

RTAP Peer Roundtable Notes

Succession Planning

06/18/2026 | 1:30-3 PM | Online

Attendees

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|------------------|-------------------|
| 1. Kathy Schultz | 5. Lezlie Grubich |
| 2. Stacy Struck | 6. Mariah Kathan |
| 3. Brandin Nurmi | 7. Jaycie Kratky |
| 4. DJ LaValla | |

Biggest Challenges

1. No Formal Succession Plans Exist

- None of the participating agencies had a written, formal succession plan in place at the time of the meeting.
- Where succession thinking exists at all, it tends to live at the parent-organization or board level and does not trickle down to transit operations staff.
- Many agencies rely on informal role redundancy or general cross-training rather than a structured plan that identifies who will fill specific positions and when.

2. Incoming Leaders Lack Onboarding Support

- New executive directors or managers frequently step into roles without any overlap with their predecessor, leaving them to piece together processes, contacts, and institutional knowledge on their own.
- Critical information — where files are stored, what recurring deadlines exist, which vendors and partners to contact, and what staff roles actually entail day-to-day — is often undocumented and held only in the outgoing person's head.
- New leaders may encounter staff resistance or confusion when they ask basic questions, compounding the difficulty of getting up to speed quickly.
- Staff with long tenure may have informal power or undocumented responsibilities that are invisible to incoming leadership until a problem surfaces.

3. Policies, Procedures, and Files Are Hard to Find or Out of Date

- Agencies struggle to maintain current, accessible documentation of policies, procedures, and role responsibilities in a central location that anyone can find and rely on.

- Documented processes created by one person are sometimes discarded or ignored when new staff arrive, making continuity difficult.
- Staff in operational roles often know exactly how to do their jobs but have never written it down, meaning that knowledge disappears when they leave.

4. Identifying and Developing Internal Candidates

- At smaller agencies, there are few — or no — staff members who have expressed interest in moving into higher-level roles, either because of age, limited ambition for advancement, or satisfaction with their current position.
- Agencies with predominantly older workforces face a near-term wave of retirements with little pipeline of younger staff ready to take on leadership responsibilities.
- Identifying who has the potential and interest for growth requires intentional conversations and observation that many managers do not have time for amid daily operational demands.
- Investing in someone's development only to have them leave the organization shortly afterward is a real concern, particularly at smaller agencies with limited training budgets.

5. Cross-Training Is Inconsistent or Incomplete

- Many agencies have at least one position — often a fiscal, operations, or dispatch role — where only one person knows how to do the work. If that person leaves unexpectedly, operations could be severely disrupted.
- Time constraints make it difficult to carve out dedicated cross-training opportunities alongside normal daily operations.
- Where cross-training does happen, it often covers only the most critical tasks and misses the nuance, judgment calls, and institutional context that make someone truly effective in a role.

6. Recruitment Pipeline Is Thin

- Rural transit agencies often draw from small local labor markets, making it harder to find candidates who are both qualified and willing to stay long term.
- Younger workers are less likely to commit to a single employer for decades, requiring agencies to rethink retention and development strategies.
- The transit field is not widely known as a career path among young people, and agencies have not always been proactive about promoting the long-term opportunities it offers.
- Posting positions and receiving no responses — or responses from candidates who quickly drop out — is a recurring frustration, particularly for operations-level roles.

7. Tribal Transit Agencies Face Additional Isolation

- Tribal transit programs are underrepresented in RTAP peer roundtables and broader Minnesota transit conversations, meaning they have fewer peers to learn from and share resources with.
- High turnover within tribal transit leadership makes it difficult for other agencies to maintain consistent contacts and relationships over time.
- Information-sharing between tribal and non-tribal agencies can be limited by cultural hesitancy, uncertainty about what is appropriate to share, and a lack of established relationships.

Solutions and Best Practices

Document Processes While You Work

- Use Scribe ([scribe.how](https://www.scribe.how)), a free tool that automatically captures screenshots and uses AI to generate step-by-step instructions as you complete computer-based tasks. It removes the need to manually take screenshots or write instructions from scratch.
- A free Scribe account is sufficient for most small agencies — documents can be printed or exported to Word or Excel once complete. Paid enterprise versions offer team access, database storage, and single sign-on integration.
- Even without Scribe, operations staff should begin maintaining a personal notebook or running document capturing what they do, how they do it, and where key files are located. The goal is that anyone could pick up that document and know where to start.
- Finance staff in particular can add significant value by documenting step-by-step processes for payroll, accounts payable, accounts receivable, and any accounting software workflows — even half a ream of paper of instructions is far better than nothing.
- When documenting dispatch or other dynamic roles, focus on the structured, repeatable parts of the job (entering rides, logging calls, handling standard requests) and acknowledge that judgment-based decisions are harder to capture but should at least be addressed in general guidance.

Build a Role Redundancy Map

- Create a spreadsheet or simple chart that identifies every critical position and lists at least one other person who can perform that role, or at least the core tasks within it, if the primary person is unavailable.
- This is sometimes called a "who do you contact if this person is out" document — even a basic version of this provides significant value during unexpected absences or departures.
- Aim to have at least two people cross-trained on every task that would halt operations or create a compliance risk if left undone.

Overlap Incoming and Outgoing Leaders

- For director-level positions, try to hire the incoming leader at least one month before the outgoing leader's final day, so the two can work side by side during the transition.
- Use that overlap period not just to walk through processes but to introduce the incoming leader to key vendors, funders, board members, and agency contacts so they inherit the relationship network, not just the job description.
- If an overlap is not possible, the outgoing leader should prepare a written transition document covering recurring deadlines, key contacts, in-progress projects, staff dynamics, and where to find critical files.

Hire for Soft Skills and Growth Potential

- Do not automatically screen out candidates who appear overqualified — they may be looking for a foot in the door and, once inside, can grow into higher-level roles over time. One agency director noted their assistant director started as a data entry employee for the volunteer driver program.
- Look for soft skills — communication, initiative, curiosity, adaptability — in interviews. How candidates interact during the conversation itself is often as telling as their formal answers.
- Candidates from working-class or non-traditional backgrounds who have worked their way up tend to be resilient, loyal when treated well, and receptive to professional development opportunities.
- Consider equivalent experience as a substitute for formal degrees wherever possible. All job descriptions should include language such as "or an equivalent combination of education and experience" to widen the eligible candidate pool.
- Keep strong candidates who were not selected for one role in mind for future openings. Reach out to them directly when relevant positions open rather than waiting for them to find the posting.

Use Performance Reviews for Development Conversations

- Leverage annual or semi-annual performance reviews as a structured opportunity to ask staff what skills they have that are not being used, what areas they would like to grow in, and what long-term interests they have within the organization.
- Set specific development goals based on those conversations — then follow through by sending staff to relevant training, pairing them with a mentor, or giving them stretch assignments.
- Actively listening to what staff say they want, and then acting on it, is one of the most effective retention tools available to transit managers.

Invest in People Even If They Leave

- Embrace the reality that not every person developed through succession planning will ultimately fill the role you envisioned for them — some will leave for better opportunities.
- Reframe this as a win: a well-developed former employee becomes a professional contact, a peer resource, and an ambassador for your agency in the broader transit community.
- Agencies that mentor eight people and retain one still end up with one highly capable successor who has the benefit of knowing eight others they can call on for support.

Proactively Identify and Develop Internal Candidates

- Hold regular informal conversations with staff — especially younger or newer employees — about their career interests. A dispatcher who mentions interest in HR should be encouraged, not just acknowledged. Connect them with job shadowing, certification guidance, or training opportunities.
- When a staff member expresses interest in a role but lacks confidence or specific skills, invest in targeted training (e.g., train-the-trainer programs) to help close that gap before the position opens.
- Encourage staff to take on additional tasks or short-term projects outside their normal role. Broader exposure builds capability and helps identify who rises to the occasion.

Expand Outreach for Tribal Transit Agencies

- RTAP can share its contact list of tribal transit agencies to help facilitate peer connections across programs.
- Tribal transit staff who have had positive experiences with RTAP are well-positioned to encourage participation from other tribal agencies, where hesitancy to engage may be rooted in unfamiliarity.
- Non-tribal transit agencies should make deliberate, sustained efforts to include tribal representatives in regional advisory committees and transportation planning conversations, and maintain updated contacts as tribal transit leadership changes.
- Explore or renew memoranda of understanding between tribal and non-tribal transit agencies where complementary service areas or ticket-sharing agreements could benefit both communities.

Engage the Community in Nontraditional Ways

- Cold outreach — approaching promising individuals directly over coffee or through referral networks — has proven effective for sourcing candidates who would not have applied to a posted job listing.

- Using part-time or intern positions as a low-risk on-ramp for candidates who are unsure whether transit is for them can yield long-term hires who become deeply committed to the mission.
- Sharing the long-term career potential of transit with young people — including at colleges and through community connections — can help build a pipeline that the field has historically underinvested in.

Ask a Peer: Questions and Answers

The following questions were raised during the Ask a Peer portion of the meeting.

Q: How can a tribal transit agency connect with other tribal transit programs in Minnesota to share information and resources?

A: A tribal transit coordinator raised this question, noting that tribal programs are consistently underrepresented in RTAP peer roundtables and that information-sharing between tribes can feel guarded or difficult to initiate. RTAP offered to share its contact list of tribal agencies, noting that a firsthand, positive experience with RTAP from a tribal peer would carry real weight in encouraging other tribal programs to participate. A participant who had previously worked with MnDOT's Office of Transit and Active Transportation shared that tribal agencies were underincluded in transit technology conversations and that direct outreach to tribal programs was well received when initiated. The group encouraged framing any outreach to other tribes around shared benefit and mutual learning, not comparison or competition.

Q: Two transit agencies have a memorandum of understanding to share tickets — but one agency's staff are not sure it is still active or how to honor it. How do they reconnect?

A: A representative from one of the agencies confirmed the MOU exists and that both agencies have historically honored it. The challenge identified was tracking down the right contact as leadership changes over time. The group recommended connecting through operations staff who manage regional advisory committees, since those relationships tend to be more stable. Participants exchanged contact information during the meeting to facilitate follow-up directly.

Q: What do you do when you have identified and developed someone for a future role and then they leave the organization?

A: One participant offered a clear answer: celebrate it. If someone you developed leaves for a better opportunity, it means the investment in their growth worked. They become a professional contact and network resource. Even if you mentor eight people and only one ultimately fills the role you had in mind, that final person has seven other well-connected peers they can draw on. The group agreed that the instinct to view departures as failures needs to shift — transit agencies that invest in people, even those who eventually leave, build stronger professional reputations and community relationships over time.

Q: How much say should an outgoing leader have in choosing their own successor?

A: One participant was direct: while they would invest heavily in preparing any successor, they would not want to be the decision-maker on who fills their own role, citing inherent conflict of interest. They would, however, enthusiastically participate in a transition overlap period — helping the incoming person learn processes, meet key contacts, and understand the institutional context. Others agreed, noting that at larger agencies the standard practice is to hire the new director at least a month before the previous one's departure so the two can work side by side.

Q: How do you involve staff who complain about processes in actually improving those processes rather than just venting?

A: A new executive director raised this question after hearing from staff early in her tenure that certain tasks were "not in their job description." An operations manager shared that for dispatch documentation, she actively solicits staff input — especially from experienced dispatchers — when building or refining SOPs. Getting everyone's ideas in writing, using different colors in a shared document to distinguish contributors, helps surface common themes and useful differences that can be synthesized into a stronger process. Another participant noted finding value in unexpected sources — such as a volunteer driver with an engineering background — who can bring a fresh, process-improvement perspective to operational workflows.

Next Peer Roundtable: August 20, 2026 – Stress & Time Management