

★ Top 5 Final Test-Taking Tips for the CAE Exam

1. Choose the *best* answer, not the “perfect” one.

CAE questions often have *multiple* plausible answers. Your job is to choose the option that is:

- **Most strategic**
- **Most aligned with best practices**
- **Least risky**
- **Most aligned with an association’s long-term health**

If an answer feels *too tactical* or *too staff-level*, it’s probably not the right one.

2. Think like a CEO, not a manager.

The exam consistently tests for:

- Governance
- Ethics
- Strategy
- Risk management
- Data-informed decision-making

If an answer indicates:

- Jumping into operations
- Making a unilateral decision
- Ignoring stakeholders
- Bypassing governance

it is almost always the *wrong* answer.

Choose answers that reflect a **thoughtful, strategic, inclusive approach**.

3. When in doubt, follow these CAE “default principles.”

If two answers seem good, the CAE’s philosophy favors the one that reflects:

- **Transparency**
- **Member value**
- **Diversity, equity, and inclusion**
- **Data-driven decisions**
- **Long-term sustainability**
- **Volunteer engagement (without overburdening them)**
- **Staff and board working within their appropriate roles**

If an option aligns with these, it’s probably the right one.

4. Watch for “red flag” answers.

The CAE exam *loves* to include tempting but **incorrect** choices that reflect common real-world shortcuts.

Automatically reject answers that involve:

- ❌ Acting without board approval (when governance is required)
- ❌ Making decisions without data
- ❌ Ignoring legal, ethical, or fiduciary issues
- ❌ Allowing board members to direct staff
- ❌ Quick fixes that sacrifice long-term value
- ❌ Over-reliance on one revenue source

If you spot a red flag, cross it off immediately.

5. Pace yourself — mark and move!

You have **4 hours for 200 questions**, which is generous but mentally exhausting.

Use this pacing strategy:

- **Answer what you know immediately.**
- **Mark tough questions and move on.**
- **Return later with a fresh brain.**

Most people who run out of time lose it by overthinking early questions.

Trust your preparation and keep moving.



Quick Mental Checks (Use During the Exam)

- If the board is involved → they set policy, they don't manage staff.
- If something goes wrong → gather data, communicate, follow process.
- If conflict exists → document, disclose, use ethics policies.
- If choosing between two good answers → pick the more strategic one.
- If timeline is unclear → start with research or assessment.

Night-Before CAE Exam Checklist

1. Review the 12 Domains at a high level — not the details.

Focus on the “big ideas”:

- Governance vs. management
- Strategy vs. operations
- Financial oversight and risk management
- Member engagement & value
- Public policy & advocacy
- Programs & products
- DEI
- Ethics
- HR and volunteer leadership

You’re refreshing **frameworks**, not reading new material.

2. Memorize the CAE “Default Response Principles.”

These will help you eliminate wrong answers fast.

Correct answers typically:

- Are strategic, not tactical
- Are proactive, not reactive
- Involve data, not intuition
- Include stakeholders, not silos
- Respect governance boundaries
- Reduce risk
- Improve transparency
- Increase member value
- Uphold ethics and DEI

If you memorize these 9 principles, they will guide at least **half the exam items**.

3. Review the most commonly tested traps (so you avoid them).

Wrong answers often involve:

- Board members managing staff
- CEOs making unilateral decisions
- Not gathering data before acting
- Skipping legal/ethical review
- Overburdening volunteers
- Chasing revenue without mission alignment
- Ignoring risk or financial oversight

Just take 10 minutes to scan these — it will make you more confident and faster.

4. Do a 15-minute “brain refresh” on key topics that show up often.

Focus on:

- Bylaws, policies, and governance hierarchy
- Budgeting types (zero-based, incremental, etc.)
- Reserves and financial ratios
- Diversity, equity, inclusion frameworks
- Strategic planning cycles

- Conflict of interest and ethics
- HR basics (job descriptions, performance evaluations, etc.)

Not deep — just enough so the terms feel familiar.

5. Pack your exam-day essentials (digital or in-person).

- Approved ID
- Confirmation email
- Water & light snack (if allowed)
- A sweater (test centers are famously cold)
- Blue-light glasses if screens fatigue you
- Noise-cancelling earbuds (if allowed by your exam site)

Then stop studying — trust what you already know.



Morning-of Exam Routine

1. Do a quick 5-minute “mental warm-up.”

Review these three reminders:

- **Think like a CEO.**
- **Strategy > Tactics.**
- **Data + stakeholder input = Best answer.**

This primes your brain for the exam’s patterns.

2. Eat something light + hydrate.

Avoid a big breakfast — it slows thinking.

Go for:

- Banana
- Toast
- Nuts
- Tea or water

Your brain wants glucose plus hydration.

3. Arrive early, breathe, and set your pace.

You have **4 hours**.

That’s **1.2 minutes per question**.

Plan to:

- Answer everything you know quickly
- Mark questions you’re unsure about
- Come back with a fresher perspective

This avoids early burnout.



Key Memory Cues for Exam Questions

Here are quick “if you see this → do this” patterns:

IF the board is involved...

→ They set **policy and strategy**, not operations.

IF staff is involved...

→ They execute, manage, implement.

IF volunteers are involved...

→ Protect their time; don’t dump tasks on them.

IF conflict exists...

→ Use a **transparent, ethical, documented process**.

IF finances are mentioned...

→ Think **risk management, reserves, and sustainability**.

IF membership is declining...

→ Gather **data**, segment, survey, then act.

IF a new program is proposed...

→ Conduct a **needs assessment & market analysis** first.

IF public policy is mentioned...

→ PAC involvement must follow **legal, voluntary** guidelines.

IF DEI comes up...

→ Choose the answer that increases **fairness, representation, and belonging**.

IF communication is involved...

→ Be transparent, member-centered, and timely.

These patterns repeat all through the exam.



Your CAE Exam Success Formula

1. **Stay calm**
2. **Apply the CAE default principles**
3. **Avoid red-flag answers**
4. **Think big-picture, association-wide**
5. **Pace yourself and mark tough questions**

You’re more prepared than you think.



STRATEGY FOR TRICKY CAE SCENARIO QUESTIONS

These are the questions where all answers seem plausible. Use this strategy to stay aligned with CAE logic.

1 Ask yourself: Who should do this — staff or board?

If an answer flips the roles:

- Wrong.

If the board is directing staff operations → Wrong.

If staff are making governance decisions → Wrong.

2 Look for the answer that avoids risk.

Risk management is baked into CAE thinking.

Choose the option that:

- Protects financial health
- Protects reputation
- Ensures legal compliance
- Documents processes

If an answer creates avoidable risk → eliminate it.

3 Choose the answer that starts with understanding the situation.

Many distractor answers jump straight to action.

The best answer usually:

- Gathers data
- Consults stakeholders
- Conducts assessments
- Reviews policies

Example: If there's a membership dip → **survey first**, not launch a new program.

4 Prioritize transparency + communication.

If one answer increases clarity and communication and another avoids it — choose transparency.

Even internal conflict questions require:

- Open conversation
 - Documentation
 - Clear expectations
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5 Look for alignment with mission + strategy.

If an answer improves short-term revenue but doesn't fit the mission, it's usually wrong.

CAE wants:

- Sustainable growth
 - Mission-driven decision-making
 - Strategic alignment
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6 Remember the CAE positivity bias.

On the exam, “best practice” = **abundance mindset**.

The correct answers often:

- Build relationships
- Strengthen governance

- Increase engagement
- Promote DEI
- Improve processes

Negative, punitive, or isolating solutions are rarely correct.

7 Beware of absolute language in answer choices.

Words like:

- “Always”
- “Never”
- “Immediately terminate”

...are often wrong unless tied to ethics or legal compliance.

8 If you're stuck between two answers: choose the one that is more strategic.

Ask:

Does this answer improve the association long-term?

If yes → it's probably right.

★ TWO-PAGE CAE EXAM CRAM SHEET

1 Governance vs. Management (Most Tested)

Board = Strategy, Policy, Oversight

Staff = Implementation, Operations, Management

- Board approves budget/strategy – staff executes
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2 CAE “Default Principles” — Use These to Pick the Right Answer

Correct answers usually emphasize:

- Strategy > Tactics
 - Data > Assumptions
 - Transparency > Secrecy
 - Long-term sustainability > Quick wins
 - Member value > Internal convenience
 - Risk management & legal compliance
 - DEI as a strategic lens
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3 Ethics & Conflict of Interest

- Disclose fully
 - Recuse when appropriate
 - Follow written policies
 - Prioritize transparency
 - Document decisions
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4 Financial Management

Budgets:

- Zero-based = build from scratch
- Incremental = last year + changes
- Capital = long-term investments

Reserves:

- Board sets reserve policy
- 3–12 months of expenses typical
- Decisions must balance risk + sustainability

Revenue decisions:

- Must align with mission & capacity
 - Avoid reliance on a single revenue source
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5 Membership & Engagement

When facing declining membership: Never jump to tactics without research.

1. Gather data (surveys, interviews, segmentation)
2. Identify needs/value gaps
3. Adjust benefits, messaging, onboarding
4. Improve engagement pathways
5. Review pricing

6 Strategy & Planning

Good strategy involves:

- Environmental scans
- Member research
- Stakeholder engagement
- SMART goals & metrics
- Ongoing evaluation

If asked what to do first → gather data or conduct assessment.

7 Programs, Products & Education

Before launching something new:

1. Needs assessment
2. Market analysis
3. Feasibility & ROI
4. Pilot
5. Evaluate → Scale

Avoid “build first, ask later.”

8 Volunteers & HR

Volunteers:

- Should not be treated as unpaid staff
- Need clear roles + training
- Should be protected from burnout

Staff:

- Clear roles
- Performance management
- Professional development

Answers that overburden volunteers = wrong.

9 Communications

CAE-correct communication is:

- Timely
- Transparent
- Member-centered
- Multi-channel
- Clear + proactive

Avoid withholding information unless legally required.

10 Advocacy, Public Policy & PACs

- Must follow legal guidelines
 - PAC contributions must be voluntary + transparent
 - Most effective PAC fundraising method = personal, peer-to-peer solicitation
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