, may result in immediate removal from the project.

COMPENSATION

Consultants will be compensated based on the NAHRO Professional Development team's approval of deliverables for each pay period. Specific compensation rates for each project will be outlined in the individual contract. No additional charges or expenses are allowed under the terms of the contract.

To receive payment, the following requirements must be met:

- A completed W-9 form must be submitted.
- All expense reports must include clearly identified deliverables and be submitted to the NAHRO Professional Development team for approval.
- Enrollment in NAHRO's bill pay system is required before payments via direct deposit can be processed.

EXPENSE REIMBURSEMENT

Expense reports must be submitted **within ten (10) working days** of project completion. Late submissions may result in payment delays or non-payment.

NAHRO will begin processing expense reports on the date that NAHRO receives the report. Payment will be made no later than 30 days after processing begins.

SMEs should keep copies of all expense reports for their personal records.

SMEs are also encouraged to visit the [Faculty Portal](#) to access updates, materials, and important information.

TERMINATION/RESTRICTIONS/REQUIREMENTS

NAHRO reserves the right to terminate any agreement.

The consultant will NOT use NAHRO training materials, curriculum, and/or registration information to promote any non-NAHRO ventures.

Appendix A

The Conflict of Interest (COI) Attestation

NAHRO Faculty and Consultants are required by NAHRO policy to complete and file annually a certification concerning real or apparent conflicts of interest.

For purposes of completing this certificate, a conflict of interest arises when a person in a position of authority over NAHRO, its activities, or its employees may benefit financially from a decision such person must or could make in their capacity as a NAHRO official or employee. This includes indirect benefits, such as benefits to family members, businesses in which the official or employee or a family member has an ownership or contractual interest or other material relationship, or benefits to other persons with whom the official or employee has a relationship that is not an arm's length relationship.

NAHRO officials and employees are expected to avoid both real conflicts of interest and actions that result in the appearance of such a conflict. Using the above-stated definition as a guide, please indicate the following (Attach a separate sheet if additional space is necessary to provide adequate detail).

Please list any interests, relationships, or activities, current or anticipated within the next 12 months, that may give rise to an actual, potential, or apparent conflict of interest with NAHRO. This includes any circumstances that could reasonably be perceived as compromising your objectivity or creating an appearance of impropriety. (Please state "none" if none.)

NAHRO Consultant Manual Receipt and Acknowledgement

Updated 5/15/25

I acknowledge that as a NAHRO consultant, I have read and understood the SME/Consultant Manual and will follow its guidance, rules, and policies.

I understand that the manual may be updated periodically and that it is my responsibility to consult with NAHRO's [Director of Professional Development and Certification](#) (PD+C) if I have questions about the most current policies. In the event of any changes, the most recent policies will take precedence over those summarized in the manual.

I understand that NAHRO will not send notifications or emails of updates or revisions to the manual. I also acknowledge that this manual will be updated occasionally at the above website location, and I need to periodically visit the website to determine and comply with any changes or updates.

Consultant Name

Signature

Date