NANA

GUIDE · JANUARY 2026



CAE SCHOLARSHIP APPLICATION GUIDE

Eligibility, required documents, and the review timeline for the NANA Foundation's annual CAE exam-fee scholarship.

Samuel Heathcote

CAREER DEVELOPMENT

ABOUT THIS GUIDE

This guide is for association staff who want to sit for the Certified Association Executive (CAE) exam and need help paying the exam fee. I am Samuel Heathcote, executive director of the NANA Foundation, and I chair the committee that reads the scholarship applications. The guide tells you what the scholarship covers, who can apply, what to send, and how we read what you send.

HOW TO USE THIS GUIDE

If you are new to the scholarship, read the sections in order. If you already plan to apply, go straight to section 4 and work through the checklist at the end of it. Each section opens with a short paragraph that says what you will be able to do once you have read it. The tables are built to be copied into your own notes, and the appendix holds a planning template for your statement and a working calendar.

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Guide · January 2026. Published by NANA. Cover photograph: generated for this guide.

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1

WHY THE FOUNDATION RUNS THIS PROGRAM

By the end of this section you will know what problem the scholarship was built to solve, and why it is narrower than you might expect. The NANA Foundation has four staff and runs two programs, institutional grants and this scholarship. I run both. The scholarship is the one where cause and effect are easiest to see.

The exam fee is, by itself, a modest sum against most association salaries. It is still real money for someone paying it out of pocket, and it arrives on top of the evenings and weekends an applicant is already giving up to study. The fee is the single biggest barrier association staff cite for not pursuing the CAE, more so than the study time itself. That is why the Foundation targets this one cost. A broader professional-development stipend would let scholars spend the money on prep materials or travel, and we could no longer say what it bought.

Removing one concrete barrier also lets us measure the program. We award a set number of scholarships, decided each year, at a fixed cost per scholar, and we can count the results. An open-ended stipend does not allow that.

The program has grown every year. The first cohort, in 2024, had 18 scholars. The second, in 2025, had 21, including Devika Anand, a membership coordinator at the Alliance of Regional Credit Unions in Columbus. That is 39 scholars in two years. The 2026 round is open as this guide goes out.

> “On a three-person staff, the exam fee comes out of a budget line that does not exist. I was not going to ask my board to invent one for me.
>
> IMANI CASTELLANE-ROY, EXECUTIVE ASSISTANT, GUILD OF STAINED GLASS CONSERVATORS

Scholarship cohorts to date.

COHORT	SCHOLARS	CHANGE FROM PRIOR YEAR	NOTABLE RESULT
2024	18	First cohort	NANA members passed the spring 2024 window at 71 percent
2025	21	+3 (+17%)	Devika Anand passed the December 2025 window
2026	Round open	Not yet decided	Applications accepted in January

One rule shapes who receives a place. We look first at applicants from associations with the thinnest professional-development budgets. We do not hold dedicated seats for small, medium or large associations, because a quota by size would force the committee to turn away a strong applicant to fill a category. We read each application and weigh the budget picture as one part of it.

The rule matters to you in practical terms. If you work for an association with two staff and no training line, you are the applicant this program was designed for. A modest employer, a modest title and a modest salary are not reasons to stay out of the pool.

The work behind the scholarship is plain. Each year my staff of four reads, corresponds, pays fees and answers questions from applicants who are unsure whether they qualify. We would rather hear from an applicant who turns out to be ineligible than lose one who assumed they were. That is the reason this guide is so specific about edge cases.

We do not treat a pass as the measure of an individual scholar's success. We treat the removal of the cost barrier as the measure, and we read passes as the sign that we removed the right one. Scholars often tell us when they pass. We use those informal updates, and no formal tracking, to see how the program is working.

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WHAT THE SCHOLARSHIP COVERS, AND WHAT IT DOESN'T

By the end of this section you will be able to say which costs the scholarship pays and which stay with you. The scholarship pays the fee the credentialing body charges to sit for the Certified Association Executive exam. It does not pay for exam-prep materials, travel to a testing center, or NANA's own CAE-preparation courses. Scholars are welcome to enroll in NANA's Learning catalog alongside the scholarship if they choose.

One point confuses some first-time applicants, so I will state it once. NANA does not administer the CAE exam. A separate credentialing body designs, administers and grades it. NANA prepares candidates for the exam and pre-approves the continuing-education credit hours they need toward eligibility.

Every rule about the exam itself belongs to the credentialing body: its fee, its application form, its deadlines, its testing windows, its passing standard and its retake policy. Check those rules with the body. Check the rules about this scholarship with us.

STEP	WHO HANDLES IT	WHAT IT COSTS YOU
Confirm you meet the credentialing body's requirements to sit	You, with the credentialing body	Nothing
Earn continuing-education credit toward eligibility	You, through NANA's pre-approved courses or other providers	Course price, if any
Prepare for the exam	You, using NANA's bootcamp, a study group or your own materials	Materials and course price
Pay the exam fee	The Foundation, if you are selected	Nothing
Sit the exam in the spring window (May 1–14) or the winter window (December 1–14)	The credentialing body	Travel, if your testing center is far
Receive your result	The credentialing body	Nothing

Who does what on the path to the credential.

The table shows where the money goes and where it does not. A scholar in the Great Lakes chapter who lives forty minutes from a testing center pays for fuel and parking. A scholar who buys a printed study guide pays for the guide. We say this in the award letter so that nobody is surprised.

Partial employer support needs a precise answer, so here it is. If your employer has agreed to pay part of the fee, the scholarship pays the rest. It does not pay the part your employer has already covered, and it does not reimburse your employer. If your employer has agreed to pay all of it, you are not eligible, and section 3 explains why.

Before you apply, count your costs outside the fee. Write the answers down. Your statement is stronger when it shows you know what the exam will take from you besides money.

- [ ] I have checked the credentialing body's current requirements for who may sit for the exam.
- [ ] I know which testing window I am targeting: spring (May 1–14) or winter (December 1–14).
- [ ] I have estimated my cost for study materials and decided how I will pay for them.
- [ ] I know where my nearest testing center is and what the trip will cost.
- [ ] I have asked my employer whether any part of the fee, or any paid study time, is already promised.
- [ ] I have looked at NANA's Learning catalog and decided whether I want a course alongside the scholarship.

A worked example shows how the pieces fit. Marisol Quintero is a program coordinator at the Guild of County Records Officers in Richmond, a seven-person staff. She received a place in the 2025 cohort and chose the winter window.

She started studying in mid-May, 28 weeks before December 1, at six hours a week, which came to 168 hours. Her own costs were one study guide and a short drive to her testing center. She sat in December 2025 and passed, and the fee was the only large item the scholarship removed.

> “My director offered to pay half of the fee. I assumed that made me ineligible and almost did not apply. The Foundation paid the other half.
>
> TERRENCE OKONJO-BELL, MEMBERSHIP MANAGER, SOCIETY OF WETLAND RESTORATION CONTRACTORS

3
WHO'S ELIGIBLE

By the end of this section you will know whether you can apply and which path fits you. You can be association staff at any career stage. Some applicants sit for the CAE for the first time a few years into their careers. Others are longtime executives who pursue the credential later than most of their peers.

There are two paths. You can apply sponsored by your employer, with a portion of the exam fee covered by your own association. Or you can apply independently, with no employer involvement in the application at all. There is one exclusion. If your employer has agreed to pay the whole fee, there is no cost for the scholarship to remove, and we direct our places to applicants who still face one.

You do not need to have taken any of NANA's CAE-preparation courses before you apply. You do not need to enroll in the Learning catalog after you are selected, though many scholars join the CAE exam study group alongside their cohort. You do not need to be a NANA member. We read applications from members and non-members on the same terms.

Common situations and how we read each one.

YOUR SITUATION	CAN YOU APPLY?	WHAT THE SCHOLARSHIP PAYS
Employer covers none of the fee	Yes	The full fee
Employer covers part of the fee	Yes	The remainder, never the part your employer covers
Employer covers the whole fee	No	Nothing; you may apply in a later round if that changes
No supervisor available to write a letter	Yes	The full fee, with a letter from a peer
Not a NANA member	Yes	The full fee, on the same terms
Took no NANA courses	Yes	The full fee
Applied and was declined before	Yes	The full fee, if selected; apply with a revised statement
Completed a NANA course this year	Yes	The full fee; coursework has no bearing on eligibility

Eligibility for the exam itself is a separate question. The credentialing body sets requirements for experience and continuing-education credit. The application asks you to confirm that you meet them, and we do not check your answer. Look the requirements up before you start writing. NANA's pre-approved continuing-education hours can count toward them, which is one reason the scholarship and the Learning catalog sit side by side.

Two applicants from the 2024 and 2025 rounds show how this plays out. Terrence Okonjo-Bell had three years at the Society of Wetland Restoration Contractors in Wilmington, a five-person staff. His director agreed to pay half of the fee. He disclosed the half, named the spring window and attached a letter from his director. We awarded him a place, and he passed in May 2024.

Imani Castellane-Roy was one of three staff at the Guild of Stained Glass Conservators in Philadelphia. Her guild had no training budget. She applied in the 2025 round with a letter from a peer she met at a chapter roundtable. We awarded her a place, and she sat in December 2025 and did not pass. She has told us she will retake the exam in the spring 2026 window.

Neither applicant was ranked above the other. The committee read two different situations and found two strong applications.

A few borderline cases come up every year, and it helps to settle them now. A part-time employee can apply on the same terms as a full-time one. So can staff of a NANA chapter, such as the Great Lakes chapter. So can an executive director who is also the only paid employee, and in that case the letter should come from a board officer or a peer. If your situation is not on the table above, ask us before you spend a month drafting.

4
THE APPLICATION, SECTION BY SECTION

By the end of this section you will be able to assemble a complete application package, piece by piece. The application asks for four things.

The first is a brief statement of why you want the credential. The second is a letter of support. The third is a specified target testing window. The fourth is basic eligibility information confirming that you meet the credentialing body's requirements to sit for the exam.

The four parts of the application.

PART	WHAT IT ASKS	TYPICAL LENGTH	WHO SUPPLIES IT
Statement of purpose	Your current work, what the credential changes, why now	Three or four paragraphs	You
Letter of support	Evidence of your commitment and readiness	One page	Your supervisor, or a peer in association management
Target testing window	Spring (May 1–14) or winter (December 1–14)	One line	You
Eligibility information	Confirmation that you meet the credentialing body's requirements	A short form	You

The statement should be specific. Do not write "I want to advance my career." Describe what you do now, what changes for you professionally if you earn the credential, and why now is the right time. Section 8 covers the structure in detail.

The letter can come from a supervisor. That suits applicants who are sponsored, or who simply want their employer's endorsement on record. It can also come from a peer in association management, which suits independent applicants without a supervisor positioned to write one. Ask for it early, because you do not control it. Give your writer our deadline, a one-paragraph summary of what you are applying for, and the qualities you hope the letter can speak to.

The testing window is the easiest gap to close. Name the spring window or the winter window. We use your choice to plan the review against your own exam date. "Whichever opens first" and "to be decided" give us nothing to plan with. If you are unsure, read section 5 and choose the later window.

The eligibility information is the part applicants treat as a formality. If you are not sure you meet the credentialing body's requirements, ask the

body before you apply, and keep the answer. A scholar who is selected and then finds they cannot sit has used a place that another candidate could have filled.

Two gaps account for more failed applications than any other: a missing letter and an unspecified window. Section 7 shows how often. A generic statement is a close second, and it is the one gap you can fix only by drafting and revising.

A few practical notes on the letter. It should be dated, signed and addressed to the scholarship committee. It should say how long the writer has known you and in what capacity. It should give at least one example of your work on a problem of the kind your statement describes. A letter of three honest paragraphs beats a page of praise.

Send plain text and a single attached letter. Do not send a résumé, certificates, a separate study schedule or a portfolio unless the form asks for one. We read dozens of packets in a short window, and extra material buries the four things we need.

Use the checklist below before you submit.

- [ ] My statement of purpose is three or four paragraphs and names a specific problem in my current role.
- [ ] My letter of support is in hand, is on a single page and comes from a supervisor or a peer in association management.
- [ ] I have named one testing window, spring (May 1–14) or winter (December 1–14).
- [ ] I have confirmed that I meet the credentialing body's requirements to sit for the exam.
- [ ] I have disclosed any part of the fee my employer will pay.
- [ ] I have read the statement aloud once and cut every sentence that would fit any applicant.
- [ ] I have submitted before the application period closes.

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WHAT THE REVIEW COMMITTEE READS FOR

By the end of this section you will know what the committee looks for, and you will be able to check your own draft against it. We read every application individually. We do not score against a rubric, and no software scores anything. A rubric rewards the applicant who writes to the score sheet. We would rather read a plain account of one person's circumstances.

Two things consistently separate a strong application from a weak one. The first is specificity. An applicant who names a particular professional challenge the credential will help them address reads as more ready for the exam than one who describes the CAE as a career milestone. The second is realism about the testing window. An applicant whose window gives adequate preparation time, and whose statement shows they have thought about how they will study, reads as more likely to sit for the exam.

Specificity has a recognizable shape. It is a title, a task and a gap. "As membership director of a 400-member regional society, I am helping my board decide whether to move to tiered dues, and I cannot yet explain the governance risk in terms the board will accept." That sentence names the role, the project and the shortfall. A sentence like "I want to deepen my knowledge of association management" fits every applicant and tells us nothing.

Realism is our way of asking whether you will show up on exam day. The calendar does most of the work.

The spring window opens May 1. Our notices go out in early February, which leaves about twelve weeks. A spring applicant should therefore be well into preparation before the notice arrives. The winter window opens December 1, which leaves about ten months.

WINDOW	TIME FROM AN EARLY FEBRUARY NOTICE	WHAT THE COMMITTEE EXPECTS TO SEE
Spring (May 1–14)	About 12 weeks	Study already under way; a plan that began before the application
Winter (December 1–14)	About 43 weeks	A schedule of weekly hours that fits the applicant's real workload

Reading the testing-window choice the way the committee does.

Neither window is better. We do not prefer one and we do not reward the nearer date. We reward the applicant whose choice matches their situation,

and we read a mismatch as a risk.

Here is the arithmetic we run. An applicant says she will study eight hours a week for 20 weeks, a total of 160 hours, and targets the spring window. The exam opens May 1, and counting back 20 weeks puts her start in mid-December, before applications open. If her statement says she has already begun, the plan is realistic. If it says she will begin after the February notice, the plan has twelve weeks in it, and we read the gap.

Consider two statements that reached the committee in the 2025 round. The first came from a membership director at the Coalition of Independent Museums, who wrote that she wanted to "grow into a leadership role." The second came from a communications manager at the Alliance of Community Radio Stations in Richmond, who wrote that her 310 member stations had asked her for a crisis plan and that she could not yet say which of the exam's governance topics applied to them. We awarded a place to the second. The first applicant did not receive a place, and she plans to reapply in the 2026 round with a rewritten opening.

The difference was not talent. The second applicant had a problem she could name, a date and a number. The first had a feeling.

Test your own draft on a colleague who does not know the CAE. Ask what you are trying to fix at work, and when you will take the exam. If your colleague cannot answer each in one sentence, rewrite the opening.

> “I picked December because I knew I needed the summer. I said so in my statement, with my hours. Nobody asked me to defend the choice.
>
> DEVIKA ANAND, MEMBERSHIP COORDINATOR, ALLIANCE OF REGIONAL CREDIT UNIONS

6
TIMELINE: FROM APPLICATION TO DECISION

By the end of this section you will be able to put every step of the cycle on your calendar and work backward from your chosen window. There is one cycle a year, and it is the same for everyone. The Foundation opens applications each January. Those who target the winter window apply in the same January cycle as those who target the spring window. We do not run two cycles.

The 2026 round opens on January 5 and closes on Friday, January 30. I read packets as they arrive. The full committee meets after the period closes, and every applicant has an individual notice by Friday, February 6. We publish the full cohort each spring.

The order matters, because the credentialing body sets its own registration deadline for each window, and the spring deadline falls around the third week of February. A scholar who wins a place needs time to register before it. Early February notices leave that time. Confirm the exact deadline with the body, because it sets the date and may change it.

The annual cycle, with the action required at each stage.

STAGE	WHEN (2026 ROUND)	WHAT HAPPENS	WHAT YOU DO
Questions	December	We answer eligibility and application questions	Send any question you have
Applications open	January 5	We accept statements, letters and window choices	Submit a complete package
First read	January	I read packets as they arrive	Do not send additions
Applications close	January 30	The committee reads each application individually	Nothing
Notices	By February 6	Every applicant hears the decision	Register with the credentialing body
Spring window	May 1–14	Spring-target scholars sit for the exam	Sit for the exam
Winter window	December 1–14	Winter-target scholars sit for the exam	Register by the body's deadline; sit for the exam

December appears on that table for a reason. I would rather field a clarifying question in December than receive an incomplete application in January that a five-minute question could have prevented. Use the month

before the cycle opens to settle your eligibility, request your letter and draft your statement.

Plan your own dates from the table. Count back from the window you chose, and add the weeks you need. For the spring window, that means your study is already under way by December. For the winter window, it means a plan with a start date in February and a protected weekly session by September.

Do not wait for the last day. An application that arrives early is read in the first pass, when I have the most time. A letter writer who needs a reminder still has time to receive one. A package with a gap, caught while the period is open, can be fixed.

Two 2025 applicants show the two windows side by side. Rafael Thornquist-Bell, the sole development officer at the Chesapeake Watermen's Cooperative Association in Annapolis, submitted on January 9 and chose the spring window. He had begun studying the previous fall. He received a place, sat in May 2025 and passed.

Naomi Adeyinka-Roth, a program manager at the Council of Regional Airport Managers in Denver, applied the same week for the winter window. She wrote a plan in two stages. From mid-February through August she read two hours a week for 30 weeks, which is 60 hours. From September 1 she studied six hours a week for 13 weeks, which is 78 hours, for 138 in all. She named the week she would begin practice questions, we awarded her a place, and she passed in December 2025.

A failed timeline has a familiar shape. The applicant picks the nearer window without counting back, submits on the last day and learns in February that the letter never arrived. Nothing can then be repaired. The table above exists to prevent that.

7

COMMON REASONS APPLICATIONS ARE TURNED DOWN

By the end of this section you will be able to name the failures that cost applicants their places and run a check against each one. The most common reason an application is turned down is a missing letter of support or an unspecified testing window, counted together. A generic statement of purpose is the largest single cause. I can say this precisely for the 2025 round, which is the last one I have closed.

In 2025 the committee read 58 applications for 21 places, or about one in three. Of the 37 that did not receive a place, 14 were incomplete: 9 lacked a letter and 5 named no window. Another 13 had statements we judged generic. The remaining 10 were close calls on the balance of need and readiness.

Why 37 applications did not receive a place in the 2025 round.

REASON	APPLICATIONS	SHARE OF THE 37	CAN YOU PREVENT IT?
Missing letter of support	9	24%	Yes: ask early
No testing window named	5	14%	Yes: choose one
Generic statement of purpose	13	35%	Yes: name your problem
Close call on need and readiness	10	27%	In part: show your plan

Two lessons follow. The first is that 14 of the 37, nearly two in five, lost out for something a checklist would have caught. The second is that the largest single cause, the generic statement, is a choice you make while drafting. Only the last row is out of your hands, and it is the smallest.

Consider the effect of each failure on the person. A scholar-in-waiting who missed the letter spent weeks on a statement that no one will read in full. An applicant who named no window cost us the chance to plan around her. Both are avoidable with an hour of care a month before the period opens.

A related problem appears after selection, not before. A scholar who has not checked the credentialing body's requirements may find they cannot sit. Check first, and keep the reply.

Here is a worked repair. In 2024, a program manager at the Society of Dental Hygiene Educators in Charlotte, a six-person staff, submitted a strong statement with no letter and no window. We could not place her.

She called us in the spring and learned what went wrong. She reapplied in January 2025 with a supervisor letter and a winter target. Her revised statement dropped the line about wanting to grow professionally and named the certification program her board had asked her to redesign. She received a place, sat in December 2025 and passed.

Run the check below the night before you submit, and again the morning you submit.

- [ ] My letter of support has arrived, and I have opened the file to confirm it is the right one.
- [ ] My application names exactly one testing window.
- [ ] My opening sentence names a problem in my own job and could not be moved to another applicant's file.
- [ ] I have confirmed my exam eligibility with the credentialing body and saved the reply.
- [ ] My study plan is written in hours per week and weeks, and it fits the window I chose.
- [ ] I have not attached material the application did not ask for.

> “Every rejection I have seen in my own review panel at a state association came from a missing page. Applicants think the committee is looking for reasons to say no. It is not.
>
> NOOR HADDAD-ELLISON, CHIEF MEMBERSHIP OFFICER, LEAGUE OF INDEPENDENT PHARMACISTS

8

WRITING A STATEMENT THAT STANDS OUT

By the end of this section you will be able to write a statement in three or four paragraphs that follows the structure the committee remembers. I read dozens of statements in a short window each January. The ones that stand out share a structure more than a style. Length is not a factor in review. Specificity is.

Think of the statement as four jobs, one per paragraph. The first states a specific, current problem you face in your role. The second connects that problem to what the CAE body of knowledge covers. The third says what changes if you pass. The fourth gives a realistic study plan, given your actual schedule and responsibilities.

What each paragraph of the statement must do.

PARAGRAPH	JOB	TEST OF SUCCESS
1	Name a specific, current problem in your role	A stranger could say what you do and what is stuck
2	Connect that problem to the exam's published content domains	You name at least one domain and say why it matters
3	Say what changes for you and your association if you pass	The change is something your board could observe
4	Give a realistic study plan and a window	Hours per week, weeks and a window that fit together

Compare two openings. The weak version reads: "I have worked in association management for six years and I am passionate about the profession." Nothing in it is false, and nothing in it is useful. The strong version reads: "In March, my board asked me to explain the risk of moving our 400 members to tiered dues. I could describe the finances but not the governance risk, and the board noticed."

The second opening gives us a date, a number, a task and a confession of a gap. It also sets up the next paragraph, where the applicant can say which part of the exam's content bears on governance. The weak version sets up nothing.

The second paragraph is where many applicants slip. You do not need to recite the exam's content domains. You need to show that you have looked at them. The credentialing body publishes its content outline, and you should read it before you write.

Name one or two domains, say what you do not yet know about them in your own work, and say how you will learn it. An applicant who treats the credential as a line for the résumé does none of this.

Here is how the second paragraph can sound.

"The exam covers the finance and governance of a membership association. I handle our dues invoices but have never read a Form 990 line by line. Our board treasurer has asked me to present the audit to the full board in June."

Each sentence names something real. The applicant has read the outline, and she knows which part of it she lacks.

The third paragraph should resist grand claims. "I will lead my association to new heights" cannot be checked. "I will be able to brief my board on the dues question in a form it can vote on" can. If we can picture the change, we can credit it.

The fourth paragraph deserves the most care. Give hours a week, weeks until the exam, and one commitment we can picture, such as a standing study-group session on Thursday evenings. "I will study as much as I can" tells us nothing.

A worked example shows the arithmetic. In 2025, Lena Marchetti-Owusu, a membership coordinator at the Society of Volunteer Fire Company Officers in Frederick, wrote that she worked 45 hours a week and cared for her mother on weekends. She found six hours, three after dinner and three on Saturday mornings, and committed to 26 weeks before the winter window. That was 156 hours, and we could see she had counted.

Compare a plan of 15 hours a week for six weeks, which is 90 hours and assumes a life she had just described as full. Lena received a place and passed in December 2025.

Write the way you would explain your plan to a respected colleague over coffee. Do not apologize for your size, your budget or your title. Do not flatter the Foundation, and do not tell us how much the scholarship would mean. We know what it means. Tell us what you will do with the credential.

Finally, revise. Read your draft for any sentence you could swap into another applicant's file, and cut it. Then look for any claim you cannot support with a date, a number or a name. A statement of 450 words that survives both passes is better than one of 900 that does not.

> “Nobody studies as much as they plan to. Write the plan you can keep, and tell them which night of the week is protected.
>
> JONAH WHITCOMBE, DIRECTOR OF OPERATIONS, FEDERATION OF FOOD BANK NETWORKS

9

IF YOU'RE APPLYING INDEPENDENTLY, WITHOUT AN EMPLOYER SPONSOR

By the end of this section you will be able to secure a letter of support that carries weight when you have no supervisor to ask. You apply on the same terms as everyone else. We do not weight sponsored applications more favorably than independent ones. Staff at smaller organizations without a formal professional-development budget are exactly the applicants the program exists to reach.

Many independent applicants work at very small associations. Many of NANA's smaller member associations have five staff or fewer, and the Association of Seed Library Curators has two. The person who runs member services may also run the website and the annual meeting. If that describes you, we expect your application.

Your letter should come from a peer in association management. That peer speaks to your professional commitment and readiness even without a supervisory relationship. They might be a colleague at a professional association you are active in, a mentor from an earlier role, or a peer from a NANA chapter roundtable or committee. They need not be senior to you. They need to speak specifically and credibly, and a peer who has worked alongside you often does that better than a senior contact who knows you only casually.

Who can write your letter, and what each can credibly speak to.

LETTER WRITER	WHAT THEY CAN SPEAK TO	WATCH FOR
Peer from a chapter roundtable	Your contributions to shared problems and your reliability	Someone who has met you only once
Mentor from an earlier role	Your growth over time and your readiness	A writer who has not seen your recent work
Colleague from a professional association	Your commitment to the field outside your own job	A writer with no knowledge of the exam
Board member or volunteer officer	Your standing with the people you serve	A writer who cannot give a concrete example

Choose the writer who has seen you work on the problem named in your statement. A chapter colleague who sat beside you while you rebuilt a budget will write a more useful letter than a senior contact who has

seen your name on a program. We read for specifics, and specifics come from proximity.

Give your writer a month if you can. A volunteer officer or a peer at another association has a full calendar of their own, and a request that arrives a week before the period closes is a request to rush. Thank them in writing afterwards, and tell them the result.

Make the request easy. Send your writer a short note with the deadline, your statement, your chosen window and three things you would like the letter to address. Offer to answer any question. Do not write the letter for them, and do not ask them to restate your claims. We can tell a letter that repeats the statement from one that adds a second view.

Here is a worked example from the 2025 round. Priyanka Venkataraman-Cole is the only full-time employee of the Association of Seed Library Curators in Burlington, which has two staff. Her board chair is a volunteer who had never seen her work on exam topics. She asked Caspian Eldridge-Park, a peer from a Greater Boston chapter roundtable who had sat with her on a committee for 14 months. His one-page letter named the budget she rebuilt and the vote it passed by.

Her statement said her association had no training budget and that she would pay for her own study guide. It named the winter window and set out 22 weeks of study at seven hours a week, or 154 hours. She told us her board chair had agreed to give her the exam day off. We awarded her a place, and she passed in December 2025.

If your association pays part of the fee, say how much. Partial coverage is not a mark against you, and the committee reads it as a sign that you have thought about the cost.

- [ ] I have named my letter writer and told them the deadline.
- [ ] I have sent them my statement, my chosen window and three things the letter might cover.
- [ ] I have written down what my employer will and will not pay for.
- [ ] I have confirmed the writer has seen my work on the problem I describe.
- [ ] I have left room for one reminder before the period closes.

> “The best letter I ever wrote was for someone I had served on a roundtable committee with for fourteen months. I could tell the committee what she did when the budget fell apart.
>
> CASPIAN ELDRIDGE-PARK, PROGRAM DIRECTOR, SOCIETY OF HERITAGE CARPENTRY TRADES

> “Write down what your employer will and will not pay. A committee that sees the gap clearly is ready to close it.
>
> YOLANDA PRUITT-AMES, EXECUTIVE DIRECTOR, COUNCIL OF EARLY CHILDHOOD EDUCATORS

10
AFTER YOU'RE SELECTED

By the end of this section you will know what happens after the notice and what to do if the answer is not yet. Scholars selected for a given year's cohort are preparing for the same testing window, and many find each other. Many stay in informal contact long after the exam. They compare study strategies and, eventually, compare notes on passing.

Past scholars serve as informal mentors for the following year's cohort. We encourage that arrangement but do not organize or require it. Scholars do not have to report their exam outcome to us.

The notice arrives by early February, and the next step is registration. Register with the credentialing body before its deadline for your window. Send us the confirmation your award letter asks for, and we will arrange payment of the fee. If you plan to study with a group, join one at once.

NANA offers two supports to scholars, neither required. The CAE exam study group is a live-virtual course led by Theo Nakashima-Ward, NANA's director of learning and credentialing, who earned his own CAE in 2021, and by Jonah Whitcombe, who earned his in 2019. The CAE Credential Bootcamp runs in spring and in winter. The spring 2026 bootcamp is on April 2, and the winter bootcamp runs in November, as the 2025 edition did on November 13.

Optional supports for scholars, and what each is for.

SUPPORT	FORMAT	BEST FOR	COST
CAE exam study group	Live-virtual	Scholars who study best with a cohort	Course price in the Learning catalog
CAE Credential Bootcamp	Virtual session before each window	Scholars who want an intensive review	Event price
Peer mentors from earlier cohorts	Informal	Scholars who want advice from someone who has passed	None
Learning catalog courses	On-demand and live	Scholars who need pre-approved continuing-education credit	Course price

The scholarship does not pay for any of these. The cohort effect is the reason to use them: people who study together tend to keep a schedule.

Exam day itself deserves a plan. Know the way to your testing center. Bring the identification the credentialing body requires. Tell your employer the

dates well in advance so that your calendar is clear for the full two-week window, even if you sit on the first day.

If you are selected, tell your supervisor or board chair the same week. A scholar who has told no one has no study time protected, and the first month is when a schedule is easiest to arrange. Ask for a standing hour in the working day if the employer can spare it. Many associations will agree to that, and it costs them nothing in dollars.

If you are not selected, apply again the following January. A second application from a returning applicant is common, and it carries no penalty. Revisit your statement before you resubmit. The professional problem that motivated the first application may have changed in the intervening year, and a statement that reflects the change reads as more current than one that repeats last year's framing.

We keep no record that connects a year's declined applications to the applicants who reapply. A returning applicant's file is read fresh each cycle. If you have a question this guide does not answer, ask the Foundation instead of guessing.

A scholar who passed in the winter window of 2025 can tell you what the last month felt like and what she would do differently. Ask. We encourage those conversations but do not arrange them, so the first message is yours to send.

> "Most scholars find the hard part is the third month, not the first. A group gets you through the third month.
>
> THEO NAKASHIMA-WARD, DIRECTOR OF LEARNING AND CREDENTIALING, NANA

- [ ] I have registered with the credentialing body for my chosen window.
- [ ] I have sent the Foundation the confirmation its award letter asks for.
- [ ] I have joined a study group or decided to study alone, and told someone my schedule.
- [ ] I have asked one past scholar for advice.
- [ ] I have a plan for sharing my result when I have it.

A QUICK FAQ

Can I apply if my employer already covers the whole CAE exam fee? No. The scholarship is reserved for applicants without full employer coverage.

Can I apply if my employer covers part of the fee? Yes. The scholarship pays the remainder.

Can I reapply the same year I passed a different NANA course? Yes. Prior NANA coursework has no bearing on scholarship eligibility.

Does the scholarship cover my prep materials? No. It covers the exam fee only.

Can I apply for both windows in one round? No. Name one window per application. If your plans change, ask us before you act.

Do I need to be a NANA member? No. Membership is not a condition of applying.

Can I switch testing windows after I apply? Ask the Foundation before you do. We plan the review against the window you name.

Will I be penalized if I applied before and was declined? No. A revised statement reads as more current.

Who sets the exam fee and the registration deadlines? The credentialing body does. Check its current figures before you plan.

Who do I contact with a question this guide does not answer? Call NANA's main line at (202) 555-0147 and ask for the Foundation.

WHERE TO GO NEXT

If you are applying, start with the NANA Foundation, which runs the scholarship and answers eligibility questions. If you want help studying, the CAE exam study group, led by Theo Nakashima-Ward and Jonah Whitcombe, is the nearest match to the scholarship cohort. The CAE Credential Bootcamp runs before each testing window and offers an intensive review.

Your chapter is a second place to look. Chapter roundtables are where many independent applicants meet the peers who later write their letters. The Great Lakes chapter runs a mentorship pairing for staff new to association management, in 12-month cohorts that start in March. The Rocky Mountain chapter's Emerging Leaders Retreat pairs each participant with a sitting executive director, a useful contact for anyone who needs a letter writer.

The Learning catalog holds courses that carry pre-approved continuing-education credit toward CAE eligibility, and you can take them before or after you apply. If you are moving into a board-facing role, the audit committee course builds knowledge the exam's content domains cover. If

you work in advocacy, the course on writing a federal comment letter speaks to a different part of the same body of knowledge.

APPENDIX: STATEMENT-OF-PURPOSE PLANNING TEMPLATE

Use this template to draft your statement before you write full paragraphs. Fill in each line with a fact, a number or a name. If a line stays blank, you have found a gap to close before you apply.

PARAGRAPH	PROMPT	YOUR NOTES
1. The problem	What am I stuck on in my job right now, and since when?	
1. The problem	Who noticed, and what did they ask me to do?	
2. The exam	Which published content domain bears on this problem?	
2. The exam	What do I not yet know about it in my own work?	
3. The change	If I pass, what will my board or my members see differently?	
3. The change	By when, and how would they know?	
4. The plan	How many hours a week, for how many weeks?	
4. The plan	Which window, and what do I already have under way?	
4. The plan	Which fixed session will I protect each week?	

Planning template for the four paragraphs of the statement.

Then check the package against this calendar, which runs from the month before the cycle to the exam.

WHEN	TASK	DONE
Early December	Confirm exam eligibility with the credentialing body	
Early December	Send any question to the Foundation	
Mid December	Ask your letter writer; send the three prompts	
Late December	Draft the statement using the template above	
First week of January	Revise; cut every sentence that fits any applicant	
Before the period closes	Submit the full package	
Early February	Receive notice; register with the credentialing body	
Third week of February	Approximate spring registration deadline; confirm with the body	
May 1–14	Spring window, for spring-target scholars	
December 1–14	Winter window, for winter-target scholars	

Working calendar for one application cycle.

Keep a copy of every document you submit and the date you submitted it. If you apply again next January, you will start from your own notes and a record of what changed in the year between.



The National Association of National Associations is the professional society for association executives, boards, and staff, serving more than 750 member organizations and 2 million professionals through research, peer community, and advocacy since 1998.