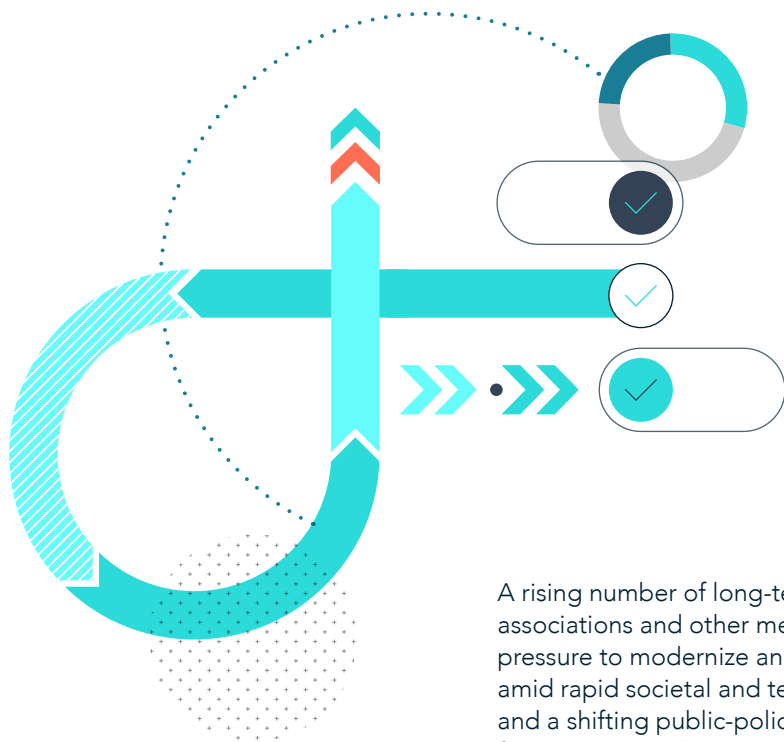


ARTICLE

CEO succession in membership-based organizations: Is your board ready for what comes next?

Too often, CEO succession is handled on an ad hoc basis. For membership-based organizations, complex governance structures and stakeholder dynamics make a more deliberate approach essential.





A rising number of long-tenured association CEOs are retiring at a time when associations and other membership-based organizations are under growing pressure to modernize and move faster.¹ Boards must manage these transitions amid rapid societal and technological change, economic and geopolitical volatility, and a shifting public-policy landscape. And with membership-based organizations facing growing demands for results, accountability, and leadership from their members and different stakeholder groups—including new media, activists, donors, and funders—who gets the top job next has rarely mattered more.

Membership-based CEO transitions are made more difficult by the unique operating constraints in these organizations. Membership-based organizations must operate with the efficiency and financial discipline of a corporation while working within the confines of a nonprofit model. Many face uncertain membership growth, increased competition for members' attention, and changing definitions of member value, all while needing to demonstrate a return on members' investment.

Such pressures can make the CEO role particularly demanding. These CEOs often serve as both the chief strategist and the public voice of the organization, and boards are increasingly looking for their next leader to bring a fresh perspective and the experience to guide them through their next phase.² In this context, CEO succession can no longer be a late-stage process that begins after incumbents signal their intention to step down.

Across organizations, the most effective CEO succession planning is an ongoing process that connects the organization's future strategy with the leadership capabilities needed.³ A well-run succession process is proactive and intentional, designed to address four core challenges that boards often face: building alignment amid organizational complexity, defining the right candidate for the future, striking a balance between continuity and change, and protecting relationships throughout the transition.

To explore how boards of membership-based organizations can meet these challenges, we spoke with several leaders in this space about the distinctive complexities of CEO succession in their domain and their best-practice advice.

1 For more, see Ellen Maag, Tonya Muse, and William O'Leary, "CEO succession: How industry and professional associations are strengthening their leadership planning," Heidrick & Struggles, June 20, 2024, heidrick.com.

2 Tonya Muse and Teraesa Vinson, "CEO succession focus: Succeeding as a first-time association CEO," Heidrick & Struggles, May 29, 2025, heidrick.com.

3 For more, see Heidrick & Struggles, "Route to the Top US 2026 | Closing the CEO capability gap," Heidrick & Struggles, May 12, 2026, heidrick.com.

Building alignment in a complex governance structure

CEOs heading associations and other membership-based organizations operate within governance structures that differ significantly from those of corporations. Volunteer boards may rotate frequently, slowing decision making and creating a risk that board priorities may shift during a CEO search. Committees, chapters, councils, and other stakeholder groups often expect to have input into the process, too. Influential members, donors, sponsors, and even industry partners may have strong opinions about what the association needs in its next leader.

Building alignment among these constituencies can be as important as assessing candidates.⁴ Without a clear process, however, broad stakeholder involvement can make a search unwieldy and allow the organization's priorities to drift.

Boards can create the necessary structure by adopting several measures:

- Educate board members early on the succession process, their responsibilities, and the major decisions that will arise, particularly when board rotation could disrupt continuity.
- Establish clear governance for the transition: who defines the candidate profile, who gathers stakeholder input, who makes final decisions, and how disagreements will be handled.
- Oversee the search committee and appropriately empower it to create a structured process for stakeholder input that ensures important voices are heard without allowing the search to lose focus.
- Confirm strategic priorities at the outset and revisit them at agreed intervals so changes in board composition do not redirect the process midstream.
- Document the process so incoming board leaders can continue it without losing momentum.



Hiring and overseeing your CEO is arguably the most important thing the board does. Having it in structure is key, especially when you have boards that are turning over.”

One association director we spoke with described how a formal structure can bring continuity to succession planning, even as board membership changes. In her association, roughly one-third of directors rotate off the board each year, so the association uses board member onboarding to reinforce the idea that succession is an ongoing responsibility. “Hiring and overseeing your CEO is arguably the most important thing the board does,” she emphasized. “Having it in structure is key, especially when you have boards that are turning over.”

In her organization, the executive committee retains responsibility for overseeing the process, while input from the full board, former presidents, key volunteer leaders, member groups, and closely aligned partners helps shape the specific requirements for the CEO.

⁴ Ellen Maag, Tonya Muse, and William O’Leary, “CEO succession: How industry and professional associations are strengthening their leadership planning,” Heidrick & Struggles, June 20, 2024, heidrick.com.

Defining the future before defining the candidate

A CEO search can quickly become a broader debate about the organization's future direction. Before developing candidate specifications, boards need to agree on the strategic outcomes they expect an incoming CEO to deliver over the next three to five years.

That discussion should lead to a future CEO success profile. Rather than simply listing desired experience and credentials, such a profile describes the outcomes the incoming CEO must achieve, the capabilities required to achieve them, and the leadership style best suited to the organization's next chapter.

For some membership-based organizations, the priority may be continuity, stewardship, and preservation of key relationships. For others, it may be business model evolution, technology modernization, a stronger orientation toward data and ROI, or a rethinking of the membership value proposition altogether. The essential task for the board is to decide deliberately which future it is hiring the CEO to lead.

For such decision making, boards can adopt the following strategies:

- Align on three to five strategic outcomes that the next CEO must deliver.
- Translate those outcomes into a success profile that includes the characteristics the board considers essential, such as enterprise leadership capacity, change leadership experience, external influence, or strengths in stakeholder navigation.
- Use that success profile consistently to evaluate candidates rather than defaulting to assumptions based on the outgoing CEO's accomplishments or the organization's historical norms.
- Revisit the profile as conditions change while avoiding a mid-process redefinition unless the board explicitly agrees it is necessary.



If you have that disconnect or knowledge gap, you cannot do strategy appropriately, and if you are not doing strategy appropriately, then you do not know what kind of leader you need."

It is ultimately the board's responsibility to ground the CEO profile in a realistic understanding of the organization's operations and strategic direction. One executive described how a board's limited visibility into an organization's day-to-day work can weaken both strategy and succession. "If you have that disconnect or knowledge gap, you cannot do strategy appropriately," she said. "And if you are not doing strategy appropriately, then you do not know what kind of leader you need."

This executive's organization uses a three-year succession plan to give the board time to build that understanding and develop confidence in an internal successor. The process begins with an assessment of the candidate's strengths, weaknesses, and development gaps, followed by knowledge transfer and, ultimately, change management. The board initially viewed the plan as a significant commitment of time and effort but eventually came to understand its value and rationale.

Striking the right balance between continuity and change

One association director noted that boards may be reluctant to reconsider leadership styles and strengths when the organization is meeting its current objectives. But when boards discuss strategy and the future, they should also ask whether they have the right management team to get there.

Long-tenured association CEOs can become closely identified with the organization itself. This can create a strong expectation of continuity after a CEO's departure, particularly when this leader has built important relationships and carries significant institutional knowledge. Internal candidates may offer stability, familiarity with the organization, and continuity in stakeholder relationships.⁵

At the same time, many membership-based organizations face pressure to modernize their business models, technology platforms, or engagement strategies. Outside influences from advocacy, political shifts, or economic trends may prompt a reassessment of long-held assumptions around member value or the ROI of key activities. In these circumstances, an external candidate may offer a way to introduce different perspectives and respond to emerging needs.

The board's task here is nuanced. Rather than making a blanket decision on whether to preserve the past or disrupt it, the board must deliberately determine what to carry forward and what needs to change.

Boards can make these determinations several ways:

- Identify the elements of the organization that most need to be preserved, including key stakeholder relationships, institutional knowledge, cultural strengths, and strategic priorities already in place.
- Identify where a meaningful shift may be required, whether in the business model, member engagement, technology, advocacy approach, pace of decision making, or tolerance for innovation and risk.
- Compare internal and external options against the future CEO success profile, ensuring the decision is based on forward-looking needs, not instinct or loyalty.
- Invest in targeted development and executive coaching for strong internal candidates, including greater exposure to the board and key stakeholders, to test a candidate's ability to lead enterprise-level change.

The choice between continuity and change starts with the organization's ambitions, not with the presumption that a successful incumbent's profile should be replicated in the next organizational chapter. One association director noted that boards may be reluctant to reconsider leadership styles and strengths when the organization is meeting its current objectives. But when boards discuss strategy and the future, they should also ask whether they have the right management team to get there.

This director cautioned against accepting a "more-of-the-same" business plan simply because the current CEO has succeeded to date. The type of leader who helped the organization reach its current position may not be the one best equipped to take it to its next stage.

⁵ Alexis Hennessy and Teraesa Vinson, "CEO succession planning: How CEOs and boards can manage internal candidates effectively," Heidrick & Struggles, July 22, 2026, heidrick.com.

Protecting critical relationships through the transition

CEOs at membership-based organizations often serve as the primary relationship holder for key members, policymakers, and partners. A transition, therefore, involves more than handing over a title or set of responsibilities. It can create uncertainty around relationships that are central to the association's work and that cannot easily be replaced.

A good transition plan addresses these risks before the handoff begins. It identifies the relationships that matter most and sets out how they will be protected in the move from incumbent to successor. Boards own this transition; the most effective boards recognize this and act accordingly, rather than delegating responsibility for this crucial step to others.

To reduce disruption, boards can take the following steps:

- Develop a written transition plan well in advance of the handoff, covering relationships with board members, staff, association members, policymakers, sponsors, and partners. Such a transition plan will likely rely heavily on the incumbent CEO's knowledge—meaning that the board must hold the incumbent CEO responsible for identifying critical relationships.
- Clarify who owns each relationship during the transition period and how introductions, joint meetings, and follow-up communications will be handled.
- Treat onboarding not as an administrative step but as a core part of succession, including structured knowledge transfer from the incumbent to the successor.
- Ensure that the incumbent steps aside in a disciplined way, giving the new CEO space to establish authority, build direct relationships, and lead in his or her own voice.
- Manage communication and timing carefully, both to limit internal disruption and to reassure external stakeholders that continuity and momentum will be maintained.

A disciplined transition depends, in part, on the incumbent CEO's willingness to facilitate the transfer of critical relationships and then step back at the appropriate time.

A disciplined transition depends, in part, on the incumbent CEO's willingness to facilitate the transfer of critical relationships and then step back at the appropriate time. One board leader described the major advantage this approach provided in a recent transition. With the departing CEO open to facilitating the handoff, helping where needed, and stepping aside when the time came, the incoming CEO was able to establish authority quickly with important stakeholders.

The process also needs to account for effects on internal relationships. Another board leader told us that an earlier effort to develop internal CEO candidates had become a "horse race," creating internal dissension and causing some candidates to focus on different priorities once they knew they were part of the succession plan. Careful management of internal succession can help preserve collaboration among senior leaders and protect the relationships and continuity that the transition is intended to sustain.

5 Alexis Hennessy and Teraesa Vinson, "CEO succession planning: How CEOs and boards can manage internal candidates effectively," Heidrick & Struggles, July 22, 2026, heidrick.com.

CEO succession brings a unique set of challenges for associations and other membership-based organizations, but most of the complexities can be managed when boards approach succession as an ongoing governance responsibility. Planning early gives boards time to align stakeholders, clarify strategic priorities, assess the balance between continuity and change, and prepare for the transfer of critical relationships.

Boards can profitably ask themselves the following questions to assess their planning readiness and help identify next steps:

- What will our organization need most from its next CEO over the next three to five years?
- Which internal successors could credibly become our next CEO, and what development would each need to be ready?
- What should the next CEO preserve, and what may need to change?
- Which relationships and institutional knowledge are most critical to transfer to the next CEO, and how will we transfer them?

The strongest organizations do not wait for a departure to confront the question of leadership. They build the capacity to answer it well before the moment arrives.

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