

# Board Box

August 2024

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SEPTEMBER 12, 2024

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	May-24	Jun-24	Jul-24	YTD
Vehicle Trips		312,193	287,239	303,635	303,635
Passenger Trips		385,749	356,520	376,308	376,308
Backup Trips		6	26	3	3
No Shows		2.0%	2.0%	2.1%	2.1%
On Time Performance (Next Day Trips)	≥ 91%	92.2%	93.6%	93.9%	93.9%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.02%	0.01%	0.01%	0.01%
Excessively Long Trips	≤ 5%	4.0%	3.3%	3.0%	3.0%
Missed Trips	≤ 0.75%	0.32%	0.29%	0.27%	0.27%
Denials	≤ 0	1	1	0	0
On Time Performance (Access to Work)	≥ 94%	96.3%	97.2%	97.0%	97.0%

### Call Performance

	Goal	May-24	Jun-24	Jul-24	YTD
<i>Reservations</i>					
Answered Calls		204,504	195,915	204,497	204,497
Average Initial Hold Time	≤ 120 sec	52	52	50	50
Calls On Hold > 5 Minutes	≤ 5%	2.8%	3.0%	2.6%	2.6%
<i>Estimated Time of Arrival (ETAs)</i>					
Answered Calls		61,767	62,288	66,890	66,890
Average Initial Hold Time		50	41	43	43
Calls On Hold > 5 Minutes	≤ 10%	3.7%	2.5%	2.8%	2.8%

### Complaints/Compliments

	Goal	May-24	Jun-24	Jul-24	YTD
Complaints Per 1,000 Trips	≤ 4.0	1.9	1.6	1.8	1.8
Compliments Per 1,000 Trips		0.8	0.7	0.0	0.0

### Safety

	Goal	May-24	Jun-24	Jul-24	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.21	0.31	0.24	0.24
Preventable Collisions Per 100,000 Miles	≤ 0.75	0.64	0.81	0.74	0.74
Miles Between Road Calls	≥ 25,000	54,853	48,028	35,600	35,600

## Antelope Valley Region Trip Performance

	Goal	May-24	Jun-24	Jul-24	YTD
Vehicle Trips		13,444	12,562	13,188	13,188
Passenger Trips		16,163	15,024	15,869	15,869
No Shows		2.2%	2.3%	2.8%	2.8%
On Time Performance (Next Day Trips)	≥ 91%	95.4%	95.7%	95.0%	95.0%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.00%	0.00%	0.00%	0.00%
Excessively Long Trips	≤ 5%	1.9%	1.7%	1.4%	1.4%
Missed Trips	≤ 0.75%	0.18%	0.17%	0.18%	0.18%
Denials	≤ 0	0	0	0	0
On Time Performance (Access to Work)	≥ 94%	96.2%	100.0%	100.0%	100.0%

## Call Performance

	Goal	May-24	Jun-24	Jul-24	YTD
<i>Reservations</i>					
Answered Calls		7,727	7,510	7,732	7,732
Average Initial Hold Time	≤ 120 sec	43	38	36	36
Calls On Hold > 5 Minutes	≤ 5%	1.4%	1.1%	0.7%	0.7%

<i>Estimated Time of Arrival (ETAs)</i>					
Answered Calls		2,605	2,537	2,673	2,673
Average Initial Hold Time		30	29	26	26
Calls On Hold > 5 Minutes	≤ 10%	1.0%	0.7%	0.6%	0.6%

## Complaints/Compliments

	Goal	May-24	Jun-24	Jul-24	YTD
Complaints Per 1,000 Trips	≤ 4.0	1.7	1.3	1.6	1.6
Compliments Per 1,000 Trips		1.4	1.3	0.0	0.0

## Safety

	Goal	May-24	Jun-24	Jul-24	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.00	0.59	0.00	0.00
Preventable Collisions Per 100,000 Miles	≤ 0.75	0.00	0.29	0.98	0.98
Miles Between Road Calls	≥ 25,000	174,474	56,956	59,447	59,447

Contractual Requirement

## Eastern Region Trip Performance

	Goal	May-24	Jun-24	Jul-24	YTD
Vehicle Trips		94,173	85,778	91,735	91,735
Passenger Trips		118,581	108,770	116,413	116,413
No Shows		1.8%	1.8%	1.9%	1.9%
On Time Performance (Next Day Trips)	≥ 91%	92.5%	94.3%	95.1%	95.1%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.01%	0.01%	0.01%	0.01%
Excessively Long Trips	≤ 5%	1.1%	0.8%	0.8%	0.8%
Missed Trips	≤ 0.75%	0.19%	0.16%	0.14%	0.14%
Denials	≤ 0	0	0	0	0
On Time Performance (Access to Work)	≥ 94%	98.2%	97.7%	98.6%	98.6%

## Call Performance

	Goal	May-24	Jun-24	Jul-24	YTD
<i>Reservations</i>					
Answered Calls		55,471	51,736	54,019	54,019
Average Initial Hold Time	≤ 120 sec	33	37	29	29
Calls On Hold > 5 Minutes	≤ 5%	3.5%	3.2%	2.0%	2.0%

<i>Estimated Time of Arrival (ETA)</i>					
Answered Calls		16,685	17,691	19,324	19,324
Average Initial Hold Time		33	25	27	27
Calls On Hold > 5 Minutes	≤ 10%	5.0%	3.0%	3.7%	3.7%

<i>Cancellations</i>					
Answered Calls		11,259	11,142	11,569	11,569
Average Initial Hold Time		30	28	22	22
Calls On Hold > 5 Minutes	≤ 10%	2.9%	2.8%	1.5%	1.5%

## Complaints/Compliments

	Goal	May-24	Jun-24	Jul-24	YTD
Complaints Per 1,000 Trips	≤ 4.0	1.2	1.1	1.4	1.4
Compliments Per 1,000 Trips		0.7	0.5	0.0	0.0

## Safety

	Goal	May-24	Jun-24	Jul-24	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.18	0.10	0.39	0.39
Preventable Collisions Per 100,000 Miles	≤ 0.75	0.92	0.46	0.94	0.94
Miles Between Road Calls	≥ 25,000	60,203	61,714	44,910	44,910

Contractual Requirement

## Santa Clarita Region Trip Performance

	Goal	May-24	Jun-24	Jul-24	YTD
Vehicle Trips		2,596	2,681	2,764	2,764
Passenger Trips		2,837	3,021	3,068	3,068
No Shows		0.8%	0.4%	0.7%	0.7%
On Time Performance (Next Day Trips)	≥ 91%	93.4%	94.4%	94.2%	94.2%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.04%	0.00%	0.00%	0.00%
Excessively Long Trips	≤ 5%	2.6%	1.9%	1.8%	1.8%
Missed Trips	≤ 0.75%	0.27%	0.33%	0.44%	0.44%
Denials	≤ 0	0	1	0	0
On Time Performance (Access to Work)	≥ 94%	-	-	-	-

## Call Performance

	Goal	May-24	Jun-24	Jul-24	YTD
<i>Reservations</i>					
Answered Calls		2,103	2,078	2,201	2,201
Average Initial Hold Time	≤ 120 sec	53	64	80	80
Calls On Hold > 5 Minutes	≤ 5%	2.3%	3.5%	4.6%	4.6%

<i>Estimated Time of Arrival (ETA)</i>					
Answered Calls		353	317	350	350
Average Initial Hold Time		37	50	66	66
Calls On Hold > 5 Minutes	≤ 10%	0.8%	1.3%	2.9%	2.9%

## Complaints/Compliments

	Goal	May-24	Jun-24	Jul-24	YTD
Complaints Per 1,000 Trips	≤ 4.0	0.4	0.0	0.3	0.3
Compliments Per 1,000 Trips		0.0	0.0	0.0	0.0

## Safety

	Goal	May-24	Jun-24	Jul-24	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	0.00
Miles Between Road Calls	≥ 25,000	*	*	*	*

### Contractual Requirement

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

## Northern Region Trip Performance

	Goal	May-24	Jun-24	Jul-24	YTD
Vehicle Trips		47,122	44,214	47,214	47,214
Passenger Trips		58,573	55,177	58,480	58,480
No Shows		1.8%	1.5%	1.5%	1.5%
On Time Performance (Next Day Trips)	≥ 91%	93.0%	94.3%	93.5%	93.5%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.07%	0.03%	0.00%	0.00%
Excessively Long Trips	≤ 5%	4.7%	3.6%	2.9%	2.9%
Missed Trips	≤ 0.75%	0.61%	0.54%	0.47%	0.47%
Denials	≤ 0	0	0	0	0
On Time Performance (Access to Work)	≥ 94%	95.6%	96.9%	98.3%	98.3%

## Call Performance

	Goal	May-24	Jun-24	Jul-24	YTD
<i>Reservations</i>					
Answered Calls		32,271	30,785	31,555	31,555
Average Initial Hold Time	≤ 120 sec	57	61	53	53
Calls On Hold > 5 Minutes	≤ 5%	1.6%	2.2%	1.7%	1.7%
<i>Estimated Time of Arrival (ETA)</i>					
Answered Calls		10,231	9,659	9,893	9,893
Average Initial Hold Time		56	61	51	51
Calls On Hold > 5 Minutes	≤ 10%	1.9%	2.8%	2.2%	2.2%

## Complaints/Compliments

	Goal	May-24	Jun-24	Jul-24	YTD
Complaints Per 1,000 Trips	≤ 4.0	2.3	1.8	1.7	1.7
Compliments Per 1,000 Trips		0.8	1.0	0.0	0.0

## Safety

	Goal	May-24	Jun-24	Jul-24	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.42	0.59	0.00	0.00
Preventable Collisions Per 100,000 Miles	≤ 0.75	0.59	0.26	0.00	0.00
Miles Between Road Calls	≥ 25,000	80,252	37,657	42,237	42,237

Contractual Requirement

## Southern Region Trip Performance

	Goal	May-24	Jun-24	Jul-24	YTD
Vehicle Trips		103,600	95,188	99,781	99,781
Passenger Trips		124,579	115,157	120,477	120,477
No Shows		2.0%	2.1%	2.1%	2.1%
On Time Performance (Next Day Trips)	≥ 91%	91.7%	92.5%	92.5%	92.5%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.01%	0.01%	0.01%	0.01%
Excessively Long Trips	≤ 5%	7.2%	6.1%	5.7%	5.7%
Missed Trips	≤ 0.75%	0.33%	0.34%	0.33%	0.33%
Denials	≤ 0	1	0	0	0
On Time Performance (Access to Work)	≥ 94%	95.8%	98.1%	95.5%	95.5%

## Call Performance

	Goal	May-24	Jun-24	Jul-24	YTD
<i>Reservations</i>					
Answered Calls		68,659	67,006	70,888	70,888
Average Initial Hold Time	≤ 120 sec	77	69	76	76
Calls On Hold > 5 Minutes	≤ 5%	3.0%	3.3%	4.2%	4.2%
<i>Estimated Time of Arrival (ETA)</i>					
Answered Calls		20,197	19,568	20,967	20,967
Average Initial Hold Time		78	59	68	68
Calls On Hold > 5 Minutes	≤ 10%	3.2%	2.2%	2.6%	2.6%

## Complaints/Compliments

	Goal	May-24	Jun-24	Jul-24	YTD
Complaints Per 1,000 Trips	≤ 4.0	2.2	1.9	2.3	2.3
Compliments Per 1,000 Trips		0.7	0.5	0.0	0.0

## Safety

	Goal	May-24	Jun-24	Jul-24	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.08	0.34	0.25	0.25
Preventable Collisions Per 100,000 Miles	≤ 0.75	0.37	1.21	0.92	0.92
Miles Between Road Calls	≥ 25,000	45,383	46,978	26,105	26,105

Contractual Requirement



## West Central Region Trip Performance

	Goal	May-24	Jun-24	Jul-24	YTD
Vehicle Trips		51,252	46,790	48,950	48,950
Passenger Trips		65,010	59,345	61,998	61,998
No Shows		2.6%	2.7%	2.6%	2.6%
On Time Performance (Next Day Trips)	≥ 91%	91.1%	93.7%	94.6%	94.6%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.02%	0.01%	0.01%	0.01%
Excessively Long Trips	≤ 5%	2.8%	2.1%	1.8%	1.8%
Missed Trips	≤ 0.75%	0.30%	0.20%	0.19%	0.19%
Denials	≤ 0	0	0	0	0
On Time Performance (Access to Work)	≥ 91%	95.2%	91.1%	95.6%	95.6%

## Call Performance

	Goal	May-24	Jun-24	Jul-24	YTD
<i>Reservations</i>					
Answered Calls		38,273	36,800	38,102	38,102
Average Initial Hold Time	≤ 120 sec	35	39	29	29
Calls On Hold > 5 Minutes	≤ 5%	2.9%	3.2%	1.4%	1.4%
<i>Estimated Time of Arrival (ETA)</i>					
Answered Calls		11,696	12,516	13,683	13,683
Average Initial Hold Time		28	20	20	20
Calls On Hold > 5 Minutes	≤ 5%	4.7%	2.3%	2.4%	2.4%

## Complaints/Compliments

	Goal	May-24	Jun-24	Jul-24	YTD
Complaints Per 1,000 Trips	≤ 4.0	2.2	2.0	1.8	1.8
Compliments Per 1,000 Trips		0.9	1.0	0.0	0.0

## Safety

	Goal	May-24	Jun-24	Jul-24	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.32	0.18	0.34	0.34
Preventable Collisions Per 100,000 Miles	≤ 0.75	0.97	1.46	0.90	0.90
Miles Between Road Calls	≥ 25,000	41,272	43,610	36,315	36,315

Contractual Requirement

## Eligibility and Appeals

### Eligibility

	Goal	May-24	Jun-24	Jul-24	YTD
Eligible Customers		114,682	115,455	116,074	116,074
Total ADA Evaluations Performed		4,606	2,869	4,513	4,513
Days From Application to Decision (avg)	≤ 21	N/A *	N/A *	N/A*	N/A *

### In Person Evaluations

	Goal	May-24	Jun-24	Jul-24	YTD
Unrestricted		2,528	1,432	2,504	2,504
Restricted		369	253	412	412
Temporary		60	45	77	77
Not Eligible		16	10	14	14
Total		2,973	1,740	3,007	3,007

### Paper Evaluations

	Goal	May-24	Jun-24	Jul-24	YTD
Unrestricted		1,633	1,129	1,506	1,506
Restricted		0	0	0	0
Temporary		0	0	0	0
Not Eligible		0	0	0	0
Total		1,633	1,129	1,506	1,506

### Appeals

	Goal	May-24	Jun-24	Jul-24	YTD
Appeals Performed		27	11	19	19
Days From Appeal to Decision (avg)	≤ 30	8	9	3	3

\* Unavailable for May, June, and July 2024

## Customer Service

### Phone Statistics

#### Customer Service

	Goal	May-24	Jun-24	Jul-24	YTD
Customer Service Calls		20,701	20,134	23,849	23,849
Average Initial Hold Time	≤ 180 sec	117	162	172	172
Calls On Hold > 5 Minutes	≤ 10%	14.3%	17.7%	20.7%	20.7%
Calls Abandoned	≤ 10%	4.6%	14.1%	13.1%	13.1%

#### Operations Monitoring Center

	Goal	May-24	Jun-24	Jul-24	YTD
Customer Service Calls		4,729	4,494	5,182	5,182
Average Initial Hold Time	≤ 180 sec	54	84	100	100
Calls On Hold > 5 Minutes	≤ 10%	4.7%	8.5%	10.5%	10.5%
Calls Abandoned	≤ 10%	5.0%	14.1%	15.8%	15.8%

Contractual Requirement

SEPTEMBER 12, 2024

TO: BOARD OF DIRECTORS  
FROM: HECTOR RODRIGUEZ, DEPUTY EXECUTIVE DIRECTOR  
RE: FINANCIAL REPORT FOR JULY 2024 - DRAFT

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Attached for your review are the draft financial reports for JULY 2024.

**DRAFT FY 2024/2025 Budget to Actual Fiscal Year-to-Date Comparison:**

- ◆ Passengers: 9.1% under budget
- ◆ Contract Revenue Miles: 12.5% under budget
- ◆ Trips: 8.8% under budget
- ◆ Total Eligibility Evaluations: 12% over budget
- ◆ Average Trip Distance: under budget by 0.36 miles at 8.34 miles
- ◆ Total cost per Passenger (before depreciation): 0.3% over budget at \$58.42
- ◆ Administration Function is 8.1% under budget
- ◆ Eligibility Determination Function is 11.6% under budget
- ◆ Purchased Transportation Function is 8.1% under budget
- ◆ Paratransit Operations Function is 15.5% under budget

Attached are the following reports for your review:

- Statistical Comparison: JULY 2023 to JULY 2024
- 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 July 2024

	% of Cost	YTD Actual	YTD Budget	Variance	% Over / (Under) Budget	% Over / (Under) Prior Yr
Purchased Transportation	84.7%	\$18,617,326	\$20,253,606	(\$1,636,280)	-8.1%	16%
Paratransit Operations	8.4%	\$1,849,053	\$2,187,283	(\$338,230)	-15.5%	16%
Eligibility Determination	2.5%	\$552,251	\$624,561	(\$72,310)	-11.6%	7%
CTSA/Ride Information	0.2%	\$37,157	\$32,510	\$4,647	14.3%	3%
Administration	4.2%	\$928,290	\$1,009,982	(\$81,692)	-8.1%	17%
<b>Total Exp before Depreciation</b>		<b>\$21,984,077</b>	<b>\$24,107,942</b>	<b>(\$2,123,865)</b>	<b>-8.8%</b>	<b>16%</b>

## Statistics - For the YTD Period Ended July 2024

	YTD Actual	YTD Budget	Variance	% Over / (Under) Budget	% Over / (Under) Prior Yr
Total Eligibility Evaluations	4,513	4,031	482	12.0%	52%
Number of PAX	376,308	413,984	(37,676)	-9.1%	14%
Number of Contract Revenue Miles	2,533,567	2,896,796	(363,229)	-12.5%	11%
Number of Trips	303,635	333,099	(29,464)	-8.8%	15%
Average Trip Distance	8.34	8.70	(0.36)	-4.1%	-4%
Purchased Transportation Cost					
Cost per Contract Rev Mile	\$7.35	\$6.99	\$0.36	5.2%	4%
Total Cost per Trip before Depreciation	\$72.40	\$72.37	\$0.03	0.0%	0%
Total Cost per Pax before Depreciation	\$58.42	\$58.23	\$0.19	0.3%	2%

## Budget Results for FY 2024/2025 For YTD Period Ending July 2024

	YTD Actual	YTD Budget	Variance	% Over / (Under) Budget	% Over / (Under) Prior Yr
Revenue					
Passenger Fares	\$808,401	\$947,440	(\$139,039)		
Other Revenue	\$284,793	\$159,204	\$125,589		
Total Revenue	\$1,093,194	\$1,106,644	(\$13,450)	-1%	0%
 Total Exp before Capital	 \$21,984,077	 \$24,107,942	 (\$2,123,865)	 -9%	 16%
Capital Expenditures					
Vehicles	\$2,200,557	\$4,981,567	(\$2,781,010)		
Other Capital Expenditures	\$0	\$666,667	(\$666,667)		
Total Capital Expenditures	\$1,112	\$0	\$1,112		
	\$2,201,669	\$5,648,234	(\$3,446,565)	-61%	7524%
 Over/(Under) Budget July 2024			 (\$5,570,430)		

## YTD Cost Per Passenger before Depreciation and Capital Cost

