

Fall 2025 CAE Study Group

Domain 6 Member and Stakeholder Engagement

November 6, 2025



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Domain 6: Member and Stakeholder Engagement

10-12% of exam



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Domain 6 Overview & Key Insights

Why People Join:

Membership is motivated by both personal benefits and commitment to the common good.

Why They Stay:

The experience of involvement—not just joining—drives retention and appreciation.

What Leaders Do:

Anticipate member and stakeholder needs

Align engagement with the strategic plan

Analyze data to target segments effectively

Build strong relationships and trust

Demonstrate emotional intelligence and ethical leadership

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Strategic Purpose of Membership



Membership dues are essential for revenue — but membership's greater value lies in advancing the association's mission and industry impact.



The bylaws define categories, rights, and membership procedures (e.g., regular, supplier, student).



Every membership decision should align with the association's strategic goals—expansion, engagement, next-gen attraction, or mission advancement



EXAM TIP: The CSE must view membership beyond income — as a strategic tool for achieving organizational purpose. Questions may test your understanding of mission-driven membership strategy versus revenue focus.

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Designing the Membership Model

Select a membership model that reflects member needs and organizational strategy:

All-inclusive: One price for all core benefits.

Unbundled: Members pay only for services used.

Tiered: Different benefit levels for different dues.

Freemium: Basic access is free; premium options are paid.

Hybrid: Combines elements of several models.

Assess financial and logistical implications, and engage members and nonmembers (via surveys or focus groups) before finalizing.

CAE EXAMP TIP: Expect scenario questions comparing dues models. Know the pros/cons of each and how they affect engagement, financial sustainability, and operational capacity.

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Recruitment Strategy & Execution

Successful recruitment requires:

- Awareness of industry climate and stakeholder needs
- A strong value proposition and communication of future relevance
- Market segmentation and targeted marketing campaigns – the LIST matters!
- Data-driven insights using AMS/CRM systems
- Encouraging member-to-member recruitment for authentic engagement

CAE Exam Tip

Questions may test your ability to build a recruitment plan aligned with strategy and segmentation. Emphasize data use, targeted outreach, and member advocacy as best practices.

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Retention & Member Value

Guiding Principles

Retention depends on **aligning** strategic objectives with tangible member benefits.

Member **involvement** and **volunteerism** are key drivers of **loyalty**.

Continuously communicate the **value** delivered — show how the association solves members' problems.

Track **KPIs** that correlate with retention and calculate lifetime member value.

Balance goals of **membership size vs. revenue**; both affect sustainability.

- **CAE Exam Tip** 💡 Be ready to identify retention indicators and explain how member engagement and communication of value sustain loyalty.
- Know the importance of measurable metrics and ROI in retention planning.

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Broad View of Stakeholders

The CSE must look beyond members to recognize all stakeholders essential to the association's mission and strategic plan.

Stakeholder success = Strategic success.

Key groups may include: industry partners, policymakers, educators, employers, and allied organizations.

Regularly review and update stakeholder lists in alignment with strategic priorities.

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Use these core questions to identify key stakeholders:

Does the association depend on them to exist?

Do they influence achievement of strategic priorities?

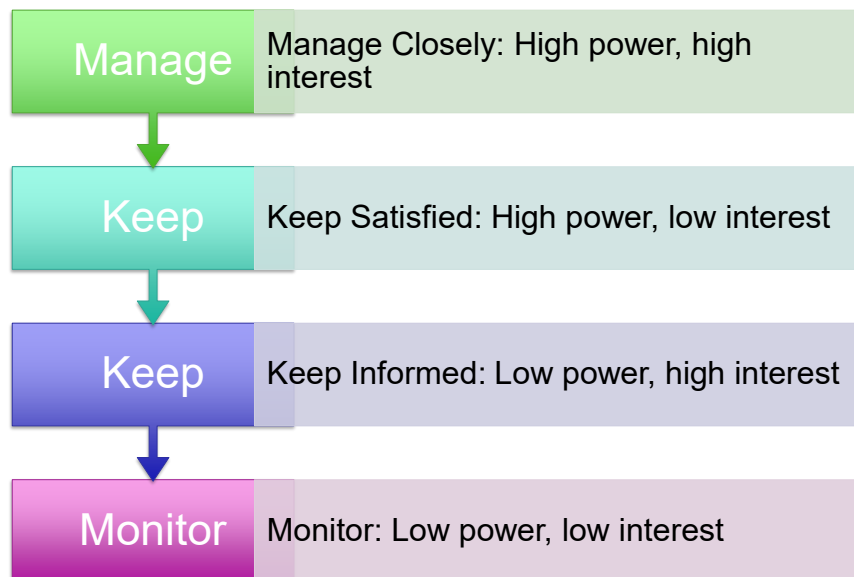
Do they rely on the association for professional success?

Do they impact mission performance?

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Stakeholder Identification & Mapping

4-quadrant model



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Engagement Continuum & Crisis Readiness

Define a member engagement continuum using tools such as:

- **Member personas** (profiles of motivation and needs)
- **Journey mapping** (touchpoints across a career/life cycle)
- **Develop a crisis response** plan for issues affecting high-influence stakeholders — rapid, transparent action maintains trust and stability.

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Engagement Fuels Retention and Mission Impact



Engagement isn't just activity—it's a strategic asset that drives member retention and advances organizational goals.



ASAE's *The Decision to Join* shows a strong link between participation and renewal; disengagement leads to non-renewal.



Engaged stakeholders do more than renew—they move the mission forward, amplifying the organization's reach and relevance.



→ Treat engagement as an investment in long-term sustainability and mission advancement.

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Engagement Evolves— It's Not Linear

Meet members where they are; build flexible paths for deeper connection.

Engagement is fluid, not sequential—members may shift between stages throughout their career.

Early, ad hoc volunteer opportunities can seed future leadership and support diverse governance pipelines.

Use the Engagement Continuum to visualize how participation grows and changes (see next slide)

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THE ENGAGEMENT CONTINUUM



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Map the Journey— Align Engagement with Strategy

Use member personas and journey mapping to tailor engagement across career stages.

As CSE, ask, “Where do voluntary contributions best advance strategic goals?”

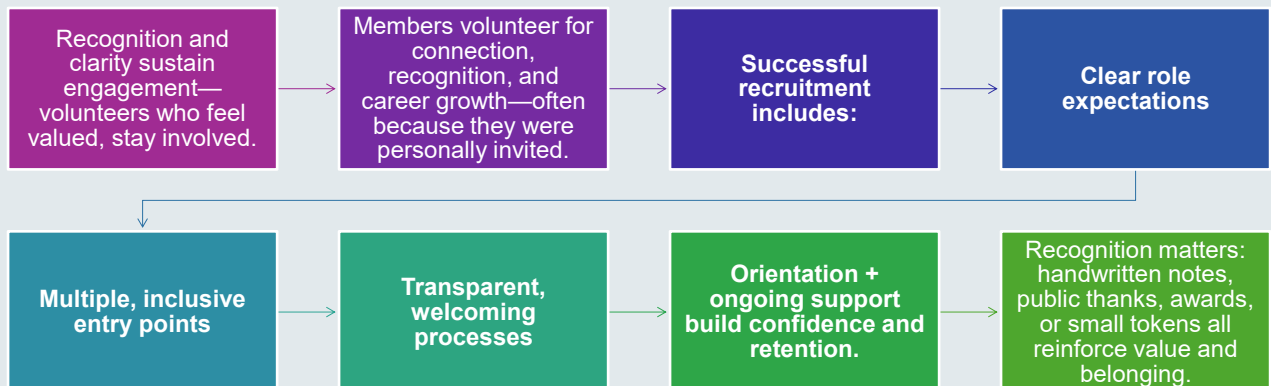
Four pillars of effective engagement:

1. Active + passive participation across all activities
2. Broad access to formal and informal volunteer roles
3. Clear link between involvement and renewal
4. Strategy-driven, adaptive engagement reflecting societal and member change

→ Engagement design should be intentional, data-informed, and strategically aligned.

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Recruit, Support, and Celebrate Volunteer Impact



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Domain 6 Test Taking Tips

Be ready to connect volunteer management to organizational strategy.

✓ Hint: If a question asks “why” engagement matters, tie it to member retention or advancing strategic goals.

Memorize and apply the five levels — Consuming → Promoting → Creating → Serving → Governing.

✓ Hint: Link “Creating” with early leadership development and diversity in governance pipelines.

Focus on the how of recruitment, onboarding, and recognition.

✓ Hint: If you see a question about increasing volunteer diversity or engagement, think about broad access and supportive culture.

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Questions?

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