

 **Online July 13-15**
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**INDUSTRY SALES
SUMMIT 2021**
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A REMINDER:

- Please keep your **microphone muted**.
- Please **do not use the group chat for sales** or promotional purposes.
- Please remember to pay your UMA dues!



Today's Agenda

1—Welcome & Intro

Larry Killingsworth

2—Motorcoach Minute

Featuring Kevin Creighton

3—UMA Legislative Update

Ken Presley and Becky Weber

4—Sales Summit Preview

Larry Killingsworth and Vicki Bowman

5—Driver Retention

- **Erin Ducharme**, Bloom's Bus
- **Brent Maitland**, MCI
- **James Blain**, PAX Training
- **Adam Hall**, Bridgestone Americas
- **Mike McDonal**, Saucon Technologies
- **Mike Van Horn**, Betterez
- **Pam Martinez**, DATTCO

6—Overdrive



The logo features the letters 'UMA' in a stylized blue font with a white swoosh underneath, followed by the word 'Online' in a green sans-serif font. Below this, the words 'TOWN HALL' are written in a large, bold, blue sans-serif font. A thin green horizontal line runs across the bottom of the 'UMA Online' section, and another thin green horizontal line runs across the bottom of the 'TOWN HALL' section.

UMA Online TOWN HALL

Ken Presley and Becky Weber
Legislative Update



[We can do this. Find COVID-19 vaccines near you. Visit Vaccines.gov.](#)

Coronavirus Economic Relief for Transportation Services (CERTS) Program

[Download Payroll Provider Letter Needed for CERTS Application](#)

[Information for companies applying from U.S. Territories](#)

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THE CERTS PORTAL IS OPEN AND ACCEPTING APPLICATIONS

Established by the Consolidated Appropriations Act, 2021, the Coronavirus Economic Relief for Transportation Services (CERTS) Program was created to support transportation service providers affected by the COVID-19 pandemic, including motorcoach, school bus, passenger vessel, and pilot vessel companies.

Under the program, Treasury will provide up to \$2 billion in grants to eligible companies that certify they have experienced an annual revenue loss of 25 percent or more as a direct or indirect result of COVID-19. CERTS grant funds are primarily to cover payroll costs, but may also be used to cover the acquisition of services, equipment, including PPE and protection measures from COVID-19 for workers and customers; continued operations and maintenance of existing equipment and facilities; rent, leases, insurance, and interest on regular debt service.

PROGRAM INFORMATION

Companies interested in applying for a CERTS grant should review the following documents.

- [CERTS Program Guidelines *Updated* \(06/17/2021\)](#) 
- [CERTS Frequently Asked Questions *Updated* \(06/29/2021\)](#) 
- [Information on the ID.me identity service](#) 
- [Information for companies applying from U.S. Territories](#)

[RECEIVE CERTS UPDATES](#)

APPLICATION PROCEDURES

CERTS

Updated FAQs

6/29/21

- There are three situations described for how to handle a form 941 that does not agree with the applicant's name and tax identification number. They are:
 - If a company uses a Professional Employer Organization, the company must upload a form letter signed by the PEO to validate the number of employees and compensation for the first quarter of 2020.
 - If a company's employees are paid under a consolidated company name, it must upload copies of the form 941 linked to the consolidated entity.
 - If a company is a holding company, the company must upload the form 941 related to the operating company.
- Main Street Lending Program loans are not reportable on the CERTS grant application.
- Changes have been made to ask applicant if the tax returns are for a calendar or fiscal year. If a company is a fiscal year (not a January through December year) reporter, the company will need to provide revenues on both a calendar year and fiscal year basis.

CERTS



Information & Action Center

POWERED BY 




CERTS Updated FAQs 6/29/21

- The answer to the average annual employees in 2019 should only include employees whose wages were reported on forms w-2. Do not include the number of independent contractors in this number.
- CERTS grants received may be used to pay independent contractors.
- The system validation message displayed after the principal business activity code has been changed to read “Please make sure the Principal Business Activity Code entered matches the code as it was entered on your 2019 tax return, and then proceed with completing the application.”
- Companies formed in US Territories (Guam, Puerto Rico, the U.S. Virgin Islands, American Samoa, and the Commonwealth of the Northern Mariana Islands) are eligible for the CERTS grant.
- For all FAQs, visit <https://home.treasury.gov/system/files/136/CERTS-FAQ-June-17-2021.pdf>.

We can do this. Find COVID-19 vaccines near you. Visit [Vaccines.gov](https://www.vaccines.gov).

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RECEIVE CERTS UPDATES



APPLICATION PROCEDURES

Application Deadline: The CERTS portal will be open for applications through July 19, 2021. To be considered, applications must be completed, electronically signed, and submitted through the portal by 11:59 PM ET on July 19. **After this deadline, no new applications, and users will not be able to finish draft applications in the portal.**

Accessing the CERTS Portal: To gain access to the CERTS portal and submit an application, a company representative must create an ID.me account and login with a username and password through the ID.me identity service. Interested companies may register to obtain access the CERTS portal here:

ACCESS THE CERTS PORTAL

If you have technical problems registering with ID.me, please visit the [ID.me + Treasury Help Page](#).



CERTS Portal

Detailed Instructions to Create an ID.me Account

June 2021

INVEST IN AMERICA ACT

Bill reauthorizing surface transportation programs for five years passed the House earlier today on an almost completely party-line vote of 221-201. Highlights of floor consideration:

Charter Service Rule:

- After discussions with Chairman DeFazio's staff, his Manager's amendment contained more modifications to the charter provision permitting public transits to do charter work sponsored by a local government entity that contributes local match:
 - Reduced number of days of service from 30 to 15
 - Required the service to be in the geographic service area of the transit agency
- UMA will continue to negotiate with Chairman DeFazio on this provision and is advocating vigorously in the Senate to avoid any incursions into the charter rule in their transit title, expected to be marked up in July. Please keep the grass roots effort opposing the House provision going.

National Employer Notification System

- UMA sent a letter to House Rules and Transportation and Infrastructure Committee leadership on Tuesday objecting to an amendment that would have directed FMCSA to create a national employer notification system of driving infractions on a drivers license for CDL drivers filed by Congressman Gottheimer (D-NJ) and Reed (R-NY). The House Rules Committee did NOT make the amendment in order so it did not receive consideration.

Registration

UMA Members:

- Individual \$109
- Team* of 5 people \$199

Non-Member:

- Individual \$219
- Team* of 5 people \$399

**Teams must be from the same operator or vendor company.*

Who should attend:

- Sales professionals
- Marketing professionals
- Owners/Managers
- Anyone who assists with your company's sales process



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UMA *Online July 13-15*
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REGISTER

REGISTER for the Sales Summit and be entered in a drawing to **WIN a FREE** website assessment from **VB Group Marketing & Event Resources**.

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**DRIVING
FORCE**



***RECRUITING
& RETAINING
DRIVERS***

Created by the ABA's Women in Buses Council, Driving Force is a program designed to tackle the nationwide driver shortage by providing industry operators tips and tools to recruit and retain their most valuable asset: **Drivers**



Who is behind the Driving Force?

James Blain, PAX Training

Erin Ducharme, Bloom's Bus

Adam Hall, Bridgestone Americas

Brent Maitland, MCI

Pam Martinez, DATTCO

Mike McDonal, Saucon Technologies

John Meier, Badger Bus

Debbie Piner, Prevost

Mike Van Horn, Betterez



CULTURE

“The Most Important Thing in Leadership is to Set a Culture”

Susan O'Malley, Former President of the NBA's Washington Bullets



- Perception with Employees
- Perception in the Community
- Perception from the Work Environment
- Perception with Customers



Perception is a Person's Reality



Steps to prepare for recruiting and retention

- ✓ Review the roadmap and toolkit
- ✓ Customize to your company
- ✓ Engage leadership
- ✓ Culture Check (See right)



Roadmap for Recruiting & Retention

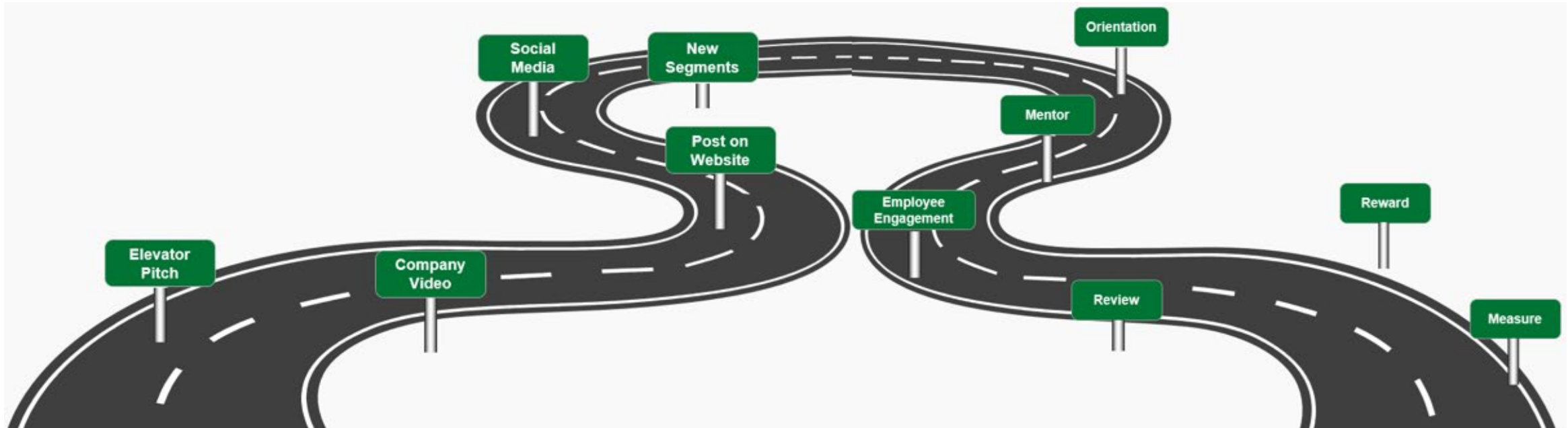
Culture is Critical

- ✓ Develop & showcase your company values
- ✓ Show employees you care
- ✓ Treat employees fair and with respect
- ✓ Provide a safe work environment
- ✓ Maintain a positive perception of the Company in the Community

RECRUITING

A
New
Career

RETENTION



The Recruiting and Retaining Roadmap will Enhance Your Most Valuable Assets – Drivers!

Tip: Welcome your new driver by making a great impression

Roadmap for Retention



Orientation

1. Onboarding & Orientation

- Set the tone of “Great Culture”, Involves owners/execs
- Functional review: Safety, Maintenance, etc.
- Key Performance expectations – A Great driver. What makes a great driver for your company
- Welcome letter

Mentor

2. Assign a Mentor

- Eases transition to revenue producing.
- Road test review
- “Help” desk function

Employee Engagement

3. Communication Plan: Part of a great Culture

- From leadership, Across drivers and company
- Make time to listen & engage with employees
- Show employees you care
- Maintain a positive perception of the Company in the Community

Reward

5. Employee Engagement: Celebrate & Recognize

- Milestones
- Service awards
- Newsletters
- Events

Review

4. Performance Feedback

- Timing: 90/180/365 days
- (Probation/checkpoint
- Great drive metrics
- Safety, Customer

Measure

6. Metrics

- Measure
- Analyze
- React
- Repeat

Onboarding & Orientation

Onboarding and orientation is the best way to set the tone for a new hire and make a great first impression.

Although they are related:

- **On-boarding** is the entire process of getting your employee (Driver) established in your organization.
- **Orientation** is part of onboarding, but is typically limited to a period of time where the new hire learns about the company, culture and key job responsibilities. During orientation, it is important for the employee to meet and begin to feel part of it.



Onboarding

Overview & Objectives: Remember, onboarding should include everything your employee will need to be effective in your organization and outstanding with your customers.

Key Steps

- Create an outline for your onboarding
- Tailor to your company
- Think about including some of the following:
 - A overview of the company
 - Expectations of drivers
 - Policy and procedures
 - Training plan

Outline

- Welcome letter
- Orientation agenda
- Training plan (Upcoming feature)
- Company success factors



Overview & Objectives: The orientation should outline all of the key activities for their first day or weeks as they prepare to hit the road.

Key Steps

- Create an agenda for your new driver **orientation**.

Outline of items you may want to include are:

- Overview of the company
- Expectations of drivers
- Policy and procedures
- Training
- Highlight your unique company culture
- Include meetings with or presentations from Key Management & Owners
- Include meeting with or presentation from key functions HR, dispatch, safety, operations & maintenance
- Review your company's success benchmarks – “What makes a great driver?”

AGENDA		
New Driver Orientation for Company XXX		
Date time Date time Meeting called by Name		
Attendees		
Name, Title 1 Name, Title 2 Name, Title 3 Name, Title 4 Name, Title 5 Name, Title 6 Name, Title 7 Name, Title 8 Name, Title 9 Name, Title 10 Name, Title 11 Name, Title 12 Name, Title 13		
Time	Item	Owner
Ad vance	Welcome letter	From X
	Day 1: Day, Date	
8:00 a.m.	Welcome	Owner
8:30	Company history and culture overview	Owner 3
Time	Review the “Roadmap” to success	Owner 4
Time	Review key function: Safety, Dispatch, Operation, Maintenance	Owner 5
Time	What it takes to be a Great Driver – Key success factors	Owner 6
Time	Break	Owner 7
Time	Functional Review: <ul style="list-style-type: none"> a. Review Shop and Fleet b. Safety and compliance c. Operations d. HR 	
Time	Fill out key Forms	Owner 9
Time	Review trainings	Owner 10
Time	Discuss mentorship	Owner 11
Time	Company Culture	
Time	Review activities and schedule for next days a weeks	
Time	Make time for listening – Q&A	

Assign a Mentor

Overview and Objectives

- A Mentor is an experienced employee that can help make the transition from new hire to seasoned driver easier.
- The role of the mentor is to show the new driver the ropes and be a helpline for basic questions.

Key Steps

- Select a mentor from a pool of successful drivers that have interest and experience.
 - A mentor should be an honor within a company. A good way to recognize these drivers is to add this as part of your employee recognition program.
- Explain the role
- Role includes:
 - Help desk
 - Questions on rules and policy
 - On the road test / ride-alongs



Communication Plan

Overview and Objectives

- Frequent and clear communication is an important element of employee satisfaction and retention.
- A critical part of the culture

A communication plan should be:

- Multifaceted, with employees hearing both information useful to their jobs as well as information on company status and strategy.
- Hearing from owners and executives is also important.
- Effective companies use multiple modes ranging from in-person, zoom, video, newsletter, email and social media.

Key Steps

- When planning your communication. Think about what employees want to hear and create 2-way dialog
- Make time to listen, take time to respond
- Act on feedback
- Let employees share ideas
- Determine what type of information you'd like to highlight. Examples can include:
 - Information on your company status and recovery
 - Information on company strategy
 - Opportunities to drive
 - Employee/s of the week/month
 - Industry news
 - Feedback/answers to employees questions.
- Determine the most effective ways to communicate for your company
- Determine the frequency that you want to communicate



Employee Engagement

Overview and Objectives

- It is important to build a team atmosphere and an open and communicative environment.
- One way to do this is to CELEBRATE milestones and success.
- Celebrating success does not need to be a monetary reward.
- Create team events and be part of the community.

Key Steps

- Types things to celebrate/recognize
 - Milestones
 - Service awards which could include such as: Driver of the week/month/year, Safety
 - Host company events such as BBQ's, Picnics and off-site outings.
 - Birthdays/Births/ other success
- Create award symbols
 - Pins, badges, etc, a visible recognition of success, and to incentivize others to do the same.
 - Announce at company meetings, newsletters or post throughout the company
 - Use company social media to showcase your employee's accomplishments
- Token of appreciation
 - Gift cards
 - Team pizza parties or cookouts
 - Personalized handwritten notes from management
- Share in newsletters, websites and social media



Performance & Feedback

Overview and Objectives

- Performance feedback is an opportunity to engage with the driver and focus on continuous improvement.
- Always to remember to acknowledge feedback on positive performance as well as what requires additional coaching.
- Having regular feedback will keep both you and the employee on the right track.
- When done correctly the employee will feel comfortable stating what areas they need to work on.

Key Steps

- Align timing with critical timing for possible turnover 1 week/90 days/ 1 year
- Ask the employee to provide what they did well, and what they can improve on?
- Provide feedback that aligns with your Key Performance criteria
- Includes both positive (What they did well) and Improvement area.
- Be specific
 - What you did. Specific example
 - What was the impact?
 - What is the plan moving forward?
- Start/Stop/Continue
 - Start: Do something not previously done.
 - Stop: Doing things you should not.
 - Continue: Doing certain things.
- Rating



Overview and Objectives

Measure and learn from your success and correct your weaknesses to improve retention. Most companies do not have tracking over time for employee retention. Installing some basic metrics can:

- Indicate if your approach is working.
- Provide areas in which you can improve.

Key Steps

- Install most important processes to track and measure.
- Key metrics could include:
 - 90 day and 1 Year Turnover
 - Turnover is # employees leaving/average over the period.
 - Stay and Leave Interviews to develop a TOP 10 reason list.
 - Interview employees: “Why do you stay with us?”
 - Exit interviews: Why did you decide to leave us?



Military Focus

Overview:

- The Bus & Coach Industry has a long history of working with the DoD/military branches
- Recently, in the last 2-3 years, the DoD has put a significant amount of effort into career development and assistance to transitioning military, reservists, National Guard, and veterans
- Personal and professional qualities, and in some cases CDL applicability, line up well with the Motorcoach Driver career
- Opportune time to increase our targeting of several military segments for Driver Recruitment

Driving Force Military Recruiting Track Goals:

- Provide strategies, tools and templates to Owner/Operators to increase military related Driver recruiting

Main Segments:

- Reservists and National Guard
- Transitioning Military and Veterans



New
Segments

Military Event

On May 12th the Driving Force hosted its first virtual military recruitment event

Transitioning Marines at Camp Pendleton, CA

H&L Charter of Rancho Cucamonga, CA

Audience - 40k Marines and Sailors are stationed at Pendleton, Approximately 10% transition annually

Marketing outreach | one hour to pitch Driver career

Leveraging Driving Force recruiting content already created

Opportunity to attract potential Drivers transitioning back to home states

This is a templated approach you can use right now



Where can I find this information?

- Hosted on ABA main web page
<https://www.buses.org/about/drivingforce>
- Tips on Recruiting & Retaining
 - All toolkit items posted here
 - Many have a PDF printable sheet and editable format for your use.
- The roadmap will serve as the overall guide.



TIPS ON RECRUITING & RETAINING DRIVERS

[Driving Force: Tips for Retaining and Retraining Your Furloughed Drivers for the Spring](#)

[Driving Force: The Importance of the Elevator Pitch](#)

[Driving Force: Creating a Great Job Listing is Important Part of Recruitment](#)

[Driving Force: Recruiting Tip: Conveying the Joy of Being a Professional Driver](#)

[Driving Force: Driver Recruitment Video](#)



What is next?

Actions

- Continue to issue “Tools” for the toolkit
- Develop and launch improved website for hosting
- Encourage sharing of best practices and usage.
- Industry metrics and benchmarking for results.
- Expand to draw NEW talent into our driver pool
- Social media

Join us for a Women in Buses Webinar on July 7th at 2pm EST
Driving Force Presents: Operator Case Studies on Recruitment & Retention



Jack Kaufman
Timi's Tours



Pam Martinez
DATTCO



Greg Hendricks
Salt Lake Express

Register at:

<https://www.buses.org/events/event/women-in-buses-wednesday15>



Questions?



To Learn More About The Driving Force Visit
<https://www.buses.org/about/drivingforce>