Board Box

August 2026

ITEM 1

September 8, 2026

TO: BOARD OF DIRECTORS

FROM: YILIN ZHANG, GIS DEVELOPER

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	May-26	Jun-26	Jul-26	YTD
Vehicle Trips		359,471	354,899	365,293	365,293
Passenger Trips		444,434	433,167	454,993	454,993
Backup Trips		42	31	38	38
No Shows		2.0%	1.9%	2.0%	2.0%
On Time Performance (Next Day Trips)	≥ 91%	91.0%	91.7%	92.5%	92.5%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.02%	0.02%	0.04%	0.04%
Excessively Long Trips	≤ 5%	2.9%	2.0%	2.1%	2.1%
Missed Trips	≤ 0.75%	0.27%	0.23%	0.20%	0.20%
Denials	≤ 0	0	0	0	0
On Time Performance (Access to Work)	≥ 94%	98.3%	98.8%	99.3%	99.3%

Call Performance

	Goal	May-26	Jun-26	Jul-26	YTD
Reservations					
Answered Calls		234,283	230,061	233,594	233,594
Average Initial Hold Time	≤ 120 sec	55	54	51	51
Calls On Hold > 5 Minutes	≤ 5%	2.9%	2.8%	2.6%	2.6%
Estimated Time of Arrival (ETAs)					
Answered Calls		80,022	75,922	78,373	78,373
Average Initial Hold Time		48	45	48	48
Calls On Hold > 5 Minutes	≤ 10%	3.6%	3.4%	3.9%	3.9%

Complaints/Compliments

	Goal	May-26	Jun-26	Jul-26	YTD
Complaints Per 1,000 Trips	≤ 4.0	1.8	1.8	1.7	1.7
Compliments Per 1,000 Trips		0.9	0.9	0.8	0.8

Safety

	Goal	May-26	Jun-26	Jul-26	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.27	0.22	0.20	0.20
Preventable Collisions Per 100,000 Miles	≤ 0.85	0.94	0.62	0.87	0.87
Mean Miles Between Major Mechanical Failures	≥ 50,000	138,353	125,537	121,550	121,550

Antelope Valley Region (First Transit)

Trip Performance

	Goal	May-26	Jun-26	Jul-26	YTD
Vehicle Trips		14,309	14,619	14,859	14,859
Passenger Trips		17,057	17,784	17,796	17,796
No Shows		2.5%	2.1%	2.5%	2.5%
On Time Performance (Next Day Trips)	≥ 91%	93.1%	93.5%	92.3%	92.3%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.00%	0.01%	0.00%	0.00%
Excessively Long Trips	≤ 5%	2.4%	2.0%	2.2%	2.2%
Missed Trips	≤ 0.75%	0.22%	0.19%	0.21%	0.21%
Denials	≤ 0	0	0	0	0
On Time Performance (Access to Work)	≥ 94%	100.0%	100.0%	97.0%	97.0%

Call Performance

	Goal	May-26	Jun-26	Jul-26	YTD
Reservations					
Answered Calls		7,208	7,138	7,722	7,722
Average Initial Hold Time	≤ 120 sec	32	28	35	35
Calls On Hold > 5 Minutes	≤ 5%	0.9%	0.4%	1.1%	1.1%

Estimated Time of Arrival (ETAs)					
Answered Calls		2,364	2,340	2,712	2,712
Average Initial Hold Time		46	44	48	48
Calls On Hold > 5 Minutes	≤ 10%	3.0%	2.2%	3.1%	3.1%

Complaints/Compliments

	Goal	May-26	Jun-26	Jul-26	YTD
Complaints Per 1,000 Trips	≤ 4.0	1.0	0.8	0.6	0.6
Compliments Per 1,000 Trips		1.8	1.2	0.9	0.9

Safety

	Goal	May-26	Jun-26	Jul-26	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.00	0.00	0.00	0.00
Preventable Collisions Per 100,000 Miles	≤ 0.85	0.56	0.00	0.27	0.27
Mean Miles Between Major Mechanical Failures	≥ 50,000	*	182,662	*	*

Contractual Requirement

*Notes: There were zero (0) major mechanical failures.

Eastern Region (San Gabriel Transit)

Trip Performance

	Goal	May-26	Jun-26	Jul-26	YTD
Vehicle Trips		109,382	106,299	110,459	110,459
Passenger Trips		137,220	130,451	138,591	138,591
No Shows		2.0%	1.9%	1.9%	1.9%
On Time Performance (Next Day Trips)	≥ 91%	90.9%	91.3%	92.4%	92.4%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.01%	0.02%	0.07%	0.07%
Excessively Long Trips	≤ 5%	0.9%	0.9%	0.9%	0.9%
Missed Trips	≤ 0.75%	0.24%	0.21%	0.22%	0.22%
Denials	≤ 0	0	0	0	0
On Time Performance (Access to Work)	≥ 94%	99.5%	100.0%	100.0%	100.0%

Call Performance

	Goal	May-26	Jun-26	Jul-26	YTD
Reservations					
Answered Calls		61,961	60,396	61,180	61,180
Average Initial Hold Time	≤ 120 sec	34	38	30	30
Calls On Hold > 5 Minutes	≤ 5%	1.6%	2.3%	1.9%	1.9%

Estimated Time of Arrival (ETA)					
Answered Calls		25,261	23,405	25,067	25,067
Average Initial Hold Time		34	36	39	39
Calls On Hold > 5 Minutes	≤ 10%	4.4%	4.8%	5.5%	5.5%

Cancellations					
Answered Calls		7,208	7,138	7,722	7,722
Average Initial Hold Time		21	23	20	20
Calls On Hold > 5 Minutes	≤ 10%	1.1%	1.2%	1.1%	1.1%

Complaints/Compliments

	Goal	May-26	Jun-26	Jul-26	YTD
Complaints Per 1,000 Trips	≤ 4.0	1.4	1.7	1.6	1.6
Compliments Per 1,000 Trips		0.5	0.5	0.4	0.4

Safety

	Goal	May-26	Jun-26	Jul-26	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.25	0.39	0.26	0.26
Preventable Collisions Per 100,000 Miles	≤ 0.85	1.01	0.58	0.62	0.62
Mean Miles Between Major Mechanical Failures	≥ 50,000	70,235	68,794	90,112	90,112

Contractual Requirement

Santa Clarita Region (Santa Clarita Transit)

Trip Performance

	Goal	May-26	Jun-26	Jul-26	YTD
Vehicle Trips		3,118	3,080	2,876	2,876
Passenger Trips		3,610	3,573	3,379	3,379
No Shows		1.6%	1.4%	1.7%	1.7%
On Time Performance (Next Day Trips)	≥ 91%	91.1%	92.9%	92.7%	92.7%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.00%	0.03%	0.03%	0.03%
Excessively Long Trips	≤ 5%	1.4%	0.5%	0.7%	0.7%
Missed Trips	≤ 0.75%	0.33%	0.13%	0.24%	0.24%
Denials	≤ 0	0	0	0	0
On Time Performance (Access to Work)	≥ 94%	-	-	-	-

Call Performance

	Goal	May-26	Jun-26	Jul-26	YTD
Reservations					
Answered Calls		2,324	2,252	2,375	2,375
Average Initial Hold Time	≤ 120 sec	51	32	31	31
Calls On Hold > 5 Minutes	≤ 5%	2.5%	1.6%	1.1%	1.1%

Estimated Time of Arrival (ETA)					
Answered Calls		536	444	480	480
Average Initial Hold Time		41	26	31	31
Calls On Hold > 5 Minutes	≤ 10%	2.4%	1.1%	2.1%	2.1%

Complaints/Compliments

	Goal	May-26	Jun-26	Jul-26	YTD
Complaints Per 1,000 Trips	≤ 4.0	1.0	0.6	0.7	0.7
Compliments Per 1,000 Trips		0.0	0.0	0.0	0.0

Safety

	Goal	May-26	Jun-26	Jul-26	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.00	0.00	0.00	0.00
Preventable Collisions Per 100,000 Miles	≤ 0.85	0.92	0.00	0.00	0.00
Mean Miles Between Major Mechanical Failures	≥ 50,000	*	*	*	*

Contractual Requirement

*Notes: There were zero (0) major mechanical failures.

Northern Region (MV Transportation)

Trip Performance

	Goal	May-26	Jun-26	Jul-26	YTD
Vehicle Trips		60,573	60,500	62,340	62,340
Passenger Trips		76,042	76,369	79,973	79,973
No Shows		1.1%	1.2%	1.3%	1.3%
On Time Performance (Next Day Trips)	≥ 91%	92.2%	92.3%	92.4%	92.4%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.01%	0.01%	0.02%	0.02%
Excessively Long Trips	≤ 5%	2.4%	2.3%	2.3%	2.3%
Missed Trips	≤ 0.75%	0.27%	0.16%	0.15%	0.15%
Denials	≤ 0	0	0	0	0
On Time Performance (Access to Work)	≥ 94%	99.3%	98.5%	99.6%	99.6%

Call Performance

	Goal	May-26	Jun-26	Jul-26	YTD
Reservations					
Answered Calls		38,857	38,043	38,478	38,478
Average Initial Hold Time	≤ 120 sec	61	66	70	70
Calls On Hold > 5 Minutes	≤ 5%	1.9%	3.0%	3.3%	3.3%
Estimated Time of Arrival (ETA)					
Answered Calls		10,209	10,039	10,611	10,611
Average Initial Hold Time		56	62	69	69
Calls On Hold > 5 Minutes	≤ 10%	2.1%	2.7%	3.7%	3.7%

Complaints/Compliments

	Goal	May-26	Jun-26	Jul-26	YTD
Complaints Per 1,000 Trips	≤ 4.0	1.8	1.9	1.7	1.7
Compliments Per 1,000 Trips		1.8	2.0	1.5	1.5

Safety

	Goal	May-26	Jun-26	Jul-26	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.21	0.00	0.42	0.42
Preventable Collisions Per 100,000 Miles	≤ 0.85	0.58	0.38	0.84	0.84
Mean Miles Between Major Mechanical Failures	≥ 50,000	472,015	*	956,215	956,215

Contractual Requirement

*Notes: There were zero (0) major mechanical failures.

Southern Region (Global Paratransit)

Trip Performance

	Goal	May-26	Jun-26	Jul-26	YTD
Vehicle Trips		116,665	115,364	117,996	117,996
Passenger Trips		140,410	136,501	143,192	143,192
No Shows		2.1%	2.0%	2.1%	2.1%
On Time Performance (Next Day Trips)	≥ 91%	91.3%	92.3%	93.5%	93.5%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.03%	0.02%	0.01%	0.01%
Excessively Long Trips	≤ 5%	5.0%	2.5%	2.6%	2.6%
Missed Trips	≤ 0.75%	0.25%	0.25%	0.18%	0.18%
Denials	≤ 0	0	0	0	0
On Time Performance (Access to Work)	≥ 94%	97.6%	98.4%	99.4%	99.4%

Call Performance

	Goal	May-26	Jun-26	Jul-26	YTD
Reservations					
Answered Calls		79,200	77,547	78,671	78,671
Average Initial Hold Time	≤ 120 sec	82	75	72	72
Calls On Hold > 5 Minutes	≤ 5%	5.6%	3.9%	3.7%	3.7%
Estimated Time of Arrival (ETA)					
Answered Calls		23,346	21,896	21,684	21,684
Average Initial Hold Time		72	59	61	61
Calls On Hold > 5 Minutes	≤ 10%	3.6%	1.7%	2.4%	2.4%

Complaints/Compliments

	Goal	May-26	Jun-26	Jul-26	YTD
Complaints Per 1,000 Trips	≤ 4.0	2.0	1.6	1.8	1.8
Compliments Per 1,000 Trips		0.7	0.7	0.8	0.8

Safety

	Goal	May-26	Jun-26	Jul-26	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.36	0.33	0.14	0.14
Preventable Collisions Per 100,000 Miles	≤ 0.85	1.16	1.19	1.18	1.18
Mean Miles Between Major Mechanical Failures	≥ 50,000	155,339	121,773	91,014	91,014

Contractual Requirement

West Central Region (California Transit)

Trip Performance

	Goal	May-26	Jun-26	Jul-26	YTD
Vehicle Trips		55,382	55,006	56,725	56,725
Passenger Trips		70,053	68,458	72,024	72,024
No Shows		2.7%	2.7%	2.5%	2.5%
On Time Performance (Next Day Trips)	≥ 91%	88.7%	89.4%	90.5%	90.5%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.03%	0.03%	0.06%	0.06%
Excessively Long Trips	≤ 5%	2.6%	2.7%	2.5%	2.5%
Missed Trips	≤ 0.75%	0.36%	0.29%	0.28%	0.28%
Denials	≤ 0	0	0	0	0
On Time Performance (Access to Work)	≥ 91%	97.2%	97.7%	97.3%	97.3%

Call Performance

	Goal	May-26	Jun-26	Jul-26	YTD
Reservations					
Answered Calls		44,733	44,685	45,168	45,168
Average Initial Hold Time	≤ 120 sec	34	37	29	29
Calls On Hold > 5 Minutes	≤ 5%	1.4%	1.8%	1.3%	1.3%
Estimated Time of Arrival (ETA)					
Answered Calls		18,306	17,798	17,819	17,819
Average Initial Hold Time		30	32	33	33
Calls On Hold > 5 Minutes	≤ 5%	3.5%	4.4%	4.0%	4.0%

Complaints/Compliments

	Goal	May-26	Jun-26	Jul-26	YTD
Complaints Per 1,000 Trips	≤ 4.0	2.3	2.3	2.3	2.3
Compliments Per 1,000 Trips		0.5	0.7	0.6	0.6

Safety

	Goal	May-26	Jun-26	Jul-26	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.32	0.17	0.00	0.00
Preventable Collisions Per 100,000 Miles	≤ 0.85	0.95	0.13	0.96	0.96
Mean Miles Between Major Mechanical Failures	≥ 50,000	158,220	95,590	92,551	92,551

Contractual Requirement

Eligibility and Appeals

Eligibility (MTM Transit)

	Goal	May-26	Jun-26	Jul-26	YTD
Eligible Customers		121,528	122,183	122,797	122,797
Total ADA Evaluations Performed		3,007	3,616	3,666	3,666
Days From Application to Decision (avg)	≤ 21	9	8	9	9

In Person Evaluations

	Goal	May-26	Jun-26	Jul-26	YTD
Unrestricted		1,545	1,882	1,846	1,846
Restricted		430	500	463	463
Temporary		99	126	117	117
Not Eligible		23	29	19	19
Total		2,097	2,537	2,445	2,445

Paper Evaluations

	Goal	May-26	Jun-26	Jul-26	YTD
Unrestricted		910	1,078	1,221	1,221
Restricted		0	1	0	0
Temporary		0	0	0	0
Not Eligible		0	0	0	0
Total		910	1,079	1,221	1,221

Appeals

	Goal	May-26	Jun-26	Jul-26	YTD
Appeals Performed		14	15	15	15
Days From Appeal to Decision (avg)	≤ 30	9	6	8	8

Customer Service (ALTA)

Phone Statistics

Customer Service

	Goal	May-26	Jun-26	Jul-26	YTD
Customer Service Calls		19,552	21,795	22,040	22,040
Average Initial Hold Time	≤ 180 sec	190	110	142	142
Calls On Hold > 5 Minutes	≤ 10%	24.5%	11.4%	16.0%	16.0%
Calls Abandoned	≤ 10%	9.1%	5.0%	6.7%	6.7%

Operations Monitoring Center

	Goal	May-26	Jun-26	Jul-26	YTD
Customer Service Calls		6,311	6,322	6,246	6,246
Average Initial Hold Time	≤ 180 sec	98	67	90	90
Calls On Hold > 5 Minutes	≤ 10%	11.3%	5.8%	9.0%	9.0%
Calls Abandoned	≤ 10%	9.7%	5.9%	8.5%	8.5%

Contractual Requirement

ITEM 2

September 8, 2026

TO: BOARD OF DIRECTORS

FROM: HECTOR RODRIGUEZ, DEPUTY EXECUTIVE DIRECTOR

RE: FINANCIAL REPORT FOR JULY 2026 - DRAFT

Attached for your review are the draft financial reports for JULY 2026.

DRAFT FY 2026/2027 Budget to Actual Fiscal Year-to-Date Comparison:

- ♦ Passengers: 0.3% over budget
- ♦ Contract Revenue Miles: 1.5% under budget
- ♦ Trips: 1.1% under budget
- ♦ Total Eligibility Evaluations: 10.5% over budget
- ♦ Average Trip Distance: under budget by 0.03 miles at 8.20 miles
- ♦ Total cost per Passenger (before depreciation): 1.9% under budget at $61.53
- ♦ Administration Function is 16.2% under budget
- ♦ Eligibility Determination Function is 3.2% over budget
- ♦ Purchased Transportation Function is 1.7% under budget
- ♦ Paratransit Operations Function is 5.0% over budget

Attached are the following reports for your review:

- Statistical Comparison: JULY 2025 to JULY 2026
- 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 2026

	% of Cost	YTD Actual	YTD Budget	Variance	% Over / (Under) Budget	% Over / (Under) Prior Yr
Purchased Transportation	83.7%	$23,424,618	$23,830,141	($405,523)	-1.7%	10%
Paratransit Operations	10.2%	$2,850,877	$2,716,387	$134,490	5.0%	14%
Eligibility Determination	2.3%	$642,854	$622,788	$20,066	3.2%	15%
CTSA/Ride Information	0.1%	$41,967	$46,383	($4,416)	-9.5%	10%
Administration	3.7%	$1,036,390	$1,236,692	($200,302)	-16.2%	1%
Total Exp before Depreciation		$27,996,706	$28,452,391	($455,685)	-1.6%	10%

Statistics – For the YTD Period Ended July 2026

	YTD Actual	YTD Budget	Variance	% Over / (Under) Budget	% Over / (Under) Prior Yr
Total Eligibility Evaluations	3,666	3,316	350	10.5%	6%
Number of PAX	454,993	453,417	1,576	0.3%	8%
Number of Contract Revenue Miles	2,996,000	3,041,527	(45,526)	-1.5%	8%
Number of Trips	365,293	369,453	(4,160)	-1.1%	8%
Average Trip Distance	8.20	8.23	(0.03)	-0.4%	0%
Purchased Transportation Cost					
Cost per Contract Rev Mile	$7.82	$7.83	($0.01)	-0.1%	2%
Total Cost per Trip before Depreciation	$76.64	$77.01	($0.37)	-0.5%	3%
Total Cost per Pax before Depreciation	$61.53	$62.75	($1.22)	-1.9%	2%

Budget Results for FY 2025/2026
For YTD Period Ending July 2026

	YTD Actual	YTD Budget	Variance	% Over / (Under) Budget	% Over / (Under) Prior Yr
Revenue					
Passenger Fares	$989,842	$1,052,829	($62,987)		
Other Revenue	$149,552	$18,204	$131,348		
Total Revenue	$1,139,394	$1,071,033	$68,361	6%	5%
Total Exp before Capital	$27,996,706	$28,452,391	($455,685)	-2%	10%
Capital Expenditures					
Vehicles	$334,592	$1,457,328	($1,122,736)		
Facilities	($0)	$666,667	($666,667)		
Other Capital Expenditures	$0	$0	$0		
Total Capital Expenditures	$334,591	$2,123,995	($1,789,404)	-84%	-58%
Over/(Under) Budget July 2026			($2,245,089)		

YTD Cost Per Passenger before Depreciation and Capital Cost