Welcome!

ABA Board of Directors

Fall 2019 Meeting
President’s Report
ABA Staff Retreats - 7/23 and 9/4

- Staff reviewed the strategic plan, the basis of our discussions
- Ensured that all employees, not just department heads participated and are on the same page
- Developed a better understanding of where the industry is today and where we believe it is going
- Worked on preparing for the challenges and opportunities over the next six months and over the next three years
ABA Staff Retreats - 7/23 and 9/4

• Threats of global war (North Korea, China, & Iran)
• Tariffs
• Political polarization
• Evolving technology developments & disruption
• Internet of everything-connecting modes and systems
• Talent gaps-finding drivers, others
• Cyber threats
• Mergers
• Increasing competition
• Shrinking profit margins

All of these and more will impact motorcoach and group travel and ABA, as well as our competitors and colleagues
Board Input to Staff

**Board Additions**

- Impact of the media on business, both positive and negative
- Insurance
- Used coach market and the impact on new and used coach sales and business valuations
- The long process for getting CDLs adds to the driver shortage, it must be uniform and streamline across all states
- Aggregators
ABA Staff Retreats - 7/23 and 9/4

- New innovations, disruptions and trends that affect the Industry.
- Bus Industry business & “up at night” challenges.
- The #1 issue that members want addressed by ABA.
- Understand ABA’s business impact on the Industry.
- Products and services which add the most value.
- Identify organizations that members work with to address business challenges and opportunities.
- ABA’s relevance in THE marketplace today.
- Factors that might make ABA more relevant three years from now.
- Identifying the ABA’s strength from a member perspective.
- Understand areas the members would like to see strengthened at ABA.
- What can ABA do to better drive industry growth?
ABA Staff Retreats - 7/23 and 9/4

What new innovations, disruptions or trends do you think will have the most positive impact on the Bus Industry and its supply chain?

• Improving data & analytics
• Environmental friendliness of coaches
• Technology that improves rider experience
• Improving technology for safety reasons
• Generational opportunities

What new innovations, disruptions, or trends do you think will have the most challenging impact on the Bus Industry and its supply chain?

• Industry disruptors (aggregators and others)
• Lack of succession
• Over-reliance on technology
• Security
• Cost of compliance – regulations at the federal and state levels
• Economy (good and bad, impacts different for sectors)
ABA Staff Retreats - 7/23 and 9/4

What are the “Up-At-Night” challenges for member companies, and the business issues that keeps the members “Up-At-Night” today?

- Employment shortage for the whole service industry (effects everything, customer service, etc.)
- Company liabilities (insurance)
- Several legislative issues: Lease & Interchange, NPS, meal and rest breaks, etc.
- Cost of doing business – lack of succession, regulations, driver shortage, industry consolidation

What is the #1 business issue that members want to see addressed or solved today?

- Workforce shortage
- Cost of regulatory compliance (“how do you keep up?”)
- Being able to maintain and grow the business
- Insurance costs

When it comes to the Bus Industry, what is ABA’s Current Business Impact i.e. grow the Industry, differentiating the value of the Industry, helping develop & recruit talent, or reducing costs? Please cite specific examples.

- Constant updates and news to members (both implicit & explicit)
- ABA needs to be more focused (can’t be all things to all members – and do it well)
Board Input to Staff

**Board Additions**

- Concern where the industry will be in five years with consolidation and the impact on ABA-membership sales
- Many owners are of retirement age and want out, and there are fewer entrants coming into the market, so fewer buyers of existing companies and for the secondary coach market
- Because of the ongoing difficulty in finding qualified drivers, could we target Uber and Lyft drivers since some want more income than they can generate driving their car
Board Input to Staff

Board Additions

• Marijuana laws are impacting driver and other employee hiring

• The HB1 visa issue is a challenge in many markets as it prevents companies from getting seasonal workers, this is especially true in the travel industry

• Social realignment regulations and legislation – more paid time off, more benefits, 30 days off required when the driver is only part time, added healthcare, etc.
ABA Staff Retreats - 7/23 and 9/4

Which products or services adds the greatest business impact to ABA and the Bus and Tour Industry?

• Business offered to members in order to operate at Marketplace
• Advocacy
• Data
• Operational information
• Visible ROI
• Fruits of advocacy – conveying the impact of the advocacy and be able to quantify it to the member level but because of this we are able to put money in your pocket.

What makes ABA most relevant to the Industry today?

• Brings industry together –ALL segments
• First to tackle issues
• ABA is more well-known & more involved (legislative, regulatory and media)
• The staff expertise, longevity, education, characteristics, etc.

What would make ABA even more relevant 3 years from now?

• Having more data in order to identity the trends of “Up-At-Night” challenges, innovations and disruptions.
• Resilient approach to fulfilling our mission.
ABA Staff Retreats - 7/23 and 9/4

From a member perspective, what are the organization’s key strengths?

• Strength & voice in industry
• Strong leadership - Board
• Biggest leader & convener of industry and information
• Trusted resource in the Industry
• Customer Service
• ABA positions the Industry in “THE Marketplace”

What are the areas that members would like to see strengthened further?

• Increase in revenue
• Greater political clout (as compared to other industries in federal departments and on the Hill)
• More operators via Marketplace and THE Marketplace

What things would you like the organization do to better to help drive Industry Growth?

• Understand our competitors – both modes of travel and associations or companies
• Share information amongst each other within the association “Who else needs to know?”
• Deliver data on Industry trends and operations
• Maximize the industry’s position with stakeholders (legislators and regulators and media)
• Serve a role to assist the Industry on the talent search and screening (could this be an ABA function)
ABA Staff Retreats - 7/23 and 9/4

ROI Information

- Advocacy – Membership
- Government Affairs
- Increased engagement (council meetings, webinars, etc.)
- Increase engagement with Comm/Marketing

Membership

- Increase engagement with Comm/Marketing
- Analyzing effectiveness of travel destination (for prospects) – staff travel (amend)
- Create/Provide STAR Reports
- Member contact information (more than one contact per company)
- ABA Database and Website – must be user friendly

Marketplace

- Finding new buyers
- Keep Marketplace relevant – travel buying has changed
- In-depth study of education sessions
- Threats caused by generational changes

Publishing, Communications & Marketing

- Getting the word out – We over communicate with our members.
- Will only send information if it has added value.
- Consider an annual ROI Report (incorporated into the ABA Annual Report).
Assuming ABA does not exist, how would the new Association be structured and how could the organization address industry challenges & business outcomes?

- Hire an Analytics Expert/Research Department
- Industry advertisement & promotion
- New name (North American ……... (motorcoach, tour, travel, etc.)
- No ties (non-members can go to Marketplace)
- Hold leadership conference (hold twice a year)
- Equipping volunteer leaders (board and members across ABA) - (chairs of committees, councils, to better understand roles and responsibilities of the association)
- Bus safety & sharing this information (making sure operators are following rules & standards)
- Tracking buses
Welcome!

ABA Board of Directors

Fall 2019 Meeting
Counsel’s Report
Antitrust Guidelines

- No discussion of rates or components of rates
- No division of markets, passengers or services
- No agreements to not deal with competitors, vendors or customers
- These rules apply throughout the meeting at all times
FAST Act Tolling Equity

- OTRBs to receive same rates, terms and conditions as transit vehicles at tolling facilities constructed with federal funds under 23 USC § 129(a)

- FHWA released guidance for funding recipients on Feb. 22, 2018; list of affected facilities included but no information on rates or terms for public transit buses
FHWA Tolling Issues

- Initial list of affected facilities found in the docket, but no info on terms for public transit vehicles
- ABA sent letters to MassDOT and 20 other toll facility operators in Nov. 2018 asking for certification of compliance with equity requirements and info on terms/rates for transit buses
Tolling Responses

- Gathering data from facility operators: 12 of 20 have said no special deals for transit buses
- 3 others (Minneapolis, SF Bay Area, Louisville) have exemptions for transits that OTRBs may also use
Massachusetts DOT

- FHWA issued final determination on August 15 that Ted Williams Tunnel is the only Mass. facility subject to sec. 129
- Massachusetts statute exempts MBTA transit buses from all tolls
- Propose meeting with DOT Secretary to discuss refunds, future exemption
Border Patrol Boarding Buses

- U.S. Border Patrol has been boarding buses without warrants within 100 air-miles of border for immigration checks
- ACLU, Washington Attorney General want carriers to resist boardings
- ABA policy in June 2018 was not to interfere with CBP/law enforcement in carrying out immigration checks
Immigration Boardings

- After threatened litigation from Washington AG, ABA, Greyhound and Jefferson Lines met with DHS/CBP staff on August 20 to discuss our concerns
- Carriers were considering denying consent to board buses without warrants, but otherwise not interfere with CBP agents
Fall 2019 PAC Report

2019 Fall Board of Directors Meeting
September 22-24, 2019

The Breakers Resort
Palm Beach, Florida
FUND BALANCE

Balance (as of 9/13/2019) $272,081

2019 Income $67,590
2019 Expenditures $30,500
2019 BOARD CONTRIBUTIONS

- **Total Board**
  - Contributors: 63%
  - Non-Contributors: 31%
  - Non-US: 6%

- **Eligible Board**
  - Contributors: 33%
  - Non-Contributors: 67%
2019 BusPAC DONORS – Top Tier

CHAIRMAN’S CLUB
(Contributions of $5,000)

Doug Anderson
Linda Burtwistle
Terry Fischer
Peter Picknelly
Francis Tedesco
Bill Torres
2019 BusPAC DONORS – Supporting Tiers

**PRESIDENTS CLUB**
(Contributions of $3,000 to $4,999)

**CAPITOL CLUB**
(Contributions of $2,000 to $2,999)
Gene Berardi
Alan Glickman
Don DeVivo

**EXECUTIVES CLUB**
(Contributions of $1,000 to $1,999)
Gregory Tedesco
Ben Blunt
Mike Butts
Craig Lentzsch

**DIRECTORS CLUB**
(Contributions of $500 to $999)
Ron Bast
Jonathan Berzas
David Eaton
Mike Dickson
Chris Shepler
Michelle Wiltgen

**MANAGERS CLUB**
(Contributions of $250 to $499)
A.J. Kinney
Kim Grzywacz
John Percy
Bryan Cole

Roman Cornell
Dane Cornell
TJ Morgan
Woody Blunt
Tom JeBran
Ron Moore
Karen Sanders
Steve Woelfel

To date, in 2019 ABA staff have contributed over $4,000
2019 BUSPAC EXPENDITURES

2019

- 30 events – ABA participation
  - 25 events – contribution total of $30,500
    - 4 events sponsored/hosted by BusPAC
  - 5 events – no funds expended

Democrats 64%
Republicans 36%

House 87%
Senate 13%
Balance as of 9/13/19 $11,250

2019 Income $11,750
2019 Expenditures $  2,500

$7000 contribution from Michael Colborne!
Make 2019 BusPAC’s Best Year Ever:

Help BusPAC Reach $100,000!

$67,590
raised as of September 18

THANK YOU!
## 2019 YTD Revenue

<table>
<thead>
<tr>
<th></th>
<th>Through 8 Months 2019</th>
<th>Budget 2019</th>
<th>Through 8 Months 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Membership</td>
<td>1,491,000</td>
<td>1,721,000</td>
<td>1,506,000</td>
</tr>
<tr>
<td>Marketplace</td>
<td>3,637,000</td>
<td>3,320,000</td>
<td>3,296,000</td>
</tr>
<tr>
<td>Publications</td>
<td>322,000</td>
<td>636,000</td>
<td>333,000</td>
</tr>
<tr>
<td>Other Income</td>
<td>371,000</td>
<td>453,000</td>
<td>383,000</td>
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<tr>
<td><strong>Total Revenue</strong></td>
<td><strong>5,821,000</strong></td>
<td><strong>6,130,000</strong></td>
<td><strong>5,518,000</strong></td>
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</tbody>
</table>
## 2019 YTD Expenses

<table>
<thead>
<tr>
<th></th>
<th>Through 8 Months 2019</th>
<th>Budget 2019</th>
<th>Through 8 Months 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Government Affairs</td>
<td>896,000</td>
<td>1,199,000</td>
<td>837,000</td>
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<tr>
<td>Communications</td>
<td>255,000</td>
<td>331,000</td>
<td>258,000</td>
</tr>
<tr>
<td>Membership</td>
<td>510,000</td>
<td>585,000</td>
<td>557,000</td>
</tr>
<tr>
<td>Marketplace</td>
<td>1,604,000</td>
<td>1,602,000</td>
<td>1,352,000</td>
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<tr>
<td>Publications</td>
<td>329,000</td>
<td>688,000</td>
<td>362,000</td>
</tr>
<tr>
<td>G &amp; A</td>
<td>1,103,000</td>
<td>1,478,000</td>
<td>1,110,000</td>
</tr>
<tr>
<td>Board of Directors</td>
<td>154,000</td>
<td>246,000</td>
<td>180,000</td>
</tr>
<tr>
<td><strong>Total Expense</strong></td>
<td><strong>4,851,000</strong></td>
<td><strong>6,129,000</strong></td>
<td><strong>4,656,000</strong></td>
</tr>
<tr>
<td><strong>Net Income</strong></td>
<td><strong>970,000</strong></td>
<td><strong>1,000</strong></td>
<td><strong>862,000</strong></td>
</tr>
</tbody>
</table>
# American Bus Association Reserve - Portfolio Overview

As of: Aug 31, 2019  Inception Date: Oct 18, 2018  Performance Inception Date: Nov 04, 2018

## Asset Allocation

<table>
<thead>
<tr>
<th>Asset Class</th>
<th>Value</th>
<th>Percent</th>
<th>QTD</th>
<th>YTD</th>
<th>ITD (Annualized)</th>
<th>Date Of Inception</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deposits &amp; Money Market Funds</td>
<td>$20,802</td>
<td>0.4%</td>
<td>0.38%</td>
<td>1.56%</td>
<td>1.89%¹</td>
<td>Nov 06, 2018</td>
</tr>
<tr>
<td>Investment Grade Fixed Income</td>
<td>2,375,481</td>
<td>45.2%</td>
<td>1.24</td>
<td>5.22</td>
<td>6.27¹</td>
<td>Nov 04, 2018</td>
</tr>
<tr>
<td>Other Fixed Income</td>
<td>353,565</td>
<td>6.7%</td>
<td>0.96</td>
<td>9.51</td>
<td>6.93¹</td>
<td>Nov 04, 2018</td>
</tr>
<tr>
<td>US Equity</td>
<td>1,655,798</td>
<td>31.5%</td>
<td>-0.49</td>
<td>18.22</td>
<td>8.22¹</td>
<td>Nov 04, 2018</td>
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<tr>
<td>Non-US Equity</td>
<td>845,871</td>
<td>16.1%</td>
<td>-2.28</td>
<td>11.48</td>
<td>9.03¹</td>
<td>Nov 04, 2018</td>
</tr>
<tr>
<td><strong>Total Investment Strategies</strong></td>
<td><strong>$5,251,517</strong></td>
<td><strong>100.0%</strong></td>
<td><strong>0.09%</strong></td>
<td><strong>10.32%</strong></td>
<td><strong>6.80%¹</strong></td>
<td><strong>Nov 04, 2018</strong></td>
</tr>
</tbody>
</table>

## Reference Benchmark Performance

<table>
<thead>
<tr>
<th>Reference Benchmark</th>
<th>QTD</th>
<th>YTD</th>
<th>ITD (Annualized)</th>
<th>Date Of Inception</th>
</tr>
</thead>
<tbody>
<tr>
<td>50% Bloomberg BC 1-5Y US Credit TR / 50% MSCI World NTR Index in USD</td>
<td>-0.20%</td>
<td>10.47%</td>
<td>7.23%</td>
<td>Nov 04, 2018</td>
</tr>
<tr>
<td>50% Bloomberg BC US Agg TR / 50% MSCI ACW NTR Index in USD</td>
<td>0.37%</td>
<td>11.56%</td>
<td>9.48%</td>
<td>Nov 04, 2018</td>
</tr>
<tr>
<td>50% Bloomberg BC US Agg TR / 50% MSCI World TR Index in USD</td>
<td>0.67%</td>
<td>12.56%</td>
<td>10.06%</td>
<td>Nov 04, 2018</td>
</tr>
</tbody>
</table>

## Investment Results

<table>
<thead>
<tr>
<th>Description</th>
<th>QTD</th>
<th>YTD</th>
<th>ITD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Beginning Investment</td>
<td>$5,248,376</td>
<td>$4,665,930</td>
<td>$0</td>
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<tr>
<td>Ending Investment</td>
<td>$5,251,517</td>
<td>$5,251,517</td>
<td>$5,251,517</td>
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<tr>
<td>Net Deposit and Withdrawal</td>
<td>$82</td>
<td>$100,251</td>
<td>$4,910,060</td>
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<tr>
<td>Investment Results</td>
<td>$3,059</td>
<td>$485,336</td>
<td>$341,457</td>
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1 Return shown is cumulative.
### ASSET ALLOCATION

<table>
<thead>
<tr>
<th>Asset Class</th>
<th>Value</th>
<th>Percent</th>
<th>QTD</th>
<th>YTD</th>
<th>ITD (Annualized)</th>
<th>Date Of Inception</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deposits &amp; Money Market Funds</td>
<td>$7,660</td>
<td>0.1%</td>
<td>0.38%</td>
<td>1.55%</td>
<td>1.88%</td>
<td>Nov 06, 2018</td>
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<tr>
<td>Investment Grade Fixed Income</td>
<td>1,684,665</td>
<td>24.6%</td>
<td>1.38</td>
<td>5.52</td>
<td>6.18</td>
<td>Nov 04, 2018</td>
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<tr>
<td>Other Fixed Income</td>
<td>538,539</td>
<td>7.9%</td>
<td>0.96</td>
<td>9.77</td>
<td>7.26</td>
<td>Nov 20, 2018</td>
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<tr>
<td>US Equity</td>
<td>3,115,057</td>
<td>45.5%</td>
<td>-0.50</td>
<td>18.17</td>
<td>8.33</td>
<td>Nov 04, 2018</td>
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<tr>
<td>Non-US Equity</td>
<td>1,494,779</td>
<td>21.9%</td>
<td>-2.23</td>
<td>11.58</td>
<td>7.09</td>
<td>Nov 04, 2018</td>
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<tr>
<td><strong>Total Investment Strategies</strong></td>
<td><strong>$6,840,701</strong></td>
<td><strong>100.0%</strong></td>
<td><strong>-0.32%</strong></td>
<td><strong>12.70%</strong></td>
<td><strong>7.45%</strong></td>
<td><strong>Nov 04, 2018</strong></td>
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### PERFORMANCE

<table>
<thead>
<tr>
<th>ASSET ALLOCATION</th>
<th>PERFORMANCE</th>
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</thead>
<tbody>
<tr>
<td><strong>ITD (Annualized)</strong></td>
<td><strong>Date Of Inception</strong></td>
</tr>
<tr>
<td>------------------</td>
<td>-------------</td>
</tr>
<tr>
<td><strong>QTD</strong></td>
<td><strong>YTD</strong></td>
</tr>
<tr>
<td>$6,840,701</td>
<td>100.0%</td>
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### REFERENCE BENCHMARK PERFORMANCE

<table>
<thead>
<tr>
<th>Reference Benchmark</th>
<th>QTD</th>
<th>YTD</th>
<th>ITD (Annualized)</th>
<th>Date Of Inception</th>
</tr>
</thead>
<tbody>
<tr>
<td>70% MSCI ACW NTR / 30% Bloomberg BC 1-5 Year US Government/Credit TR Index QR in USD</td>
<td>-1.14%</td>
<td>11.11%</td>
<td>6.50%</td>
<td>Nov 04, 2018</td>
</tr>
<tr>
<td>70% MSCI ACW NTR / 30% Bloomberg BC US Agg TR Index MR in USD</td>
<td>-0.61%</td>
<td>12.58%</td>
<td>8.18%</td>
<td>Nov 04, 2018</td>
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<tr>
<td>70% MSCI World NTR / 30% Bloomberg BC US Agg TR Index MR in USD</td>
<td>-0.24%</td>
<td>13.51%</td>
<td>8.68%</td>
<td>Nov 04, 2018</td>
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### INVESTMENT RESULTS

<table>
<thead>
<tr>
<th>Investment Results</th>
<th>QTD</th>
<th>YTD</th>
<th>ITD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Beginning Investment</td>
<td>$6,665,060</td>
<td>$6,110,451</td>
<td>$0</td>
</tr>
<tr>
<td>Ending Investment</td>
<td>$6,840,701</td>
<td>$6,840,701</td>
<td>$6,840,701</td>
</tr>
<tr>
<td>Net Deposit and Withdrawal</td>
<td>$0</td>
<td>-$45,000</td>
<td>$6,325,195</td>
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<tr>
<td>Investment Results</td>
<td>-$24,359</td>
<td>$775,250</td>
<td>$515,506</td>
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</table>

1 Return shown is cumulative.
## 2020 Budget - Revenue

<table>
<thead>
<tr>
<th>Revenue</th>
<th>Budget 2020</th>
<th>Budget 2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Membership</td>
<td>1,739,000</td>
<td>1,721,000</td>
</tr>
<tr>
<td>MKPL/Meetings</td>
<td>3,538,000</td>
<td>3,320,000</td>
</tr>
<tr>
<td>Publications</td>
<td>641,000</td>
<td>636,000</td>
</tr>
<tr>
<td>Other Income</td>
<td>513,000</td>
<td>454,000</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>6,431,000</strong></td>
<td><strong>6,131,000</strong></td>
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</table>
# 2020 Budget - Expense

<table>
<thead>
<tr>
<th>Expenses</th>
<th>Budget 2020</th>
<th>Budget 2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Government Affairs</td>
<td>1,305,000</td>
<td>1,199,000</td>
</tr>
<tr>
<td>Communications</td>
<td>409,000</td>
<td>331,000</td>
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<tr>
<td>Membership</td>
<td>592,000</td>
<td>585,000</td>
</tr>
<tr>
<td>Marketplace</td>
<td>1,643,000</td>
<td>1,602,000</td>
</tr>
<tr>
<td>Publications</td>
<td>588,000</td>
<td>688,000</td>
</tr>
<tr>
<td>G &amp; A</td>
<td>1,569,000</td>
<td>1,478,000</td>
</tr>
<tr>
<td>Board of Directors</td>
<td>276,000</td>
<td>246,000</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>6,382,000</strong></td>
<td><strong>6,129,000</strong></td>
</tr>
</tbody>
</table>
• Current Real Estate Loan
  • $3,026,000 = Current Balance
  • 12/01/2019-12/01/2020 = Refinance period
  • $2,992,000 = Balance at beginning of refinance period
  • 3.56% = Current Interest Rate (tax-exempt financing)

• Current Proposal for new loan
  • 4.19% = Interest Rate (taxable financing)
  • 15 year fixed interest rate period
  • 20 year amortization schedule
    • Monthly payments (P&I)
      • $20,500 = Current Loan
      • $18,000 = $3 Million Loan
      • $12,000 = $2 Million Loan
      • $6,000 = $1 Million Loan

• Down Payment Implications on Reserve Fund
ABA Foundation
<table>
<thead>
<tr>
<th>Primary Focus</th>
<th>Fundraising Opportunities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Research</td>
<td>Direct Contributions &amp; General Research</td>
</tr>
<tr>
<td>Scholarships</td>
<td>Silent/Live Auctions</td>
</tr>
<tr>
<td></td>
<td>Sponsorships/Advertising</td>
</tr>
<tr>
<td></td>
<td>Afterglow</td>
</tr>
<tr>
<td></td>
<td>Dues check-off</td>
</tr>
</tbody>
</table>
Updates

- Released Environmental Study Update
- Targeting new donors for match campaign
- Seeking increased participation from companies for 2019 Motorcoach Census
## Financial Update

<table>
<thead>
<tr>
<th>Revenue</th>
<th></th>
<th>Expenses</th>
</tr>
</thead>
<tbody>
<tr>
<td>$197,600</td>
<td>$270,376</td>
<td>$197,600</td>
</tr>
</tbody>
</table>

### Net

<table>
<thead>
<tr>
<th>2020 Budget</th>
<th>2019*</th>
<th>2019 Budget</th>
<th>2018*</th>
</tr>
</thead>
<tbody>
<tr>
<td>($133,450)</td>
<td>$24,394</td>
<td>($133,450)</td>
<td>($59,692)</td>
</tr>
</tbody>
</table>

- As of July 31

*Does not include any investment activity, revenue or expense*
Scholarship Program

Scholarships Available
ABA Member, Bus & Tour Operator, Driving the Future, Academic Merit, Diversity, Peter L. Picknelly, Ron Cornell, Yellow Ribbon Scholarship

$100,000 total offered through 21 scholarships
• $5,000 – 19 Scholarships
• $2,500 – 2 Scholarships

Fundraising income at ABA’s Marketplace used exclusively for scholarship funding
## Scholarship Program Applications

<table>
<thead>
<tr>
<th></th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
<th>2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Applications Completed</td>
<td>47</td>
<td>147</td>
<td>149</td>
<td>156</td>
<td>212</td>
</tr>
<tr>
<td>Applications Submitted</td>
<td>48</td>
<td>158</td>
<td>192</td>
<td>208</td>
<td>294</td>
</tr>
<tr>
<td>Applications Started</td>
<td>131</td>
<td>541</td>
<td>1,046</td>
<td>1,057</td>
<td>1,089</td>
</tr>
</tbody>
</table>

### 2020 Timeline

- Online application opens - **December 5**
- Application Deadline - **April 2**
- Extended Deadline - **April 16**
Research

Ongoing Projects
• 2017 Motorcoach Census Completed
• Group travel & tourism economic impact and local reports
• Quarterly manufacturer data collection

Other Projects
• The Environmental Benefits of Motorcoach Travel Update Completed

Future
• Motorcoach Driver Payment Structures Study – Texas A&M Transportation Institute
• Federal Transportation Subsidy – Nathan Inc.
GOVERNMENT AFFAIRS AND POLICY REPORT

2019 Fall Board of Directors Meeting

September 23-24, 2019
The Breakers
Palm Beach, FL
I. STRATEGIC GOALS

2019 ABA Strategic Plan
- Government Affairs and Policy (GAP):

1. Legislative impact on industry, and report on successes;

2. Change/Modify existing regulations; prevent onerous/burdensome regulatory actions;

3. Resource Management
II. LEGISLATIVE BRANCH MATTERS

A. Appropriations
   1. Budget Deal
   2. CR
   3. FY 2020 Bills
      a. T-HUD
      b. Interior
      c. Homeland Security

B. Other Legislation of Note
   1. Infrastructure – S. 2302
   2. FLSA – H.R. 3485/S. 2217
   3. Motor Carrier Accountability – H.R. 3628
   5. Brand USA – H.R. 3851/S. 2203
A. Regulations

1. Lease & Interchange – Final Rule
2. HOS provisions – NPRM
3. Drug & Alcohol Clearinghouse – Final Rule implementation
4. Motorcoach Model Curriculum (Entry Level Driver Training) – Final Rule implementation
5. CDL’s/Driver Shortage – multiple
6. TSA – Security Training – awaiting Final Rule
B. Administrative Actions

1. USDOT/FMCSA
   a. Petitions – CMR, SFO, 19A, Chicago Decal
   b. Crash Preventability Program

2. DHS
   a. TSA/FEMA FY 2019 Grants
   b. CBP/ICE
      i. Bus Boardings
      ii. APIS

3. DOI/NPS
   a. Entry Fees
   b. CUA program – Also Forest Service?
IV. RESOURCE MANAGEMENT

A. Councils

1. BISC - 2019 Summer Meeting (June 25-26)
   a. BISC West – October 15, with CBA

2. BusMARC – 2019 Summer Meeting (June 26-27)

B. State/Regional Associations

State/Regional Association

a. Participation in 5 state/regional/transportation mtgs
b. Next quarterly conference call: September 26, 2019
c. Upcoming 2020 Roundtable & Legislative Update
Questions?

Thank you

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Suzanne Rohde  
Senior Vice President  
American Bus Association  
Srohde@buses.org  
202/218-7224
Membership
Membership Department Overview

What’s New?

New Benefits & Resources

Member Engagement

Outreach campaign

ABA on the Road

Dora Hoyt

Rozina Estfanos
Help member companies engage drivers to improve upon safety and efficiency

Provides accurate, actionable information and analysis to the lodging industry
Member Engagement

Member Spotlight

Meet Mindy Dean-Caldwell from Portland Spirit and Columbia Gorge Sternwheeler Cruises in Portland, Ore.

ABA on the Road – Northwest USA Spotlight, Olympia, WA

Onboarding Webinar
Outreach Campaign

- RTO Summit
- Discover New England
- International Pow Wow
- Student & Youth Travel Association
Questions?

Thank you

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Lia Zegeye
Senior Director, Membership
American Bus Association
lzegeye@buses.org
202.218.7234
Meetings & Education
<table>
<thead>
<tr>
<th>Category</th>
<th>MKPL 2020</th>
<th>MKPL 2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>OPERATORS</td>
<td>567</td>
<td>536</td>
</tr>
<tr>
<td>AT BUYERS</td>
<td>263</td>
<td>257</td>
</tr>
<tr>
<td>DMO</td>
<td>375</td>
<td>370</td>
</tr>
<tr>
<td>LODGING</td>
<td>267</td>
<td>234</td>
</tr>
<tr>
<td>ATTRACTIONS</td>
<td>440</td>
<td>404</td>
</tr>
<tr>
<td>REC OP/CHARTER</td>
<td>74</td>
<td>75</td>
</tr>
<tr>
<td>ASSOCIATES</td>
<td>121</td>
<td>79</td>
</tr>
<tr>
<td>TOTAL</td>
<td>1864</td>
<td>1717</td>
</tr>
</tbody>
</table>
ABA’s MARKETPLACE 2020

Targeted mailings, phone calls and emails

74 Education Sessions for all attendee segments

Revised Sponsorship Program
  • Busworld Academy
  • Tennessee Breakfast
  • Year-Round Partnerships

ABA Gives Back in Omaha
  • Scatter Joy Acres
  • Saving Grace

Social Media, Marketing and Branding

CTIS Graduation at Sunday Lunch
ABA’s MARKETPLACE 2021
Atlanta
Boston
Charlotte
Cincinnati
Cleveland
Detroit
Ft. Lauderdale
Gaylord Rockies
Kansas City
Las Vegas
Miami
New Orleans
Orlando
Reno Tahoe
FUTURE BOARD MEETINGS

Spring Board Meeting 2020
April 27 – 28, 2020
Conrad Hilton
Washington, D.C.

Fall Board Meeting 2020
Sept. 21 - 22, 2020
The Biltmore
Asheville, N.C.

Spring Board Meeting 2021
April 26 – 27, 2020
Conrad Hilton
Washington, D.C.
Communications
RESEARCH PROMOTION

• Released the 2017 Motorcoach Census Report – June 2019
• Released the Updated Modes of Transportation Environmental Report – Sept. 2019

Upcoming:
• 2018 Group Travel & Tourism Economic Impact – Oct. 2019
• PSA video promoting Environmental Report – Nov. 2019
RESEARCH PROMOTION

Upcoming:

• 2018 Group Travel & Tourism Economic Impact – Oct. 2019
• PSA video promoting Environmental Report – Nov. 2019
BUSWORLD ACADEMY PROMOTION

• Running advertisements in Oct/Nov/Dec in BusRide Magazine, METRO and APTA’s Passenger Transport magazine
• Coordinating Email Blasts with METRO and BusRide
• Personalized invitation from Don and Luke to all ABA members + all operators we have contact details for