

Section 1

Getting Started

Introduction

The Certified Association Executive (CAE) designation is designed to elevate professional standards, enhance individual performance, and identify association professionals who demonstrate the knowledge essential to the practice of association management. The credential is held by a diverse group of more than 4,000 people worldwide who achieved the CAE to demonstrate their commitment to the profession of association management and to the missions of associations. Successful CAE candidates join this distinguished group in pursuing a high level of personal commitment to continuing education and professional development.

Founded in 1960, the CAE program stands as a mark of excellence and has evolved to reflect what it takes to manage an association in today's challenging climate. Reflecting ASAE's commitment to its quality and effectiveness, the CAE program was accredited by the National Commission for Certifying Agencies in 2010. The CAE is a vibrant program that continues to grow and be refined in accordance with the evolution of association management and certification professional practices.

What Is Certification?

Credentialing is the term commonly used to describe the group of programs that provide recognition that individuals, programs, or organizations have met established requirements. In associations, the most common credentialing programs are licensure, certificate programs, accreditation, and certification.

The CAE is a *certification* program, a voluntary process in which individuals demonstrate, by satisfying requirements and passing an assessment, that they possess an established level of knowledge in a particular field. In many cases, the CAE included, certain requirements must be met to qualify to take the exam; once

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certification is earned, additional requirements must be fulfilled in order to maintain it. A CAE must recertify every three years by completing a minimum level of professional development programs and, perhaps, other activities such as writing, teaching, and/or volunteer service. Visit ASAE's websites www.asaecenter.org and www.whatiscae.org to learn more about CAE certification and recertification.

Reasons for Earning the CAE

People seek the CAE certification for a variety of reasons, chief among which is a personal commitment to a career in association management. Those who seek the credential are typically motivated by the resulting opportunities to enhance their knowledge, improve their advancement opportunities, and elevate their status in their current position. And there is a certain pride in having accomplished a challenge less than 1 percent of the people working in associations have achieved.

As a CAE, you commit yourself to lifelong learning and an ongoing pursuit of knowledge in the profession. Once earned, the credential opens doors and creates connections through a range of CAE-only events and increased volunteer leadership opportunities through ASAE and local, state, and regional association professional societies. In the association community, the CAE designation is recognized as a mark of distinction. Board leaders, members, and those involved in hiring non-profit professionals recognize the potential value and commitment the individual holding the credential brings to their organizations.

What CAEs Say About Their Reasons for Achieving the Credential

Preparing for the CAE exam will dramatically expand your knowledge of the association profession. When you receive your CAE, you really will have become a learned practitioner, and you will have earned the prestige and recognition that will come your way.

—David M. Patt, CAE, President, Association Executive Management

I applied to take the CAE exam as soon as I was eligible to do so. I thought that earning the CAE would help me build my career and open doors—which proved to be true. What I didn't realize was how much I would learn through the process of studying for the exam, and what great connections I would make to other CAE candidates. I'm still grateful for both of those things.

—Lisa Junker, CAE, Director, Publications and Communications,
Entomological Society of America



Obtaining my CAE was the best decision I could have made for my career in association management. The entire process was a tremendous learning opportunity. I was able to learn from current professionals who shared their domain knowledge and expertise. I participated in a study group that allowed me to have discussions with peers going through the same process. Since obtaining my CAE I've seen opportunities open up, and others within and outside of my organization look to me as a resource within the community.

—**Trevor S. Mitchell, CAE, Executive Director Membership & Technology, ARMA International**

I was determined to earn my CAE because it distinguishes me as someone dedicated to lifelong learning with a commitment to following best practices inside my association. ASAE does a tremendous job of preparing CAE candidates through immersion courses and numerous other resources that help association executives run better, stronger organizations.

—**Maria E. Brennan, CAE, President & CEO, Women in Cable Telecommunications**

One of the benefits of attaining and maintaining my CAE is that I am a more prepared, well-rounded association professional with a real appreciation for areas outside my area of technical expertise. It has made me better prepared to take on my next role as an association executive.

—**Mike Chamberlain, MBA, CAE, Executive Director, National Association of Parliamentarians**

I always believed in doing the things necessary to be at the top of my profession. Attaining the CAE was an important piece of being a successful association executive. Through the study process and earning the certification, the people you meet and the information you pick up really add to your library of experiences and become part of your knowledge base.

—**Barry S. Pilson, CAE, Director of Marketing & Membership, TESOL International Association**

Earning the CAE denotes a level of competency and understanding that goes well beyond nonprofit principles, policies, and procedures. Preparing for the CAE examination provided me with both the incentive and means necessary to bring together the vast knowledge that I knew existed in the area of association management but to which I might not otherwise have been exposed.



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Having the CAE allows me to be more successful in my day-to-day work and also allows me, through my volunteer leadership experiences, the opportunity to add to the body of knowledge and raise the level of professionalism in the association management sector.

—Debra N. McGuire, MBA, IOM, CAE, Chief Executive Officer,
Michigan Townships Association; 2012–13 Chair, CAE Commission

Are You Ready to Earn the CAE?

If you've decided to make association management your career, it makes sense to pursue the field's highest professional credential. However, before you begin it is important to ensure that you meet the qualifications.

Basic Qualifications

To be eligible to take the CAE exam, you must

- Be employed (currently or within the past five years) in a qualifying nonprofit organization or association management company.
- Have sufficient qualifying association management experience (three years as a CEO or five years as an employee at a qualifying organization).
- Have a bachelor's degree or higher, or fulfill professional equivalency requirements. Applicants without a qualifying degree must submit eight additional years of professional work experience to qualify to take the exam. Each year of completed undergraduate studies may be substituted for two years of professional work experience.
- Have completed a minimum of 100 hours of broad-based association management-related professional development activities within the five years preceding the application.
- Sign an attestation to uphold ASAE's Standards of Conduct.
- Disclose any felony convictions.

You will be eligible to sit for the CAE exam for one year after your application is accepted; if you're not ready by then, the application process begins again.

Your Commitment to Success

Earning the CAE credential requires making a firm commitment to dedicate the time required to achieve and maintain it. Recent successful candidates say to plan on a minimum of six to eight hours a week for study, so you must block time on your calendar well in advance. Remember the commitment is not yours alone; it may include support from employers and family.



Once you have decided to seek the CAE credential, commit to doing whatever is required to pass the exam the first time you take it. The CAE exam is designed to identify those ready to step into the executive director role of a nonprofit of any type or size. That means that if you have had a more specialized role in association management, you will need to expand your horizons to gain the general knowledge outlined in the nine domains shown on the CAE exam content outline.

To be successful in earning the CAE, commit yourself to the process. Get excited about the learning opportunities and new knowledge you will acquire. Invite a colleague to prepare for the exam with you or join a study group locally or online, where you will meet new colleagues who have made the same commitment.

Your Readiness: A Self-Assessment

Now that you have committed to seeking the CAE, your first step should be self-assessment and planning. There are a number of things you may not yet have considered that will be important as you begin to plan your exam preparation.

Your path to earning the CAE will be unique. You will need to make choices on how to prepare based on your individual motivation, professional and educational background, personal learning preferences, and available resources. The worksheet on the following pages has questions and checklists designed to help you reflect on your current strengths and plan your path to earning the CAE credential.



WORKSHEET 1

My Path to Earning the CAE®: A Personal Worksheet

My motivation

- I want to earn the CAE because

- I would like to hold the CAE credential by [*supply date*]

My background

- My professional background has given me experience in the following exam content areas:

Domain 1: Strategic Management

- General Management
- Identity and Branding
- Financial Management
- Globalization
- Strategic Planning and Thinking

Domain 2: Governance and Structure

- Governance
- Volunteer Leadership Development
- Affiliate/Chapter Relations

Domain 3: Membership Development

- Member Engagement
- Membership Recruitment and Retention
- Ethics Program
- Standard-Setting Programs

Domain 4: Programs, Products, and Services

- Development of Programs, Products, and Services
- Fundraising, Sponsorships, and Development Programs
- Meetings and Events
- Certification, Accreditation, and Licensure
- Affinity Programs
- Professional Development Programs and Delivery Systems

Domain 5: Leadership

- General Leadership
- Ethics
- Diversity
- Interpersonal Skills and Group Facilitation
- Negotiating

Domain 6: Administration

- Human Resources
- Technology
- Legal and Risk Management
- Facilities Management
- Vendor/Supplier Management
- Business Planning

Domain 7: Knowledge Management and Research

- Knowledge Management
- Research, Evaluation, and Statistics

- My professional work has given me experience in nonprofits of the following types and with the following characteristics:

a. Nonprofit organization type

- Trade association
- Individual membership organization
- Other

Domain 8: Public Policy, Government Relations, and Coalition Building

- Public Policy
- Government Relations
- Coalition Building

Domain 9: Marketing, Public Relations, and Communications

- Marketing
- Public Relations Programs
- Publications, Media, and Messages

b. Membership type

- Companies/institutions only
- Combination—both individuals/ professionals and companies

- Professional society
- Philanthropic organization

c. Membership scope

- Local
- State

- Individuals/professionals only
- Donors

- National
- International

8 Certified Association Executive Study Guide 2015**d. Membership size**

- | | |
|--|--|
| <input type="checkbox"/> Limited number of members | <input type="checkbox"/> Several hundred members |
| <input type="checkbox"/> Thousands of members | |

e. Staff size

- | | |
|---|--|
| <input type="checkbox"/> Less than 10 employees | <input type="checkbox"/> 10–49 employees |
| <input type="checkbox"/> 50 or more employees | |

- I have formally studied the following areas of the exam content:

- | | |
|---|--|
| <input type="checkbox"/> Domain 1: Strategic Management | <input type="checkbox"/> Domain 7: Knowledge Management and Research |
| <input type="checkbox"/> Domain 2: Governance and Structure | |
| <input type="checkbox"/> Domain 3: Membership Development | <input type="checkbox"/> Domain 8: Public Policy, Government Relations, and Coalition Building |
| <input type="checkbox"/> Domain 4: Programs, Products, and Services | <input type="checkbox"/> Domain 9: Marketing, Public Relations, and Communications |
| <input type="checkbox"/> Domain 5: Leadership | |
| <input type="checkbox"/> Domain 6: Administration | |

Personal learning preferences

- My preferred methods of learning are

- In general, I would characterize my ability and comfort with test taking as

Resources I plan to use to assist my preparation

- I plan to ask the following people for help as I prepare for the CAE:

- I plan to use the following resources to prepare myself to earn the CAE:

Evaluating Where You Are Now

One of the most important considerations in preparing for the CAE exam is realistically evaluating your level of preparedness. By doing so you can better map out your study plan and devote sufficient time to areas in which you need to build your knowledge. The sooner you begin, the better you will be able to align your study plan and your association management continuing education programs to build your skills across all areas of the exam content outline.

In fact, the exam content outline is a good place to begin! At the end of this section, using the outline and rating form in Exhibit 1.1, you will candidly rate your level of knowledge on each task listed, according to the four categories shown below.

- **Basic knowledge:** I know and can easily use key terms and concepts associated with this task.
- **Intermediate knowledge:** I have had limited professional experience with this task. (That is, if you have only on-the-job experience in a function, you may be operating with commonly held misconceptions. Through reading and/or formal learning and synthesizing this new information, you will likely become more aware of effective practices and be able to start applying them.)
- **Advanced knowledge:** I have studied academically and/or have extensive professional experience in the specialty area.
- **CAE knowledge:** I understand the basics, the possibilities, and how to apply strategy to this task in this domain; I know when to use my knowledge; and I know how to gather and deploy the resources to make strategy happen.

Be careful about making overly generous assumptions about your experience. It's far better to initially underestimate your expertise and then discover, as you study, that you know more.

Once you have determined what you need to learn more about, you can develop a study plan to strengthen those areas. Remember that the CAE exam is designed to assess your readiness to step into the executive director role in any type or size of nonprofit association. Seek out a variety of ways to build your perspective, such as taking courses, reading, participating in discussions, and mentoring. Using a variety of study resources can help you better understand the nuances of different nonprofits.

Other Considerations

Of course, preparing for the exam is more than ensuring you know the outline content. Unless you're a recent graduate or regularly take courses requiring work

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outside formal learning sessions, it's likely you haven't had to engage in concentrated study for some time. Your study skills may need a polish!

Studying for the exam typically takes from as little as two months to as much as four months or more; it quickly becomes as much about your ability to set priorities and maintain the right (for you) work-life balance as your aptitude for learning. So consider how you will balance exam study with other things in your work and personal life.

Earning the CAE requires that you also know how to *apply* your content knowledge as the chief staff executive of an association. It cannot be overemphasized that to earn the CAE, you must adopt the perspective of a chief staff executive. You'll want to do more than simply read the authoritative literature. Studying for the exam also involves a significant amount of reflection and considering how to apply what you have read or learned in other ways. The more diverse your study sources, the greater the chance you'll have to succeed. This guide contains content review, study questions, discussion questions, and scenarios throughout Section 3, organized by the CAE content domains. Work through these on your own *and* engage in discussions with other CAE candidates as well as current CAEs and/or other mentors.

The best advice from those who've been where you are now is simply this: get started! And a good way to get started is to assess what you know, using the exam content outline as a guide.

The Exam Content Outline and Self-Assessment

Periodic changes to ensure currency and relevance are a hallmark of a well-designed credentialing program. Therefore the Certified Association Executive (CAE) credentialing program undertakes a job analysis study every five years, as well as an ongoing review of policies and procedures.

The composition of the CAE exam is guided by this extensive research on the job tasks performed and knowledge needed by association executives. During the 2013 to 2014 period, the CAE Commission oversaw a methodical and comprehensive investigation into the skills required for successful association management. This research resulted in the identification of 159 essential association management competencies, which were organized into nine knowledge domains. They appear in outline form in Exhibit 1.1 and represent the content covered on the CAE exam. (The percentage of the test devoted to each domain is indicated in parentheses after the domain name.)

Using Exhibit 1.1 and the levels of knowledge that were listed earlier, rate your perception of your level of knowledge in each area. In Section 2, you will use the result of your self-assessment as the basis for developing your study plan.

Exhibit 1.1: Exam Content Outline and Self-Assessment

Domain 1: Strategic Management (16%–18%)	Basic	Intermediate	Advanced	CAE
A. General Management				
1. Define the association's core competencies and align operations and activities to capitalize on these competencies.				
2. Identify and implement strategic partnerships with other entities to position the association to most effectively accomplish its mission.				
3. Identify and interpret performance metrics to guide progression towards organization's goals.				
4. Institute volunteer and staff leadership succession plans to facilitate cross-training and position the association for continuity of operations.				
5. Develop systems to facilitate adaptability and promote innovation.				
6. Establish benchmarks for continuous quality improvement of operations.				
7. Create a strategy for human capital management to position the association to fulfill the goals and mission of the organization.				
8. Analyze stakeholder feedback to ensure that programs, products, and services are consistent with evolving member needs.				
B. Identity and Branding				
1. Establish brand standards to define the features, benefits, and value of the organization to stakeholders and other audiences.				
2. Direct the integration of the organization's brand in all programs, services, and activities to reinforce the organization's value.				
3. Review and assess the organization's brand effectiveness.				
4. Establish a coherent identity for the organization and its members to distinguish the organization's value.				

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	Basic	Intermediate	Advanced	CAE
C. Financial Management				
1. Develop, recommend, and oversee organizational financial and business planning to achieve strategic objectives.				
2. Identify and establish user-friendly systems, metrics, and tools to monitor and manage financial performance.				
3. Provide clear, transparent, and accurate financial reporting to board, staff, members, and the public to reflect the financial health of the organization.				
4. Recommend, implement, and manage revenue, investment, and reserve policies to enhance and protect the financial security and viability of the organization.				
5. Develop a policy of independent periodic review and audit of the organization's finances to identify weaknesses and capitalize on strengths to respond to the management letter.				
6. Communicate the financial status of the organization to members and volunteers to support the decision-making process.				
7. Recognize and respond to the impact of economic and other external factors to effectively guide financial planning, investment policies, and financial performance.				
8. Develop business plans and financial modeling to evaluate return on investment (ROI).				
D. Globalization				
1. Analyze, interpret, and communicate the impact of global trends (social, cultural, technological, and economic) on the organization and its key stakeholders to advance the organization and anticipate future needs.				
2. Assess the implications of globalization on the organization's stakeholders, programs, and services to identify whether and how business should be expanded globally.				
3. Ensure the organization's mission remains relevant in the global marketplace to maintain a competitive advantage.				
4. Define opportunities to gain global perspectives from stakeholders in order to further organizational goals.				

	Basic	Intermediate	Advanced	CAE
E. Strategic Planning and Thinking				
1. Establish and implement a strategic planning process, including regular plan updates, to advance the organization's vision and mission.				
2. Assist the board in setting short- and long-term organizational goals and objectives for a strategic planning process.				
3. Examine the external data and internal performance metrics to evaluate the effectiveness of the strategic plan and revise plan as necessary.				
4. Work with the board to establish the vision and mission of the organization to ensure sustainability of the organization.				
5. Identify resources (human and capital) necessary to address current and future needs as identified in the strategic plan.				
6. Act upon changes in the external environment on the strategic planning process and reevaluate accordingly.				

Domain 2: Governance and Structure**(10%–12%)**

A. Governance				
1. Conduct ongoing review of governance documents to ensure they support the organization's strategic direction and that the organization is in compliance.				
2. Serve as liaison with the board and Executive Committee to implement the board's policy and vision.				
3. Support and maintain an effective, representative governance system to guide the organization in accomplishing its mission, and recommend changes as needed.				
4. Communicate and manage the unique roles and responsibilities to the board and staff to ensure an appropriate balance of power and the alignment of duties with the organization's vision.				

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	Basic	Intermediate	Advanced	CAE
B. Volunteer Leadership Development				
1. Establish and maintain a volunteer recruitment, training, recognition, and accountability system to attract and retain active and effective involvement of membership.				
2. Educate and orient board members, volunteers, and staff regarding their responsibilities to maximize the capacity of the organization.				
3. Work with the board to develop a volunteer leadership succession plan that facilitates the transition process.				
C. Affiliate/Chapter Relations				
1. Analyze the need for new affiliates/chapters to better serve member needs.				
2. Establish policies, procedures, and resources to support affiliate/chapter relationships.				
3. Develop strategies for building and maintaining strong affiliate/chapter relationships.				
4. Develop and implement affiliation agreements to delineate lines of authority and responsibility for the affiliate/chapter.				

Domain 3: Membership Development (7%–9%)

A. Member Engagement				
1. Identify the needs and views of current and potential members to create and prioritize effective strategies for member engagement.				
2. Identify opportunities for members to contribute to the advancement of organizational programs and goals.				
B. Membership Recruitment and Retention				
1. Define the parameters of membership and assess future opportunities to ensure organizational relevance.				
2. Determine the membership business model and member value proposition for the organization to ensure alignment with the mission and strategic goals.				

	Basic	Intermediate	Advanced	CAE
3. Define goals and key performance indicators for membership recruitment and retention.				
4. Monitor member recruitment and retention programs and services to ensure their relevance.				
C. Ethics Program				
1. Define the ethical standards of professional conduct that align with the vision and mission of the organization.				
2. Raise awareness of the ethical standards to foster a community that encourages members to identify and adhere to the ethical standards of professional conduct.				
3. Establish and manage a discipline program to address violations of the ethical standards of professional conduct.				
4. Review professional and industry practices to determine how to maintain the relevance of the ethical standards of professional conduct.				
D. Standard-Setting Program				
1. Identify the need for standards to promote the profession or industry and assure the public of quality products/services in keeping with the organizational vision and mission.				
2. Align standard-setting programs with the organizational strategic plan and values.				
3. Establish and implement transparent and objective standard-setting programs to protect public welfare and safety.				
4. Ensure that the standard-setting process protects the organization and minimizes liability and risks.				

Domain 4: Programs, Products, and Services (9%–11%)

A. Development of Programs, Products, and Services				
1. Identify and determine the best methods for responding to the needs and interests of stakeholders to develop relevant programs, products, and services that align with the organization’s strategic goals and values.				

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	Basic	Intermediate	Advanced	CAE
2. Direct and evaluate needs assessments and market research to evaluate the feasibility of introducing, modifying, or discontinuing programs, products, and services.				
3. Review metrics to evaluate programs, products, and services and make recommendations to maintain, improve, or discontinue.				
4. Develop comprehensive implementation plans to ensure that programs, products, and services are fiscally responsible.				
B. Fundraising, Sponsorships, and Development Programs				
1. Utilize qualitative and quantitative data to identify appropriate revenue-generating vehicles for accomplishing organization goals.				
2. Develop and execute a fundraising plan to improve the effectiveness of fundraising efforts.				
3. Evaluate the effectiveness of revenue-generating initiatives associated with giving to inform decisions for future programs.				
4. Establish a development framework, such as foundations, endowments, and annual giving, to align with and advance the organization's mission.				
C. Meetings and Events				
1. Define success and value for your meetings and events to achieve overall organizational goals.				
2. Prioritize the use of organizational resources to achieve successful meetings and events.				
3. Evaluate outcomes relative to objectives to improve future meetings and events.				
4. Determine stakeholder needs (education, information, and networking) and define program objectives to ensure the success of meetings and events.				
D. Certification, Accreditation, and Licensure				
1. Develop and direct credentialing programs that define and promote best practices for stakeholders.				
2. Investigate and evaluate relevant standards and legal implications and liabilities associated with credentialing programs to identify strategies for minimizing risk.				

	Basic	Intermediate	Advanced	CAE
3. Ensure that credentialing programs meet technical standards to maintain validity and reliability.				
4. Assess the need for and relevance of credentialing programs to elevate performance and quality.				
E. Affinity Programs				
1. Develop processes to maintain professional integrity in the decision-making process regarding affinity programs.				
2. Determine policies and make decisions regarding the selection and review of affinity programs that are consistent with the organization's vision and mission.				
3. Develop and evaluate affinity programs to maximize effectiveness.				
F. Professional Development Programs and Delivery Systems				
1. Assess the needs and interests of stakeholders to develop relevant professional development programs, products, and services.				
2. Evaluate and plan the use of multiple methods and delivery systems to appropriately address stakeholder needs.				
3. Ensure the review of existing and potential professional development activities that incorporate the conditions necessary for successful adult learning.				

Domain 5: Leadership (16%–18%)

A. General Leadership				
1. Make decisions based on information from a variety of sources/inputs, as appropriate to the situation.				
2. Establish collaborative leadership with internal and external stakeholders to achieve mutually beneficial outcomes.				
3. Define an organizational culture that is sensitive and responsive to the needs, interests, and values of all stakeholders.				
4. Guide board members and volunteer leadership to assist them in fully executing their responsibilities.				
5. Demonstrate strategic leadership and calculated risk taking to achieve the long-term goals of the organization.				

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	Basic	Intermediate	Advanced	CAE
6. Establish strong, open working relationships with volunteer and staff leaders.				
7. Establish and model the core values to provide a framework for effectively leading the organization.				
B. Ethics				
1. Comply with the American Society of Association Executive's Standards of Conduct to model ethical behavior.				
2. Explain and exhibit the organization's standards of ethical conduct to maintain the highest degree of integrity and ethical behavior.				
3. Establish and implement conflict of interest and sexual harassment policies for board and staff to ensure transparency.				
4. Maintain the highest degree of personal integrity in order to demonstrate exemplary conduct.				
C. Diversity				
1. Ensure and align communications, programs, products, and services to reflect diversity while achieving the goals of the organization.				
2. Promote and model an understanding and respect for diversity and its impact on daily work.				
3. Create a climate of inclusiveness in order to ensure the sustainability and viability of the organization.				
4. Create policies in support of diversity and inclusiveness to convey the organization's commitment.				
5. Proactively address the impact of changing demographic and cultural trends.				
D. Interpersonal Skills and Group Facilitation				
1. Advance staff's professional and personal development through coaching, mentoring, career counseling, and leadership development in order to build a stronger organization.				
2. Coach and mentor volunteer leaders and association staff to develop their interpersonal skills in order to increase their effectiveness.				

	Basic	Intermediate	Advanced	CAE
3. Facilitate individual participation and ownership in group decision making and consensus building to increase board and staff effectiveness.				
4. Devise board activities and processes to determine the objectives that advance the organization's mission and vision.				
5. Facilitate an environment conducive to building and maintaining effective working relationships with staff and stakeholders.				
E. Negotiating				
1. Exercise effective and ethical negotiation skills to resolve conflicts and achieve consensus among parties.				
2. Utilize conflict resolution skills to productively resolve differences among parties.				

Domain 6: Administration**(15%–17%)**

A. Human Resources				
1. Establish and maintain a values-driven work environment that fosters staff teamwork, communication, efficiency, and effectiveness to retain qualified staff and assure organizational effectiveness.				
2. Ensure clear delineation of job functions, organizational responsibilities, and chain of command within the office through documented policies and procedures that promote organizational efficiency.				
3. Identify and comply with legal recruiting and hiring practices to mitigate exposure to risk and attract highly qualified staff.				
4. Develop a formal performance review process to maximize employees' growth and development.				
5. Structure and develop disciplinary and termination policies and procedures to ensure fair and equitable treatment of staff and mitigate exposure to risk.				
6. Develop, implement, and manage strategies (e.g., benchmarking, benefits packages) to attract and retain qualified staff.				

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	Basic	Intermediate	Advanced	CAE
7. Enforce compliance with applicable employment laws to mitigate exposure to risk.				
8. Establish core competencies for essential functional areas in order to achieve the organization's goals.				
B. Technology				
1. Maintain awareness of state-of-the-art technology to recommend, select, and integrate technology solutions.				
2. Establish policies and procedures to ensure secure systems, data integrity, and prevent unauthorized access.				
3. Act as a strategic partner with other departments to better support all functions of the organization.				
C. Legal and Risk Management				
1. Manage the organization to comply with relevant laws and regulations.				
2. Mitigate risk exposure to protect and advance the organization.				
3. Monitor the organization's legal and tax status (e.g., not-for-profit organization, antitrust) to maintain compliance.				
4. Protect the organization's reputation and assets (e.g., intellectual property, HR practices, contracts, insurance coverage).				
D. Facilities Management				
1. Evaluate and align facilities and equipment to meet organizational objectives and ensure fiscal responsibility.				
2. Adopt policies and procedures to ensure the work environment is compliant with applicable laws and regulations to create a productive, safe, and accessible workplace.				
3. Ensure an organization-wide crisis management program is in place to protect and secure human, technological, and physical assets.				

	Basic	Intermediate	Advanced	CAE
E. Vendor/Supplier Management				
1. Develop strategies and plans to foster mutually beneficial vendor/supplier relationships to meet organizational goals.				
2. Establish and implement transparent and objective procedures for contracts including development, review, conflict of interest, and confidentiality policies to ensure that the organization's interests and assets are protected.				
3. Establish and implement objective procedures for requests for proposals (RFPs), taking into account performance evaluation criteria, vendor bias, and conflict of interest to ensure selection of appropriate proposals.				
4. Identify opportunities and evaluation criteria for partnerships and outsourcing to maximize operational efficiencies.				
F. Business Planning				
1. Prepare business plans that align the organization's resources, activities, and operations to support the strategic goals of the organization.				
2. Define criteria for measurable outcomes to accomplish the goals of the business plan.				
3. Assure the provision of accurate and timely financial and other information to support effective decision making.				
4. Develop a business continuity plan to ensure continuation of the organization's operations in the event of a disaster.				
5. Identify objectives, strategies, and tactics to achieve business goals.				
6. Develop long-range funding and needs plans to ensure adequate financial assets for the future management and development of the organization.				

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Domain 7: Knowledge Management and Research (2%–4%)	Basic	Intermediate	Advanced	CAE
A. Knowledge Management				
1. Analyze the information needs and preferences of stakeholders to design a knowledge management system.				
2. Utilize data from the knowledge management system to make recommendations about programs, products, and services to meet member needs and share leading-edge profession or industry learning, insight, and best practices.				
3. Establish a process for evaluating knowledge management systems to lead continuous improvement efforts.				
B. Research, Evaluation, and Statistics				
1. Develop a research agenda to benefit the internal operations of the organization, advance the profession or industry, and provide needed information for stakeholders.				
2. Use appropriate research and data collection methods to guide decisions and operations within the organization.				
3. Ensure customized internal data systems are in place to support strategy and positioning.				

Domain 8: Public Policy, Government Relations, and Coalition Building (7%–9%)

A. Public Policy				
1. Identify and analyze the need for public policy development activities for the purpose of determining how to best support the organization mission.				
2. Create an inclusive advocacy agenda to support the profession or industry.				
3. Implement a public policy program to educate key stakeholders.				
B. Government Relations				
1. Establish and evaluate the government relations programs that are consistent with public policy strategies to promote the organization's goals.				

	Basic	Intermediate	Advanced	CAE
2. Develop strategies for political action committees (PACs) to advance the organization's public policy agenda.				
3. Define the government relations agenda consistent with accomplishing public policy goals.				
4. Oversee a grassroots advocacy program to advance the organization's public policy agenda.				
5. Establish association lobbying activities to ensure compliance with applicable laws and regulations.				
6. Establish measurable goals to assess government relations programs success.				
C. Coalition Building				
1. Establish a vision of coalition building that is flexible and inclusive to advance mutual goals.				
2. Identify opportunities for new coalitions to address emerging issues.				
3. Organize coalitions to address single issues of common interest that advance the organization's public policy agenda.				
4. Establish a model to assess efficacy of coalition partnerships.				

Domain 9: Marketing, Public Relations, and Communications (6%–8%)

A. Marketing				
1. Define the scope of the market and identify target segments to ensure that marketing strategies are met.				
2. Develop a data-driven marketing strategy to support the organization's position and branding; enhance membership recruitment and retention efforts; and promote programs, products, and services.				
3. Identify channels for brand expansion and awareness to expand markets.				

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	Basic	Intermediate	Advanced	CAE
B. Public Relations Programs				
1. Identify the target segments and key stakeholder groups that must be influenced to ensure that PR efforts meet strategic goals.				
2. Formulate and articulate appropriate responses to inquiries from the media and the public and ensure that all relevant parties are properly informed.				
3. Dynamically evaluate the effect of external factors on PR strategies to ensure that strategic goals are met.				
4. Evaluate and develop a public relations education and information plan to influence groups and individuals and enhance public trust.				
5. Establish a policy for responding to external factors and capitalizing on opportunities.				
C. Publications, Media, and Messages				
1. Determine the appropriate publications (including technical journals) to meet the diverse needs and interests of members and stakeholders.				
2. Respond to trends in formats and delivery systems to ensure relevance to members and stakeholders.				
3. Provide oversight for publications to meet organization goals and objectives.				
4. Develop an infrastructure and policies to ensure the quality and integrity of publications, including advertising.				