Fall 2025 CAE Study Group

Domain 2: Executive Leadership
October 9, 2025

ASSOCIATIONS *West*

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Domain 2

Executive Leadership

Content Outline

(20-22% of exam)

- Decision Making
- Ethical Leadership
- Diversity, Inclusion & Equity
- Adaptive Leadership

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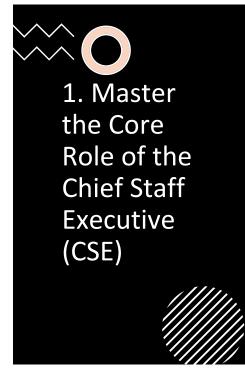## Domain 2: Core Reading Resources

ASSOCIATIONS West

- ASAE Professional Practices in Association Management, 4th Edition, Chapters 8–13, 25.
- Association Law Handbook, 6th Edition, Chapters 11–13, 24.
- The Jossey-Bass Handbook of Nonprofit Leadership and Management, 4th Edition, Chapters 3–7, 11–12, 16.

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1. Master the Core Role of the Chief Staff Executive (CSE)

Understand	Understand that the CSE is both leader and partner — balancing responsibility between board governance and staff management.
Know	Know how the CSE establishes organizational direction, drives ethical culture, and aligns operations with the strategic plan.
Be	Be able to distinguish between governance (board) and management (staff) responsibilities, a frequent exam focus.

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2. Connect Leadership to Strategy and Performance

Recognize that executive leadership is strategy in action — the CSE uses the strategic plan to set priorities, measure progress, and ensure alignment across all departments.

Be familiar with performance metrics, foresight, and change management as tools of strategic leadership.

Understand how culture, DEI, and emotional intelligence directly affect performance and innovation.

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3. Demonstrate an Ethical, Inclusive, and Future-Focused Mindset

Ethical leadership is at the heart of Domain 2 — integrity, transparency, and fairness underpin every decision.

Embrace diversity, equity, and inclusion as strategic imperatives, not side initiatives.

Understand foresight — the CSE anticipates change, prepares the board, and positions the organization for long-term success.

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Executive Leadership Overview

01
Set performance metrics and ensure accountability

02
Guide effective, well-informed decision-making

03
Model ethical leadership and integrity

04
Foster a diverse, equitable, and inclusive culture

05
Lead with adaptability and a proactive approach to change

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Board–Executive Partnership

Effective leadership depends on balance and collaboration between the chief staff executive and chief elected officer for effective decision making.

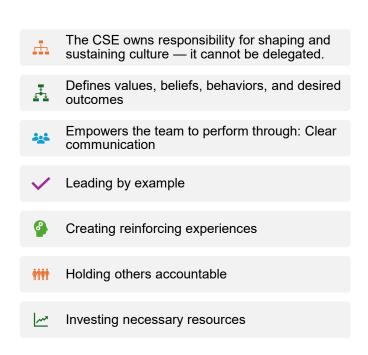Both board and management serve the organization's best interests

The board holds ultimate statutory authority

The board meets periodically — not involved in daily operations

Management reports to and operates under board direction

Harmony and progress depend on minimizing tension and competition

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Building a Strong, Values-Based Culture

Culture and performance are interdependent — both are essential to success.

🗂️	The CSE owns responsibility for shaping and sustaining culture — it cannot be delegated.
🗂️	Defines values, beliefs, behaviors, and desired outcomes
👥	Empowers the team to perform through: Clear communication
✓	Leading by example
🧠	Creating reinforcing experiences
👪	Holding others accountable
📈	Investing necessary resources

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Measuring Cultural Success

🔍 Cultural success can be measured through **numbers** (performance toward mission, vision, and bottom line)

👥 Also can be measured through **stories** (what members, staff, and other stakeholders say about the organization and their experiences with it).

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People are at the center of performance – and need these traits:

Empowerment & Engagement – Understand roles and responsibilities

Openness to Change – Adapt to both small and major shifts

Transparent Communication – Share key decisions clearly and timely

Accountability – Everyone is responsible for their performance and actions

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From Strategy to Action

The board's strategic plan guides all planning efforts

The chief staff executive (CSE) translates strategy into operational priorities

The staff provide context, develop project plans, and define measurable goals

All activities and metrics should tie back to the strategic plan to ensure cohesive execution

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Driving Performance Through Collaboration

● **CSE and volunteer leaders align on meaningful, strategy-driven performance metrics**

The Board ensures:

Focused discussions that set direction

Adequate resource allocation

Oversight of strategic progress, financial performance, and CSE outcomes

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Using Metrics for Strategic Oversight

The CSE provides regular reports on finances, membership, and key metrics to the board.

The board fulfills its fiduciary duty by monitoring these reports to gauge progress.

Effective practices include:

Clarifying how the board should use the information

Periodically reviewing the relevance and value of reports

Reinforcing a data-driven culture during orientation and at every board meeting

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Data should inform good decision making

Data informs effective strategy and decisions

The chief staff executive (CSE) ensures sound data systems, policies, and interpretation

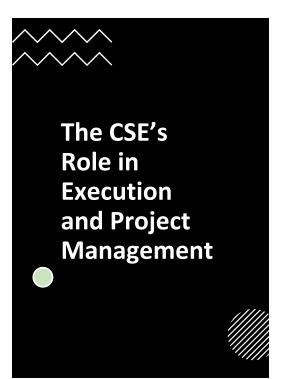The CSE also guides volunteer leaders on how data connects to strategic goals

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Key Questions to Drive Discussion of Data:

How will this data help achieve our mission?

What metrics show where to focus resources?

What will we do differently with this information?

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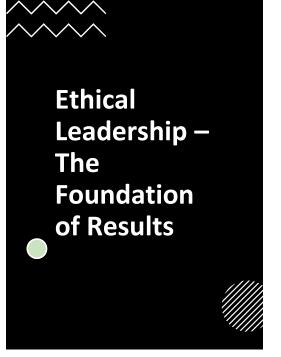## The CSE's Role in Execution and Project Management

The CSE ensures effective execution — through delegation or direct project management

The CSE's key responsibility is to create clarity — defining roles, authority, and expectations to keep projects on track

Operating in a nonprofit environment has unique elements such as *shared power with the board, *engaged volunteers and multiple stakeholders, and *blurred boundaries in roles and accountability

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Ethical Leadership – The Foundation of Results

Ethical leadership drives performance and trust.

The chief staff executive (CSE) must model transparency, professionalism, and integrity.

Ethical leadership enables the CSE to:

Lead staff effectively

Share leadership with the board and elected officers

How results are achieved matters — ethics are not the end goal, but the path to sustainable success.

The CSE and volunteer leaders collaborate to shape an ethical, results-oriented culture.

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Principles and Tools of Ethical Leadership – Key Tools for the CSE:

ASAE CODE OF CONDUCT

ASAE ETHICS TOOLKIT
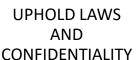
PERSONAL ETHICAL PRINCIPLES

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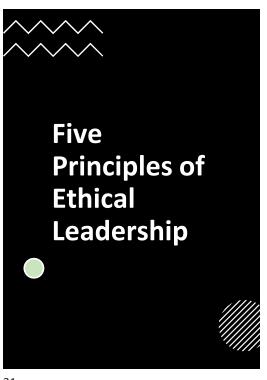# Principles and Tools of Ethical Leadership - Core Ethical Standards:

UPHOLD LAWS AND CONFIDENTIALITY

BE HONEST AND ACT FAIRLY

FOSTER AN ETHICAL CULTURE

TAKE RESPONSIBILITY FOR CONDUCT

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Five Principles of Ethical Leadership

- Respect others
- Serve others
- Show justice
- Manifest honesty
- Build community

Leading with Diversity, Equity & Inclusion (DEI)

Organizations that prioritize DEI thrive amid demographic and cultural change

Chief staff executives (CSEs) play a key role in fostering inclusion

Effective DEI leadership starts with recognizing and addressing unconscious bias

Building a personal DEI mindset sets the foundation for organizational progress

The Power of Diverse Teams

Diverse leadership and staff bring broader perspectives and ideas

This leads to more innovative, effective solutions

Organizations that embrace diversity consistently achieve higher performance and better results

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Key Steps to Embedding DEI into the Organization

Define and reinforce behavioral norms and expectations → Align DEI with mission and strategic goals

Develop supporting principles, policies, and practices → Establish metrics and baselines to measure progress

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The Value of Foresight in Association Leadership

Foresight enables proactive, intentional leadership — not reactionary decisions

Helps the organization stay relevant and map its preferred future

A research-based foresight approach guides today's actions toward tomorrow's goals

Prepares the association for disruptors and change

Board involvement is essential to align foresight with mission and vision

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Five Steps to Building Foresight Capacity

1

Framing – Define the current state and explore possible future environments

2

Scanning – Identify external changes and trends that could impact the association

3

Forecasting – Analyze potential futures and their implications

4

Visioning – Craft a clear statement of the association's preferred future

5

Planning – Develop actionable strategies at the board level to move toward that future

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Effective CSE Leadership Means:

What: Leading execution of strategy and change

How: Leading with authenticity, empathy, and decisiveness

Why: By asking the right questions, listening deeply, and valuing diverse perspectives

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Fostering a Performance & Innovation Culture

Encouraging **experimentation** and idea generation

Presenting **manageable challenges** that inspire learning

Embracing failure as a path to innovation

Providing **ethical and legal guidance**

Ensuring a **safe, fast way to fail and adapt**

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Emotional Intelligence in Leadership

High EQ is essential for adaptive, effective leadership

Enables leaders to manage their emotions and respond thoughtfully to others

Strengthens relationships with staff, board members, and stakeholders

Fosters a positive, resilient organizational culture

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Questions?

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