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# Board Box

October 2021

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October 26, 2021

**TO: BOARD OF DIRECTORS**

**FROM: VY VU, SYSTEM ADMINISTRATOR - DATA**

**RE: KEY PERFORMANCE INDICATORS**

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**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	Jul-21	Aug-21	Sep-21	YTD
Vehicle Trips		182,955	185,754	185,872	554,581
Passenger Trips		234,138	236,846	236,162	707,146
Backup Trips		42	0	0	42
No Shows		2.8%	2.8%	2.7%	2.8%
On Time Performance (Next Day Trips)	≥ 91%	91.3%	90.9%	90.3%	90.8%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.05%	0.06%	0.09%	0.07%
Excessively Long Trips	≤ 5%	2.6%	3.0%	3.3%	3.0%
Missed Trips	≤ 0.75%	0.38%	0.43%	0.47%	0.42%
Denials	≤ 0	0	1	1	2
On Time Performance (Access to Work)	≥ 94%	97.0%	96.6%	97.0%	96.9%

### Call Performance

	Goal	Jul-21	Aug-21	Sep-21	YTD
<i>Reservations</i>					
Answered Calls		156,799	159,812	155,740	472,351
Average Initial Hold Time	≤ 120 sec	47	54	57	53
Calls On Hold > 5 Minutes	≤ 5%	1.5%	2.4%	1.9%	1.9%
<i>Estimated Time of Arrival (ETAs)</i>					
Answered Calls		39,487	39,910	41,011	120,408
Average Initial Hold Time		40	42	45	43
Calls On Hold > 5 Minutes	≤ 10%	1.0%	1.5%	1.9%	1.4%

### Complaints/Commendations

	Goal	Jul-21	Aug-21	Sep-21	YTD
Complaints Per 1,000 Trips	≤ 4.0	3.4	3.5	3.4	3.4
Commendations Per 1,000 Trips		1.7	1.4	1.3	1.5

### Safety

	Goal	Jul-21	Aug-21	Sep-21	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.33	0.22	0.15	0.23
Preventable Collisions Per 100,000 Miles	≤ 0.50	0.67	0.85	0.50	0.67
Miles Between Road Calls	≥ 25,000	59,937	56,495	68,718	61,290

## Antelope Valley Region Trip Performance

	Goal	Jul-21	Aug-21	Sep-21	YTD
Vehicle Trips		7,919	8,340	8,203	24,462
Passenger Trips		11,317	12,242	12,136	35,695
No Shows		2.7%	2.2%	2.5%	2.5%
On Time Performance (Next Day Trips)	≥ 91%	91.0%	87.0%	85.0%	87.6%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.19%	0.27%	0.49%	0.32%
Excessively Long Trips	≤ 5%	1.7%	2.2%	2.5%	2.1%
Missed Trips	≤ 0.75%	0.75%	0.97%	1.15%	0.96%
Denials	≤ 0	0	0	0	0
On Time Performance (Access to Work)	≥ 92%	100.0%	97.4%	100.0%	99.1%

## Call Performance

	Goal	Jul-21	Aug-21	Sep-21	YTD
<i>Reservations</i>					
Answered Calls		5,452	5,203	5,236	15,891
Average Initial Hold Time	≤ 120 sec	145	72	183	134
Calls On Hold > 5 Minutes	≤ 5%	14.7%	6.3%	5.7%	9.0%

<i>Estimated Time of Arrival (ETAs)</i>					
Answered Calls		2,028	2,479	2,860	7,367
Average Initial Hold Time		95	99	102	99
Calls On Hold > 5 Minutes	≤ 10%	7.1%	8.8%	7.7%	7.9%

## Complaints/Commendations

	Goal	Jul-21	Aug-21	Sep-21	YTD
Complaints Per 1,000 Trips	≤ 4.0	4.4	4.3	4.5	4.5
Commendations Per 1,000 Trips		1.5	0.5	0.1	0.7

## Safety

	Goal	Jul-21	Aug-21	Sep-21	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	1.68	0.00	0.00	0.56
Preventable Collisions Per 100,000 Miles	≤ 0.50	0.42	0.83	1.07	0.77
Miles Between Road Calls	≥ 25,000	19,833	20,052	29,266	22,273

Contractual Requirement

## Eastern Region Trip Performance

	Goal	Jul-21	Aug-21	Sep-21	YTD
Vehicle Trips		50,221	50,335	50,403	150,959
Passenger Trips		64,951	64,760	64,532	194,243
No Shows		2.8%	2.5%	2.3%	2.6%
On Time Performance (Next Day Trips)	≥ 91%	91.3%	90.3%	89.6%	90.4%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.08%	0.03%	0.07%	0.06%
Excessively Long Trips	≤ 5%	0.7%	0.9%	1.0%	0.9%
Missed Trips	≤ 0.75%	0.35%	0.37%	0.37%	0.36%
Denials	≤ 0	0	0	0	0
On Time Performance (Access to Work)	≥ 95%	96.4%	94.8%	95.1%	95.4%

## Call Performance

	Goal	Jul-21	Aug-21	Sep-21	YTD
<i>Reservations</i>					
Answered Calls		42,137	41,913	39,021	123,071
Average Initial Hold Time	≤ 120 sec	20	22	21	21
Calls On Hold > 5 Minutes	≤ 5%	0.4%	0.5%	0.2%	0.4%

<i>Estimated Time of Arrival (ETA)</i>					
Answered Calls		8,794	8,987	9,854	27,635
Average Initial Hold Time		12	13	13	13
Calls On Hold > 5 Minutes	≤ 10%	0.3%	0.2%	0.1%	0.2%

## Complaints/Commendations

	Goal	Jul-21	Aug-21	Sep-21	YTD
Complaints Per 1,000 Trips	≤ 4.0	3.2	2.7	3.0	3.0
Commendations Per 1,000 Trips		1.7	1.4	0.9	1.3

## Safety

	Goal	Jul-21	Aug-21	Sep-21	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.42	0.14	0.28	0.28
Preventable Collisions Per 100,000 Miles	≤ 0.50	1.14	0.73	0.32	0.74
Miles Between Road Calls	≥ 25,000	103,198	65,094	70,282	76,334

Contractual Requirement

## Santa Clarita Region Trip Performance

	Goal	Jul-21	Aug-21	Sep-21	YTD
Vehicle Trips		1,978	2,283	2,198	6,459
Passenger Trips		2,148	2,492	2,390	7,030
No Shows		2.1%	2.2%	2.4%	2.2%
On Time Performance (Next Day Trips)	≥ 91%	93.9%	89.1%	85.7%	89.4%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.00%	0.47%	1.27%	0.60%
Excessively Long Trips	≤ 5%	1.1%	1.8%	3.3%	2.1%
Missed Trips	≤ 0.75%	0.68%	1.92%	3.15%	1.99%
Denials	≤ 0	0	0	0	0
On Time Performance (Access to Work)	≥ 94%	-	-	-	-

## Call Performance

	Goal	Jul-21	Aug-21	Sep-21	YTD
<i>Reservations</i>					
Answered Calls		1,544	1,796	1,504	4,844
Average Initial Hold Time	≤ 120 sec	79	118	85	95
Calls On Hold > 5 Minutes	≤ 5%	6.2%	9.0%	4.6%	6.7%

<i>Estimated Time of Arrival (ETA)</i>					
Answered Calls		145	260	314	719
Average Initial Hold Time		95	93	121	106
Calls On Hold > 5 Minutes	≤ 10%	4.1%	6.9%	10.8%	8.1%

## Complaints/Commendations

	Goal	Jul-21	Aug-21	Sep-21	YTD
Complaints Per 1,000 Trips	≤ 4.0	0.5	1.7	0.0	0.8
Commendations Per 1,000 Trips		0.5	0.0	0.0	0.2

## Safety

	Goal	Jul-21	Aug-21	Sep-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	*	*	*	*

### Contractual Requirement

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

## Northern Region Trip Performance

	Goal	Jul-21	Aug-21	Sep-21	YTD
Vehicle Trips		25,921	26,505	26,645	79,071
Passenger Trips		33,012	33,559	33,634	100,205
No Shows		3.0%	3.5%	3.3%	3.3%
On Time Performance (Next Day Trips)	≥ 91%	92.3%	91.9%	91.7%	92.0%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.01%	0.02%	0.02%	0.02%
Excessively Long Trips	≤ 5%	2.4%	2.5%	2.5%	2.4%
Missed Trips	≤ 0.75%	0.34%	0.44%	0.40%	0.40%
Denials	≤ 0	0	0	1	1
On Time Performance (Access to Work)	≥ 94%	98.1%	97.5%	99.2%	98.3%

## Call Performance

	Goal	Jul-21	Aug-21	Sep-21	YTD
<i>Reservations</i>					
Answered Calls		25,178	26,542	26,458	78,178
Average Initial Hold Time	≤ 120 sec	96	110	85	97
Calls On Hold > 5 Minutes	≤ 5%	3.4%	8.6%	4.1%	5.4%
<i>Estimated Time of Arrival (ETA)</i>					
Answered Calls		5,607	5,869	5,730	17,206
Average Initial Hold Time		72	67	63	67
Calls On Hold > 5 Minutes	≤ 10%	1.1%	2.2%	1.8%	1.7%

## Complaints/Commendations

	Goal	Jul-21	Aug-21	Sep-21	YTD
Complaints Per 1,000 Trips	≤ 4.0	3.6	4.0	3.6	3.7
Commendations Per 1,000 Trips		1.8	1.3	1.5	1.6

## Safety

	Goal	Jul-21	Aug-21	Sep-21	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.21	0.21	0.00	0.14
Preventable Collisions Per 100,000 Miles	≤ 0.50	0.80	0.42	0.81	0.67
Miles Between Road Calls	≥ 25,000	78,473	67,677	77,639	74,519

Contractual Requirement

## Southern Region Trip Performance

	Goal	Jul-21	Aug-21	Sep-21	YTD
Vehicle Trips		66,070	67,142	67,487	200,699
Passenger Trips		82,584	83,042	83,211	248,837
No Shows		2.4%	2.4%	2.4%	2.4%
On Time Performance (Next Day Trips)	≥ 91%	90.8%	91.9%	91.4%	91.3%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.03%	0.02%	0.03%	0.02%
Excessively Long Trips	≤ 5%	4.7%	5.3%	6.1%	5.4%
Missed Trips	≤ 0.75%	0.34%	0.31%	0.31%	0.32%
Denials	≤ 0	0	0	0	0
On Time Performance (Access to Work)	≥ 92%	96.3%	98.8%	97.6%	97.6%

## Call Performance

	Goal	Jul-21	Aug-21	Sep-21	YTD
<i>Reservations</i>					
Answered Calls		55,346	55,978	55,521	166,845
Average Initial Hold Time	≤ 120 sec	48	62	74	62
Calls On Hold > 5 Minutes	≤ 5%	0.6%	1.2%	2.4%	1.4%
<i>Estimated Time of Arrival (ETA)</i>					
Answered Calls		16,474	15,789	15,553	47,816
Average Initial Hold Time		47	51	61	53
Calls On Hold > 5 Minutes	≤ 10%	0.8%	1.1%	2.5%	1.5%

## Complaints/Commendations

	Goal	Jul-21	Aug-21	Sep-21	YTD
Complaints Per 1,000 Trips	≤ 4.0	3.3	3.4	2.9	3.2
Commendations Per 1,000 Trips		1.8	1.6	1.4	1.6

## Safety

	Goal	Jul-21	Aug-21	Sep-21	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.32	0.32	0.11	0.25
Preventable Collisions Per 100,000 Miles	≤ 0.50	0.30	1.21	0.40	0.64
Miles Between Road Calls	≥ 25,000	57,753	71,250	155,660	79,550

Contractual Requirement



## West Central Region Trip Performance

	Goal	Jul-21	Aug-21	Sep-21	YTD
Vehicle Trips		30,804	31,149	30,936	92,889
Passenger Trips		40,084	40,751	40,259	121,094
No Shows		3.6%	3.7%	3.6%	3.7%
On Time Performance (Next Day Trips)	≥ 91%	91.5%	90.1%	89.6%	90.4%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.06%	0.13%	0.15%	0.11%
Excessively Long Trips	≤ 5%	1.6%	2.0%	2.1%	1.9%
Missed Trips	≤ 0.75%	0.39%	0.49%	0.60%	0.49%
Denials	≤ 0	0	1	0	1
On Time Performance (Access to Work)	≥ 91%	100.0%	95.7%	100.0%	98.5%

## Call Performance

	Goal	Jul-21	Aug-21	Sep-21	YTD
<i>Reservations</i>					
Answered Calls		27,142	28,380	28,000	83,522
Average Initial Hold Time	≤ 120 sec	20	22	22	22
Calls On Hold > 5 Minutes	≤ 5%	0.4%	0.5%	0.3%	0.4%
<i>Estimated Time of Arrival (ETA)</i>					
Answered Calls		6,439	6,526	6,700	19,665
Average Initial Hold Time		13	15	13	14
Calls On Hold > 5 Minutes	≤ 5%	0.4%	0.3%	0.1%	0.2%

## Complaints/Commendations

	Goal	Jul-21	Aug-21	Sep-21	YTD
Complaints Per 1,000 Trips	≤ 4.0	3.8	4.2	5.1	4.4
Commendations Per 1,000 Trips		1.8	1.7	2.0	1.8

## Safety

	Goal	Jul-21	Aug-21	Sep-21	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.00	0.22	0.23	0.15
Preventable Collisions Per 100,000 Miles	≤ 0.50	0.62	0.77	0.57	0.65
Miles Between Road Calls	≥ 25,000	44,404	41,416	33,980	39,445

Contractual Requirement

## Eligibility and Appeals

### Eligibility

	Goal	Jul-21	Aug-21	Sep-21	YTD
Eligible Customers		124,335	122,994	121,220	122,994
Total ADA Evaluations Performed		4,351	4,800	4,536	13,687
Days From Application to Decision (avg)	≤ 21	10	10	10	10

### In Person Evaluations

	Goal	Jul-21	Aug-21	Sep-21	YTD
Unrestricted		0	0	0	0
Restricted		0	0	0	0
Temporary		2,966	3,394	3,241	9,601
Not Eligible		25	39	42	106
Total		2,991	3,433	3,283	9,707

### Paper Evaluations

	Goal	Jul-21	Aug-21	Sep-21	YTD
Unrestricted		1,360	1,367	1,253	3,980
Restricted		0	0	0	0
Temporary		0	0	0	0
Not Eligible		0	0	0	0
Total		1,360	1,367	1,253	3,980

### Appeals

	Goal	Jul-21	Aug-21	Sep-21	YTD
Appeals Performed		7	5	10	22
Days From Appeal to Decision (avg)	≤ 30	4	10	7	7

## Customer Service

### Phone Statistics

#### Customer Service

	Goal	Jul-21	Aug-21	Sep-21	YTD
Customer Service Calls		20,627	22,695	23,029	66,351
Average Initial Hold Time	≤ 180 sec	62	99	92	85
Calls On Hold > 5 Minutes	≤ 10%	5.7%	11.5%	9.3%	8.9%
Call Duration	≤ 300 sec	319	305	294	306
Calls Abandoned	≤ 10%	2.0%	3.3%	3.0%	2.8%

#### Operations Monitoring Center

	Goal	Jul-21	Aug-21	Sep-21	YTD
Customer Service Calls		4,599	4,870	4,793	14,262
Average Initial Hold Time	≤ 180 sec	44	64	61	56
Calls On Hold > 5 Minutes	≤ 10%	2.7%	5.7%	4.5%	4.3%
Call Duration	≤ 300 sec	390	353	322	354
Calls Abandoned	≤ 10%	2.6%	5.1%	4.6%	4.1%

Contractual Requirement

October 20, 2021

**TO: BOARD OF DIRECTORS**

**FROM: HECTOR RODRIGUEZ, DEPUTY EXECUTIVE DIRECTOR**

**RE: FINANCIAL REPORT FOR SEPTEMBER 2021 - DRAFT**

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

**DRAFT** FY 2021/2022 Budget to Actual Fiscal Year-to-Date Comparison:

- ◆ Passengers: 2% over budget
- ◆ Contract Revenue Miles: 9% under budget
- ◆ Trips: 2% over budget
- ◆ Total Eligibility Evaluations: 29% over budget
- ◆ Average Trip Distance: under budget by 1.06 miles at 9.46 miles
- ◆ Total cost per Passenger (before depreciation): 15% under budget at \$56.76
- ◆ Administration Function is 0.3% under budget
- ◆ Eligibility Determination Function is 19.3% under budget
- ◆ Purchased Transportation Function is 14.6% under budget
- ◆ Paratransit Operations Function is 9.0% under budget

Attached are the following reports for your review:

- Statistical Comparison: SEPTEMBER 2020 to SEPTEMBER 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 September 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	81.5%	\$32,710,141	\$38,320,017	(\$5,609,876)	-15%	2%
Paratransit Operations	9.1%	\$3,648,542	\$4,011,346	(\$362,804)	-9%	-3%
Eligibility Determination	3.6%	\$1,444,393	\$1,790,838	(\$346,445)	-19%	3%
CTSA/Ride Information	0.3%	\$140,346	\$135,311	\$5,035	4%	7%
Administration	5.5%	\$2,190,794	\$2,196,689	(\$5,895)	0%	18%
Total Exp before Depreciation		<b>\$40,134,216</b>	<b>\$46,454,201</b>	<b>(\$6,319,985)</b>	<b>-14%</b>	<b>2%</b>

## Statistics - For the YTD Period Ended September 2021

	YTD Actual	YTD Budget	Variance	% Over / (Under) Budget	% Over / (Under) Prior Yr
Total Eligibility Evaluations	13,621	10,558	3,063	29%	69%
Number of PAX	707,146	693,288	13,858	2%	46%
Number of Contract Revenue Miles	5,247,165	5,735,664	(488,499)	-9%	29%
Number of Trips	554,581	545,372	9,209	2%	43%
Average Trip Distance	9.46	10.52	(1.06)	-10%	-10%
Purchased Transportation Cost					
Cost per Trip	\$58.98	\$70.26	(\$11.28)	-16%	-29%
Cost per PAX	\$46.26	\$55.27	(\$9.01)	-16%	-31%
Cost per Contract Rev Mile	\$6.23	\$6.68	(\$0.45)	-7%	-21%
Total Cost per Pax before Depreciation	\$56.76	\$67.01	(\$10.25)	-15%	-30%

## Budget Results for FY 2021/2022 For YTD Period Ending September 2021

	YTD Actual	YTD Budget	Variance	% Over / (Under) Budget	% Over / (Under) Prior Yr
Revenue					
Passenger Fares	\$1,631,835	\$1,513,568	\$118,267		
Other Revenue	\$47,693	\$176,933	(\$129,240)		
Total Revenue	\$1,679,528	\$1,690,501	(\$10,973)	-1%	31%
 Total Exp before Capital	 \$40,134,216	 \$46,454,201	 (\$6,319,985)	 -14%	 2%
Capital Expenditures					
Vehicles	\$0	\$8,669,000	(\$8,669,000)		
Other Capital Expenditures	\$137,761	\$0	\$137,761		
Total Capital Expenditures	\$137,761	\$8,669,000	(\$8,531,239)	-98%	-94%
 Over/(Under) Budget September 2021			 (\$14,851,224)		

## YTD Cost Per Passenger before Depreciation and Capital Cost

