

2024 Practice Analysis Report for the Certified Association Executive (CAE) Examination

The American Society of Association Executives (ASAE)

Executive Summary, April 2025

Prepared for

The American Society of Association Executives

1575 I Street NW

Washington, DC 20005

Prepared by

Meazure Learning

7901 Jones Branch Drive, #330

McLean, VA 22102

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Table of Contents

Introduction	2
Phase I: Initial Development and Evaluation	2
Panel of Experts.....	2
Panel Meeting	3
Exit Survey	5
Phase II: Validation Study	5
Survey Design	5
Survey Distribution.....	6
Survey Results	6
Phase III: Development of Test Specifications	8
Conclusion	8

Appendices

Panel Demographics	Appendix A
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Introduction

The American Society for Association Executives (ASAE) is the essential organization for association management, representing both organizations and individual association professionals. Its organizational members are trade associations and individual membership societies that represent almost every sector of the economy and countless professions.

ASAE is committed to enhancing the professional development of and recognition for professionals in association management. The Certified Association Executive (CAE) credential, governed by the CAE Commission, is the marker of a committed association professional who has demonstrated the wide range of knowledge essential to manage an association in today's challenging environment.

The development of a high-quality certification program must follow certain logically sound and legally defensible procedures. ASAE partners with Meazure Learning to ensure the examination adheres to these standards, which are outlined in federal regulation (*Uniform Guidelines on Employee Selection Procedures*) and manuals such as *Standards for Educational and Psychological Testing* (published by the American Educational Research Association, 2014).

Starting in September 2024, ASAE assembled a panel of subject matter experts (SMEs) to determine the competencies required for successful performance as a newly certified CAE. The results of this process, known as a practice analysis study, serve as the cornerstone for examination development by ensuring the content on the examination reflects the tasks performed in practice settings.

The study consisted of three phases:

- I. **Initial Development and Evaluation.** The panel identified the major domains, subdomains, and tasks required for the competent performance of a CAE.
- II. **Validation Study.** A large sample of current certificants validated the work of the panel.
- III. **Development of Test Specifications.** Based on the ratings gathered from the sample of professionals, the test specifications for the examination were developed.

Phase I: Initial Development and Evaluation

Panel of Experts

In September 2024, a panel of 10 subject matter experts (SMEs), assembled by ASAE, met to delineate the role of the CAE. The major function of the certification program is to ensure competence and professionalism for individuals working in association management. The results of these meetings were used to create a preliminary content outline of the major areas of responsibility that describes the current practice in the field.

Panel meetings were conducted remotely on September 9, 10, and 11a. To ensure a representative practice analysis, the panel consisted of SMEs carefully selected to reflect the diversity of practice within the profession. ASAE assembled the panel with the following targets in mind:

- Representation from each major organization type (i.e., professional, trade, consultant, association management).
- At least 20% newly certified (three years or less).

- At least 20% with fewer than 10 years of experience.
- At least one panelist from Australia or New Zealand.
- No more than 80% representing a single demographic category in terms of gender identity or race/ethnicity.

The panel represented a diverse range of demographic and professional characteristics, including gender, race/ethnicity, years of experience, geographic region, and organization type. Two panelists were newly certified (within the past three years), and two had fewer than 10 years of industry experience. Geographic representation spanned the United States, with one panelist from Australia. Seven panelists were female, three were male, and they reflected a variety of racial and ethnic backgrounds. Panelist qualifications are detailed in Appendix A.

Although ASAE invited qualified SMEs from various organization types, it was unable to secure a qualified panelist representing trade organizations. During the first meeting, panelists received training on their roles and expectations, including the importance of thinking broadly beyond their own work settings, achieving consensus as a group, and ensuring that no single perspective unduly influenced the panel's decisions. These principles were reinforced throughout the panel discussions.

Panel Meeting

After reviewing the purpose of the meeting and clarifying roles and responsibilities, the panel discussed the mission of the program, relevant characteristics of potential certificants, the changes in the industry during the past five years, as well as the anticipated changes in the next five years. Although certificants are not required to be chief staff executives to earn the CAE designation, the credential is designed to assess basic competence in this role.

Target Audience and Eligibility

These discussions aided the review of the target audience and eligibility requirements for the examination, which are detailed below.

- Five years of experience as an employee at the staff level or one year employed as a chief staff executive or C-suite-level executive at a qualifying organization.
 - A qualifying organization is a nonprofit organization (trade association, professional society, individual membership organization, philanthropic organization, tribal organization) or an association management company (AMC).
 - In lieu of employment at a qualifying organization, an applicant may have 10 years' paid service as an employee, independent contractor, or consultant with demonstrated professional involvement within the association community by providing services as defined by the CAE exam content outline or five years of such service if substantially all work is devoted solely to qualifying organizations.
- Current employment by a qualifying organization or employed by one within the last five years.
 - If qualifying under "in lieu of employment" requirements, current (or within the last five years) employment in paid service as an employee, independent contractor, or consultant with demonstrated professional involvement within the association community by providing services as defined by the CAE exam content outline.
- Bachelor's degree or higher or, in lieu of a degree, eight additional years of professional work experience.

- Work experience can be substituted for a degree on a calculated basis. Each year of completed undergraduate studies may be substituted for two years of professional work experience. Internship experience and volunteer service are not applicable toward the employment experience requirements.
- 100 hours of broad-based, association management-related professional development, as defined by the exam content outline, within the last five years preceding the application submission.
- Commitment to uphold the ASAE Standards of Conduct and have no felony convictions related to the practice of association management.

After reviewing the eligibility requirements, the panel discussed whether eight years of additional work experience in place of a bachelor's degree remains appropriate in the current association management environment. This feedback was presented to the CAE Commission during a meeting on October 28, 2024. The Commission concluded that further analysis of the profession is needed before making any adjustments to the eligibility criteria.

Domain, Subdomain, and Task Development

After the panel established a clear understanding of the program's target audience, the meeting shifted to developing a new content outline for newly certified association executives. The panel reviewed the 2019 practice analysis content outline, identifying the key domains and subdomains—the major groupings of responsibilities, knowledge, and skills that constitute significant areas of the role—and the specific tasks or activities performed within each subdomain.

Discussions focused on ensuring the identified responsibilities and knowledge areas accurately reflected the diverse settings in which CAEs operate. As the panel refined the content outline, they assessed the relevance and currency of the domains and subdomains, making necessary additions, edits, or removal until a comprehensive list was created. Tasks underwent revision to varying degrees throughout the meeting. Some tasks were reworded, removed, or moved to more appropriate domains as the meetings progressed.

Through iterative development, review, and revision, the panel created a comprehensive list of eight domains, 31 subdomains, and 119 task statements. The eight domains include:

1. Governance
2. Executive Leadership
3. Organizational Strategy
4. Operations
5. Business Development
6. Member and Stakeholder Engagement
7. Advocacy and Public Policy
8. Marketing and Communications

During the meetings, the panel discussed integrating diversity, equity, inclusion, and accessibility (DEIA) tasks across all domains and introduced a new "Digital Strategy" subdomain to highlight technology's role in association management. New tasks were added to address crisis management, covering both planning and communication, and to promote a foresight-driven culture. Language was broadened to reflect role variability, particularly in Marketing and Communications, recognizing that many CAEs oversee specific tasks rather than perform them directly. Additionally, data and performance metrics were established as central to decision making across all domains. The domains, subdomains, and tasks were designed to reflect practices in both the United States and Australasia.

Input on Survey Design

The panel was asked to provide input on the design of the validation survey that would be distributed to a larger sample of CAEs. The panel determined that domains, subdomains, and task statements should be assessed with ratings of frequency and criticality (see Phase II of this report). The panel refined the scales to ensure their applicability to association management.

The panel also discussed the various demographic questions that would be used to evaluate the representativeness of the respondents.

Exit Survey

At the conclusion of the practice analysis meetings, panelists were asked to respond to a workshop evaluation survey to gauge their understanding of the meeting objectives as well as their confidence in their ability to meet those objectives. The results of the exit survey indicate that the panelists understood their roles and felt confident that their work during the meeting resulted in an appropriate and defensible list of domains, subdomains, and tasks.

Phase II: Validation Study

Survey Design

Upon completion of the panel meetings, Measure collaborated with ASAE to develop an online survey to validate the work of the panel. The final survey comprised four sections. The first section provided an introduction, outlining the survey's purpose, target audience, and instructions. The second section asked respondents to rate each of the domains, subdomains, and tasks using the following scales:

Frequency: How frequently do you perform work in this domain, subdomain, or task in your role?

- (1) Not performed at all
- (2) Annually/semi-annually
- (3) Quarterly
- (4) Monthly
- (5) Daily or weekly

Criticality: How important is this domain, subdomain, or task in your role?

- (1) Of no importance
- (2) Slightly important
- (3) Moderately important
- (4) Very important
- (5) Critical

In the third section, respondents were asked to indicate the percentage of examination items that should be allocated to each CAE domain. The fourth section gathered demographic information to assess the representativeness of the respondents.

Survey Distribution

On September 26, 2024, Measure sent an email invitation, including a unique survey link, to 4,072 valid contacts¹ provided by ASAE. All invitees were promised confidentiality regarding their participation. Data were collected until October 17, 2024. After three reminder emails, 953 individuals responded, resulting in a 23% response rate.

Survey Results

Characteristics of Respondents

Demographic data were collected and analyzed to confirm that respondents accurately represented the intended certificant population. The respondents were primarily experienced professionals in association management, with 53% having over 20 years of experience and most holding C-level, executive, or vice president roles. While seasoned in their careers, 62% were relatively new to their current positions, having served six years or less. Nearly all respondents held at least a bachelor's degree (96%), with 46% earning a master's degree. Their CAE certification tenure varied, with 20% certified for three years or less and 24% for more than 16 years.

Just over half (51%) worked for professional associations, followed by trade associations (20%). Organization sizes varied, with 29% serving fewer than 1,000 members and 33% serving over 10,000. Most respondents worked in smaller organizations, with 58% having 25 or fewer staff and 32% reported mid-size revenues between \$1 million and \$5 million. Nearly all respondents were based in the United States (99%), predominately in the South (49%) and Midwest (32%). Most respondents identified as female (65%) and reported their race/ethnicity as White/Non-Hispanic (88%).

Analysis of Domains and Subdomains

Survey respondents rated each domain using two scales selected by the practice analysis panel: frequency and criticality. Average frequency ratings for the eight domains ranged from 2.40 (Advocacy and Public Policy) to 4.39 (Executive Leadership). On the frequency scale, a rating of 2 indicates the domain is performed annually or semiannually, while a rating of 5 means it is performed daily or weekly. Average criticality ratings for the domains ranged from 2.93 (Advocacy and Public Policy) to 4.33 (Governance), with a rating of 2 indicating the domain is slightly important and a rating of 5 signifying critical importance. These results suggest that even the lowest rated domains are performed and carry at least some importance, on average.

Survey respondents rated the 31 subdomains using the same frequency and criticality scales. Average frequency ratings ranged from 1.97 (Public Relations) to 4.71 (Ethical Leadership), with a rating of 1 indicating the subdomain is not performed, while a rating of 5 indicating it is performed daily or weekly. Average criticality ratings for subdomains ranged from 2.63 (Coalition Building) to 4.53 (Ethical Leadership), with a rating of 2 indicating slight importance and a rating of 5 indicating critical importance. These findings suggest that certain subdomains, such as Public Relations, may not be relevant in all contexts.

To quantify the relative importance of each domain and subdomain to the CAE role, each frequency rating was multiplied by its criticality rating. Domains and subdomains with lower frequency and criticality ratings received lower relative importance scores, while those with higher ratings received higher scores. This aligns with the expectation that domains and subdomains that are both frequently performed and critical should carry more

¹ Valid contacts excluded 264 email addresses that were either bounced or deactivated.

weight on the exam. In addition to serving as an evaluative measure, these relative importance scores also informed the development of the CAE test specifications (Phase III).

Relative Importance Score = Mean Frequency Rating * Mean Criticality Rating

The three highest-rated statements according to their relative importance scores include:

- Embody and communicate the highest ethical principles in behavior and decision making throughout the organization (under Ethical Leadership).
- Implement the board's policies and strategic priorities (under Governance Structure).
- Adhere to the ASAE Standards of Conduct to demonstrate transparency, professionalism, and integrity (under Ethical Leadership).

The three lowest-rated statements according to their relative importance scores include:

- Establish an evaluation process for government relations programs (under Government Relations).
- Assess the need and relevance for new and existing credentialing programs (under Certification, Licensure, and Accreditation).
- Assess the need for a public relations program (under Public Relations).

Examination Weights

Survey respondents indicated the percentage of the examination that should be devoted to each domain. Executive Leadership and Governance received the highest weightings, on average, while Advocacy and Public Policy received the lowest weighting. The results of this analysis were used as a top-down approach in determining the test specifications (Phase III).

Discussion of Survey Results

In a series of web-based meetings on October 28, 2024, and November 4, 2024, Measure Learning shared the results of the panel meetings and validation survey with the CAE Commission. These discussions achieved three key goals: (1) confirming that the survey respondents were sufficiently representative and qualified to validate the work of the practice analysis panel; (2) evaluating domain, subdomain, and task ratings to ensure that all content areas warranted inclusion in the test specifications; and (3) approving the new test specifications based on the survey results, as described in the next section of this report (Phase III).

After reviewing the demographics of the survey respondents, the CAE Commission concluded that the respondents were representative of the CAE population and could reliably be used to establish the examination's test specifications, as outlined in the following section. The Commission examined the domains, subdomains, and tasks with the lowest frequency and criticality ratings, determining that no task warranted complete removal from the CAE examination. However, some tasks with overlapping processes were merged, and one task was added to Public Relations, which are detailed below:

- Under Government Relations, "Assess the adequacy of and need for government relations programs" and "Establish an evaluation process for government relations programs" merged into "Evaluate the need, adequacy, and effectiveness of government relations programs." Additionally, "Maintain an understanding of laws and regulations related to political fundraising" and "Implement strategies that adhere to applicable laws and regulations for lobbying and political activity" merged into "Implement

strategies that adhere to applicable laws and regulations related to lobbying, political activity, and political fundraising.”

- Under Coalition Building, “Assess the utility of and need for coalitions” and “Assess the efficacy of each coalition relative to the organization’s advocacy goals” were merged into “Assess the utility and efficacy of coalitions relative to the organization’s advocacy goals.” Furthermore, “Identify opportunities for new coalitions to address emerging issues” and “Organize coalitions to address issues of common interest” were combined into “Identify and organize coalitions to address emerging issues.”
- Under Public Policy, the task “Determine strategies to achieve public policy goals” was combined with “Create and communicate a framework for policy engagement” into “Determine and communicate strategies to achieve public policy goals and engagement.”
- Under Public Relations, the task, “Establish and maintain public relations strategies that support the organization’s goals” was added.

The final content outline consists of eight domains, 31 subdomains, and 115 tasks.

Phase III: Development of Test Specifications

The final phase of a practice analysis study is the development of test specifications that identify the proportion of questions to be allocated to each content area on the examination. To ensure a strong link between the practice analysis study and the examination, information collected through the validation survey was used to calculate new test specifications.

The CAE Commission determined that a hybrid approach, blending both bottom-up and top-down weights, would best represent the CAE role and ensure sufficient content coverage at the subdomain and task-level. To account for sampling error (i.e., variability in statistical estimates from a sample) associated with survey ratings and to allow flexibility when assembling future test forms, the CAE Commission concluded that minor shifts in domain weights would not impact the exam’s overall validity. Thus, domain weights are permitted to deviate by plus or minus one percent. ASAE notified Measure Learning of final approval of the CAE test specifications on December 2, 2024

Conclusion

The survey results confirm the outcomes of the practice analysis meeting, indicating that the domains, subdomains, and tasks areas defined by the panel accurately represent competent practice for a newly certified CAE.

Upon finalization of the test specifications, the existing item bank will be reclassified to reflect the updated domains, subdomains, and task statements. Any identified item gaps—areas where content does not sufficiently meet the requirements outlined in the test specifications—will be addressed through the development of additional items as necessary. When new forms are developed, items will be selected to ensure content coverage fully aligns with the test specifications.

Appendix A: Panel Demographics

A total of 10 subject matter experts participated in the meetings. The age, gender, number of years working in association management, and other relevant characteristics are presented in the table below.

Table A-1: Practice Analysis Panel

Name	Age	Gender	Race/Ethnicity	Credentials	Years In Industry	Years CAE Certified	Job Title	Company Type	Location
Panelist A	41	Male	White (non-Hispanic)	MBA, CAE	17	12	President and CEO	Association Mgmt Company	NY
Panelist B	51	Female	Hispanic/Latino(a)	MBA, IOM, CAE	30	19	Executive Director	Professional Association	TX
Panelist C	44	Female	Asian	CAE	18	6	Executive Director	Professional Association	DC
Panelist D	51	Female	African American/Black	MBA, CAE	30	9	Chief Executive Officer	Professional Association	VA
Panelist E	-	Female	African American/Black	MBA, CMP, CAE	31	25	Executive Vice President	Professional Association	DC
Panelist F	55	Male	-	CAE	22	3	Chief Executive Officer	Professional Association	AUS
Panelist G	62	Female	White (non-Hispanic)	CMP, CMM, CAE	38	20	Association Executive	-	IL
Panelist H	52	Female	-	CAE	30	17	-	-	DC
Panelist I	40	Male	Multi-racial	CAE	4	6	Chief Learning Officer	Professional Association	DC
Panelist J	51	Female	White (non-Hispanic)	CAE	10	2	Nonprofit Relationship Management	Consultant	MA