PRIOR LEARNING ASSESSMENT RECOGNITION

Portfolio Development Guide
April 2011
**Introduction**

CSAE recognizes prior learning — whether academic, experiential, or professional — through Prior Learning Assessment. Prior Learning Assessment Recognition (PLAR) is the identification, documentation, assessment and recognition of learning acquired through formal and informal study. This guide has been developed to help you attain the Certified Association Executive (CAE) designation through Prior Learning Assessment Recognition.

**CSAE’s PLAR Requirements**

To be assessed under CSAE’s PLAR program, you must:

- have at least 10 years not-for-profit management experience
- be a CSAE member in good standing
- have the support of two references (see p.17)
- complete the ‘Request for Portfolio Assessment’ form (p.18)
- submit a portfolio which demonstrates your prior learning, including supporting documentation

**Before You Begin**

Completing your Portfolio will be time-consuming. Please read this document carefully and use the ‘Competency Assessment’ Form (p.10-16) to evaluate your knowledge of the ‘Not-for-Profit Management Competencies’ (p.5).

The self-evaluation process will help you assess your strengths and weaknesses and help to determine if you should submit your portfolio. When making your decision, keep in mind that you must demonstrate that you have mastered at least 80% of the competencies to obtain the CAE designation. You may be eligible to receive credit for one or more of the five CAE® courses should you not meet that requirement.

If you have any questions, please contact:

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*Director, Chapter Relations & Education*  
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Toronto, ON M5C 1C3  
416.363.3555 x 240  
1.800.461.3608 x 240  
josette@csae.com

**Acknowledgement**

This Prior Learning Assessment Recognition (PLAR) Portfolio Development Guide is based on the Forum for International Trade Training (FITT) Portfolio Development Guide. CSAE thanks FITT, and especially FITT’s President, Caroline Tompkins, for sharing her knowledge of PLAR best practices. CSAE also thanks Patrick Culhane for his involvement and guidance through the inception, development and refinement of the PLAR process.

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Preparing Your Submission

CSAE has certified not-for-profit leaders in the practice of association management since 1972 — through PLAR and the CAE® Program. The CAE® Program is based on the ‘Not-For-Profit Management Competencies’ (p.5). CAE is a professional designation; and individuals who hold it demonstrate a mastery of the aforementioned competencies. To prepare your submission, you must evaluate yourself against the competencies (see page 10 for the ‘Competency Assessment’ form) and demonstrate your mastery of the competencies through building and submitting a Portfolio. Your Portfolio is “a record of your learning gained from work experience, personal development and/or education” and will be evaluated by the CSAE PLAR Assessment Committee. Follow the steps below to prepare your submission.

**Step 1 Building Your Portfolio**

Complete ‘Step A’ of the ‘Competency Assessment’ form (p.10) which rates your knowledge and mastery of each competency. Complete ‘Step B’ of the ‘Competency Assessment’ form which lists your supporting evidence for each competency. Refer to your résumé, job descriptions and other evidence, as needed. You may attach up to three pages of evidence per competency. See page 10 for more details on how to proceed.

**Step 2 Organizing Your Portfolio**

Present your portfolio in a professional manner. This step is important to ensure that the PLAR Assessment Committee is able to fairly assess your portfolio. Please follow the Portfolio Format Guidelines as defined in the sidebar to avoid unnecessary delays in processing your submission.

**Step 3 Submitting Your Portfolio**

Submit a cover letter with your ‘Request for Portfolio Assessment’ form, along with three hard copies of all other documents to:

Josette Forde  
Director, Chapter Relations & Education  
Canadian Society of Association Executives  
10 King Street East, Suite 1100  
Toronto, ON M5C 1C3  
Canada

Checklist

**Portfolio Content**

- Table of Contents
- Résumé (must be up-to-date)
- Detailed & current job description
- ‘Competency Assessment’ form (p.10)
- Additional supporting documentation

**Portfolio Format Guidelines**

- Use a maximum of three pages of evidence per competency
- Place your portfolio in a binder and use tabs to separate the different portfolio sections

**Documents to Submit With Your Portfolio**

- Cover letter
- ‘References’ form (p.17)
- ‘Request for Portfolio Assessment’ form (p.18)
- Assessment fee of ($525 + applicable taxes)
Frequently Asked Questions

Do I need to be a CSAE member in order to submit a Portfolio?

Yes, you must be a CSAE member to submit your Portfolio for Prior Learning Assessment Recognition (PLAR).

Who will assess my Portfolio?

CSAE’s PLAR Assessment Committee will assess your Portfolio. The committee is comprised of qualified, Certified Association Executives (CAEs). The committee evaluates each submission against the ‘Not-for-Profit Management Competencies’ which are the basis for the CAE® Program.

Will my Portfolio be returned to me?

No. We recommend that you keep a copy of your submission. CSAE does not assume responsibility for documents that may be lost.

What are the fees to submit my Portfolio, for assessment?

Your Portfolio submission must be accompanied by a completed ‘Request for Portfolio Assessment’ form (p.18) and payment by cheque, American Express, Visa, or MasterCard in the amount of $525 plus applicable taxes.

How long will it take to assess my Portfolio?

Usually two to four months, although it may take longer if your submission is not well-organized or if some required documents are missing.

What are the possible outcomes?

- You could have the designation conferred upon you outright, or
- You could meet the criteria to be exempt from all or some of the CAE® courses and then be required to write the CAE® Exam, or
- You have not demonstrated a mastery of the competencies and would be required to enroll in the CAE® Program to obtain the designation

If you are not granted the CAE designation, the Assessment Committee will identify areas in which you require additional learning. In some instances, the Assessment Committee may request additional information to further demonstrate your mastery of the ‘Not-For-Profit Management Competencies.’

After my Portfolio has been evaluated, what is the next step?

Your results will be officially confirmed by mail. If you were not granted the CAE designation, you will need to complete additional courses and CAE® Exam as required by the Assessment Committee.

Portfolio Tips

Approach building your portfolio as you would a résumé. Your portfolio should:

- **Look Professional & Be Organized**
  Reviewing your portfolio should be easy for the PLAR Assessment Committee. A well-organized portfolio will demonstrate your competencies more effectively.

- **Be Accurate**
  Provide the necessary background information. For example: “I was in charge of human resources at organization XYZ. I was responsible for X employees and implemented the following...” Give numbers, show results, give facts; not opinions or impressions.

- **Be Succinct, Yet Descriptive**
  Remember that you must demonstrate your mastery of the competencies. Avoid information that does not add to your claim. In general, quality is better than quantity.

- **Show Your Mastery of the Competencies**
  Read the ‘Not-for-Profit Management Competencies’ to make sure your evidence demonstrates your mastery of the competencies as defined on page 5.
Forms & Appendices
**NOT-FOR-PROFIT MANAGEMENT COMPETENCIES**

**Overview**

The following list includes an overview of the ‘Not-for-Profit Competencies’ divided into six competency domains.

**LEADERSHIP**
1. Vision
   - Understand the importance of values and vision, and methods and processes for vision development and promotion.
   - Anticipate future needs and developments for the organization.
   - Define a vision with stakeholders and guide individuals and groups towards promoting, sharing, and contributing to the vision.

2. Working Together
   - Understand team-building techniques and dynamics.
   - Act as a leader or member of a multi-function team, appreciate the value of diversity and use effective communication skills.
   - Build and motivate teams inside and outside the organization, and resolve conflict.

3. Facilitation & Commitment
   - Understand practices to facilitate situations and engender commitment.
   - Provide self-direction and self-motivation and demonstrate commitment to members and the organization.
   - Facilitate consensus-building and commitment towards the mission and its implementation.

4. Continuous Learning
   - Understand self-assessment, mentoring and staff development techniques and practices.
   - Maintain a career management plan and seek mentorship when needed.
   - Continually learn and promote the value of learning for self and others.

**STRUCTURE & ENVIRONMENT**
9. History, Current Status, Trends & Issues
10. Governance & Decision Making
11. Policy & Bylaws
12. Volunteers
13. Staffing

**DIRECTION & STRATEGY**
14. Strategic Management
15. Planning
16. Implementation
17. Monitoring & Evaluation
18. Reporting & Accountability
19. Knowledge Management

**MEMBERSHIP SERVICES**
20. Understanding Members
21. Member Relations
22. Member Communications
23. Recruitment & Retention
24. Products & Services
25. Quality & Pricing
26. Marketing
27. Strategy, Standards & Satisfaction

**OPERATIONS SUPPORT**
28. Human Resources
29. Systems & Practices
30. Technology
31. Financial & Management Accounting
32. Facilities & Equipment
33. Legal & Statutory
34. Insurance & Tax
35. Communications & External Relations
36. Continuous Improvement

**PRODUCTS & SERVICES**
37. Publications & Information
38. Events
39. Education
40. Advocacy
41. Fundraising
42. Credentialing
43. Other Services
44. Strategic Alliances & Partnerships

Each competency is defined below:

**LEADERSHIP**

1. Vision
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4. Continuous Learning
   - Understand self-assessment, mentoring and staff development techniques and practices.
   - Maintain a career management plan and seek mentorship when needed.
   - Continually learn and promote the value of learning for self and others.
5. Conceptual Skills
- Understand decision-making tools and their applications in developing problem-solving strategies using a systems thinking approach.
- Apply strategic integrative analysis to evaluation of products, services and processes.
- Identify and analyze situations and problems so that viable solutions are found; approach tasks and problems so that the total system and strategies are taken into account by self and others.

6. Ethics
- Understand ethical responsibilities and dilemmas.
- Demonstrate adherence to established or desirable ethical standards.
- Set highest standards for self and others, and monitor practice.

7. Innovation & Creativity
- Aware of successful practices to establish innovation and creative environments.
- Implement innovative and creative products, services and practices.
- Create an environment where innovation and creativity are encouraged in the organization and lead by example.

8. Change & Flexibility
- Recognize the stages within the change process and the importance of flexibility and negotiations.
- Anticipate, respond and adapt approach and style to different leadership demands.
- Use change management processes to benefit the organization and involve key stakeholders.

STRUCTURE & ENVIRONMENT

9. History, Current Status, Trends & Issues
- Understand the purpose, relationships, and value of not-for-profit organizations.
- Identify and analyze trends and issues facing the organization.
- Recognize the attributes of a high-performance organization.

10. Governance & Decision-Making
- Understand the distinction between governance and management, and applicable responsibilities for decision-making.
- Develop effective and efficient chapter or other multi-level structure relationships, and identify and provide required support.
- Evaluate current governance and decision-making efforts and establish structures, operating processes and accountability to ensure effectiveness.

11. Policy & Bylaws
- Understand how policy, board motions and bylaws are developed and implemented.
- Develop policy options with supporting analysis.
- Identify the need for policy; develop and recommend policy as appropriate.

12. Volunteers
- Understand the role of volunteers, whom and how to recruit, train and recognize.
- Develop orientation and training processes to assist volunteers in fulfilling their role.
- Establish and work with governance groups to complete and evaluate their work.

13. Staffing
- Understand the role of staff and desirable structures to support organizations.
- Develop practices to attract, retain, evaluate, reward and develop the necessary staff.
- Establish and maintain a staff structure to support organization governance.

DIRECTION & STRATEGY

14. Strategic Management
- Understand the importance of developing and maintaining a strategic management process.
- Establish and maintain a strategic management process.
- Understand the strategic management process to involve key stakeholders in defining the mission and plans as appropriate.
15. Planning
- Understand critical components of the planning process.
- Review an organization’s planning situation and identify opportunities for improvement.
- Assist and guide the organization to establish a vision and mission that is shared by all key stakeholders.

16. Implementation
- Understand methods and impacts when implementing strategy.
- Use standards, performance indicators and policy to support strategy implementation.
- Develop commitment, ownership and timing to reflect resource capability.

17. Monitoring & Evaluation
- Understand the importance of measurement and practices to monitor and evaluate plans and related processes.
- Develop effective processes to ensure adequate monitoring and evaluation occurs.
- Use a continuous improvement approach to review and comment on plans.

18. Reporting & Accountability
- Understand the extent and responsibility for reporting to fulfill accountability requirements.
- Develop reporting practices to support accountability.
- Develop and monitor reports to ensure reported accountabilities are linked to the organization strategic direction and governance requirements.

19. Knowledge Management
- Understand the nature and elements of Knowledge Management and its relationship to organizational performance.
- Measure the organization’s efforts to improve Knowledge Management activities.
- Develop recommendations and implement practices to improve Knowledge Management activities.

MEMBERSHIP SERVICES

20. Understanding Members
- Understand the value and methods of getting member information and the need for self-regulation.
- Use member input to influence decision-making.
- Develop and conduct a member survey to determine needs and wants and standards for self-regulation.

21. Member Relations
- Understand the importance and practices to maintain effective member relations.
- Personally engage in activities to improve member relations.
- Evaluate current member relations efforts and develop, implement and manage a member relations program.

22. Member Communications
- Understand various types of communications and processes used.
- Seek out and listen to messages from members.
- Evaluate current member communications efforts and develop, implement and manage a member communications plan.

23. Recruitment & Retention
- Understand practices used to improve recruitment and retention efforts.
- Recognize member issues and problems.
- Evaluate current recruitment and retention efforts and develop, implement and manage a member recruitment and retention program.

24. Products & Services
- Understand how products and services are approved or abandoned.
- Use a continuous improvement approach to products and services.
- Evaluate current new product development and abandonment efforts and develop criteria that should be part of the decision-making process.

25. Quality & Pricing
- Understand the importance of quality in serving members and pricing decisions.
- Apply quality principles and objectives with self and promote them with others.
- Evaluate current quality efforts and pricing practices and recommend a plan for improvement.
26. Marketing
- Understand the importance of marketing and its impact on the organization.
- Make decisions which give due regard to marketing implications.
- Evaluate current marketing efforts and develop, implement and manage a marketing plan.

27. Strategy, Standards & Satisfaction
- Understand the value in linking overall strategy to standards and member satisfaction.
- Monitor and use the links to direct continuous improvements.
- Evaluate efforts to link strategy, standards and satisfaction and recommend a plan for improvement.

OPERATIONS SUPPORT

28. Human Resources
- Understand the strategic human resource management concept and practices necessary to create a productive environment with satisfied participants.
- Sensitive to diversity and support enhancing strategic human resource management.
- Evaluate efforts to create an organization that practices strategic human resource management and identify opportunities for improvement.

29. Systems & Practices
- Understand various operating systems and practices to keep track of members and service their needs.
- Strive to reduce cycle time, improve access, value and quality.
- Evaluate efforts to keep track of members and service practices to meet their needs, and through benchmarking, identify opportunities for improvement.

30. Technology
- Understand issues, trends, and successful technology applications.
- Use current technology to complete work and make informed decisions.
- Evaluate use of technology and through benchmarking, identify opportunities for improvement.

31. Financial & Management Accounting
- Understand the role and importance of financial and management accounting for an organization.
- Consider the impact on financial resources when making decisions.
- Evaluate financial and management accounting efforts, identify opportunities for improvement.

32. Facilities & Equipment
- Understand successful practices for acquisition and application of facilities and equipment.
- Manage assigned assets efficiently and effectively.
- Evaluate practices for facilities and equipment, and through benchmarking, identify opportunities for improvement.

33. Legal & Statutory
- Understand legal and statutory implications for organizations.
- Comply with requirements.
- Evaluate compliance efforts and identify opportunities for improvement.

34. Insurance & Tax
- Understand insurance and tax issues for organizations.
- Comply with requirements and provide for insurance needs.
- Evaluate the tax situation and insurance plans and identify opportunities for improvement.

35. Communications & External Relations
- Understand the importance of external relations and successful practices.
- Serve as an ambassador for the organization.
- Evaluate communications and external relations efforts; and through benchmarking develop a plan, implement and manage related activities.
36. Continuous Improvement (Innovation, Creativity & Management Tools)
- Understand the impact of innovation and creativity in making continuous improvement. Also understand what tools are available and when they should be used.
- Subscribe to continuous improvement and seek out innovative approaches and adapt them to the organization’s unique circumstances and requirements.
- Evaluate efforts in the use of various management tools and the impact on innovation, creativity and continuous improvement. Identify how continuous improvement efforts can be enhanced.

PRODUCTS & SERVICES

37. Publications & Information
- Understand how to plan, develop, and manage publications and information.
- Promote publications and information and continuous improvements to meet member needs.
- Evaluate efforts to provide quality, relevant and timely publications and information through benchmarking. Identify opportunities for improvement.

38. Events
- Understand how to plan, develop, and manage a variety of events.
- Promote events and continuous improvements to meet member needs.
- Evaluate efforts to provide quality, relevant and timely events through benchmarking and identify opportunities for improvement.

39. Education
- Understand how to plan, develop, and manage education programs.
- Promote education programs and continuous improvements to meet member needs.
- Evaluate efforts to provide quality, relevant and timely education programs through benchmarking and identify opportunities for improvement.

40. Advocacy
- Understand how to plan, develop, and manage advocacy activities.
- Promote advocacy activities and continuous improvements to meet member needs.
- Evaluate efforts to provide quality, relevant and timely advocacy activities through benchmarking and identify opportunities for improvement.

41. Fundraising
- Understand how to plan, develop, and manage fundraising activities.
- Promote fundraising activities and continuous improvements to serve member needs.
- Evaluate efforts to provide quality, relevant and timely fundraising activities through benchmarking and identify opportunities for improvement.

42. Credentialing
- Understand how to plan, develop, and manage credentialing programs.
- Promote credentialing programs and continuous improvements to serve member needs.
- Evaluate efforts to provide quality, relevant and timely credentialing programs through benchmarking and identify opportunities for improvement.

43. Other Services (Standards, Affinity Programs etc.)
- Understand how to plan, develop, and manage a variety of organization products and services.
- Promote products and services and continuous improvement to serve members.
- Evaluate efforts to provide quality, relevant and timely products and services through benchmarking and identify opportunities for improvement.

44. Strategic Alliances & Partnerships
- Understand the importance of alliances and partnerships and how to overcome barriers and reach agreements.
- Promote use of strategic alliances and partnerships as a tool to get results.
- Evaluate efforts to establish and operate strategic alliances and partnerships through benchmarking and identify opportunities for improvements.
The Prior Learning Assessment method of earning the CAE designation is available to senior association executives who can demonstrate mastery of at least 80% of the Not-for-Profit Management Competencies. You may refer to the ‘Not-for-Profit Management Competencies’ list (p.5) for definitions and further clarification.

How to Complete the Form

Step A
Self-Assessment
Rate your knowledge of each competency. Choose 0/Nil if you do not have experience in a particular area and 5 if you are an expert.

Step B
List Supporting Evidence
Supporting evidence typically falls under the following categories: Educational (formal university courses, professional designations), Career Accomplishments (actual project results) or Professional Experience (as an association executive). Define your evidence, indicating which category it belongs to and by providing more details. You may refer to your résumé, job descriptions, projects you have done, courses you have taken and so on. When necessary, attach specific evidence as an appendix to your portfolio. You may add up to three pages of evidence per competency.

How to Complete the ‘Competency Assessment’ Form

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<tr>
<th>Competency</th>
<th>Step A Self-Assessment</th>
<th>Step B List Supporting Evidence</th>
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<tr>
<td>Planning</td>
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Rate yourself. Refer to evidence. See above example.
### Competency Domain: Leadership

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<th>Competency</th>
<th>Step A Self-Assessment</th>
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<tr>
<td>1. Vision</td>
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<td>2. Working Together</td>
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<td>3. Facilitation &amp; Commitment</td>
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<td>4. Continuous Learning</td>
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<td>7. Innovation &amp; Creativity</td>
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<td>8. Change &amp; Flexibility</td>
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## Competency Domain: Association Structure & Environment

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<td>9. History, Current Status, Trends &amp; Issues</td>
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<td>10. Governance &amp; Decision Making</td>
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<td>11. Policy &amp; Bylaws</td>
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<td>12. Volunteers</td>
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<td>13. Staffing</td>
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### Competency Domain: Direction & Strategy

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<td>15. Planning</td>
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<td>16. Implementation</td>
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<td>18. Reporting &amp; Accountability</td>
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<td>19. Knowledge Management</td>
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<tr>
<td>20. Understanding Members</td>
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<td>21. Member Relations</td>
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<td>22. Member Communications</td>
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<td>27. Strategy, Standards &amp; Satisfaction</td>
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<td>28. Human Resources</td>
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<td>30. Technology</td>
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<td>31. Financial &amp; Management Accounting</td>
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<td>32. Facilities &amp; Equipment</td>
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<td>33. Legal &amp; Statutory</td>
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<td>34. Insurance &amp; Tax</td>
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<td>35. Communications &amp; External Relations</td>
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<td>36. Continuous Improvement</td>
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<tr>
<td>Competency</td>
<td>Step A Self-Assessment</td>
<td>Step B List Supporting Evidence</td>
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<td>Competency: Products &amp; Services</td>
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<td>37. Publications &amp; Information</td>
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<td>38. Events</td>
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<td>39. Education</td>
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<td>40. Advocacy</td>
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<td>41. Fundraising</td>
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<td>42. Credentialing</td>
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<td>43. Other Services</td>
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<td>44. Strategic Alliances &amp; Partnerships</td>
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Name of Candidate: ________________________________

List 2 references (CAEs or senior not-for-profit executives) who support your candidacy:

<table>
<thead>
<tr>
<th>Reference</th>
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<td>2</td>
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</tbody>
</table>

**REFERENCE**

- Dr. ☐  Mr. ☐  Mrs. ☐  Ms ☐

Name __________________________ Title __________________________

Organization __________________________

Address __________________________

City __________________ Province ____________ Postal Code __________________

Phone __________ Fax _______________ E-mail __________________________

I recommend this person for the CAE® designation

Reference Signature __________________ Date __________

Josette Forde

Director, Chapter Relations & Education

Canadian Society of Association Executives

10 King Street East, Suite 1100

Toronto, ON M5C 1C3

Please return this form, along with your portfolio to Josette Forde at the address below. If you have any questions, contact Josette by phone or e-mail at 416.363.3555 x 240, toll free 1.800.461.3608 x 240 or at josette@csae.com
Request for Portfolio Assessment

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<th>O Dr.</th>
<th>O Mr.</th>
<th>O Mrs.</th>
<th>O Ms</th>
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</table>

Name ___________________________ Title ___________________________

Organization ___________________________

Address ___________________________

City __________________ Province __________ Postal Code __________

Phone __________________ Fax __________ E-mail __________________

| O Cover Letter |
| O ‘References’ form |
| O ‘Request for Portfolio Assessment’ form |

Portofolio Content & Submission Documents

- Table of Contents
- Résumé
- Job Description
- ‘Competency Assessment’ form
- Additional Supporting Documentation (as needed)

PLAR Fee: $525 + applicable taxes

- $551.25 - GST @ 5% (#R1006866890) (AB, SK, MB, QC, PEI, YT, NT, NU)
- $588.00 - HST @ 12% (#R1006866890) (BC)
- $593.25 - HST @ 13% (#R1006866890) (ON, NB, NL)
- $603.75 - HST @ 15% (#R1006866890) (NS)

PAYMENT* BY: O Cheque (Payable to CSAE) O VISA O MasterCard O American Express

Name of Cardholder ___________________________

Card Number ___________________________ Expiry Date ___________________________

Signature ___________________________ Date ___________________________

* payment must be received before the assessment will take place

I understand that if I successfully fulfil the requirements to be granted the right to use the designation Certified Association Executive or CAE after my name, THAT I WILL RETAIN THAT RIGHT ONLY SO LONG AS I REMAIN A MEMBER IN GOOD STANDING OF THE CANADIAN SOCIETY OF ASSOCIATION EXECUTIVES.

I certify that this portfolio accurately and honestly documents the relevant aspects of my association management career. I understand that the decision of the assessment panel is final, and that submission of this portfolio does not guarantee certification.

Signature ___________________________ Date ___________________________

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