



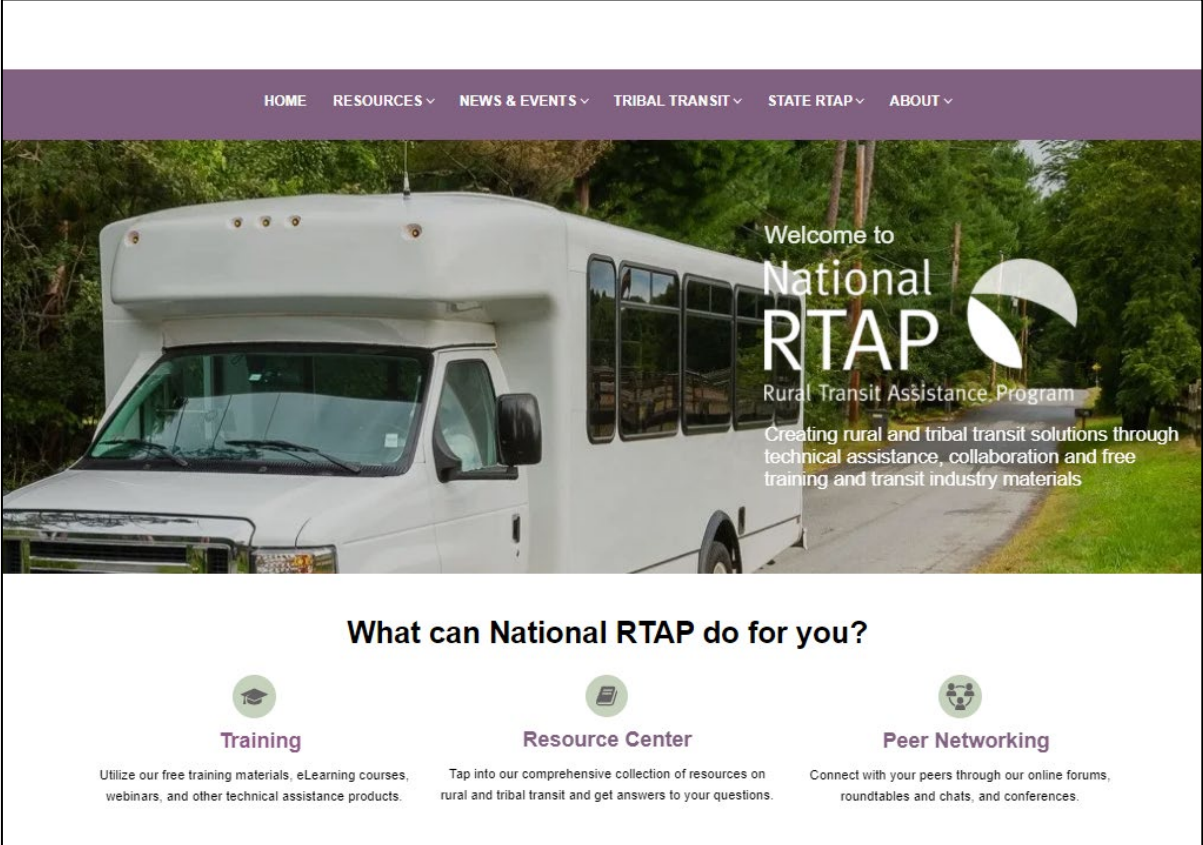
Succession Planning 101

June 13, 2024, 2:00-3:00 PM ET



National Rural Transit Assistance Program

- Technical assistance center funded by FTA through the Section 5311 Program
- Provides free training materials and technical assistance to rural and tribal transit providers and State RTAPs
- Review Board – 14 State DOT and rural and tribal transit agency staff from across the country
- Learn more at nationalrtap.org



HOME RESOURCES NEWS & EVENTS TRIBAL TRANSIT STATE RTAP ABOUT

Welcome to
National RTAP
Rural Transit Assistance Program

Creating rural and tribal transit solutions through technical assistance, collaboration and free training and transit industry materials

What can National RTAP do for you?

- Training**
Utilize our free training materials, eLearning courses, webinars, and other technical assistance products.
- Resource Center**
Tap into our comprehensive collection of resources on rural and tribal transit and get answers to your questions.
- Peer Networking**
Connect with your peers through our online forums, roundtables and chats, and conferences.

What is TACL?



<http://transportation-tacl.org>

The Transportation Technical Assistance Coordination Library (TACL) provides a sustainable methodology and platform for access and findability of rural and tribal transit coordination resources across a diverse range of transportation technical assistance centers and the Federal Transit Administration (FTA).

The FTA-funded technical assistance centers participating in this ongoing work are:

- National Aging and Disability Transportation Center (NADTC)
- National Center for Applied Transit Technology (N-CATT)
- National Center for Mobility Management (NCMM)
- National Rural Transit Assistance Program (National RTAP)
- Shared-Use Mobility Center (SUMC)
- Transit Workforce Center (TWC)

What is Succession Planning

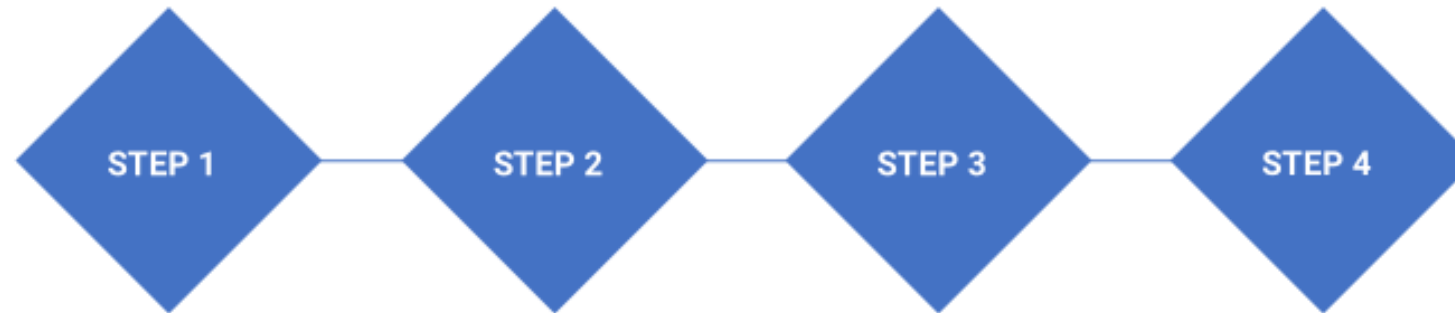
Succession planning is the strategic process of identifying and preparing high-potential employees through mentoring, training, and job rotation opportunities to replace staff, upon exiting the agency.

Source: TCRP, [Strategies to Attract and Retain a Capable Transportation Workforce](#). Washington, DC: The National Academies Press, 2011.



Steps in Succession Planning

— The Succession Planning Process



- **Preparation**

- Maintain job descriptions for each position. Identify staff likely to retire or change positions.

- **Skills**

- Identify the skills and key competencies needed to succeed in the position.

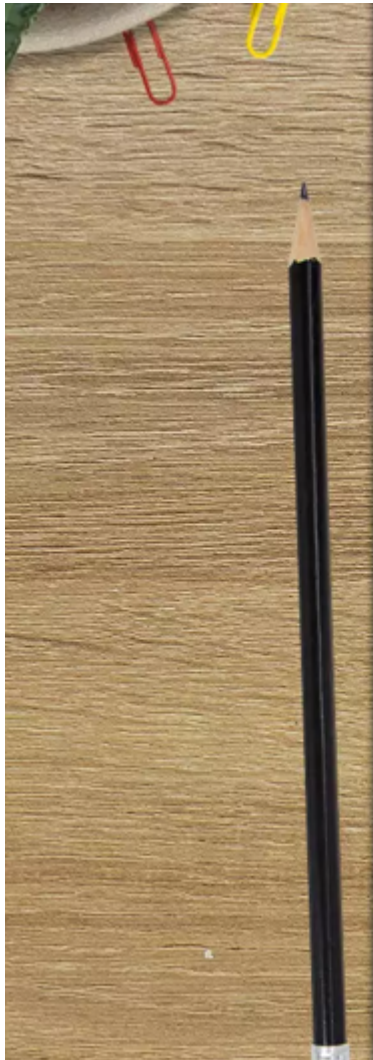
- **Training**

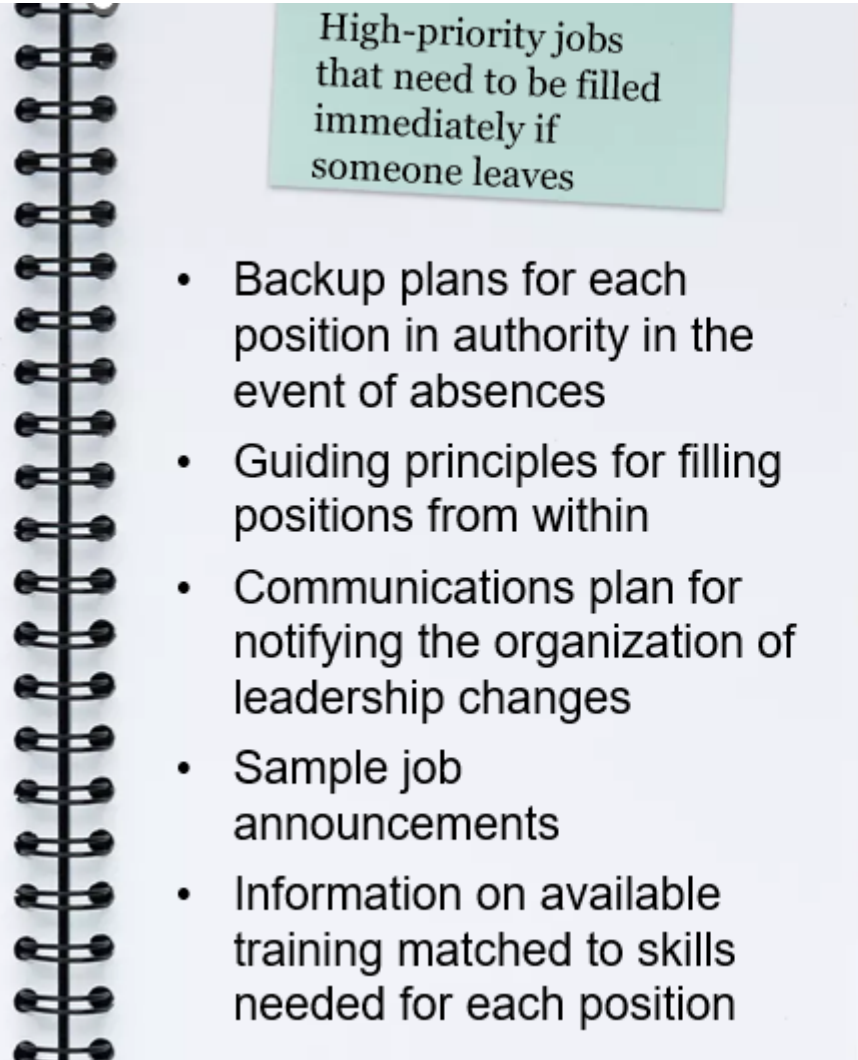
- Identify the training or experience needed to acquire these skills and offer training and mentoring to staff.

- **Create the plan**


- Whether the position is offered to an internal or external candidate, a written succession plan should be developed.

What Should be Included in a Succession Plan?

- 
- Organizational environment description, including mission, vision, values, structure, and governance
 - Organizational chart
 - Lines of authority & supervision of staff responsibilities by position
 - Current position descriptions
 - Roles each position has in everyday operations
 - Key competencies needed for each position
 - Procedures for appointing acting or interim roles



High-priority jobs that need to be filled immediately if someone leaves

- Backup plans for each position in authority in the event of absences
 - Guiding principles for filling positions from within
 - Communications plan for notifying the organization of leadership changes
 - Sample job announcements
 - Information on available training matched to skills needed for each position
- 

Succession Planning 101 Demo

<https://elearning.nationalrtap.org/>



Additional National RTAP Resources

Transit Manager's Toolkit

<https://www.nationalrtap.org/Toolkits/Transit-Managers-Toolkit/Administration/Human-Resources#SuccessionPlanning>

Succession Planning

A 2011 study published by the Transportation Research Board, **Strategies to Attract and Retain a Capable Transportation Workforce**, defines succession planning as the strategic process of identifying and preparing high-potential employees through mentoring, training, and job rotation opportunities to replace staff, upon exiting the agency. A 2016 study published by the National Center for Transit Research, **Workforce Development and Succession Planning to Prepare the Rural Transit Industry for the Future**, found that only about 15% of rural transit managers who responded to a national survey have succession plans. To ensure a transit agency will continue to function well after a transit manager retires or transitions to a new job, transit managers need to develop an effective succession plan for their successors. National RTAP hosted a **Succession to Transit Twitter Chat** in January 2020 during which participants shared recommendations and practical advice for building a succession plan. The recommendations included:

- Incorporate succession planning into/build upon existing planning efforts. Consider succession planning when doing strategic planning. Address as part of emergency planning to support staff who are isolated or made unavailable due to an emergency.
- Develop a plan that supports the agency's mission and vision
- Establish a mentoring program that allows employees to become familiar with processes enabling them to move up in the organization
- Consistently have open form discussions and frequent communications
- Have back up plans
- Cross train staff

Succession to Transit Twitter Chat

https://irp.cdn-website.com/270961f6/files/uploaded/Transit_Succession_Planning_Twitter_Chat_Summary.pdf



The screenshot shows a Twitter chat thread. The main tweet is from Mike Mowery (@mikemowery) on Jan 28, 2020, discussing the importance of listening in leadership. It has 3 likes and is replied to by #floridartap (@floridartap) and HIRTA Public Transit (@rideHIRTA). The replies discuss developing listening skills and the importance of having a shared strategic plan.

Mike Mowery @mikemowery · Jan 28, 2020
#Succession2Transit Excellent observation. All good leadership begins with good listening.

#floridartap @floridartap · Jan 28, 2020
Replying to @mikemowery @nat_rtap and @StrategicGovt
Developing listening skills and you are not developing an answer before you have heard the message/issue. #Success2Transit

Mike Mowery @mikemowery · Jan 28, 2020
#Succession2Transit Yes, and talk about that plan often. Organizations become what you talk about! We can't just make plans to decorate our bookshelves. They have to be kept in front of all of us.

HIRTA Public Transit @rideHIRTA · Jan 28, 2020
Replying to @mikemowery @nat_rtap and @StrategicGovt
Have a Strategic Plan that is shared with all the staff so they are part of the culture! #Succession2Transit

Using the Templates

- <https://nationalrtap.eos-intl.net/N94067/OPAC/Details/Record.aspx?BibCode=631950>
- Available in both MS Excel or Word and scalable, so you can adjust sections if you need more room to write
- The templates can be used for multiple positions within the same form or separate forms for each position.
- Electronic or printed versions should contain everything needed to provide the intended guidance, especially for unforeseen vacancies.

Q&A



Thank You

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