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# Board Box

December 2021

<b>Item #</b>	<b>Item</b>	<b>Staff</b>	<b>Page</b>
1.	Key Performance Indicators - Nov 2021	V. Vu	2-11
2.	Financial Report - Nov 2021	H. Rodriguez	12-16

December 29, 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	Sep-21	Oct-21	Nov-21	YTD
Vehicle Trips		185,872	196,752	193,082	944,415
Passenger Trips		236,162	249,607	244,797	1,201,550
Backup Trips		0	0	0	42
No Shows		2.7%	2.7%	2.7%	2.7%
On Time Performance (Next Day Trips)	≥ 91%	90.3%	89.8%	88.8%	90.2%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.09%	0.06%	0.17%	0.09%
Excessively Long Trips	≤ 5%	3.3%	3.5%	3.7%	3.2%
Missed Trips	≤ 0.75%	0.47%	0.45%	0.55%	0.45%
Denials	≤ 0	1	0	0	2
On Time Performance (Access to Work)	≥ 94%	97.0%	96.6%	96.5%	96.8%

## Call Performance

	Goal	Sep-21	Oct-21	Nov-21	YTD
<i>Reservations</i>					
Answered Calls		155,740	157,599	157,567	788,127
Average Initial Hold Time	≤ 120 sec	57	59	73	58
Calls On Hold > 5 Minutes	≤ 5%	1.9%	2.7%	4.3%	2.6%
<i>Estimated Time of Arrival (ETAs)</i>					
Answered Calls		41,011	43,152	41,760	205,402
Average Initial Hold Time		45	46	63	47
Calls On Hold > 5 Minutes	≤ 10%	1.9%	1.9%	3.5%	2.0%

## Complaints/Commendations

	Goal	Sep-21	Oct-21	Nov-21	YTD
Complaints Per 1,000 Trips	≤ 4.0	3.4	2.7	3.4	3.3
Commendations Per 1,000 Trips		1.3	1.3	1.2	1.4

## Safety

	Goal	Sep-21	Oct-21	Nov-21	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.15	0.14	0.36	0.24
Preventable Collisions Per 100,000 Miles	≤ 0.50	0.50	0.78	0.89	0.74
Miles Between Road Calls	≥ 25,000	68,718	66,077	63,175	62,615

## Antelope Valley Region Trip Performance

	Goal	Sep-21	Oct-21	Nov-21	YTD
Vehicle Trips		8,203	8,579	8,478	41,519
Passenger Trips		12,136	12,411	12,353	60,459
No Shows		2.5%	2.3%	2.8%	2.5%
On Time Performance (Next Day Trips)	≥ 91%	85.0%	88.1%	87.6%	87.7%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.49%	0.12%	0.22%	0.26%
Excessively Long Trips	≤ 5%	2.5%	2.0%	1.4%	1.9%
Missed Trips	≤ 0.75%	1.15%	1.29%	1.16%	1.07%
Denials	≤ 0	0	0	0	0
On Time Performance (Access to Work)	≥ 92%	100.0%	100.0%	95.8%	98.8%

## Call Performance

	Goal	Sep-21	Oct-21	Nov-21	YTD
<i>Reservations</i>					
Answered Calls		5,236	5,190	5,129	26,210
Average Initial Hold Time	≤ 120 sec	183	111	83	119
Calls On Hold > 5 Minutes	≤ 5%	5.7%	9.1%	7.1%	8.6%

<i>Estimated Time of Arrival (ETAs)</i>					
Answered Calls		2,860	2,861	2,692	12,920
Average Initial Hold Time		102	114	242	132
Calls On Hold > 5 Minutes	≤ 10%	7.7%	8.9%	19.5%	10.5%

## Complaints/Commendations

	Goal	Sep-21	Oct-21	Nov-21	YTD
Complaints Per 1,000 Trips	≤ 4.0	4.5	3.0	4.4	4.2
Commendations Per 1,000 Trips		0.1	0.7	0.8	0.7

## Safety

	Goal	Sep-21	Oct-21	Nov-21	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.00	0.00	0.00	0.32
Preventable Collisions Per 100,000 Miles	≤ 0.50	1.07	2.30	2.70	1.50
Miles Between Road Calls	≥ 25,000	29,266	65,290	25,944	26,812

Contractual Requirement

## Eastern Region Trip Performance

	Goal	Sep-21	Oct-21	Nov-21	YTD
Vehicle Trips		50,403	53,388	52,430	256,777
Passenger Trips		64,532	68,376	67,100	329,719
No Shows		2.3%	2.5%	2.4%	2.5%
On Time Performance (Next Day Trips)	≥ 91%	89.6%	88.4%	86.1%	89.1%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.07%	0.07%	0.29%	0.11%
Excessively Long Trips	≤ 5%	1.0%	1.2%	1.6%	1.1%
Missed Trips	≤ 0.75%	0.37%	0.42%	0.63%	0.43%
Denials	≤ 0	0	0	0	0
On Time Performance (Access to Work)	≥ 95%	95.1%	95.4%	93.9%	95.1%

## Call Performance

	Goal	Sep-21	Oct-21	Nov-21	YTD
<i>Reservations</i>					
Answered Calls		39,021	35,349	34,937	193,357
Average Initial Hold Time	≤ 120 sec	21	21	32	23
Calls On Hold > 5 Minutes	≤ 5%	0.2%	0.5%	1.6%	0.6%

<i>Estimated Time of Arrival (ETA)</i>					
Answered Calls		9,854	10,604	10,466	48,705
Average Initial Hold Time		13	15	25	16
Calls On Hold > 5 Minutes	≤ 10%	0.1%	0.1%	0.9%	0.3%

## Complaints/Commendations

	Goal	Sep-21	Oct-21	Nov-21	YTD
Complaints Per 1,000 Trips	≤ 4.0	3.0	2.4	3.2	2.9
Commendations Per 1,000 Trips		0.9	1.1	0.9	1.2

## Safety

	Goal	Sep-21	Oct-21	Nov-21	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.28	0.13	0.27	0.25
Preventable Collisions Per 100,000 Miles	≤ 0.50	0.32	0.67	0.55	0.69
Miles Between Road Calls	≥ 25,000	70,282	74,431	72,902	75,184

Contractual Requirement

## Santa Clarita Region Trip Performance

	Goal	Sep-21	Oct-21	Nov-21	YTD
Vehicle Trips		2,198	2,347	2,275	11,081
Passenger Trips		2,390	2,499	2,486	12,015
No Shows		2.4%	2.2%	2.4%	2.3%
On Time Performance (Next Day Trips)	≥ 91%	85.7%	94.7%	93.4%	91.5%
Excessively Late Trips (45+ min late)	≤ 0.10%	1.27%	0.08%	0.03%	0.36%
Excessively Long Trips	≤ 5%	3.3%	1.8%	1.6%	2.0%
Missed Trips	≤ 0.75%	3.15%	0.51%	0.87%	1.40%
Denials	≤ 0	0	0	0	0
On Time Performance (Access to Work)	≥ 94%	-	-	-	-

## Call Performance

	Goal	Sep-21	Oct-21	Nov-21	YTD
<i>Reservations</i>					
Answered Calls		1,504	1,968	1,884	9,306
Average Initial Hold Time	≤ 120 sec	85	63	59	81
Calls On Hold > 5 Minutes	≤ 5%	4.6%	3.4%	3.6%	5.3%

<i>Estimated Time of Arrival (ETA)</i>					
Answered Calls		314	218	220	1,239
Average Initial Hold Time		121	70	52	93
Calls On Hold > 5 Minutes	≤ 10%	10.8%	5.5%	2.7%	7.3%

## Complaints/Commendations

	Goal	Sep-21	Oct-21	Nov-21	YTD
Complaints Per 1,000 Trips	≤ 4.0	0.0	0.8	0.0	0.6
Commendations Per 1,000 Trips		0.0	0.4	0.0	0.2

## Safety

	Goal	Sep-21	Oct-21	Nov-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	Sep-21	Oct-21	Nov-21	YTD
Vehicle Trips		26,645	28,754	28,511	136,336
Passenger Trips		33,634	36,210	35,702	172,117
No Shows		3.3%	3.3%	3.1%	3.2%
On Time Performance (Next Day Trips)	≥ 91%	91.7%	88.8%	88.7%	90.6%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.02%	0.07%	0.08%	0.04%
Excessively Long Trips	≤ 5%	2.5%	3.0%	3.1%	2.7%
Missed Trips	≤ 0.75%	0.40%	0.55%	0.57%	0.46%
Denials	≤ 0	1	0	0	1
On Time Performance (Access to Work)	≥ 94%	99.2%	97.8%	96.9%	97.9%

## Call Performance

	Goal	Sep-21	Oct-21	Nov-21	YTD
<i>Reservations</i>					
Answered Calls		26,458	25,568	25,281	129,027
Average Initial Hold Time	≤ 120 sec	85	93	130	103
Calls On Hold > 5 Minutes	≤ 5%	4.1%	5.8%	11.7%	6.7%
<i>Estimated Time of Arrival (ETA)</i>					
Answered Calls		5,730	5,907	5,542	28,655
Average Initial Hold Time		63	71	84	71
Calls On Hold > 5 Minutes	≤ 10%	1.8%	2.6%	4.4%	2.4%

## Complaints/Commendations

	Goal	Sep-21	Oct-21	Nov-21	YTD
Complaints Per 1,000 Trips	≤ 4.0	3.6	2.8	3.0	3.4
Commendations Per 1,000 Trips		1.5	1.0	1.5	1.4

## Safety

	Goal	Sep-21	Oct-21	Nov-21	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.00	0.00	0.42	0.17
Preventable Collisions Per 100,000 Miles	≤ 0.50	0.81	0.60	0.78	0.68
Miles Between Road Calls	≥ 25,000	77,639	71,405	43,477	64,625

Contractual Requirement

## Southern Region Trip Performance

	Goal	Sep-21	Oct-21	Nov-21	YTD
Vehicle Trips		67,487	71,058	68,728	340,485
Passenger Trips		83,211	87,911	84,777	421,525
No Shows		2.4%	2.3%	2.3%	2.4%
On Time Performance (Next Day Trips)	≥ 91%	91.4%	91.7%	91.6%	91.5%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.03%	0.02%	0.05%	0.03%
Excessively Long Trips	≤ 5%	6.1%	5.9%	6.1%	5.7%
Missed Trips	≤ 0.75%	0.31%	0.31%	0.33%	0.32%
Denials	≤ 0	0	0	0	0
On Time Performance (Access to Work)	≥ 92%	97.6%	96.7%	99.2%	97.7%

## Call Performance

	Goal	Sep-21	Oct-21	Nov-21	YTD
<i>Reservations</i>					
Answered Calls		55,521	59,512	58,706	285,063
Average Initial Hold Time	≤ 120 sec	74	78	92	71
Calls On Hold > 5 Minutes	≤ 5%	2.4%	3.1%	3.8%	2.2%
<i>Estimated Time of Arrival (ETA)</i>					
Answered Calls		15,553	16,446	15,182	79,444
Average Initial Hold Time		61	58	69	57
Calls On Hold > 5 Minutes	≤ 10%	2.5%	2.3%	3.6%	2.0%

## Complaints/Commendations

	Goal	Sep-21	Oct-21	Nov-21	YTD
Complaints Per 1,000 Trips	≤ 4.0	2.9	2.7	3.2	3.1
Commendations Per 1,000 Trips		1.4	1.4	1.1	1.5

## Safety

	Goal	Sep-21	Oct-21	Nov-21	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.11	0.30	0.63	0.34
Preventable Collisions Per 100,000 Miles	≤ 0.50	0.40	0.94	1.06	0.78
Miles Between Road Calls	≥ 25,000	155,660	81,997	118,265	85,715

Contractual Requirement



## West Central Region Trip Performance

	Goal	Sep-21	Oct-21	Nov-21	YTD
Vehicle Trips		30,936	32,626	32,660	158,175
Passenger Trips		40,259	42,200	42,379	205,673
No Shows		3.6%	3.5%	3.5%	3.6%
On Time Performance (Next Day Trips)	≥ 91%	89.6%	88.9%	87.2%	89.4%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.15%	0.08%	0.32%	0.15%
Excessively Long Trips	≤ 5%	2.1%	2.6%	3.0%	2.3%
Missed Trips	≤ 0.75%	0.60%	0.49%	0.67%	0.53%
Denials	≤ 0	0	0	0	1
On Time Performance (Access to Work)	≥ 91%	100.0%	98.2%	100.0%	98.7%

## Call Performance

	Goal	Sep-21	Oct-21	Nov-21	YTD
<i>Reservations</i>					
Answered Calls		28,000	30,012	31,630	145,164
Average Initial Hold Time	≤ 120 sec	22	27	36	26
Calls On Hold > 5 Minutes	≤ 5%	0.3%	0.9%	2.0%	0.9%
<i>Estimated Time of Arrival (ETA)</i>					
Answered Calls		6,700	7,116	7,658	34,439
Average Initial Hold Time		13	14	26	17
Calls On Hold > 5 Minutes	≤ 5%	0.1%	0.2%	0.9%	0.4%

## Complaints/Commendations

	Goal	Sep-21	Oct-21	Nov-21	YTD
Complaints Per 1,000 Trips	≤ 4.0	5.1	3.6	4.5	4.2
Commendations Per 1,000 Trips		2.0	1.5	1.9	1.8

## Safety

	Goal	Sep-21	Oct-21	Nov-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	0.57	0.43	0.76	0.63
Miles Between Road Calls	≥ 25,000	33,980	38,499	46,349	40,470

Contractual Requirement

## Eligibility and Appeals

### Eligibility

	Goal	Sep-21	Oct-21	Nov-21	YTD
Eligible Customers		121,220	120,372	118,608	118,608
Total ADA Evaluations Performed		4,536	4,631	4,419	22,737
Days From Application to Decision (avg)	≤ 21	10	11	10	10

### In Person Evaluations

	Goal	Sep-21	Oct-21	Nov-21	YTD
Unrestricted		0	0	0	0
Restricted		0	0	0	0
Temporary		3,241	3,450	2,866	15,917
Not Eligible		42	28	18	152
Total		3,283	3,478	2,884	16,069

### Paper Evaluations

	Goal	Sep-21	Oct-21	Nov-21	YTD
Unrestricted		1,253	1,153	1,535	6,668
Restricted		0	0	0	0
Temporary		0	0	0	0
Not Eligible		0	0	0	0
Total		1,253	1,153	1,535	6,668

### Appeals

	Goal	Sep-21	Oct-21	Nov-21	YTD
Appeals Performed		10	14	12	48
Days From Appeal to Decision (avg)	≤ 30	7	9	8	7

## Customer Service

### Phone Statistics

#### Customer Service

	Goal	Sep-21	Oct-21	Nov-21	YTD
Customer Service Calls		23,029	22,421	21,605	110,377
Average Initial Hold Time	≤ 180 sec	92	87	82	85
Calls On Hold > 5 Minutes	≤ 10%	9.3%	9.3%	7.2%	8.6%
Call Duration	≤ 300 sec	294	297	301	303
Calls Abandoned	≤ 10%	3.0%	3.0%	2.4%	2.8%

#### Operations Monitoring Center

	Goal	Sep-21	Oct-21	Nov-21	YTD
Customer Service Calls		4,793	4,806	5,153	24,221
Average Initial Hold Time	≤ 180 sec	61	59	66	59
Calls On Hold > 5 Minutes	≤ 10%	4.5%	4.5%	5.1%	4.5%
Call Duration	≤ 300 sec	322	330	347	348
Calls Abandoned	≤ 10%	4.6%	3.8%	4.6%	4.2%

Contractual Requirement

December 29, 2021

**TO: BOARD OF DIRECTORS**

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

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

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

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

- ◆ Passengers: 2.1% under budget
- ◆ Contract Revenue Miles: 12.4% under budget
- ◆ Trips: 2.1% under budget
- ◆ Total Eligibility Evaluations: 16.5% over budget
- ◆ Average Trip Distance: under budget by 1.10 miles at 9.42 miles
- ◆ Total cost per Passenger (before depreciation): 13.9% under budget at \$56.78
- ◆ Administration Function is 6.1% under budget
- ◆ Eligibility Determination Function is 23.1% under budget
- ◆ Purchased Transportation Function is 16.9% under budget
- ◆ Paratransit Operations Function is 6.3% under budget

Attached are the following reports for your review:

- Statistical Comparison: NOVEMBER 2020 to NOVEMBER 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 November 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%	\$55,630,630	\$66,974,211	(\$11,343,581)	-16.9%	0%
Paratransit Operations	9.3%	\$6,356,065	\$6,780,250	(\$424,185)	-6.3%	4%
Eligibility Determination	3.5%	\$2,409,260	\$3,134,107	(\$724,847)	-23.1%	2%
CTSA/Ride Information	0.3%	\$231,511	\$228,050	\$3,461	1.5%	7%
Administration	5.3%	<u>\$3,592,731</u>	<u>\$3,826,654</u>	<u>(\$233,923)</u>	<u>-6.1%</u>	<u>13%</u>
Total Exp before Depreciation		<b>\$68,220,197</b>	<b>\$80,943,272</b>	<b>(\$12,723,075)</b>	<b>-15.7%</b>	<b>1%</b>

## Statistics - For the YTD Period Ended November 2021

	YTD Actual	YTD Budget	Variance	% Over / (Under) Budget	% Over / (Under) Prior Yr
Total Eligibility Evaluations	22,643	19,442	3,201	16.5%	47%
Number of PAX	1,201,550	1,226,804	(25,254)	-2.1%	42%
Number of Contract Revenue Miles	8,895,390	10,149,543	(1,254,153)	-12.4%	24%
Number of Trips	944,415	965,063	(20,648)	-2.1%	39%
Average Trip Distance	9.42	10.52	(1.10)	-10.4%	-10%
Purchased Transportation Cost					
Cost per Trip	\$58.90	\$69.40	(\$10.50)	-15.1%	-28%
Cost per PAX	\$46.30	\$54.59	(\$8.29)	-15.2%	-29%
Cost per Contract Rev Mile	\$6.25	\$6.60	(\$0.35)	-5.3%	-19%
Total Cost per Pax before Depreciation	\$56.78	\$65.98	(\$9.20)	-13.9%	-29%

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

	YTD Actual	YTD Budget	Variance	% Over / (Under) Budget	% Over / (Under) Prior Yr
Revenue					
Passenger Fares	\$2,946,445	\$2,678,331	\$268,114		
Other Revenue	\$78,057	\$293,466	(\$215,409)		
Total Revenue	\$3,024,502	\$2,971,797	\$52,705	2%	36%
 Total Exp before Capital	 \$68,220,197	 \$80,943,272	 (\$12,723,075)	 -16%	 1%
Capital Expenditures					
Vehicles	\$0	\$10,768,000	(\$10,768,000)		
Other Capital Expenditures	\$146,619	\$0	\$146,619		
Total Capital Expenditures	\$146,619	\$10,768,000	(\$10,621,381)	-99%	-93%
 Over/(Under) Budget November 2021			 (\$23,344,456)		

## YTD Cost Per Passenger before Depreciation and Capital Cost

