

**CAE Exam Content Outline**  
**Australasian Version**  
begins with December 2020 exam

**Domains**

**1. Governance**

A. Governance Structure

1. Sustain an effective governance system that values diversity of thought to guide the organization in accomplishing its mission.
2. Implement the board's policies and strategic priorities.
3. Partner with the board and board committees to achieve the organization's mission and vision.
4. Ensure there are clear lines defined for members and staff in the governance of the organization.
5. Comply with laws and regulations that relate to board activities, meetings, and governance.

B. Chapters and Affiliate Relations

1. Evaluate the structure and function of affiliates and chapters to advance the organization's mission.
2. Delineate the lines of authority and responsibility for affiliates and chapters using appropriate agreements.
3. Align policies, procedures, and resources to support affiliate and chapter relationships.

C. Volunteer Leadership Development

1. Develop a leadership identification program that addresses diversity and inclusiveness and aligns the organization's needs with individual talent.
2. Ensure the leadership development program addresses orientation, ongoing training, collaboration, fiduciary responsibility, and accountability.
3. Develop a leadership succession plan.

**2. Executive Leadership**

A. Decision Making

1. Manage roles between the chief staff executive and leadership to facilitate effective decision making.
2. Ensure the creation of organizational performance metrics.
3. Establish a culture of accountability.

B. Ethical Leadership

1. Adhere to the ASAE Standards of Conduct to demonstrate transparency, professionalism, and integrity.
2. Embody the highest ethical principles in behavior and decision making.
3. Communicate the importance of ethical behavior and decision making throughout the organization.

C. Diversity, Inclusion, and Equity

1. Model an understanding and respect for a culture of inclusivity to enhance the daily work

and sustainability of the organization.

2. Proactively address the impact of changing demographic and cultural trends.
3. Identify ways that conscious and unconscious biases may impact the organization.
4. Align communications, programs, products, and services to reflect the organization's diversity.
5. Create policies in support of diversity and inclusiveness.

D. Adaptive Leadership

1. Seek new perspectives and growth opportunities to increase effectiveness and build team capacity.
2. Develop a diverse array of facilitation techniques and communication skills to stimulate creative thinking, ensure all voices are understood, and accomplish intended goals.
3. Exercise effective and ethical negotiation skills to resolve conflicts and achieve consensus.
4. Formulate a process to effectively navigate change and promote innovation.
5. Cultivate relationships to advance the organization's strategic objectives.
6. Model self-care and wellness behaviors to encourage workforce satisfaction and productivity.
7. Facilitate a culture of inquiry that assesses the impact of trends, future scenarios, challenges, and opportunities.

**3. Organizational Strategy**

A. General Management

1. Analyze economic and other external factors to guide long term financial planning and performance.
2. Prepare business plans to align resources, activities, and operations with the organization's core purpose.
3. Utilize performance metrics to guide progression towards organization's goals.
4. Develop a policy of independent periodic review and audit of the organization's finances.

B. Critical Analysis and Planning

1. Analyze the impact of key trends, including the competitive environment, on the organization and its stakeholders.
2. Implement a strategic planning process to advance the organization's vision and mission.
3. Develop strategies for capturing business intelligence data to inform decision making.

C. Knowledge Management

1. Develop a knowledge management system to address stakeholder needs and preferences.
2. Analyze data from the knowledge management system to advance the organization's mission.
3. Evaluate the effectiveness of the knowledge management system.

**4. Operations**

A. Financial Management

1. Oversee financial and business planning to achieve the organization's strategic objectives and mission.
2. Implement systems, metrics, and tools to monitor, manage, and report financial performance and ensure compliance with laws and regulations.

3. Communicate clear and accurate financial information to leadership and relevant stakeholders to support decision making and ensure transparency.
4. Manage revenue, investment, and reserve policies to protect and enhance the financial security of the organization.
5. Apply generally accepted accounting principles for independent review or audit of the organization's finances.
6. Anticipate the impact of internal and external factors to guide financial planning and policies.
7. Develop financial modeling to inform decision making and evaluate performance.

B. Human Resources

1. Foster a safe and accessible workplace through compliance with rules and regulations and development of policies and procedures.
2. Delineate job roles and responsibilities with clear position descriptions, policies, and procedures.
3. Ensure fair and equitable treatment of staff and mitigate exposure to risk through compliance with applicable law and regulations in recruiting, hiring, disciplinary, and termination practices.
4. Evaluate employees using a documented process to support teamwork, performance, growth, and professional development.
5. Maintain an up-to-date employee manual to articulate the organization's policies, values, and expectations and comply with applicable employment laws and regulations.
6. Ensure diversity, inclusion, and equity are integrated into policies, practices, and culture.

C. Legal Oversight and Risk Mitigation

1. Manage the organization in compliance with relevant laws and regulations.
2. Obtain appropriate insurance to protect the organization's reputation and assets.
3. Maintain data privacy and security consistent with current law and best practices.
4. Protect the organization's intellectual property.
5. Protect human, technological, and physical assets with an emergency and business continuity plan.

D. Infrastructure and Technology

1. Align facilities, equipment, and technology with organizational objectives and the requirements of a changing workplace environment.
2. Determine the organization's ongoing technology strategy.
3. Ensure technology solutions are appropriate, used effectively, and aligned with organizational goals.
4. Establish policies and procedures to ensure appropriate use of the organization's technology assets.

E. Vendor Relations

1. Assess the organization's needs for products and services.
2. Develop selection and evaluation criteria for potential vendors.
3. Implement objective processes for Requests for Proposals.
4. Implement contracting procedures that ensure the organization's expectations, interests, and assets are protected.
5. Enforce contractual compliance.

## **5. Business Development**

### **A. Programs, Products, Services, and Other Revenue**

1. Analyze stakeholder feedback to ensure that programs, products, and services are consistent with evolving member needs and the organization's strategic goals and values.
2. Evaluate the feasibility of introducing, modifying, or discontinuing programs, products, and services.
3. Develop comprehensive implementation plans to ensure that programs, products, and services are mission-driven.

### **B. Meetings and Events**

1. Define objectives for meetings and events in alignment with organizational goals and stakeholder needs.
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.

### **C. Certification, Licensure, and Accreditation**

1. Maintain a current understanding of the distinguishing characteristics of certification, certificate programs, licensure, and accreditation.
2. Assess the need for and relevance of credentialing programs.
3. Comply with relevant standards and legal obligations associated with credentialing programs to ensure validity and reliability and minimize risk.

### **D. Industry Standards Added "Industry" to both outlines**

1. Identify the need for standards in the industry served by the organization in keeping with the organizational vision and mission.
2. Implement transparent and objective standards development and promulgation processes.
3. Ensure that standards are maintained to protect the organization and minimize risk.

### **E. Strategic Partnerships**

1. Determine the organization's strategic needs and objectives for partnership.
2. Develop strategic partnerships to advance the organization's mission.
3. Conduct due diligence and ongoing review to ensure partnerships are viable and aligned with the organization's mission.
4. Negotiate agreements that define the terms of partnership and comply with legal requirements.

## **6. Member and Stakeholder Engagement and Management**

### **A. Recruitment and Retention**

1. Determine the membership business model and value proposition to ensure alignment with the mission and strategic goals.
2. Define goals and key performance indicators for membership recruitment and retention.

### **B. Stakeholder Identification and Cultivation**

1. Establish criteria for the identification of individuals and organizations as stakeholders to align them with the organization and its strategic objectives.
2. Engage stakeholders by identifying their current and future needs in order to maximize organizational impact.

3. Review the alignment of stakeholders using organizational metrics on a regular basis.

C. Volunteer Management

1. Establish a system that attracts and engages volunteers through training, recognition, and accountability.
2. Clearly delineate roles and responsibilities of staff and volunteers.
3. Establish a volunteer succession plan that supports organizational continuity.

D. Ethics

1. Define the ethical standards for professional conduct that align with the vision and mission of the organization and stakeholder interests.
2. Raise awareness of the ethical standards to encourage adherence.
3. Manage a discipline program to address violations of the ethical standards.
4. Review stakeholder interests and professional practice periodically to maintain the relevance of the ethical standards.

**7. Advocacy**

A. Government Relations

1. Assess the appropriateness of and need for government relations programs.
2. Maintain an understanding of laws and regulations related to advocacy activity.
3. Define the government relations agenda consistent with accomplishing advocacy goals.
4. Implement strategies that adhere to applicable laws and regulations for lobbying and political activity.
5. Establish an evaluation process for government relations programs.

B. 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 issues of common interest.
4. Assess the efficacy of each coalition relative to the organization's advocacy goals.

C. Public Policy

1. Establish prioritized public policy positions that support the organization's goals.
2. Determine strategies to achieve public policy goals.

**8. Marketing and Communications**

A. Marketing

1. Define the scope of current and potential markets.
2. Identify market segments and their unique interests and needs.
3. Develop a data-driven marketing strategy to achieve organizational goals.
4. Utilize effective methods of marketing to diverse groups and cultures.

B. Brand Management

1. Establish brand standards to convey 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.

3. Evaluate the organization's brand effectiveness.

C. Communication

1. Define the communication goals.
2. Identify the most appropriate communication channels and preferences for meeting the diverse needs and interests of targeted audiences.
3. Customize content and messaging that leverage current and emerging communication channels.
4. Establish an evaluation process to gauge the effectiveness of messaging and communication methods.

D. Public Relations

1. Identify the target audiences that should be influenced to ensure that PR efforts meet strategic goals.
2. Implement a public relations program that may include public education, information, media relations, and influence strategies.
3. Evaluate the changing effects of external factors on public relations strategies.