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# Board Box

January 2018

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**JANUARY 29, 2018**

**TO: BOARD OF DIRECTORS**  
**FROM: MELISSA MUNGIA, DATA ANALYST**  
**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	Oct-17	Nov-17	Dec-17	YTD
Vehicle Trips		300,796	282,625	261,713	1,694,894
Passenger Trips		391,747	364,032	341,659	2,222,543
Back-Up Trips		24	10	16	90
No Shows		3.9%	3.9%	5.0%	4.1%
On Time Performance (Next Day Trips)	≥ 91%	89.1%	91.3%	92.4%	90.9%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.13%	0.08%	0.06%	0.09%
Excessively Long Trips	≤ 5%	5.2%	4.7%	4.2%	4.6%
Missed Trips	≤ 0.75%	0.83%	0.64%	0.70%	0.73%
Denials	≤ 0%	0.00%	0.88%	0.00%	0.36%
On Time Performance (Access to Work)	≥ 94%	92.6%	92.9%	95.1%	93.6%

## Call Performance

	Goal	Oct-17	Nov-17	Dec-17	YTD
<i>Reservations</i>					
Answered Calls		285,109	267,834	252,969	1,622,836
Average Initial Hold Time	≤ 120	89	76	79	81
Calls On Hold > 5 Minutes	≤ 5%	4.4%	3.5%	5.5%	4.3%
<i>Estimated Time of Arrival (ETAs)</i>					
Answered Calls		95,178	101,091	73,367	533,121
Average Initial Hold Time		192	143	190	203
Calls On Hold > 5 Minutes	≤ 10%	23.9%	15.8%	22.9%	24.5%

## Complaints/Commendations

	Goal	Oct-17	Nov-17	Dec-17	YTD
Complaints Per 1,000 Trips	≤ 4.0	3.7	2.9	2.6	3.7
Commendations Per 1,000 Trips		1.7	1.6	1.4	1.9

## Safety

	Goal	Oct-17	Nov-17	Dec-17	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.30	0.20	0.20	0.20
Preventable Collisions Per 100,000 Miles	≤ 0.50	0.54	0.60	0.70	0.66
Miles Between Road Calls	≥ 25,000	29,573	46,182	36,077	32,354

## Antelope Valley Region Trip Performance

	Goal	Oct-17	Nov-17	Dec-17	YTD
Vehicle Trips		13,952	12,445	11,612	77,854
Passenger Trips		18,774	16,658	15,787	105,523
No Shows		2.2%	3.5%	3.9%	3.1%
On Time Performance (Next Day Trips)	≥ 91%	88.9%	90.5%	92.3%	90.3%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.01%	0.01%	0.07%	0.03%
Excessively Long Trips	≤ 5%	2.9%	2.5%	2.0%	2.9%
Missed Trips	≤ 0.75%	0.49%	0.67%	0.76%	0.69%
Denials	≤ 0%	0.00%	5.26%	0.00%	0.88%
On Time Performance (Access to Work)	≥ 94%	100.0%	100.0%	100.0%	100.0%

## Call Performance

	Goal	Oct-17	Nov-17	Dec-17	YTD
<i>Reservations</i>					
Answered Calls		8,772	8,100	7,577	49,948
Average Initial Hold Time	≤ 120	103	105	101	103
Calls On Hold > 5 Minutes	≤ 5%	3.7%	3.9%	3.7%	3.6%

## Complaints/Commendations

	Goal	Oct-17	Nov-17	Dec-17	YTD
Complaints Per 1,000 Trips	≤ 4.0	3.1	1.8	1.4	2.5
Commendations Per 1,000 Trips		2.1	1.5	1.7	2.2

## Safety

	Goal	Oct-17	Nov-17	Dec-17	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.00	0.00	0.00	0.11
Preventable Collisions Per 100,000 Miles	≤ 0.50	0.00	0.67	0.00	0.32
Miles Between Road Calls	≥ 25,000	20,776	16,920	36,954	22,333

## Eastern Region Trip Performance

	Goal	Oct-17	Nov-17	Dec-17	YTD
Vehicle Trips		85,277	81,481	76,579	484,995
Passenger Trips		112,524	107,779	102,418	643,777
No Shows		2.7%	2.6%	2.8%	2.7%
On Time Performance (Next Day Trips)	≥ 91%	89.2%	92.1%	93.1%	91.5%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.13%	0.04%	0.06%	0.09%
Excessively Long Trips	≤ 5%	1.7%	1.5%	1.3%	1.4%
Missed Trips	≤ 0.75%	0.64%	0.42%	0.34%	0.48%
Denials	≤ 0%	0.00%	0.00%	0.00%	0.22%
On Time Performance (Access to Work)	≥ 94%	93.1%	94.1%	95.6%	94.3%

## Call Performance

	Goal	Oct-17	Nov-17	Dec-17	YTD
<i>Reservations</i>					
Answered Calls		75,291	70,815	65,799	418,895
Average Initial Hold Time	≤ 120	71	50	55	62
Calls On Hold > 5 Minutes	≤ 5%	4.7%	1.9%	3.2%	4.0%

<i>Estimated Time of Arrival (ETA)</i>					
Answered Calls		10,983	10,592	10,154	60,538
Average Initial Hold Time		137	54	53	114
Calls On Hold > 5 Minutes	≤ 10%	16.2%	3.2%	3.9%	12.3%

## Complaints/Commendations

	Goal	Oct-17	Nov-17	Dec-17	YTD
Complaints Per 1,000 Trips	≤ 4.0	3.3	2.9	2.4	3.0
Commendations Per 1,000 Trips		2.3	1.8	1.5	2.0

## Safety

	Goal	Oct-17	Nov-17	Dec-17	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.28	0.10	0.20	0.18
Preventable Collisions Per 100,000 Miles	≤ 0.50	0.83	0.38	0.80	0.75
Miles Between Road Calls	≥ 25,000	30,997	94,982	76,690	47,197

## Santa Clarita Region Trip Performance

	Goal	Oct-17	Nov-17	Dec-17	YTD
Vehicle Trips		3,782	3,206	2,811	19,659
Passenger Trips		4,383	3,716	3,254	22,924
No Shows		2.6%	3.0%	3.3%	2.8%
On Time Performance (Next Day Trips)	≥ 91%	94.7%	94.5%	94.7%	95.2%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.00%	0.10%	0.04%	0.05%
Excessively Long Trips	≤ 5%	3.2%	3.6%	3.7%	3.3%
Missed Trips	≤ 0.75%	0.69%	0.76%	0.64%	0.58%
Denials	≤ 0%	0.00%	0.00%	0.00%	0.00%
On Time Performance (Access to Work)	≥ 94%	-	-	-	-

## Call Performance

	Goal	Oct-17	Nov-17	Dec-17	YTD
<i>Reservations</i>					
Answered Calls		3,765	3,193	2,995	21,491
Average Initial Hold Time	≤ 120	61	59	55	53
Calls On Hold > 5 Minutes	≤ 5%	2.6%	2.4%	2.5%	2.3%

## Complaints/Commendations

	Goal	Oct-17	Nov-17	Dec-17	YTD
Complaints Per 1,000 Trips	≤ 4.0	0.0	0.0	0.0	0.3
Commendations Per 1,000 Trips		0.0	0.3	0.0	0.5

## Safety

	Goal	Oct-17	Nov-17	Dec-17	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	2.89	0.00	3.90	1.68
Preventable Collisions Per 100,000 Miles	≤ 0.50	0.00	0.00	0.00	0.56
Miles Between Road Calls	≥ 25,000	34,565	29,443	25,650	29,815

## Northern Region Trip Performance

	Goal	Oct-17	Nov-17	Dec-17	YTD
Vehicle Trips		53,720	49,714	44,999	301,104
Passenger Trips		66,346	61,539	56,949	374,838
No Shows		4.1%	4.2%	5.1%	4.4%
On Time Performance (Next Day Trips)	≥ 91%	91.2%	91.9%	93.7%	91.9%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.12%	0.14%	0.09%	0.12%
Excessively Long Trips	≤ 5%	8.8%	7.4%	6.2%	7.6%
Missed Trips	≤ 0.75%	0.70%	0.62%	0.59%	0.70%
Denials	≤ 0%	0.00%	0.00%	0.00%	0.22%
On Time Performance (Access to Work)	≥ 94%	90.9%	89.4%	93.7%	90.7%

## Call Performance

	Goal	Oct-17	Nov-17	Dec-17	YTD
<i>Reservations</i>					
Answered Calls		46,552	44,648	43,036	270,638
Average Initial Hold Time	≤ 120	104	94	77	92
Calls On Hold > 5 Minutes	≤ 5%	4.0%	3.8%	2.9%	3.7%
<i>Estimated Time of Arrival (ETA)</i>					
Answered Calls		6,738	6,716	5,402	36,252
Average Initial Hold Time		76	75	68	68
Calls On Hold > 5 Minutes	≤ 10%	4.7%	4.7%	4.5%	4.3%

## Complaints/Commendations

	Goal	Oct-17	Nov-17	Dec-17	YTD
Complaints Per 1,000 Trips	≤ 4.0	1.6	1.4	1.3	1.9
Commendations Per 1,000 Trips		1.5	1.8	1.9	2.0

## Safety

	Goal	Oct-17	Nov-17	Dec-17	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.58	0.15	0.16	0.25
Preventable Collisions Per 100,000 Miles	≤ 0.50	0.29	0.31	0.49	0.43
Miles Between Road Calls	≥ 25,000	86,936	108,103	47,295	70,556

## Southern Region Trip Performance

	Goal	Oct-17	Nov-17	Dec-17	YTD
Vehicle Trips		98,194	92,770	86,300	552,019
Passenger Trips		128,667	116,754	110,045	728,640
No Shows		4.9%	4.6%	6.8%	5.1%
On Time Performance (Next Day Trips)	≥ 91%	87.7%	90.1%	90.6%	89.7%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.18%	0.10%	0.03%	0.10%
Excessively Long Trips	≤ 5%	7.1%	6.5%	6.3%	6.3%
Missed Trips	≤ 0.75%	1.12%	0.84%	1.06%	0.96%
Denials	≤ 0%	0.00%	0.00%	0.00%	0.65%
On Time Performance (Access to Work)	≥ 94%	100.0%	94.1%	100.0%	97.0%

## Call Performance

	Goal	Oct-17	Nov-17	Dec-17	YTD
<i>Reservations</i>					
Answered Calls		95,756	90,740	87,067	558,827
Average Initial Hold Time	≤ 120	106	101	111	98
Calls On Hold > 5 Minutes	≤ 5%	4.1%	5.6%	10.2%	5.1%
<i>Estimated Time of Arrival (ETA)</i>					
Answered Calls		69,330	75,984	50,976	392,564
Average Initial Hold Time		220	170	250	239
Calls On Hold > 5 Minutes	≤ 10%	28.0%	19.9%	31.3%	29.7%

## Complaints/Commendations

	Goal	Oct-17	Nov-17	Dec-17	YTD
Complaints Per 1,000 Trips	≤ 4.0	5.8	4.4	3.9	6.0
Commendations Per 1,000 Trips		1.1	1.2	0.9	1.4

## Safety

	Goal	Oct-17	Nov-17	Dec-17	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.17	0.28	0.26	0.22
Preventable Collisions Per 100,000 Miles	≤ 0.50	0.43	0.83	0.71	0.74
Miles Between Road Calls	≥ 25,000	19,389	25,321	21,408	19,620



## West Central Region Trip Performance

	Goal	Oct-17	Nov-17	Dec-17	YTD
Vehicle Trips		45,847	42,999	39,412	259,189
Passenger Trips		61,029	57,576	53,190	346,751
No Shows		4.0%	3.8%	4.3%	4.2%
On Time Performance (Next Day Trips)	≥ 91%	88.9%	91.3%	93.5%	91.1%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.11%	0.08%	0.08%	0.09%
Excessively Long Trips	≤ 5%	4.4%	4.2%	3.3%	3.8%
Missed Trips	≤ 0.75%	0.70%	0.52%	0.49%	0.59%
Denials	≤ 0%	0.00%	0.00%	0.00%	0.22%
On Time Performance (Access to Work)	≥ 94%	92.3%	95.5%	97.1%	95.7%

## Call Performance

	Goal	Oct-17	Nov-17	Dec-17	YTD
<i>Reservations</i>					
Answered Calls		54,973	50,338	46,495	303,037
Average Initial Hold Time	≤ 120	70	49	52	61
Calls On Hold > 5 Minutes	≤ 5%	5.2%	2.0%	3.1%	4.2%
<i>Estimated Time of Arrival (ETA)</i>					
Answered Calls		8,127	7,799	6,835	43,767
Average Initial Hold Time		127	53	49	111
Calls On Hold > 5 Minutes	≤ 10%	14.7%	2.5%	3.0%	12.0%

## Complaints/Commendations

	Goal	Oct-17	Nov-17	Dec-17	YTD
Complaints Per 1,000 Trips	≤ 4.0	2.8	1.9	2.1	2.7
Commendations Per 1,000 Trips		1.4	1.4	1.3	1.8

## Safety

	Goal	Oct-17	Nov-17	Dec-17	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.17	0.37	0.00	0.09
Preventable Collisions Per 100,000 Miles	≤ 0.50	0.69	0.92	0.99	0.73
Miles Between Road Calls	≥ 25,000	38,606	77,768	46,128	40,295

## Eligibility and Appeals

### Eligibility

	Goal	Oct-17	Nov-17	Dec-17	YTD
Eligible Customers		166,776	166,531	164,836	164,836
ADA Evaluations Performed		2,469	2,625	2,823	14,055
Days From Application to Decision (avg)	≤ 21	13	13	14	15

### Eligibility Determinations

	Goal	Oct-17	Nov-17	Dec-17	YTD
Unrestricted		1,324	1,422	1,378	7,751
Restricted		482	484	574	2,571
Temporary		174	150	150	1,007
Not Eligible		489	569	721	2,726
Total		2,469	2,625	2,823	14,055

### Appeals

	Goal	Oct-17	Nov-17	Dec-17	YTD
Appeals Performed		70	49	70	557
Days From Appeal to Decision (avg)	≤ 30	7	10	12	9

## Customer Service

### Phone Statistics

#### Customer Service

	Goal	Oct-17	Nov-17	Dec-17	YTD
Customer Service Calls		33,292	29,261	29,729	195,852
Average Initial Hold Time	≤ 180 sec	347	258	106	219
Calls on Hold over 5 Minutes	≤ 10%	48.6%	34.8%	13.2%	29.6%
Call Duration	≤ 300 sec	335	317	308	327
Calls Abandoned	≤ 10%	10.7%	8.3%	3.7%	7.3%

#### Operations Monitoring Center

	Goal	Oct-17	Nov-17	Dec-17	YTD
Customer Service Calls		11,461	10,181	9,720	67,184
Average Initial Hold Time	≤ 180 sec	229	175	102	161
Calls on Hold over 5 Minutes	≤ 10%	30.3%	22.5%	12.3%	20.6%
Call Duration	≤ 300 sec	432	401	437	447
Calls Abandoned	≤ 10%	16.1%	12.2%	8.2%	11.8%

**JANUARY 29, 2018**

**TO: BOARD OF DIRECTORS**

**FROM: HECTOR RODRIGUEZ, DEPUTY EX. DIRECTOR, FINANCE**

**RE: FINANCIAL REPORT FOR NOVEMBER 2017**

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Attached for your review are the draft financial reports for November 2017.

Approved FY 2017/18 Budget to Actual Fiscal Year-to-Date Comparison:

- Passengers: 2.7% under budget
- Contract Revenue Miles: 3.5% under budget
- Trips: 2.9% under budget
- Completed Eligibility Interviews: 37% under budget
- Average Trip Distance: 0.6% under budget at 9.30 miles
- Total cost per Passenger (before depreciation): 6.7% under budget
- Administration Function is 7% under budget
- Eligibility Determination Function is 45% under budget
- Purchased Transportation Function is 3.9% under budget
- Paratransit Operations Function is 18% under budget

Attached are the following reports for your review:

- Statistical Comparison: November 2016 to November 2017
- 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 2017**

	% of Cost	YTD Actual	YTD Budget	Variance	% Over / (Under) Budget	% Over / (Under) Prior Yr
Purchased Transportation	81%	\$51,207,536	\$53,296,306	(\$2,088,770)	-3.9%	6%
Paratransit Operations	9%	\$5,672,024	\$6,924,150	(\$1,252,126)	-18%	-21%
Eligibility Determination	5%	\$3,301,603	\$6,033,847	(\$2,732,244)	-45%	-19%
CTSA/Ride Information	0.1%	\$73,171	\$130,940	(\$57,769)	-44%	-73%
Administrative	4%	\$2,834,837	\$3,045,925	(\$211,088)	-7%	12%
<b>Total Exp before Depreciation</b>		<b>\$63,089,171</b>	<b>\$69,431,168</b>	<b>(\$6,341,997)</b>	<b>-9.1%</b>	<b>1.3%</b>

## Statistics - - For the YTD Period Ended November 2017

	YTD Actual	YTD Budget	Variance	% Over / (Under) Budget	% Over / (Under) Prior Yr
Number of Completed Cert Interviews	10,776	17,089	(6,313)	-36.9%	-36.8%
Number of PAX	1,861,317	1,912,015	(50,698)	-2.7%	0.9%
Number of Contract Revenue Miles	13,179,409	13,657,705	(478,296)	-3.5%	0.9%
Number of Trips	1,416,398	1,458,477	(42,079)	-2.9%	-0.9%
Average Trip Distance	9.30	9.36	(0.06)	-0.6%	1.8%
<b>Purchased Transportation Cost</b>					
Cost per Trip	\$36.15	\$36.54	(\$0.39)	-1.1%	7.2%
Cost per PAX	\$27.51	\$27.87	(\$0.36)	-1.3%	5.2%
Cost per Contract Rev Mile	\$3.89	\$3.90	(\$0.01)	-0.2%	5.3%
Total Cost per Pax before Depreciation	\$33.89	\$36.31	(\$2.42)	-6.7%	0.4%

**Budget Results for FY 2017/2018**  
**For YTD Period Ending November 2017**

	YTD Actual	YTD Budget	Variance	% Over / (Under) Budget	% Over / (Under) Prior Yr
Revenue					
Passenger Fares	\$4,061,352	\$4,135,760	(\$74,408)		
Other Revenue	\$61,161	\$133,330	(\$72,169)		
Total Revenue	<u>\$4,122,513</u>	<u>\$4,269,090</u>	<u>(\$146,577)</u>	-3.4%	-8%
 Total Exp before Capital	 \$63,089,171	 \$69,431,168	 (\$6,341,997)	 -9%	 1%
Capital Expenditures					
Vehicles	\$75,081	\$0	\$75,081		
Other Capital Expenditures	\$21,335	\$0	\$21,335		
Total Capital Expenditures	<u>\$96,416</u>	<u>\$0</u>	<u>\$96,416</u>		
 Over/(Under) Budget November 2017			 <u>(\$6,245,581)</u>		

# YTD COST PER PASSENGER BEFORE DEPRECIATION AND CAPITAL COST

