

Succession Planning Worksheet

For team leadership transitions



The purpose of this document is to provide a working outline and fillable discussion questions for current and future head coaches/leadership for your team. It is based on a one-year timeline and is aligned with this [succession planning document](#). This worksheet follows a process in which there is one year of overlap for the current/future head coach. This allows for mentorship of the incoming coach. If this doesn't match your timeline, it can still be useful to go through the worksheet on an adjusted scale. An intentional process, thoughtful communication, guided reflection, and teamwork will set your team and new leadership up for success!

[INSERT YOUR TEAM NAME HERE]

CURRENT HEAD COACH(ES)	[Names]	NEW HEAD COACH(ES)	[Names]
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Working agreements

Use these norms to guide communication between the incoming and outgoing head coaches to foster healthy and impactful collaboration.

1. **Pause** - allow time for considering an idea before responding
2. **Paraphrase** - make sure that you paraphrase back ideas to ensure that you are on the same page
3. **Pose questions** - question ideas to make them stronger
4. **Provide data** - use qualitative and quantitative data to make decisions
5. **Put ideas on the table** - bring ideas to the table but don't "get on the table" with the idea. A question of that idea (or a decision to not use that idea) is not about the person that brought the idea, it is just about the idea itself.
6. **Provide space for all voices** - make sure to allow time for everyone to speak and provide input from your leadership team
7. **Presume positive intentions** - presume that everyone involved with the collaboration believes they are doing what is best for the team and believes they are following the team's values and goals. You can disagree on how to achieve the goals while still wanting what is best for the team

Communication

Establish norms for communication type/cadence between the current head coach(es) and the new head coach(es).

What are the best ways for us to communicate? Circle all that apply.	IN PERSON	PHONE CALL	TEXT	EMAIL	OTHER
How often do you want to communicate about the team? Establish a cadence for communication.					
What issues can be an email or text, and what issues need to be a conversation (in person or phone call)?					

ACTION ITEM!

Share all team organizational folders digitally with the entering head coach and help them understand the structure/organization of the files.

Does the current or future leadership have any resources or tips to share? What are some favorite coaching and leadership books, podcasts and blogs? Share your favorites and/or these titles:

- o *Coaching Better Every Season* by Wade Gilbert
- o *Every Moment Matters* by John O'Sullivan
- o *Good for a Girl* by Lauren Fleshman
- o *The Culture Code* by Daniel Coyle
- o *Legacy* by James Kerr

One year before the transition

Complete the following section after your initial decision for transferring leadership (ideally, about a year before the current head coach steps down fully). These discussion questions are designed to help you share your ideas/philosophies, and establish the foundation for your conversations moving forward.

Postseason reflection

Use these questions to reflect. This discussion is best held in the off-season, as close as possible to the end of the season.

What went well during the season, what are we going to **keep doing**?

[Response/notes here]

What did we **learn** this season that we can use in the future?

[Response/notes here]

What can we do **better** next season?

[Response/notes here]

Preseason of the mentorship year

Complete this section during the pre-season, before the head coach fully steps away, while the future coach takes on a leadership role under the current head coaches' guidance.

Goal-setting

Establish personal coaching goals for the upcoming season:

Current head coach goals:

[List goals here]

Future head coach goals during mentorship year:

[List goals here]

PRO TIP!

Provides strategies for how to respect and honor an incoming head coach as a new team leader. It will be natural for fellow coaches and returning athletes to turn to the veteran head coach for leadership. Outgoing head coaches should defer to the new head coach so they can establish themselves as a leader.

Planning meetings

After setting goals for the season, a series of meetings can help iron out the logistics and get the leadership team prepared and on the same page for the pre-season.

Season and practice planning meeting

For this meeting, the head coach should share the season/practice plans for the previous season with the incoming coach, with time for review. Then, work together to complete the following:

SEASON PLANNING

1. Review the full-season plan from the previous year
2. Make adjustments to the season plan based on the end-of-season reflection meeting
3. Draft your new season plan

INDIVIDUAL PRACTICE PLANNING

1. Review the previous season's practice plans
2. Make adjustments based on reflection meeting
3. Plan 1-2 practices together as a unit: the future head coach should draft 1-2 practice plans, with the exiting head coach reviewing and providing feedback

Recruitment planning meeting

Recruitment strategies can be built on previous years plans, and improved with strategies and feedback from the end-of-year reflection process above. Here are some steps to take:

1. Share recruitment materials from previous years
2. Collaborate on a plan for the season; divide the tasks and responsibilities: plan to co-lead parent and athlete information sessions/meetings
3. Draft a welcome email to families and coaches; communicate about the head coach transition in the email, and clearly define who will be the point of contact as head coach
4. Plan a preseason coaches' meeting agenda and co-lead the preseason coaches' meeting

PRO TIP!

Use NICA's recruitment tips and resources. Find templates for info meeting agendas, slide decks, flyers, try-it out events, and even a sample plan for a preseason coach practice. Resources can be found in the NICA Education Center by logging into Pit Zone and clicking the "Courses, Resources, & Benefits" button.

During the season of the mentorship year

As soon as that first practice starts, the season flies by quickly! Plan ahead and establish communication cadence, meeting agendas, and practice roles to take the pressure off during the busy weeks of riding with athletes.

Establish a regular check-in meeting

Mentorship meeting cadence

Set a weekly meeting for the current/future head coaches to check in for 15-30 minutes. Honor this meeting: it allows the mentee to hold questions for the meeting and not feel like they are bothering the exiting head coach more often than needed.

In-season mentorship meeting schedule - what day and time will you meet?

Day:

Time:

Mentorship meeting agenda

Every time you meet, use these questions as a guide for your meeting:

- Did we meet the objectives for last week (for both practice and team management)?
- What went well?
- What can we do better?
- What are the objectives for the upcoming week?
- What are the action steps for the next week (and beyond)?

Leading practices

The current head coach should allow space for the entering head coach to lead some practices and activities. It can be helpful for the current head coach to strategically “miss” a few practices throughout the season to provide space for the entering head coach to lead. It is better if this is planned and not random (especially if level 2 and 3 coach/rider ratios are tight). Pick two practices to miss in the mentoring year, and add them to the table below. One should be an early-season practice that is focused more on skill development and team development; the other should be a trail riding practice.

Practice date	Objectives of the practice	Location	Will the team have enough level 2 / 3 coaches to run practice without the current head coach?

PRO TIP!

If the outgoing head coach has input or advice for the incoming head coach, schedule time to talk with them privately and not in front of the team or other coaches. Remember that a new head coach may do things a little differently! They might also make some mistakes, but that is part of the learning process. Outgoing head coaches can help them learn and grow into their role by encouraging them to try new approaches. You can reflect on the outcomes during your check-in meetings.

Race weekend mentorship

The current and entering head coach should participate in all event weekend meetings. It can be helpful for the entering head coach to act as the head coach for a race weekend in the mentorship year with the support of the current head coach. Which race weekend works best for the entering head coach to lead? The first race of the year and the championship race are probably not great options. Pick a race in the middle of the season when the routines are established.

Race weekend venue/dates	Who will lead the pre-ride?	Who will take the lead on any issues?	Who will lead pre-race meeting with athletes?	Who will meet athletes at the finish area?

Celebrate the leadership/work of the exiting head coach at the end of the season

How will you honor the legacy of the head coach that is stepping down?

Postseason reflection

POST-SEASON DISCUSSION

Use these questions to reflect. This discussion is best held in the off-season, as close as possible to the end of the season.

What went well during the season, what are we going to keep doing ?
[Response/notes here]

What did we learn this season that we can use in the future?
[Response/notes here]

What can we do better next season?
[Response/notes here]

Preseason with new head coach leading

Plan for the incoming head coach to take on primary roles and responsibilities for this year, with the former head coach serving in a lighter mentorship role. Together in the preseason, complete the following questions:

Goal-setting

Establish personal coaching goals for the upcoming season

Current head coach goals:
[List goals here]

Former head coach goals:
[List goals here]

Establish roles

If the exiting head coach continues to be a part of the team, it is important to establish a defined new role with the team. Will you continue to coach on the team? Will you continue to be an advisor for the new head coach? It can be really fun to just show up to practice and be a coach when you have been the head coach for a long time! Or, consider taking a year off and coming back. Time away from the team can give you the space to find out what you really love about coaching again.

Once the former head coach has established a new role with the team, stick to it. The role can change again in the future, but avoid slipping into a fuzzy role that is undefined.

What role will the former head coach have within the team? Describe below.
[Describe the new role, if applicable]

Planning the season

After setting goals and determining roles for the season, it's time to iron out the logistics for the season, with the new head coach leading the charge.

Season and practice planning

In the first year of new leadership, planning is especially important. Establishing routines, expectations, and having a clear plan will help your entire team rally around the new head coach. As you plan, consider the following:

PRE-SEASON PLANNING

1. Host a coaches meeting
 - a. The new head coach should introduce themselves and share their coaching philosophy with the larger coach group
 - b. Let the coaches know how you will continue to collaborate with them
 - c. Explain the role of the former head coach (if they will continue to coach with the team)
 - d. Remind coaches about their training requirements, and inform them of any upcoming opportunities to level up
 - e. Schedule a coaches practice
 - f. Thank them for joining you on this new journey!
2. Plan and execute recruitment events, info meetings, etc.

SEASON PLANNING

Review the full-season plan from the previous year, make adjustments to the season plan based on the end-of-season reflection meeting, and draft a new season plan

INDIVIDUAL PRACTICE PLANNING

Review the previous season's practice plans, adjust based on end-of-season reflection, and create the new season's plans.

PRO TIP!

You don't have to reinvent the wheel. Don't forget about NICA's coach resources. Access templates for info meeting agendas, slide decks, flyers, try-it out events, and even a sample plan for a preseason coach practice. Resources can be found in the NICA Education Center by logging into Pit Zone and clicking "Courses, Resources, & Benefits".

During the first season of new coach leadership

The first year of head coaching can be challenging. If possible, continue to have regular, established check-ins with your former head coach. They can act as a thought-partner, help with problem solving, and provide insight from their experiences.

Establish a regular check-in meeting

Mentorship meeting cadence

Set a weekly meeting for the current/future head coaches to check in for 15-30 minutes. Honor this meeting to keep communication efficient and concise.

In-season mentorship meeting schedule - what day and time will you meet?	
Day:	Time:

Mentorship meeting agenda

Every time you meet, [use the same questions](#) as previous check-ins as a guide for your meeting. These intentional questions spark thoughtful conversations – keep them consistent from week to week.