2015 Certified Association Executive Exam Content Outline

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 periodic 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 extensive research on the job tasks performed and knowledge needed by association executives. During 2013–2014, the CAE Commission oversaw a methodical and comprehensive investigation into the skills required for successful association management. The research resulted in the identification of 159 essential association management competencies organized into nine knowledge domains. This outline presents the content covered on the CAE exam with the amount of the test devoted to each area indicated in parentheses.

The exam content outline below takes effect in 2015, and will first be used for the May 1, 2015 CAE exam.

		% range on exam
1. Strategic Management		**16-18**
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.	
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.	
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 on 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 re-evaluate accordingly.	
2. Governance and Structure		**10-12**
A. Governance		
	1. Conduct on-going 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.	
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.	
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.	
	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 which 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 Programs		
	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.	
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.	
	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 effectivenss of revenue generating initiatives associated with giving to inform decision for future programs.	
	4. Establish a development framework, such as foundations, endowments, 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.	
	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.	
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.	
	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 staffs' 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.	
	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 which 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.	
6. Administration		**15-17**
A. Human Resources		
	1. Establish and maintain a values-driven work environment that fosters staff teamwork, communications, 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.	
	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 knowledge about 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, 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.	
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.	
7. Knowledge Management & Research		**2-4**
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.	
8. Public Policy, Government Relations, and Coalition Building		**7-9**
A. Public Policy		
	1. Establish public policy priorities for the organization that support the organization mission.	
	2. Determine strategies to achieve public policy goals and allocate resources.	
	3. Adapt public policy strategies to changing circumstances to remain current and achieve organization goals.	
B. Government Relations		
	1. Establish and evaluate the government relations programs that are consistent with public policy strategies to promote the organization's goals.	
	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.	
9. Marketing, Public Relations, & 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.	
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 & 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.	