

Board Box

April 2023

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April 26, 2023

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	Jan-23	Feb-23	Mar-23	YTD
Vehicle Trips		228,668	226,878	264,198	2,092,850
Passenger Trips		281,788	280,187	324,658	2,592,598
Backup Trips		21	32	39	362
No Shows		3.0%	2.5%	2.5%	2.7%
On Time Performance (Next Day Trips)	≥ 91%	91.5%	90.9%	90.8%	90.9%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.03%	0.04%	0.03%	0.05%
Excessively Long Trips	≤ 5%	3.5%	3.8%	3.6%	3.8%
Missed Trips	≤ 0.75%	0.46%	0.41%	0.42%	0.46%
Denials	≤ 0	0	1	0	3
On Time Performance (Access to Work)	≥ 94%	94.7%	94.9%	94.7%	94.7%

Call Performance

	Goal	Jan-23	Feb-23	Mar-23	YTD
<i>Reservations</i>					
Answered Calls		189,005	178,155	199,911	1,687,355
Average Initial Hold Time	≤ 120 sec	52	55	52	60
Calls On Hold > 5 Minutes	≤ 5%	1.8%	2.2%	1.7%	2.3%
<i>Estimated Time of Arrival (ETAs)</i>					
Answered Calls		44,825	42,726	48,800	397,087
Average Initial Hold Time		44	45	43	49
Calls On Hold > 5 Minutes	≤ 10%	1.6%	2.1%	1.6%	2.0%

Complaints/Commendations

	Goal	Jan-23	Feb-23	Mar-23	YTD
Complaints Per 1,000 Trips	≤ 4.0	2.3	2.6	2.6	2.9
Commendations Per 1,000 Trips		0.9	0.9	1.0	0.9

Safety

	Goal	Jan-23	Feb-23	Mar-23	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.07	0.17	0.09	0.18
Preventable Collisions Per 100,000 Miles	≤ 0.75	1.06	0.85	0.92	0.87
Miles Between Road Calls	≥ 25,000	31,216	35,248	32,667	39,903

Antelope Valley Region Trip Performance

	Goal	Jan-23	Feb-23	Mar-23	YTD
Vehicle Trips		11,321	10,908	12,403	103,732
Passenger Trips		13,517	13,060	14,546	124,172
No Shows		4.2%	3.6%	3.2%	3.8%
On Time Performance (Next Day Trips)	≥ 91%	95.6%	96.1%	95.7%	95.6%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.00%	0.02%	0.00%	0.01%
Excessively Long Trips	≤ 5%	0.9%	1.3%	1.2%	1.6%
Missed Trips	≤ 0.75%	0.30%	0.25%	0.14%	0.26%
Denials	≤ 0	0	0	0	0
On Time Performance (Access to Work)	≥ 94%	100.0%	100.0%	100.0%	97.9%

Call Performance

	Goal	Jan-23	Feb-23	Mar-23	YTD
<i>Reservations</i>					
Answered Calls		7,744	7,413	7,921	69,452
Average Initial Hold Time	≤ 120 sec	37	34	37	40
Calls On Hold > 5 Minutes	≤ 5%	1.1%	0.9%	0.9%	1.3%

<i>Estimated Time of Arrival (ETAs)</i>					
Answered Calls		2,348	2,122	2,400	20,306
Average Initial Hold Time		29	26	27	31
Calls On Hold > 5 Minutes	≤ 10%	0.7%	0.5%	0.8%	0.9%

Complaints/Commendations

	Goal	Jan-23	Feb-23	Mar-23	YTD
Complaints Per 1,000 Trips	≤ 4.0	1.6	3.1	2.8	2.5
Commendations Per 1,000 Trips		1.2	1.3	0.8	1.3

Safety

	Goal	Jan-23	Feb-23	Mar-23	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.00	0.00	0.00	0.21
Preventable Collisions Per 100,000 Miles	≤ 0.75	1.45	0.00	0.00	0.53
Miles Between Road Calls	≥ 25,000	155,348	74,537	163,871	54,259

Contractual Requirement

Eastern Region Trip Performance

	Goal	Jan-23	Feb-23	Mar-23	YTD
Vehicle Trips		64,626	65,450	76,755	596,930
Passenger Trips		81,217	82,359	96,028	752,681
No Shows		2.6%	2.1%	2.2%	2.4%
On Time Performance (Next Day Trips)	≥ 91%	91.8%	91.4%	91.0%	90.5%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.02%	0.01%	0.01%	0.05%
Excessively Long Trips	≤ 5%	1.0%	1.2%	1.2%	1.2%
Missed Trips	≤ 0.75%	0.29%	0.27%	0.29%	0.35%
Denials	≤ 0	0	0	0	0
On Time Performance (Access to Work)	≥ 94%	96.3%	91.6%	94.2%	94.5%

Call Performance

	Goal	Jan-23	Feb-23	Mar-23	YTD
<i>Reservations</i>					
Answered Calls		50,365	47,784	54,117	452,188
Average Initial Hold Time	≤ 120 sec	35	24	23	35
Calls On Hold > 5 Minutes	≤ 5%	1.4%	0.6%	0.7%	1.3%

<i>Estimated Time of Arrival (ETA)</i>					
Answered Calls		10,520	9,977	11,333	95,498
Average Initial Hold Time		22	12	11	23
Calls On Hold > 5 Minutes	≤ 10%	0.5%	0.1%	0.1%	0.6%

Complaints/Commendations

	Goal	Jan-23	Feb-23	Mar-23	YTD
Complaints Per 1,000 Trips	≤ 4.0	1.8	1.6	1.6	2.0
Commendations Per 1,000 Trips		0.5	0.3	0.4	0.5

Safety

	Goal	Jan-23	Feb-23	Mar-23	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.00	0.12	0.11	0.11
Preventable Collisions Per 100,000 Miles	≤ 0.75	0.56	0.59	0.67	0.76
Miles Between Road Calls	≥ 25,000	18,654	20,532	18,074	28,392

Contractual Requirement

Santa Clarita Region Trip Performance

	Goal	Jan-23	Feb-23	Mar-23	YTD
Vehicle Trips		2,438	2,307	2,603	22,242
Passenger Trips		2,698	2,591	2,873	24,684
No Shows		1.4%	1.6%	1.3%	2.0%
On Time Performance (Next Day Trips)	≥ 91%	94.2%	93.1%	95.5%	92.8%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.00%	0.09%	0.00%	0.13%
Excessively Long Trips	≤ 5%	2.8%	4.2%	4.0%	3.3%
Missed Trips	≤ 0.75%	0.99%	0.38%	1.06%	1.03%
Denials	≤ 0	0	0	0	1
On Time Performance (Access to Work)	≥ 94%	-	-	-	-

Call Performance

	Goal	Jan-23	Feb-23	Mar-23	YTD
<i>Reservations</i>					
Answered Calls		1,933	1,524	1,763	16,499
Average Initial Hold Time	≤ 120 sec	61	72	83	79
Calls On Hold > 5 Minutes	≤ 5%	3.5%	4.3%	5.7%	5.1%

<i>Estimated Time of Arrival (ETA)</i>					
Answered Calls		207	175	292	2,098
Average Initial Hold Time		61	61	79	79
Calls On Hold > 5 Minutes	≤ 10%	5.8%	5.7%	6.8%	6.7%

Complaints/Commendations

	Goal	Jan-23	Feb-23	Mar-23	YTD
Complaints Per 1,000 Trips	≤ 4.0	1.6	1.4	0.8	1.7
Commendations Per 1,000 Trips		0.0	0.0	0.4	0.2

Safety

	Goal	Jan-23	Feb-23	Mar-23	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.00	0.00	0.00	0.00
Preventable Collisions Per 100,000 Miles	≤ 0.75	0.00	0.00	0.00	0.34
Miles Between Road Calls	≥ 25,000	*	*	*	221,483

Contractual Requirement

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

Northern Region

Trip Performance

	Goal	Jan-23	Feb-23	Mar-23	YTD
Vehicle Trips		32,726	32,469	37,958	297,763
Passenger Trips		40,354	39,805	46,258	367,254
No Shows		2.3%	2.1%	2.3%	2.6%
On Time Performance (Next Day Trips)	≥ 91%	90.6%	88.2%	90.9%	89.8%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.06%	0.11%	0.07%	0.09%
Excessively Long Trips	≤ 5%	5.8%	6.9%	5.8%	5.5%
Missed Trips	≤ 0.75%	0.65%	0.69%	0.61%	0.71%
Denials	≤ 0	0	0	0	1
On Time Performance (Access to Work)	≥ 94%	96.8%	94.7%	96.3%	94.2%

Call Performance

	Goal	Jan-23	Feb-23	Mar-23	YTD
<i>Reservations</i>					
Answered Calls		29,693	27,874	31,019	271,658
Average Initial Hold Time	≤ 120 sec	64	81	83	78
Calls On Hold > 5 Minutes	≤ 5%	2.6%	3.3%	3.7%	3.5%
<i>Estimated Time of Arrival (ETA)</i>					
Answered Calls		7,514	7,652	7,883	66,060
Average Initial Hold Time		60	61	65	58
Calls On Hold > 5 Minutes	≤ 10%	3.1%	2.5%	2.9%	2.3%

Complaints/Commendations

	Goal	Jan-23	Feb-23	Mar-23	YTD
Complaints Per 1,000 Trips	≤ 4.0	3.1	4.0	3.8	3.8
Commendations Per 1,000 Trips		1.8	1.8	1.8	1.8

Safety

	Goal	Jan-23	Feb-23	Mar-23	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.00	0.00	0.00	0.04
Preventable Collisions Per 100,000 Miles	≤ 0.75	0.61	1.00	0.76	0.56
Miles Between Road Calls	≥ 25,000	35,408	59,594	55,835	52,646

Contractual Requirement

Southern Region

Trip Performance

	Goal	Jan-23	Feb-23	Mar-23	YTD
Vehicle Trips		79,159	77,905	90,542	723,703
Passenger Trips		95,694	94,705	109,612	881,433
No Shows		3.1%	2.4%	2.4%	2.5%
On Time Performance (Next Day Trips)	≥ 91%	91.9%	91.6%	90.9%	92.1%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.02%	0.04%	0.04%	0.02%
Excessively Long Trips	≤ 5%	5.0%	5.3%	5.3%	6.1%
Missed Trips	≤ 0.75%	0.48%	0.43%	0.43%	0.42%
Denials	≤ 0	0	1	0	1
On Time Performance (Access to Work)	≥ 94%	91.3%	96.7%	94.7%	94.6%

Call Performance

	Goal	Jan-23	Feb-23	Mar-23	YTD
<i>Reservations</i>					
Answered Calls		64,934	60,270	67,171	571,593
Average Initial Hold Time	≤ 120 sec	70	85	77	87
Calls On Hold > 5 Minutes	≤ 5%	1.8%	4.0%	2.1%	3.0%
<i>Estimated Time of Arrival (ETA)</i>					
Answered Calls		16,692	15,517	18,354	143,814
Average Initial Hold Time		61	75	68	76
Calls On Hold > 5 Minutes	≤ 10%	2.2%	4.3%	2.6%	3.5%

Complaints/Commendations

	Goal	Jan-23	Feb-23	Mar-23	YTD
Complaints Per 1,000 Trips	≤ 4.0	2.4	2.5	2.8	3.1
Commendations Per 1,000 Trips		0.9	1.0	1.2	0.8

Safety

	Goal	Jan-23	Feb-23	Mar-23	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.00	0.41	0.18	0.33
Preventable Collisions Per 100,000 Miles	≤ 0.75	1.39	0.98	1.20	1.13
Miles Between Road Calls	≥ 25,000	40,352	51,142	41,605	69,649

Contractual Requirement

West Central Region

Trip Performance

	Goal	Jan-23	Feb-23	Mar-23	YTD
Vehicle Trips		38,377	37,807	43,898	348,118
Passenger Trips		48,287	47,635	55,302	442,012
No Shows		3.8%	3.1%	3.3%	3.5%
On Time Performance (Next Day Trips)	≥ 91%	89.4%	89.5%	88.7%	88.6%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.05%	0.03%	0.04%	0.07%
Excessively Long Trips	≤ 5%	2.9%	3.2%	3.0%	2.9%
Missed Trips	≤ 0.75%	0.51%	0.42%	0.49%	0.53%
Denials	≤ 0	0	0	0	0
On Time Performance (Access to Work)	≥ 91%	96.1%	97.9%	91.0%	95.2%

Call Performance

	Goal	Jan-23	Feb-23	Mar-23	YTD
<i>Reservations</i>					
Answered Calls		34,336	33,290	37,920	305,965
Average Initial Hold Time	≤ 120 sec	36	25	25	36
Calls On Hold > 5 Minutes	≤ 5%	1.5%	0.7%	0.9%	1.4%
<i>Estimated Time of Arrival (ETA)</i>					
Answered Calls		7,544	7,283	8,538	69,311
Average Initial Hold Time		25	13	13	25
Calls On Hold > 5 Minutes	≤ 5%	0.6%	0.1%	0.1%	0.7%

Complaints/Commendations

	Goal	Jan-23	Feb-23	Mar-23	YTD
Complaints Per 1,000 Trips	≤ 4.0	2.3	2.9	3.1	3.2
Commendations Per 1,000 Trips		1.0	0.7	1.0	0.9

Safety

	Goal	Jan-23	Feb-23	Mar-23	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.42	0.00	0.00	0.16
Preventable Collisions Per 100,000 Miles	≤ 0.75	1.62	1.17	1.26	0.93
Miles Between Road Calls	≥ 25,000	39,954	33,657	42,640	25,335

Contractual Requirement

Eligibility and Appeals

Eligibility

	Goal	Jan-23	Feb-23	Mar-23	YTD
Eligible Customers		103,027	102,955	103,663	103,663
Total ADA Evaluations Performed		9,090	7,564	7,662	56,825
Days From Application to Decision (avg)	≤ 21	8	6	4	8

In Person Evaluations

	Goal	Jan-23	Feb-23	Mar-23	YTD
Unrestricted		1,259	2,440	2,643	12,171
Restricted		356	1,097	1,374	4,007
Temporary		863	1,350	1,672	19,919
Not Eligible		15	32	33	228
Total		2,493	4,919	5,722	36,325

Paper Evaluations

	Goal	Jan-23	Feb-23	Mar-23	YTD
Unrestricted		4,318	2,128	1,615	17,005
Restricted		2,273	517	325	3,459
Temporary		6	0	0	36
Not Eligible		0	0	0	0
Total		6,597	2,645	1,940	20,500

Appeals

	Goal	Jan-23	Feb-23	Mar-23	YTD
Appeals Performed		7	18	31	120
Days From Appeal to Decision (avg)	≤ 30	8	8	9	9

Customer Service

Phone Statistics

Customer Service

	Goal	Jan-23	Feb-23	Mar-23	YTD
Customer Service Calls		29,500	25,415	26,528	262,774
Average Initial Hold Time	≤ 180 sec	29	42	39	32
Calls On Hold > 5 Minutes	≤ 10%	1.4%	2.8%	3.0%	2.2%
Calls Abandoned	≤ 10%	0.6%	1.2%	1.3%	0.8%

Operations Monitoring Center

	Goal	Jan-23	Feb-23	Mar-23	YTD
Customer Service Calls		6,687	7,413	8,093	59,220
Average Initial Hold Time	≤ 180 sec	39	52	48	46
Calls On Hold > 5 Minutes	≤ 10%	2.0%	3.6%	3.5%	3.3%
Calls Abandoned	≤ 10%	2.4%	4.8%	4.3%	3.5%

Contractual Requirement

April 26, 2023

TO: BOARD OF DIRECTORS
FROM: HECTOR RODRIGUEZ, DEPUTY EXECUTIVE DIRECTOR
RE: FINANCIAL REPORT FOR MARCH 2023 - DRAFT

Attached for your review are the draft financial reports for MARCH 2023.

DRAFT FY 2022/2023 Budget to Actual Fiscal Year-to-Date Comparison:

- ◆ Passengers: 4.5% over budget
- ◆ Contract Revenue Miles: 2.1% under budget
- ◆ Trips: 7.1% over budget
- ◆ Total Eligibility Evaluations: 37.5% over budget
- ◆ Average Trip Distance: under budget by 0.81 miles at 8.63 miles
- ◆ Total cost per Passenger (before depreciation): 6.6% under budget at \$59.91
- ◆ Administration Function is 10.0% under budget
- ◆ Eligibility Determination Function is 3.8% under budget
- ◆ Purchased Transportation Function is 1.5% under budget
- ◆ Paratransit Operations Function is 4.4% under budget

Attached are the following reports for your review:

- Statistical Comparison: MARCH 2022 to MARCH 2023
- 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 March 2023

	% of Cost	YTD Actual	YTD Budget	Variance	% Over / (Under) Budget	% Over / (Under) Prior Yr
Purchased Transportation	83.4%	\$129,608,780	\$131,634,159	(\$2,025,379)	-1.5%	30%
Paratransit Operations	7.9%	\$12,195,145	\$12,753,692	(\$558,547)	-4.4%	6%
Eligibility Determination	3.9%	\$5,981,333	\$6,217,562	(\$236,229)	-3.8%	37%
CTSA/Ride Information	0.2%	\$245,166	\$426,477	(\$181,311)	-42.5%	-39%
Administration	4.7%	<u>\$7,293,458</u>	<u>\$8,100,316</u>	<u>(\$806,858)</u>	<u>-10.0%</u>	<u>14%</u>
Total Exp before Depreciation		\$155,323,882	\$159,132,206	(\$3,808,324)	-2.4%	27%

Statistics - For the YTD Period Ended March 2023

	YTD Actual	YTD Budget	Variance	% Over / (Under) Budget	% Over / (Under) Prior Yr
Total Eligibility Evaluations	56,841	41,334	15,507	37.5%	34%
Number of PAX	2,592,598	2,480,495	112,103	4.5%	21%
Number of Contract Revenue Miles	18,065,943	18,450,364	(384,419)	-2.1%	15%
Number of Trips	2,092,850	1,954,571	138,279	7.1%	24%
Average Trip Distance	8.63	9.44	(0.81)	-8.6%	-7%
Purchased Transportation Cost					
Cost per Contract Rev Mile	\$7.17	\$7.13	\$0.04	0.6%	13%
Total Cost per Trip before Depreciation	\$74.22	\$81.42	(\$7.20)	-8.8%	2%
Total Cost per Pax before Depreciation	\$59.91	\$64.15	(\$4.24)	-6.6%	5%

**Budget Results for FY 2022/2023
For YTD Period Ending March 2023**

	YTD Actual	YTD Budget	Variance	% Over / (Under) Budget	% Over / (Under) Prior Yr
Revenue					
Passenger Fares	\$6,159,236	\$6,209,360	(\$50,124)		
Other Revenue	\$2,259,688	\$529,298	\$1,730,390		
Total Revenue	\$8,418,924	\$6,738,658	\$1,680,266	25%	62%
Total Exp before Capital	\$155,323,883	\$159,132,206	(\$3,808,323)	-2%	27%
Capital Expenditures					
Vehicles	\$85,692	\$20,132,327	(\$20,046,635)		
Other Capital Expenditures	\$36,090	\$0	\$36,090		
Total Capital Expenditures	\$208,400	\$0	\$208,400		
	\$330,183	\$20,132,327	(\$19,802,145)	-98%	50%
Over/(Under) Budget March 2023			(\$23,610,468)		

YTD Cost Per Passenger before Depreciation and Capital Cost

