

Succession Planning 101

May 9, 2:00-3:00 PM ET

National RTAP
Rural Transit Assistance Program

MTAP

Federal Transit Administration

Speakers



Cara Marcus
Knowledge and Resource Manager
National RTAP



Rebecca Anger
Program Manager for Transit
AASHTO



Jonnie Kusek
Director of Transportation
Opens Plain Transit



Laura Corff
Transit Director
United Community Action Program
Cimarron Transit



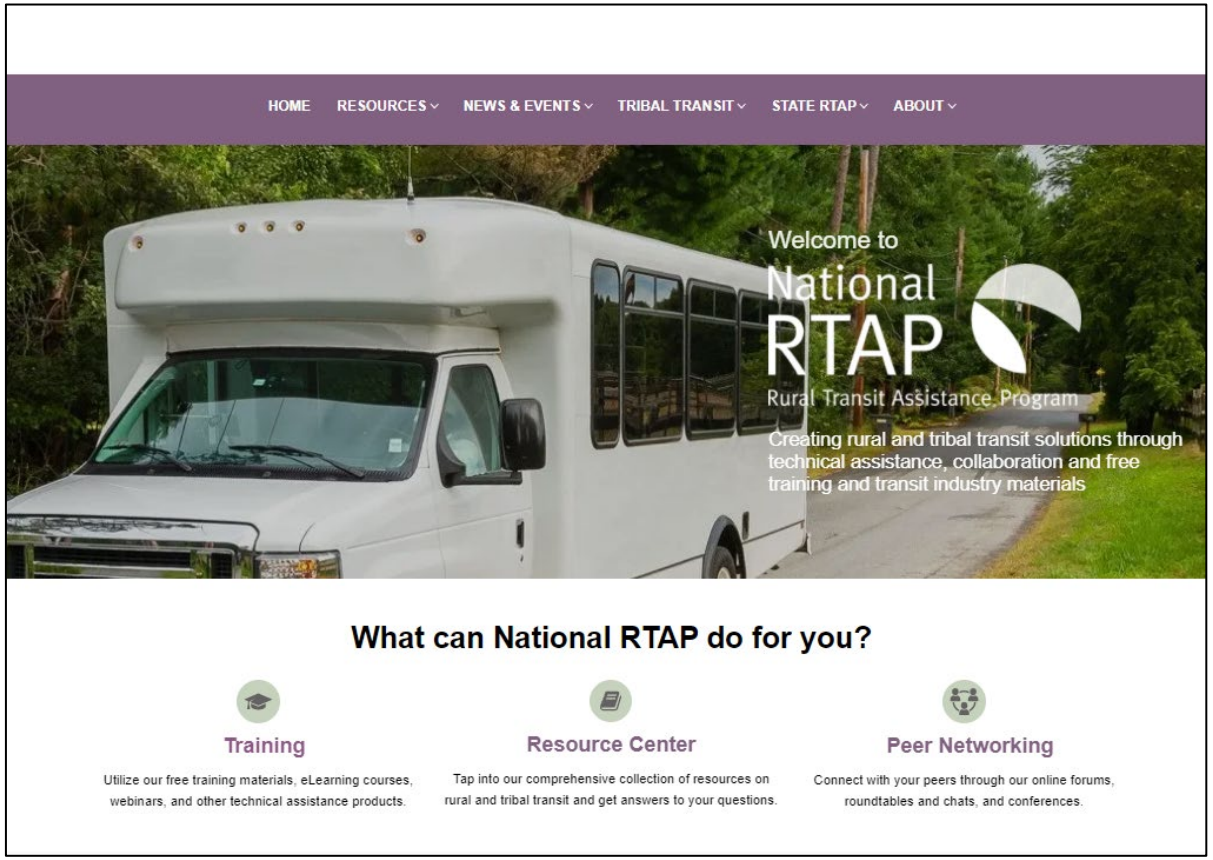
Bren Schweitzer
Transportation Program Coordinator
City of Sioux Falls, SD



Sara Walton
Public Transit Manager
Ohio Department of Transportation

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



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)

COUNCIL ON PUBLIC TRANSPORTATION

MTAP

Multi-State Transit Technical Assistance Program

mtap.transportation.org



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Public Transportation Division
Washington State DOT



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Kaitlyn McClanahan
Transit Manager
Tennessee DOT

Three in-person Annual Meetings	Online Educational Forums & Webinars	AASHTO Reports & NCHRP Research	Regulatory Support for Transit Programs	Biweekly e-News & Biannual Newsletters

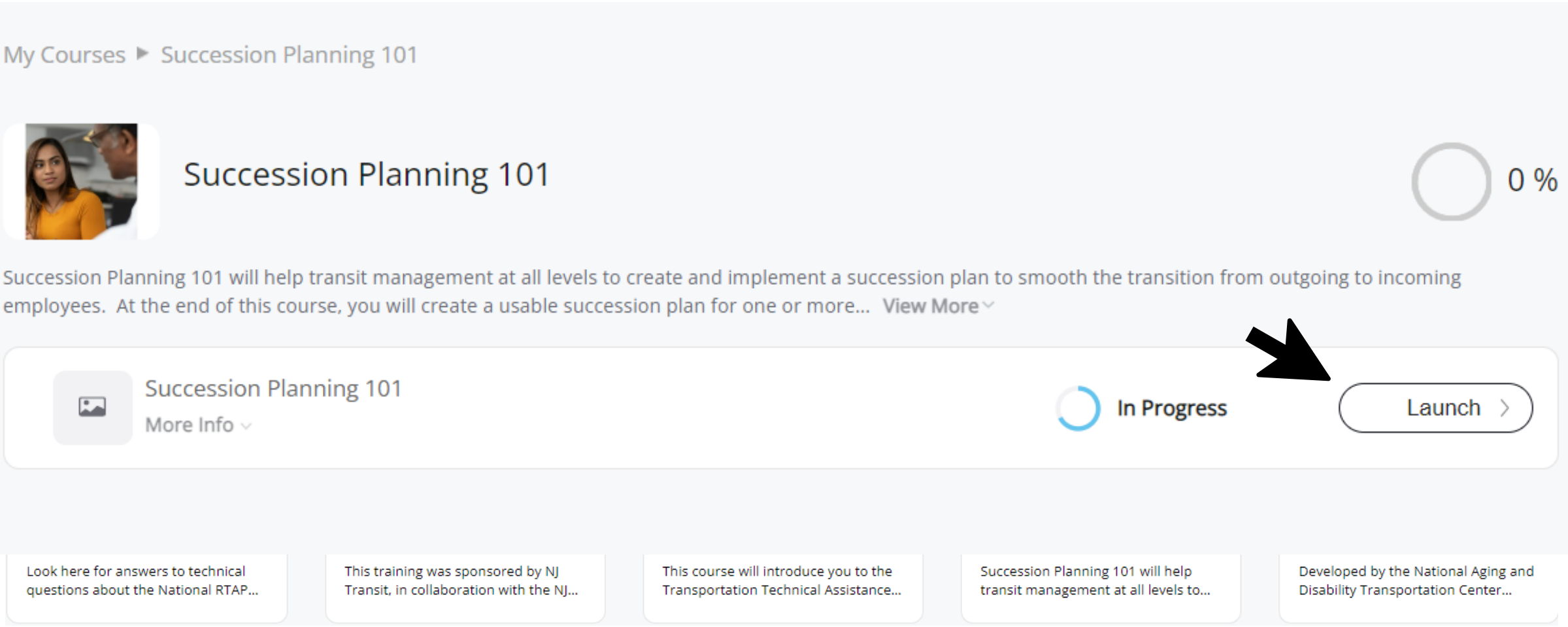
What is Succession Planning

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.



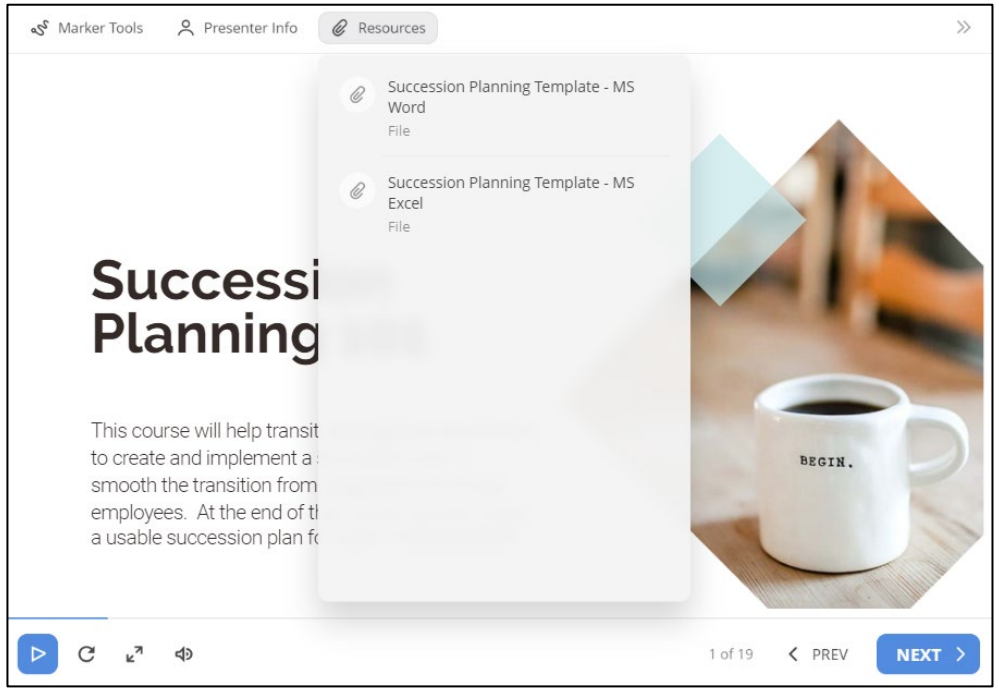
How to Find the Succession Planning 101 eLearning Course



How to Find the Succession Planning 101 Templates

In our eLearning course under Resources

https://elearning.nationalrtap.org/



In our Resource Library

https://cloud.nationalrtap.org/Resource-Center/Advanced-Search/fid/1328

Succession Planning Template

This National RTAP *Succession Planning Template* can be customized for any transit agency and any position. It is meant to be used in conjunction with the National RTAP eLearning course Succession Planning 101. It is created in MS Word and Excel, rather than PDF, so users can add extra rows to the charts easily. All instructions may be deleted, so they are not part of the succession plan if they are no longer needed.

External Link
Download
Add to Cart

Citation: National RTAP. Succession Planning Template. 2022. https://cloud.nationalrtap.org/Resource-Library/Advanced-Search/fid=1328

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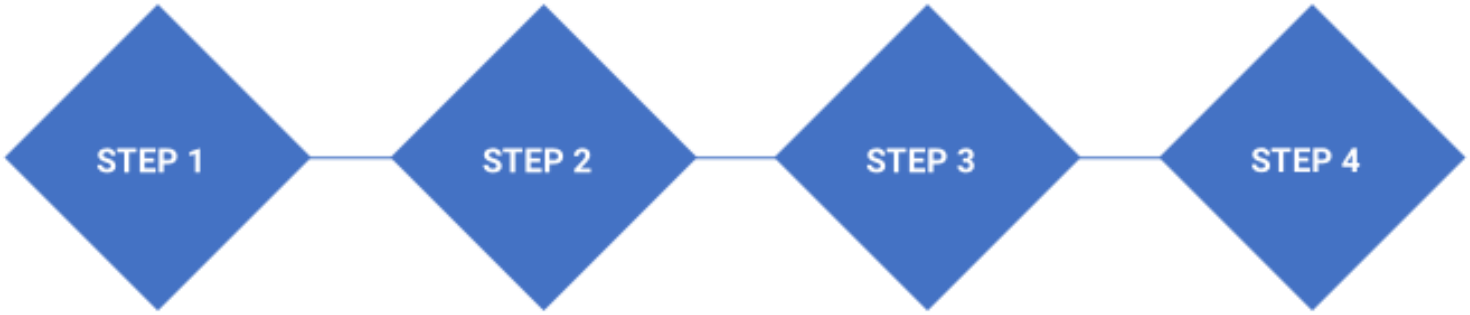
eLearning Course Content

Course Objectives

- Understand why succession planning is necessary
- For each role, understand its responsibilities and skills and knowledge needed for success
- Develop a plan that supports the agency's mission, vision, objectives, and strategic plan
- Create a succession plan for all roles within the organization
- Incorporate succession planning into existing planning efforts and involve key stakeholders
- Use the plan for onboarding, mentoring, and ongoing professional development

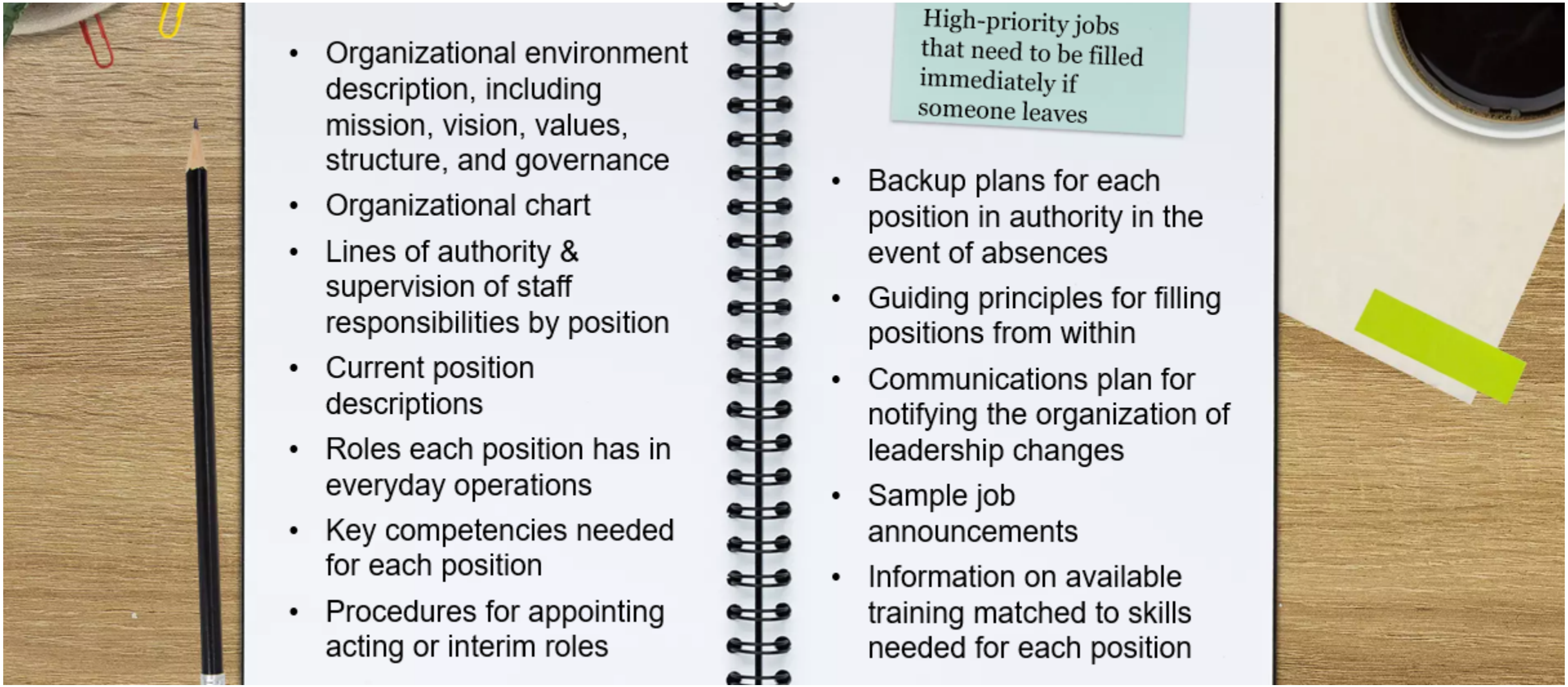
Steps in Succession Planning

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?



eLearning Course 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



Using the Templates

- Available in both MS Excel or Word
- 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.
- It may be helpful to include media contact information within the form for job posting procedures.
- Governing Boards and organizational bylaws should be included in Succession Plans where applicable.
- Electronic or printed versions should contain everything needed to provide the intended guidance, especially for unforeseen vacancies.

Panel Session

Three of our panelists, Laura, Bren, and Sara, will discuss their own succession planning journeys and share recommendations and best practices from their experiences.

Then, the panel session will open for participants to ask questions of any of today's speakers.

Participants are also welcome to share any best practices for succession planning that they would like to recommend.

Q&A



Thank You

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