

SME Operating Policies and Guidelines

The following document outlines the standard operating guidelines and policies to support the effective operation of the Subject Matter Expert (SME) program.

Preamble

SME Steering Committee

1. The SME Steering Committee (the Committee), appointed by the board, shall be responsible for the establishment, ongoing management and evaluation of the SME program.
2. The Committee's responsibilities include, but are not limited to, the following:
 - a. establish the operating guidelines for the effective management of the SME program
 - b. evaluate and report on the effectiveness of the SME program
 - c. determine and review the criteria and terms and conditions for appointment of SMEs;
 - d. participate actively in reviewing applicant applications, maintaining and enforcing the requirements for qualified applicants and appointments by ensuring consistency and fairness of how applicants are assessed;
 - e. appointing SMEs;
 - f. determine, and review from time to time, the industry areas of expertise to be included in the SME program;
 - g. work with CERC management to promote and evaluate the SME program
 - h. review the conduct of the appointed SMEs, including making termination decisions relating to SMEs who do not comply with the application criteria or the terms and conditions of the SME Program; and
 - i. provide the board with recommendations to improve the program's effectiveness from time to time.

Operating guidelines

- a. The CERC website will list the industry areas of expertise (known as a Group – Example Immigration Group) covered under the Program
- b. The CERC website will contain contact information of all designated SMEs, (including areas of expertise, certification and other relevant biographical information) assigned / approved to the Group
- c. A CERC member (after logging into the site) may subscribe to a Group
- d. As a subscriber to a Group, the member can submit a question to any, or all SME's within the Group
- e. The subscriber and SME may choose to maintain a confidential connection outside of the group

- f. As a subscriber to the Group the member will receive a notice of the question and the response(s) from the SME, and any discussion from other Group subscribers
- g. A history of Group discussions will be maintained and accessible to all Group subscribers

Subject Matter Experts SMEs

- a. are appointed by the SME Committee and may serve as an SME for (period)
- b. individuals - not companies
- c. receive no remuneration
- d. serve at the discretion of the SME Committee
- e. are bound by rules of confidentiality, as set forth in the SME application (Appendix #)
- f. there are no limits on the number of SMEs in any one industry area of expertise
- g. all CERC members in good standing may apply to be designated as a SME
- h. SMEs may not charge a fee for any services / advice given under the program
- i. Are subject to liability covenants as set for in the SME (appendix #)
- j. Where practical, agree to provide CERC with relevant materials (content – webinars / podcasts / Relo book etc.)
- k. May serve in more than one area of expertise
- l. Agree to respond promptly to enquiries from members.

Members

- a. access to the SME advisory program shall be through the CERC Website
- b. access to the SME advisory program is available to all CERC members in good standing