NANA

GUIDE · JANUARY 2026



CAE STUDY PLAN

A 12-week study plan toward the May CAE testing window, from NANA's director of learning and credentialing.

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CAREER DEVELOPMENT

ABOUT THIS GUIDE

This guide is a week-by-week schedule for association professionals who have decided to sit for the CAE exam and want to know what to do on Monday. We wrote it for candidates who work full time, who have a testing window in mind, and who need a plan that survives a work trip, a budget season and a bad week. It covers twelve weeks of study, two built-in review weeks, a method for deciding what to study when time runs short, and the logistics that decide whether you reach the exam room at all. Its first calendar targets the May 1–14, 2026 window, and the appendix carries dated calendars for the 2027 windows as well.

HOW TO USE THIS GUIDE

Read sections 1 and 2 first, book your appointment, and start week one on the Monday you chose. Sections 3 through 5 follow the weeks in order, so open the one that matches the week you are in. Sections 6 through 10 answer the questions that arrive in the middle of a plan: the choice of window, a full-time job, a study group, a missed week and test-day logistics. Each section opens with a sentence that says what you will be able to do by its end. The checklists are meant to be copied into your own notes, and the appendix holds the calendars and templates the plan refers to.

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

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1
WHO THIS PLAN IS FOR

By the end of this section you will know whether this plan fits your situation, what it assumes about your time and experience, and what to settle before week one.

This plan is for a candidate who has already confirmed their own eligibility to sit for the CAE exam and wants a schedule to study against. It is not for a candidate still deciding whether to pursue the credential. It assumes four to six hours a week of dedicated study alongside a full-time association job, not the ten-plus hours that an unlimited evening and weekend schedule would allow. We built it that way because a plan that asks for more time than most candidates have gets abandoned by week three, when work intrudes.

NANA does not award the CAE, administer the exam or set its content domains. The credentialing body does all three, and it publishes the dates, the content outline and the weightings. This plan is our preparation schedule built around that structure, and it is not official exam guidance. Where we name study groupings, they are NANA's own, and week one shows you how to match them to the official outline.

The plan also assumes some baseline familiarity with association management gained through the job. It organizes and reinforces knowledge you already have some exposure to, and it is not a from-scratch course in the field. A candidate with less than a year or two in the role may find twelve weeks compressed. Weigh whether more time in the role, or a longer preparation window, would produce a stronger result than this pace.

We have both studied for and passed the CAE, one of us in 2019 and the other in 2021. We co-lead NANA's CAE exam study group, and one of us runs the CAE preparation courses in the Learning catalog. We have watched several hundred candidates start a plan, and the ones who finished did two things: they protected a small block of time, and they did not skip the reviews.

Table 1. Where you stand, and what to do before you start.

YOUR SITUATION	FIT WITH THIS PLAN	WHY	FIRST STEP
Three or more years in an association role, eligibility confirmed	Good fit	The job has already given you exposure to most domains	Book your appointment, then start week one
One to two years in an association role	Workable, with care	Some domains will be new rather than familiar	Add one hour to weeks 1–4, or consider a longer window
Under one year in an association role	Weak fit	Twelve weeks is too short to build knowledge and practice it	Spend another year in the role, or join a mentorship cohort first
Eligibility not yet confirmed	Not yet	A plan cannot fix a missed requirement	Confirm eligibility with the credentialing body first
Sat the exam before and wants another attempt	Good fit, adjusted	Your old results show where to spend time	Replace the week 1 crosswalk with a gap analysis of your last attempt
Can offer ten or more hours a week	Good fit, capped	More hours do not help once reading outruns recall	Hold to the plan's hours and spend the spare time in a study group

The last row surprises people. A candidate with ten free hours is tempted to read ahead, and reading ahead is the habit the plan is built to prevent. Extra time is better spent explaining a concept to someone else, because that exposes a gap a solo re-read does not.

The plan's hours add up to 61: five in each of weeks 1 through 8, six in each of weeks 9 through 11, and three in week 12. A schedule that assumes ten hours a week asks for 120. A candidate who starts that schedule and delivers four hours a week for six weeks has studied 24 hours with no structure. Sixty-one hours that actually happen are worth more than 120 that do not.

Before you start week one:

- [ ] Eligibility confirmed in writing with the credentialing body.
- [ ] A testing window chosen, and an appointment booked inside it.
- [ ] Week one's Monday and the eleven Mondays after it written in your calendar.
- [ ] A weekly block of four to six hours entered as a recurring appointment.
- [ ] The credentialing body's current content outline downloaded, with its weightings.
- [ ] One named person who knows your test date and will ask how it is going.

2
THE TWELVE-WEEK STRUCTURE, AT A GLANCE

By the end of this section you will be able to read the whole plan on one page and say why each week sits where it does.

The plan counts backward from your appointment. Week twelve is the Monday-to-Sunday week that contains the appointment, and week one begins eleven weeks earlier. For an appointment on Thursday, May 7, 2026, week one starts Monday, February 16, 2026. The appendix works out the dates for three windows.

Weeks one through four cover foundational groupings, in an order chosen so that later groupings build on earlier ones. Weeks five through eight cover applied groupings and add practice questions. Week six is the midpoint review, which exists to catch material from weeks one through five that did not stick before new content buries it. Weeks nine through eleven shift from new material to timed practice, with volume rising each week. Week twelve is a light final week.

Table 2. The twelve weeks, with hours and practice volume.

WEEK	PHASE	GROUPING	HOURS	PRACTICE QUESTIONS
1	Foundations	Governance and law; build the crosswalk	5	None
2	Foundations	Finance, dues and audit	5	None
3	Foundations	Staff and volunteers	5	None
4	Foundations	Membership and programs	5	None
5	Applied	Advocacy and communications	5	20
6	Midpoint review	Weeks 1–5, no new content	5	30
7	Applied	Technology and operations	5	40
8	Applied	Cases that cross all six groupings	5	50
9	Practice testing	Half-length timed set; gap-filling	6	One half-length set
10	Practice testing	Full-length timed test; gap-filling	6	One full-length test
11	Practice testing	Full-length timed test; targeted drills	6	One full-length test plus 30
12	Final stretch	Light review and a short set	3	One set of 25

Three design choices sit behind the table. Practice questions wait until week five, because early practice rewards memory for answer patterns over

understanding. Volume then rises every week, from 20 questions to 50, and on to full-length tests. A candidate who reaches week eight has answered 140 questions (20, 30, 40 and 50) before the first timed set.

Hours are a budget. If a week runs over, take the extra time from the next week's lowest-weighted reading, not from sleep or from the review weeks.

The six groupings are ours: (1) governance and law; (2) finance, dues and audit; (3) staff and volunteers; (4) membership and programs; (5) advocacy and communications; and (6) technology and operations. The credentialing body's outline uses its own labels and weightings. Every table and example in this guide uses these six names, so you can match your own notes to them.

3
WEEKS 1–4: FOUNDATIONAL DOMAINS

By the end of this section you will be able to run a foundations week from Monday to Sunday, write a one-page summary that tests your own understanding, and build the crosswalk that ties your study to the official outline.

The first four weeks are built around reading and note-taking, with no practice questions. A candidate who jumps to practice questions before building foundations memorizes answer patterns, and the damage shows up later as a plateau in practice scores. Each week has one grouping, a reading assignment, and a deadline: by Sunday you produce a one-page summary of the key concepts. "Read until you feel ready" is not a goal you can measure, and the summary is.

Every foundations week spends five hours the same way. Three go to reading, one to writing the summary from memory, and one to the corrections, a running list of terms and the crosswalk. The summary is the check. If you can write a page on the week's grouping with the book closed, the reading worked, and if you cannot, you know what to reread before Sunday.

ACTIVITY	HOURS	WHAT YOU PRODUCE
Preview and read the week's material	3	Margin notes, no highlighting
Close the book and write the one-page summary	1	A single page, handwritten or typed, from memory
Compare the summary to the reading and fix it	0.5	Corrections in a second color
Terms list and crosswalk entries	0.5	New terms, and each topic matched to an outline line

Table 3. How a foundations week spends its five hours.

Start each reading session by previewing the headings and any summary boxes for ten minutes. Then read in sittings of 40 to 50 minutes with a short break, and note questions in the margin instead of stopping to look them up. Highlighting records what looked important and tests nothing, which is why the page limit on the summary matters. One page forces you to choose.

Keep a running list of terms from the first day. Each entry has the term, a definition in your own words and the week you met it. Add to it every week, and read it aloud once a week on a walk or a commute, since terms are the one part of the material that rewards short, frequent repetition. By week eight the list will run to 80 or 100 entries, and the entries you keep stumbling on become the first lines of your gap-filling sessions.

Week one carries an extra job. The credentialing body's outline lists domains and weightings in its own words, and your study sources use different words, so you build a crosswalk: a two-column list matching each topic you study to a line in the official outline. It takes about half an hour and saves hours later, because the gap-filling in weeks nine through eleven works from the outline's weightings. If a topic maps to no line in the outline, flag it and ask a colleague who holds the CAE.

The order is a dependency order. A candidate who studies finance before governance has to memorize who approves a budget, while one who studies governance first already knows. Staff and volunteers come third because the people rules set what a program can afford, and membership and programs come fourth because they are the visible output of the first three.

Worked example 1. A foundations week at the Alliance of Regional Credit Unions, 2025.

Devika Anand, Membership Coordinator at the Alliance of Regional Credit Unions in Columbus, studied for the December 2025 window as a 2025 NANA Foundation scholar. Her week two covered finance, dues and audit, and the reading ran to 54 pages. She read 18 pages in each of three 50-minute evening sittings and spent 30 minutes on Saturday returning to her margin questions. She then wrote her summary in 55 minutes, and the comparison found two errors: she had confused a reserve policy with an operating budget, and she had left out the audit committee's role entirely.

She corrected both in red and added three terms to her list. The week took about 5 hours, as planned. She passed in the December 2025 window.

Foundations week checklist:

- [ ] Reading previewed on Monday, headings first.
- [ ] Three reading sittings completed, each under 50 minutes, with margin questions noted.
- [ ] One-page summary written from memory with the book closed.
- [ ] Summary compared to the reading, corrections in a second color.

> “The red ink was the best part of my notes. Every mistake I made in week two was a mistake I did not make in week twelve.
>
> DEVIKA ANAND, MEMBERSHIP COORDINATOR, ALLIANCE OF REGIONAL CREDIT UNIONS

- [ ] New terms added to the running list.
- [ ] Each topic matched to a line in the official outline.

4

WEEKS 5–8: APPLIED DOMAINS AND THE MIDPOINT REVIEW

By the end of this section you will be able to start practice questions without turning them into pattern-matching, keep a miss log that tells you something, and run week six as a real review.

Weeks five through eight introduce practice questions at low volume, each paired with a review of the concept behind any miss. Noting the right letter and moving on throws the lesson away. Answer without a clock in these weeks and allow about two minutes a question, so that 50 questions fills a two-hour block. Timing begins in week nine.

An applied week spends its five hours as follows: about 1.5 on the week's grouping, up to 2 on questions, and the remaining 1.5 reviewing every miss. The review is the part candidates cut, and it should not be. A missed question is a free description of something you do not yet know.

Keep a miss log for every question you get wrong or guess right. It has columns for the grouping, what you chose, why it was wrong, the concept behind it and whether you have fixed it. Sort each miss into one of four types, because the fix differs by type.

TYPE OF MISS	WHAT HAPPENED	RESPONSE
Did not know	The concept was missing or wrong	Return to the reading, then rewrite that part of the summary
Misread	You knew the concept and missed a word in the question	Slow down on the last clause; underline qualifiers such as "first" and "most"
Second-guessed	Your first choice was right and you changed it	Change an answer only when you can name the specific error
Ran out of time	You knew it and ran short	Practice pacing in weeks nine through eleven

Table 4. Four kinds of miss, and what each one asks of you.

Write each entry so that you could use it a month later. "Wrong, reread chapter" is useless, while "chose operating budget; the board sets the reserve policy, and the budget only reflects it" tells you what to fix. Two lines per miss is enough, and the habit of naming the reason is what separates a miss log from a score sheet.

A candidate who treats every miss as a knowledge gap rereads material they already know. If three of seven misses were misreads, the fix is a habit of reading questions, not another chapter.

Worked example 2. Practice scores across the applied weeks, Federation of Community Libraries, 2025.

A program manager at the Federation of Community Libraries in Baltimore recorded these results while preparing for the May 2025 window. She sat the exam in that window and passed.

Table 5. Practice scores across the applied weeks, Federation of Community Libraries, 2025.

WEEK	QUESTIONS	CORRECT	SCORE	DID NOT KNOW	MISREAD	SECOND-GUESSED
5	20	13	65%	3	2	2
6	30	21	70%	4	3	2
7	40	29	73%	5	3	3
8	50	36	72%	6	4	4

Her score rose from 65 to 73 percent over three weeks and slipped a point in week eight. The week-eight set was the first to include cases that cross all six groupings, and a curve for new material is rarely a straight line. She logged the slip, checked that her "did not know" misses were not rising as a share, and kept going.

The midpoint review in week six has its own shape. It is five hours with no new reading. On Monday, read all five summaries in order in one sitting of about 75 minutes, and mark any page you cannot read without wincing. On Wednesday, answer 30 fresh questions drawn across weeks one through five, with no notes. On the weekend, review every miss, rewrite the summaries that failed and update the crosswalk.

This is the step candidates most often skip on their own, and its absence shows most clearly in practice scores near test day. We build it in because week two is easy to lose without noticing. If week six shows a grouping under 60 percent, do not add hours to week seven. Take the lowest-weighted content from week seven and spend that time on the repair, because the plan's hours are fixed and a repair always costs something.

Midpoint review checklist:

- [ ] All five summaries read in order in one sitting.
- [ ] Thirty fresh questions taken across weeks one through five, with no notes.
- [ ] Every miss logged and sorted by type.
- [ ] Any grouping under 60 percent flagged, with a repair planned for week seven.
- [ ] Summaries rewritten where the review showed a gap.
- [ ] Crosswalk updated, with unmapped topics raised with a CAE holder.

5

WEEKS 9–12: PRACTICE TESTING, GAP-FILLING AND THE FINAL STRETCH

By the end of this section you will be able to run a timed practice test, score it by grouping, divide your gap-filling time by what the scores say, and taper in the last week.

From week nine the plan turns to timed practice. Each test is followed by a gap-filling session aimed at the groupings where you missed the most, which makes better use of the shrinking time than a general re-review. Week nine opens with a half-length set: half the official number of questions at the official pace. Use the credentialing body's published question count and time allowed, and do not improvise either.

Weeks ten and eleven each carry a full-length test. Hours rise to six, split into a sitting, a review and a gap-filling session. If a full sitting does not fit your weekly block, take it in two sessions within the same week and note that in your log. Run the test the way you will take the exam: at a table, with your phone silenced, no notes, stopping when time is called. Then score it by grouping and by miss type before you read any explanations.

Table 6. A gap-filling plan from one full-length test, with the retest a week later. Weights are invented for illustration; use the official outline's.

GROUPING	WEIGHT	MISSED, WEEK 10	PRIORITY (WEIGHT X MISSED)	MINUTES OF 120	MISSED, WEEK 11
Finance, dues and audit	20%	31%	6.2	31	19%
Advocacy and communications	15%	40%	6.0	30	34%
Membership and programs	20%	22%	4.4	22	20%
Staff and volunteers	15%	18%	2.7	13	21%
Technology and operations	10%	25%	2.5	12	18%
Governance and law	20%	12%	2.4	12	10%

Worked example 3. Gap-filling at the Society of Theater Production Managers, 2024.

A candidate at the Society of Theater Production Managers in Chicago took her week-ten test in November 2024, ahead of the December 2024

window. She multiplied each grouping's weight by the share she missed and added the six products to get 24.2. Each product divided by 24.2 gave that grouping's share of her two gap-filling hours: finance at 25.6 percent (31 minutes), advocacy at 24.8 percent (30), membership and programs at 18.2 percent (22), staff and volunteers at 11.2 percent (13), technology and operations at 10.3 percent (12) and governance at 9.9 percent (12).

Finance came first even though advocacy had the higher miss rate, because finance carries more weight. Governance got 12 minutes, which felt thin to someone who enjoyed that material, and that is the method working. A week later her retest showed finance down 12 points and advocacy down 6. Staff and volunteers rose 3 points, which is inside the swing one test produces by chance, so she treated it as a flag for the targeted drills and did not read it as a result. She sat the exam in the December 2024 window and passed.

Read your scores as a trend and not as a verdict. One test is a noisy measurement, and a swing of a few points between two tests says little. Three scores in a row that rise, hold or fall say much more, and a fall across two consecutive full-length tests is the signal to run the catch-up tests in section 9. We do not give a passing score, because the credentialing body sets and scores its own exam and a practice test from any source is only a guide.

A gap-filling session is not a reread. For each grouping, open the miss log, find the concept behind each miss, rewrite the part of your summary that failed, and then answer five fresh questions on that grouping the same day. A fix is confirmed when you can answer a new question on the concept, not when you recognize the old one. Record your time at each quarter of the test as well. If you reach the halfway mark with more than 55 percent of your time gone, practice moving on from a question after a fixed limit and returning to it at the end.

WEEK 12: THE FINAL STRETCH

The final week is light by design: one short practice set early in the week, a read of your own summaries, and no new content. Candidates who study hard in the last 48 hours arrive tired, and tired candidates miss questions they know. The last days should feel almost anticlimactic. The schedule below assumes a Thursday appointment. If yours falls on a Monday or Tuesday, move the set and the review into the preceding Friday and weekend, and keep the total at three hours.

DAY	ACTIVITY	TIME
Monday	One set of 25 questions, then review every miss	90 minutes
Tuesday	Read your own one-page summaries once, in order	60 minutes
Wednesday	Skim the miss log, then stop	30 minutes
Thursday	Appointment	Not a study day

Table 7. A three-hour final week for a Thursday appointment.

Monday's set is the last practice you will do, and its purpose is to give you a result you can read, not to find new gaps. A gap found on Monday cannot be fixed by Thursday, and trying costs sleep. Tuesday's summaries hold your corrections in red, so rereading them is the most efficient review you have. The night before, eat a normal dinner, lay out what you need and go to bed at your usual hour.

Practice test and final week checklist:

- [ ] Official question count and time allowed confirmed with the credentialing body.
- [ ] Each full test taken at a table, with no notes and no phone.
- [ ] Score worked out by grouping before explanations were read.
- [ ] Gap-filling minutes divided by priority, with five fresh questions per grouping.
- [ ] Week twelve's 25-question set taken on Monday, misses reviewed.
- [ ] Items required by the credentialing body laid out the night before.

6
CHOOSING AND ADAPTING YOUR WINDOW

By the end of this section you will be able to map the plan onto any window, spot the work conflicts each one brings, and choose between spring and winter.

The credentialing body runs two windows a year, one in May and one in December. Candidates targeting the December 1–14 winter window use the identical twelve-week structure and count back from their own appointment. The content and pacing do not change between windows. Only the calendar dates change. The spring window in both 2026 and 2027 runs May 1 through 14, the winter 2027 window runs December 1 through 14, and you should confirm every date against the credentialing body's own publication before building a calendar.

What differs is the working year around the plan. A spring plan runs from mid-February to early May, through budget season and the spring events. A winter plan runs from mid-September to early December, through audit fieldwork, the fall conferences and Thanksgiving. The same twelve weeks cost different days in different seasons, and the appendix lists the NANA dates that fall inside each plan.

Place the losses carefully. A lost day in foundations weeks 1–4 is cheap, because those weeks have slack and the summary can be written the next day. A lost day in weeks 9–11 is expensive, because timed tests cannot be compressed. A plan whose known conflicts land early beats one whose conflicts land late, even if the total number of days is the same.

Worked example 4. Choosing between windows at the Federation of Youth Orchestra Managers, 2025.

A program director at the Federation of Youth Orchestra Managers in Seattle chose between the May 2025 and December 2025 windows. The Federation's fiscal year runs July to June. A spring plan, starting February 17, 2025, put the board's budget close in the last two weeks of April, which are weeks 10 and 11, and Advocacy Day on April 16 in week 9. That came to six working days lost, all in the practice weeks.

A winter plan, starting September 15, 2025, put audit fieldwork on September 29 through October 10, in weeks 3 and 4, and the Fall Policy Forum on November 6 in week 8. That came to five working days, four of them in foundations weeks with slack. She chose winter, finished the plan and sat in the December 2025 window. She passed.

Her method works for any window. List the known events for each twelve-week span, count the working days each plan loses, note whether they land early or late, and ask which window leaves a fallback if the plan slips.

Choosing a window checklist:

- [ ] Both windows' dates confirmed against the credentialing body's own publication.
- [ ] Work events, travel and fiscal deadlines for each twelve-week span written on one page.
- [ ] Days lost to each plan counted, and whether they land early or late.
- [ ] The fallback window after each plan identified.
- [ ] Appointment booked in the chosen window before week one.

7
STUDYING AROUND A FULL-TIME JOB

By the end of this section you will have a protected weekly study block, a rule for the weeks it breaks, and a way to tell a bad week from a failing plan.

Treat the weekly study block as a fixed, recurring calendar commitment: the same time each week, protected the way a standing meeting is. Candidates who fit study into the gaps lose weeks to travel, family commitments and fatigue, and a twelve-week plan has room to absorb one or two missed weeks at most. Building the schedule around a protected block from week one is the single change that most improves a candidate's odds of finishing the plan as written. Put it in your calendar as a meeting with yourself, visible to your manager.

A block is a pattern, and three are common. An evening pattern puts two sessions on weekday evenings and one on a weekend morning. An early-morning pattern puts three or four short sessions before work. A weekend pattern puts the whole week into one long session, and we discourage it.

Table 8. Three study patterns for a five-hour week.

PATTERN	EXAMPLE WEEK	STRENGTH	WEAKNESS
Evenings plus a weekend morning	Tue and Thu 6:30 p.m. to 8:00 p.m., Sat 8:30 a.m. to 10:30 a.m.	Spaced sessions help recall; the weekend session absorbs the summary	A late meeting takes an evening
Early mornings	Mon, Tue, Thu and Fri 6:00 a.m. to 7:15 a.m.	Protected from the workday	Needs an early bedtime
One weekend block	Sun 9:00 a.m. to 2:00 p.m.	Simple to schedule	Long sessions tire the reader; a missed Sunday loses the week

Spaced sessions beat one long session because recall improves when material is revisited after a gap, and because a missed session costs a third of a week, not all of it. The evening pattern comes to 1.5 plus 1.5 plus 2, which is five hours.

Association work has predictable heavy periods, so mark them before week one. Renewal cycles, budget close, the annual meeting and any conference your association hosts are known months ahead. If week four falls on your annual meeting, move week four's reading earlier by ten or fifteen minutes a day in weeks two and three.

Worked example 5. Protecting the block through a work trip, 2024.

Sunniva Hartigan-Boateng, Membership Director at the Society of Volunteer Fire Company Officers in Frederick, prepared for the December 2024 window. She planned Tuesday and Thursday evenings and a Saturday morning: 1.5, 1.5 and 2 hours. In week three a three-day member visit in Pittsburgh, Tuesday through Thursday, took both weekday evenings and cost 3 of the week's 5 hours. She had set a rule in advance that a lost session moves to 6:00 a.m. the next morning, and never to "later in the week."

She did Tuesday's session at 6:00 a.m. on Wednesday, from her hotel room, and Thursday's at 6:00 a.m. on Friday, and she kept Saturday's 2 hours. The week closed at 5.0 hours, and nothing had to be decided on the road. She sat in the December 2024 window and passed.

If you notice yourself reading the same paragraph three times, stop, write down the question you cannot answer and return to it tomorrow. A half-hour of rest does more than the next hour of reading.

Protecting the block checklist:

- [ ] Recurring block entered for all twelve weeks, marked busy.
- [ ] Heavy work periods marked, and reading moved earlier where possible.
- [ ] A rule set in advance for replacing a lost session within 24 hours.
- [ ] Your manager or a colleague told about the block and the test date.
- [ ] Phone and email notifications off during the block.
- [ ] A stopping rule: three reads of one paragraph, then rest.

> “I told my director the Tuesday and Thursday evenings were booked, the same as a board meeting. Nobody asked me to move them, and I would not have survived week three if they had.
>
> SUNNIVA HARTIGAN-BOATENG, MEMBERSHIP DIRECTOR, SOCIETY OF VOLUNTEER FIRE COMPANY OFFICERS

8
STUDY GROUP VERSUS STUDYING ALONE

By the end of this section you will know what a study group adds, how to replace it if you study alone, and which weeks to join even if you otherwise work solo.

You can follow this plan alone or alongside NANA's CAE exam study group, which we co-lead. The content and pacing are identical either way. A group adds two things a solo candidate has to build: a fixed weekly check-in that makes skipping a week socially costly as well as personally disappointing, and a source of explanation when a concept does not click from the reading. The group is a live-virtual course in the Learning catalog, open to candidates in all six chapters, and its schedule mirrors this plan week by week on purpose. It takes one session a week and no extra hours, because the session replaces the solo summary hour in weeks one through four and the miss-review hour from week five on.

In week six, the group spends its session on the midpoint review, with members swapping summaries and quizzing each other on the pages that gave them trouble. In week twelve it spends the hour on questions candidates have been saving, and then it closes on time so that everyone can rest. If you cannot attend the live session, ask for the week's questions and work through them with your accountability partner instead.

If you study alone, build the second benefit deliberately. Name a colleague who already holds the CAE, or find an online forum for your window. Do not assume you will work through every confusing concept from the materials alone. Even a solo candidate should join the group for weeks six and twelve, the two review weeks, because hearing someone else's explanation of a concept you found confusing exposes gaps a solitary re-read does not.

Table 9. What each way of studying gives you.

WAY OF STUDYING	ACCOUNTABILITY	EXPLANATION OF HARD CONCEPTS	COST TO YOUR SCHEDULE	BEST FOR
Alone	Self-set; a partner helps	A CAE-holding colleague or a forum, found by you	None beyond the plan's hours	Steady habits and a CAE-holding colleague
Weekly study group	Built in; a skipped week is visible	Built in; others have met the same concept	One session a week, inside the hours	Candidates who have abandoned a plan before
Alone, plus weeks 6 and 12 with the group	A fixed check at the two reviews	Built in at the two reviews	Two sessions	Candidates who prefer solitude but know the reviews matter

A session runs about an hour. The first ten minutes are a check-in, in which each member names the week's grouping and says whether the summary got written. The next thirty-five go to the one or two concepts members found hardest, taught by whoever understands them best. The last fifteen are an explain-back: a member explains a concept from memory, and the others correct it.

The explain-back works with or without a group. If you study alone, explain a concept aloud to a colleague or into a recording, and you will find the gap at the sentence where your explanation stalls. A group also shows a warning sign a solo candidate never sees. In one group of 14 preparing for a December window, 11 were still attending at week eight, and each of the three who left had missed two sessions in a row first.

Studying alone checklist:

- [ ] A colleague who holds the CAE identified, and asked to answer questions.
- [ ] An accountability partner named, with a fixed weekly check-in.
- [ ] An online forum for your window found and bookmarked.
- [ ] Weeks 6 and 12 booked with the study group.
- [ ] One concept explained aloud each week, to a person or a recording.

> “I joined for week six and stayed. I explained the audit committee to people I had never met, and in ten minutes I learned what two evenings of rereading had not shown me.
>
> DEVIKA ANAND, MEMBERSHIP COORDINATOR, ALLIANCE OF REGIONAL CREDIT UNIONS

9
WHAT TO DO IF YOU FALL BEHIND

By the end of this section you will have a rule for a missed week, a test for when to postpone, and a way to decide without panic.

A candidate working full time will hit at least one disrupted week: a work trip, a family emergency, a stretch when the day job demands more hours. Do not make up a missed week by doubling the next week's material. Compressed cramming produces the shallow, pattern-matching learning the early weeks are designed to avoid. Drop the missed week's lowest-weighted content, which you can read off the outline's weightings, and continue from where the calendar actually is.

If you fall behind by more than two weeks, ask whether your window is still realistic. Moving to the next one, spring to winter or winter to the following spring, may produce a better-prepared candidate than a compressed version of the remaining plan. We find this harder to recommend than it sounds, because candidates are reluctant to delay a window they have already committed to. A rushed attempt costs more in the end than one postponed window.

WEEKS BEHIND	WHAT IT MEANS	WHAT TO DO
Part of one week	A few sessions lost	Replace sessions within 24 hours; change nothing else
One full week	Five hours of content lost	Drop that week's lowest-weighted content; do not double the next week
Two full weeks	Ten hours lost, a sixth of the plan	Drop low-weighted content from both weeks; protect weeks 6 and 12
More than two weeks	The plan can no longer be finished as written	Run the three tests below

Table 10. What to do, by how far behind you are.

Apply three tests on the same day, with the numbers in front of you. First, hours: add the hours the remaining weeks supply and the hours the lost content needs. Second, trend: look at your last two practice scores. Third, flexibility: ask the credentialing body what moving your appointment or window would involve, including any new registration step and fee.

If you are within one week of the hours needed, the trend is rising and the review weeks are intact, keep going. If you are more than one week short, the trend is flat or falling, or a review week is already lost, postpone. When

you postpone, restart at week one of a new twelve-week count, keep your old summaries and miss log, and spend the early weeks correcting them in red instead of writing them again. A second pass through material you have already summarized takes roughly half the reading time, and you can give the saved hours to practice questions.

Worked example 6. A gap of eleven hours, Guild of County Records Officers, 2025.

Priyanka Voss-Adeleke, Operations Manager at the Guild of County Records Officers in Richmond, started a twelve-week plan for the May 2025 window. In weeks four through six a records-system migration left her 4 study hours against 15 planned, so she was 11 hours behind and had lost her midpoint review. She ran the three tests at the start of week seven. The remaining six weeks supply 31 hours (5, 5, 6, 6, 6 and 3), and the lost content needed 11 more, so she needed 42 and had 31.

Her last practice score was 58 percent, flat against the one before. The credentialing body told her that moving to the winter window meant a new appointment and no change to her eligibility. She postponed, restarted with the midpoint review intact, and sat in the December 2025 window. At the equivalent point of her second plan she scored 71 percent, against 58 in the first, and she passed. The delay cost seven months.

Catch-up decision checklist:

- [ ] Hours lost counted in numbers, not described as "a couple of weeks."
- [ ] Hours left compared to hours the remaining plan needs.
- [ ] Last two practice scores compared for trend.
- [ ] The credentialing body asked what moving the appointment or window involves.
- [ ] Weeks 6 and 12 checked: still intact?
- [ ] A decision made on the day of the count and written in your log.

> “Eleven hours is a number I could argue with. Feeling behind is not. Once I wrote 31 and 42 next to each other, the decision made itself.
>
> PRIYANKA VOSS-ADELEKE, OPERATIONS MANAGER, GUILD OF COUNTY RECORDS OFFICERS

10
TEST-DAY LOGISTICS AND WHERE TO GO NEXT

By the end of this section you will know what to settle in which week, what the plan leaves to the credentialing body, and which NANA programs support each stage.

This plan covers study only. Test-day logistics, registration deadlines and domain weightings are the credentialing body's, and you should confirm your own requirements with it well before your window. A missed registration deadline can push you into the following window however well you have studied. Build test-day scheduling into week one, and confirm an appointment before you read a page of week one's material, so the date that drives the countdown is firm.

Plan your own travel around the window you choose. Testing center availability can fill in the days closest to a window's opening, particularly in large metro areas where many candidates from one region target the same window. An appointment in the first week of the window leaves the second week as a fallback if illness or a travel failure intervenes.

WHEN	WHAT TO SETTLE	WHY THEN
Before week 1	Eligibility, registration, window, appointment	The countdown needs a firm date
Week 1	Funding: your employer's budget or a scholarship application	Application cycles close before the window opens
Week 2	Time off for the test day and the day before	Managers plan leave weeks ahead
Week 6	Travel and lodging, if the test site is not local	Rooms and seats fill near a window's opening
Week 10	A trial journey to the site at the same hour	Reveals parking, traffic and building access
Week 12	Required items packed; route and arrival time fixed	Removes decisions from the last two days

Table 11. Logistics by week.

Funding is easy to overlook. The NANA Foundation runs a CAE scholarship program that covers exam fees for a cohort each year, with 18 scholars in 2024 and 21 in 2025. Applications open each January, which means a candidate planning for May should look this month.

Logistics checklist:

- [ ] Registration deadline and window dates confirmed directly with the credentialing body.
- [ ] Appointment booked in the first week of the window, with the second week held as a fallback.
- [ ] Funding settled: employer budget, or a scholarship application filed.
- [ ] Time off arranged for the test day and the day before.
- [ ] Travel and lodging booked, where needed, by week six.
- [ ] Required items taken from the credentialing body's own list.

> "A scholarship pays the exam fee. It does not pay for the twelve weeks. The scholars I worry about are the ones who think the money was the hard part.
>
> SAMUEL HEATHCOTE, EXECUTIVE DIRECTOR, NANA FOUNDATION

WHERE TO GO NEXT

- **CAE exam study group.** A live-virtual course with a weekly checkpoint that follows this plan. Join in week one if you can, and for weeks six and twelve at least.
- **CAE Credential Bootcamp.** Offered each spring and winter, and it falls inside a plan built for the nearest window. The 2026 spring edition is April 2.
- **NANA Foundation CAE scholarships.** Exam-fee scholarships for a cohort each year, run by Samuel Heathcote. NANA's CAE scholarship application guide walks through the application.
- **Credit-hour pre-approval.** NANA pre-approves continuing-education hours toward CAE eligibility for its courses, so check a course's listing before you enroll.
- **Learning catalog.** On-demand courses on Lanternfield Learning cover the groupings in this plan, including Reading Your Form 990 for finance, Board Governance Fundamentals for governance, Advocacy 101 for advocacy and the Membership Renewal Playbook for membership.
- **Great Lakes mentorship pairing.** A 12-month cohort from March for staff new to association management, useful if Table 1 told you to wait a year.
- **Your chapter.** Each of the six chapters has members who hold the CAE, and a chapter meeting is a natural place to find the colleague this plan asks you to name. The Great Lakes, Greater Boston and Southeast chapters meet monthly, Mid-Atlantic every other month, and Pacific Northwest and Rocky Mountain quarterly.

APPENDIX: CALENDARS AND TEMPLATES

CALENDARS FOR THREE WINDOWS

Each calendar counts back from a Thursday appointment. The spring windows run May 1 through 14, and the winter 2027 window runs December 1 through 14. The credentialing body sets the application deadline, so confirm it directly. Dates for 2027 are as scheduled at the time of writing.

Table 12. Week-start Mondays for three windows.

WEEK	GROUPING	SPRING 2026	SPRING 2027	WINTER 2027
1	Governance and law	Feb 16	Feb 15	Sep 20
2	Finance, dues and audit	Feb 23	Feb 22	Sep 27
3	Staff and volunteers	Mar 2	Mar 1	Oct 4
4	Membership and programs	Mar 9	Mar 8	Oct 11
5	Advocacy and communications	Mar 16	Mar 15	Oct 18
6	Midpoint review	Mar 23	Mar 22	Oct 25
7	Technology and operations	Mar 30	Mar 29	Nov 1
8	Cases across all six groupings	Apr 6	Apr 5	Nov 8
9	Half-length timed set	Apr 13	Apr 12	Nov 15
10	Full-length test	Apr 20	Apr 19	Nov 22
11	Full-length test	Apr 27	Apr 26	Nov 29
12	Final stretch	May 4 (test May 7)	May 3 (test May 6)	Dec 6 (test Dec 9)

Table 13. NANA dates that fall inside each plan, by week.

PLAN	DATES AND THE WEEK THEY FALL IN
Spring 2026	State of Associations 2026 report, Mar 1 (week 2); member webinar, Mar 12 (week 4); CAE Credential Bootcamp, Apr 2 (week 7); Membership Growth Summit, Apr 8–9 (week 8); Advocacy Day, Apr 15 (week 9)
Spring 2027	State of Associations 2027 report, Mar 2 (week 3); member webinar, Mar 11 (week 4); CAE Credential Bootcamp, Apr 1 (week 7); Membership Growth Summit, Apr 7–8 (week 8); Advocacy Day, Apr 14 (week 9)
Winter 2027	Data-Driven Engagement Workshop, Oct 14 (week 4); Chapter Leadership Intensive, Oct 28 (week 6); Fall Policy Forum, Nov 4 (week 7); CAE Credential Bootcamp, Nov 18 (week 9); Thanksgiving, Nov 25 (week 10); Executive Succession Planning course, Dec 1, and Leadership Summit, Dec 2–4 (week 11)

The winter 2027 plan has two hazards. The Chapter Leadership Intensive lands in the midpoint review week, and the Summit lands in week eleven, when the window also opens. If you attend the Summit, move week eleven's full-length test to the weekend of week ten, and plan the targeted drills for the evenings before and after.

TEMPLATE A: THE ONE-PAGE SUMMARY

Write it from memory, with the book closed, on a single page. Use these five headings.

- The grouping, and the line of the official outline it maps to.
- The five ideas a colleague would need to know, one sentence each.
- The terms that matter, each with a one-line definition.
- One example from your own association.
- Two questions I still cannot answer.

TEMPLATE B: THE MISS LOG

Table 14. A miss log, with one sample row.

QUESTION	GROUPING	WHAT I CHOSE	WHY IT WAS WRONG	CONCEPT	TYPE	FIXED
Week 5, Q14	Finance	Operating budget	The board sets a reserve policy; the budget does not	Reserve policy versus budget	Did not know	Yes, Mar 20

TEMPLATE C: THE WEEKLY LOG

- Week number and dates.
- Hours planned and hours delivered.

- Practice questions taken, score and misses by type.
- What I will drop or move next week.



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