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March 2021

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March 23, 2021

TO: BOARD OF DIRECTORS

FROM: VY VU, SYSTEM ADMINISTRATOR - DATA

RE: KEY PERFORMANCE INDICATORS

ISSUE:

The following pages provide a summary of the Key Performance Indicators for:

- Operations and Safety
- Eligibility and Appeals
- Customer Service

System

Trip Performance

	Goal	Dec-20	Jan-21	Feb-21	YTD
Vehicle Trips		130,228	119,688	131,903	1,062,600
Passenger Trips		159,549	145,431	162,182	1,313,079
Backup Trips		0	0	1	34
No Shows		2.6%	2.7%	2.4%	2.8%
On Time Performance (Next Day Trips)	≥ 91%	95.7%	96.3%	92.8%	93.7%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.01%	0.02%	0.04%	0.04%
Excessively Long Trips	≤ 5%	0.0%	0.0%	0.0%	0.0%
Missed Trips	≤ 0.75%	0.21%	0.18%	0.32%	0.29%
Denials	≤ 0	0	1	0	2
On Time Performance (Access to Work)	≥ 94%	99.5%	99.7%	99.7%	98.3%

Call Performance

	Goal	Dec-20	Jan-21	Feb-21	YTD
<i>Reservations</i>					
Answered Calls		109,427	105,263	114,211	903,637
Average Initial Hold Time	≤ 120 sec	34	30	35	44
Calls On Hold > 5 Minutes	≤ 5%	0.9%	0.9%	0.8%	1.7%
<i>Estimated Time of Arrival (ETAs)</i>					
Answered Calls		24,753	23,298	28,873	213,995
Average Initial Hold Time		31	28	29	37
Calls On Hold > 5 Minutes	≤ 10%	1.0%	0.7%	0.6%	1.2%

Complaints/Commendations

	Goal	Dec-20	Jan-21	Feb-21	YTD
Complaints Per 1,000 Trips	≤ 4.0	2.0	1.7	2.3	2.1
Commendations Per 1,000 Trips		1.5	1.0	1.3	1.3

Safety

	Goal	Dec-20	Jan-21	Feb-21	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.26	0.09	0.04	0.10
Preventable Collisions Per 100,000 Miles	≤ 0.50	0.39	0.47	0.49	0.48
Miles Between Road Calls	≥ 25,000	60,164	77,186	72,150	64,104

Antelope Valley Region Trip Performance

	Goal	Dec-20	Jan-21	Feb-21	YTD
Vehicle Trips		6,252	6,041	6,584	53,751
Passenger Trips		9,354	8,865	9,827	79,943
No Shows		2.7%	2.4%	2.4%	2.4%
On Time Performance (Next Day Trips)	≥ 91%	91.6%	91.1%	92.6%	90.3%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.11%	0.19%	0.11%	0.21%
Excessively Long Trips	≤ 5%	0.0%	0.0%	0.1%	0.0%
Missed Trips	≤ 0.75%	0.64%	0.56%	0.71%	0.64%
Denials	≤ 0	0	0	0	0
On Time Performance (Access to Work)	≥ 92%	100.0%	100.0%	100.0%	99.5%

Call Performance

	Goal	Dec-20	Jan-21	Feb-21	YTD
<i>Reservations</i>					
Answered Calls		3,438	3,561	3,507	33,381
Average Initial Hold Time	≤ 120 sec	57	60	37	66
Calls On Hold > 5 Minutes	≤ 5%	2.2%	3.0%	1.3%	3.8%

<i>Estimated Time of Arrival (ETAs)</i>					
Answered Calls		2,113	1,997	2,186	17,222
Average Initial Hold Time		66	67	66	75
Calls On Hold > 5 Minutes	≤ 10%	3.4%	3.3%	3.1%	4.6%

Complaints/Commendations

	Goal	Dec-20	Jan-21	Feb-21	YTD
Complaints Per 1,000 Trips	≤ 4.0	2.4	2.2	3.9	3.1
Commendations Per 1,000 Trips		1.8	0.5	2.4	1.4

Safety

	Goal	Dec-20	Jan-21	Feb-21	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.79	0.00	0.00	0.19
Preventable Collisions Per 100,000 Miles	≤ 0.50	0.00	0.00	0.58	0.37
Miles Between Road Calls	≥ 25,000	*	37,797	64,128	82,250

Contractual Requirement

Eastern Region Trip Performance

	Goal	Dec-20	Jan-21	Feb-21	YTD
Vehicle Trips		32,356	29,788	32,882	266,491
Passenger Trips		39,630	36,028	40,370	328,753
No Shows		2.5%	2.9%	2.3%	2.8%
On Time Performance (Next Day Trips)	≥ 91%	95.0%	96.2%	91.3%	92.9%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.00%	0.00%	0.06%	0.04%
Excessively Long Trips	≤ 5%	0.0%	0.0%	0.0%	0.0%
Missed Trips	≤ 0.75%	0.17%	0.15%	0.31%	0.30%
Denials	≤ 0	0	0	0	0
On Time Performance (Access to Work)	≥ 95%	100.0%	98.9%	100.0%	99.0%

Call Performance

	Goal	Dec-20	Jan-21	Feb-21	YTD
<i>Reservations</i>					
Answered Calls		27,048	26,323	28,326	216,070
Average Initial Hold Time	≤ 120 sec	16	16	23	28
Calls On Hold > 5 Minutes	≤ 5%	0.2%	0.7%	0.8%	1.4%

<i>Estimated Time of Arrival (ETA)</i>					
Answered Calls		5,192	4,783	5,946	44,688
Average Initial Hold Time		12	11	10	18
Calls On Hold > 5 Minutes	≤ 10%	0.2%	0.3%	0.1%	0.7%

Complaints/Commendations

	Goal	Dec-20	Jan-21	Feb-21	YTD
Complaints Per 1,000 Trips	≤ 4.0	2.0	1.5	2.2	2.2
Commendations Per 1,000 Trips		1.4	0.5	1.0	1.4

Safety

	Goal	Dec-20	Jan-21	Feb-21	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.00	0.17	0.00	0.02
Preventable Collisions Per 100,000 Miles	≤ 0.50	0.60	0.95	0.52	0.55
Miles Between Road Calls	≥ 25,000	78,453	72,625	62,508	58,103

Contractual Requirement

Santa Clarita Region

Trip Performance

	Goal	Dec-20	Jan-21	Feb-21	YTD
Vehicle Trips		1,241	1,163	1,301	10,662
Passenger Trips		1,305	1,233	1,395	11,518
No Shows		1.9%	1.1%	1.1%	1.7%
On Time Performance (Next Day Trips)	≥ 91%	97.0%	97.6%	96.2%	95.9%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.00%	0.08%	0.00%	0.03%
Excessively Long Trips	≤ 5%	0.0%	0.1%	0.0%	0.1%
Missed Trips	≤ 0.75%	0.36%	0.51%	0.24%	0.37%
Denials	≤ 0	0	0	0	0
On Time Performance (Access to Work)	≥ 94%	-	-	-	0.0%

Call Performance

	Goal	Dec-20	Jan-21	Feb-21	YTD
<i>Reservations</i>					
Answered Calls		1,095	970	1,129	9,307
Average Initial Hold Time	≤ 120 sec	45	46	90	53
Calls On Hold > 5 Minutes	≤ 5%	2.9%	3.0%	5.9%	3.3%

<i>Estimated Time of Arrival (ETA)</i>					
Answered Calls		110	100	109	1,072
Average Initial Hold Time		38	48	82	49
Calls On Hold > 5 Minutes	≤ 10%	2.7%	4.0%	5.5%	3.6%

Complaints/Commendations

	Goal	Dec-20	Jan-21	Feb-21	YTD
Complaints Per 1,000 Trips	≤ 4.0	0.0	0.9	0.0	1.3
Commendations Per 1,000 Trips		0.8	0.9	0.0	0.2

Safety

	Goal	Dec-20	Jan-21	Feb-21	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.00	0.00	0.00	0.00
Preventable Collisions Per 100,000 Miles	≤ 0.50	0.00	0.00	0.00	0.00
Miles Between Road Calls	≥ 25,000	*	*	*	100,844

Contractual Requirement

*Note: There were zero (0) road calls for these months.

Northern Region Trip Performance

	Goal	Dec-20	Jan-21	Feb-21	YTD
Vehicle Trips		17,727	15,766	17,487	144,434
Passenger Trips		21,674	19,126	21,361	178,445
No Shows		3.2%	3.3%	3.2%	3.3%
On Time Performance (Next Day Trips)	≥ 91%	93.6%	94.9%	91.6%	93.8%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.04%	0.04%	0.03%	0.06%
Excessively Long Trips	≤ 5%	0.2%	0.1%	0.1%	0.1%
Missed Trips	≤ 0.75%	0.35%	0.33%	0.43%	0.32%
Denials	≤ 0	0	0	0	0
On Time Performance (Access to Work)	≥ 94%	100.0%	100.0%	100.0%	97.1%

Call Performance

	Goal	Dec-20	Jan-21	Feb-21	YTD
<i>Reservations</i>					
Answered Calls		17,623	16,554	18,355	147,048
Average Initial Hold Time	≤ 120 sec	62	60	56	60
Calls On Hold > 5 Minutes	≤ 5%	1.8%	1.9%	0.8%	1.2%
<i>Estimated Time of Arrival (ETA)</i>					
Answered Calls		3,792	3,191	4,212	29,109
Average Initial Hold Time		46	44	47	51
Calls On Hold > 5 Minutes	≤ 10%	0.6%	0.7%	0.6%	0.8%

Complaints/Commendations

	Goal	Dec-20	Jan-21	Feb-21	YTD
Complaints Per 1,000 Trips	≤ 4.0	2.4	2.1	4.1	2.8
Commendations Per 1,000 Trips		3.4	2.7	1.8	2.3

Safety

	Goal	Dec-20	Jan-21	Feb-21	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.23	0.00	0.00	0.09
Preventable Collisions Per 100,000 Miles	≤ 0.50	0.23	0.00	0.28	0.18
Miles Between Road Calls	≥ 25,000	35,774	78,904	88,053	71,774

Contractual Requirement

Southern Region Trip Performance

	Goal	Dec-20	Jan-21	Feb-21	YTD
Vehicle Trips		51,048	46,986	51,318	410,602
Passenger Trips		61,038	55,898	61,650	494,336
No Shows		2.2%	2.2%	2.0%	2.3%
On Time Performance (Next Day Trips)	≥ 91%	96.5%	96.7%	94.2%	94.1%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.00%	0.00%	0.01%	0.00%
Excessively Long Trips	≤ 5%	0.0%	0.0%	0.0%	0.0%
Missed Trips	≤ 0.75%	0.17%	0.13%	0.24%	0.23%
Denials	≤ 0	0	0	0	1
On Time Performance (Access to Work)	≥ 92%	98.8%	100.0%	99.3%	98.0%

Call Performance

	Goal	Dec-20	Jan-21	Feb-21	YTD
<i>Reservations</i>					
Answered Calls		41,378	39,739	42,919	343,414
Average Initial Hold Time	≤ 120 sec	41	29	36	53
Calls On Hold > 5 Minutes	≤ 5%	1.2%	0.7%	0.7%	1.8%
<i>Estimated Time of Arrival (ETA)</i>					
Answered Calls		9,807	9,733	11,911	89,415
Average Initial Hold Time		36	29	31	41
Calls On Hold > 5 Minutes	≤ 10%	1.3%	0.6%	0.4%	1.1%

Complaints/Commendations

	Goal	Dec-20	Jan-21	Feb-21	YTD
Complaints Per 1,000 Trips	≤ 4.0	1.6	1.5	1.4	1.5
Commendations Per 1,000 Trips		1.1	0.8	1.4	0.9

Safety

	Goal	Dec-20	Jan-21	Feb-21	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.39	0.00	0.13	0.19
Preventable Collisions Per 100,000 Miles	≤ 0.50	0.30	0.46	0.59	0.47
Miles Between Road Calls	≥ 25,000	69,217	70,134	58,897	63,880

Contractual Requirement

West Central Region Trip Performance

	Goal	Dec-20	Jan-21	Feb-21	YTD
Vehicle Trips		21,604	19,944	22,330	176,626
Passenger Trips		26,548	24,281	27,578	220,050
No Shows		3.3%	3.7%	2.9%	3.6%
On Time Performance (Next Day Trips)	≥ 91%	97.5%	97.7%	92.8%	94.6%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.01%	0.00%	0.07%	0.05%
Excessively Long Trips	≤ 5%	0.0%	0.0%	0.0%	0.0%
Missed Trips	≤ 0.75%	0.12%	0.13%	0.32%	0.28%
Denials	≤ 0	0	1	0	1
On Time Performance (Access to Work)	≥ 91%	100.0%	100.0%	100.0%	99.2%

Call Performance

	Goal	Dec-20	Jan-21	Feb-21	YTD
<i>Reservations</i>					
Answered Calls		18,845	18,116	19,975	154,417
Average Initial Hold Time	≤ 120 sec	17	17	24	29
Calls On Hold > 5 Minutes	≤ 5%	0.2%	0.6%	0.9%	1.5%
<i>Estimated Time of Arrival (ETA)</i>					
Answered Calls		3,739	3,494	4,509	32,489
Average Initial Hold Time		11	9	12	17
Calls On Hold > 5 Minutes	≤ 5%	0.3%	0.1%	0.1%	0.6%

Complaints/Commendations

	Goal	Dec-20	Jan-21	Feb-21	YTD
Complaints Per 1,000 Trips	≤ 4.0	2.4	1.8	3.0	2.4
Commendations Per 1,000 Trips		1.2	0.9	1.0	1.2

Safety

	Goal	Dec-20	Jan-21	Feb-21	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.26	0.00	0.00	0.03
Preventable Collisions Per 100,000 Miles	≤ 0.50	0.58	0.42	0.49	0.76
Miles Between Road Calls	≥ 25,000	48,593	179,339	136,090	62,871

Contractual Requirement

Eligibility and Appeals

Eligibility

	Goal	Dec-20	Jan-21	Feb-21	YTD
Eligible Customers		132,394	131,245	129,975	129,975
Total ADA Evaluations Performed		2,941	2,102	2,847	23,537
Days From Application to Decision (avg)	≤ 21	6	6	4	5

In Person Evaluations*

	Goal	Dec-20	Jan-21	Feb-21	YTD
Unrestricted		0	0	0	0
Restricted		0	0	0	0
Temporary		1,842	1,304	1,050	12,429
Not Eligible		35	25	10	341
Total		1,877	1,329	1,060	12,770

*Conducted vis phone interview due to COVID-19

Paper Evaluations

	Goal	Dec-20	Jan-21	Feb-21	YTD
Unrestricted		1,064	773	1,786	10,752
Restricted		0	0	0	0
Temporary		0	0	1	15
Not Eligible		0	0	0	0
Total		1,064	773	1,787	10,767

Appeals

	Goal	Dec-20	Jan-21	Feb-21	YTD
Appeals Performed		17	16	11	118
Days From Appeal to Decision (avg)	≤ 30	6	6	6	6

Customer Service

Phone Statistics

Customer Service

	Goal	Dec-20	Jan-21	Feb-21	YTD
Customer Service Calls		12,627	11,428	12,588	112,554
Average Initial Hold Time	≤ 180 sec	37	31	59	63
Calls On Hold > 5 Minutes	≤ 10%	2.4%	1.8%	5.1%	6.0%
Call Duration	≤ 300 sec	258	258	268	269
Calls Abandoned	≤ 10%	1.0%	0.8%	1.7%	2.1%

Operations Monitoring Center

	Goal	Dec-20	Jan-21	Feb-21	YTD
Customer Service Calls		3,359	2,932	3,547	28,605
Average Initial Hold Time	≤ 180 sec	21	21	34	32
Calls On Hold > 5 Minutes	≤ 10%	0.8%	0.5%	2.1%	1.8%
Call Duration	≤ 300 sec	313	324	347	338
Calls Abandoned	≤ 10%	1.4%	1.3%	2.4%	2.4%

Contractual Requirement

March 19, 2021

TO: BOARD OF DIRECTORS

FROM: HECTOR RODRIGUEZ, DEPUTY EXECUTIVE DIRECTOR

RE: FINANCIAL REPORT FOR FEBRUARY 2021 - DRAFT

Attached for your review are the draft financial reports for FEBRUARY 2021.

DRAFT FY 2020/2021 Budget to Actual Fiscal Year-to-Date Comparison:

- Passengers: 33% over budget
- Contract Revenue Miles: 60% over budget
- Trips: 38% over budget
- Total Eligibility Evaluations: 5% over budget
- Average Trip Distance: over budget by 1.40 miles at 10.46 miles
- Total cost per Passenger (before depreciation): 21% under budget at \$80.80
- Administration Function is 6% under budget
- Eligibility Determination Function is 18% under budget
- Purchased Transportation Function is 9% over budget
- Paratransit Operations Function is 10% under budget

Attached are the following reports for your review:

- Statistical Comparison: FEBRUARY 2020 to FEBRUARY 2021
- Expenses by Functional Area
- Budget to Actual Comparison of Statistics
- YTD Budget Results
- Graph: YTD PAX Cost Comparison

Expenses by Functional Area

For the YTD Period Ending February 2021

	<u>% of Cost</u>	<u>YTD Actual</u>	<u>YTD Budget</u>	<u>Variance</u>	<u>% Over / (Under) Budget</u>	<u>% Over / (Under) Prior Yr</u>
Purchased Transportation	82.3%	\$87,355,999	\$80,137,998	\$7,218,001	9%	-17%
Paratransit Operations	8.9%	\$9,474,246	\$10,584,537	(\$1,110,291)	-10%	-15%
Eligibility Determination	3.5%	\$3,705,180	\$4,504,989	(\$799,809)	-18%	-22%
CTSA/Ride Information	0.3%	\$368,361	\$339,077	\$29,284	9%	20%
Administration	4.9%	\$5,198,815	\$5,539,710	(\$340,895)	-6%	6%
Total Exp before Depreciation		\$106,102,601	\$101,106,311	\$4,996,290	5%	-16%

Statistics - - For the YTD Period Ended February 2021

	YTD Actual	YTD Budget	Variance	% Over / (Under) Budget	% Over / (Under) Prior Yr
Total Eligibility Evaluations	23,242	22,163	1,079	5%	-35%
Number of PAX	1,313,108	984,535	328,573	33%	-59%
Number of Contract Revenue Miles	11,119,493	6,963,586	4,155,907	60%	-51%
Number of Trips	1,062,629	768,697	293,932	38%	-57%
Average Trip Distance	10.46	9.06	1.40	15%	16%
Purchased Transportation Cost					
Cost per Trip	\$82.21	\$104.25	(\$22.04)	-21%	94%
Cost per PAX	\$66.53	\$81.40	(\$14.87)	-18%	101%
Cost per Contract Rev Mile	\$7.86	\$11.51	(\$3.65)	0%	67%
Total Cost per Pax before Depreciation	\$80.80	\$102.69	(\$21.89)	-21%	103%

Budget Results for FY 2020/2021

For YTD Period Ending February 2021

	YTD Actual	YTD Budget	Variance	% Over / (Under) Budget	% Over / (Under) Prior Yr
Revenue					
Passenger Fares	\$3,194,284	\$2,423,044	\$771,240		
Other Revenue	\$297,058	\$371,322	(\$74,264)		
Total Revenue	\$3,491,342	\$2,794,366	\$696,976	25%	-55%
Total Exp before Capital	\$106,102,601	\$101,106,311	\$4,996,290	5%	-16%
Capital Expenditures					
Vehicles	\$1,348,871	\$10,200,000	(\$8,851,129)		
Other Capital Expenditures	\$935,731	\$0	\$935,731		
Total Capital Expenditures	\$2,284,603	\$10,200,000	(\$7,915,397)	-78%	-67%
Over/(Under) Budget February 2021			(\$2,919,107)		

YTD COST PER PASSENGER BEFORE DEPRECIATION AND CAPITAL COST

