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# Board Box

September 2018

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**September 27, 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	Jun-18	Jul-18	Aug-18	YTD
Vehicle Trips		283,395	286,243	304,872	591,115
Passenger Trips		369,895	374,195	396,477	770,672
Backup Trips		14	3	52	55
No Shows		3.6%	3.5%	3.2%	3.3%
On Time Performance (Next Day Trips)	≥ 91%	93.6%	93.8%	92.1%	93.1%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.04%	0.06%	0.10%	0.07%
Excessively Long Trips	≤ 5%	5.0%	3.9%	4.0%	3.9%
Missed Trips	≤ 0.75%	0.58%	0.59%	0.69%	0.64%
Denials	≤ 0	0	0	1	1
On Time Performance (Access to Work)	≥ 94%	96.9%	97.0%	95.9%	96.4%

## Call Performance

	Goal	Jun-18	Jul-18	Aug-18	YTD
<i>Reservations</i>					
Answered Calls		246,234	256,767	268,749	525,516
Average Initial Hold Time (seconds)	≤ 120	112	70	85	78
Calls On Hold > 5 Minutes	≤ 5%	10.2%	4.3%	5.5%	4.9%
<i>Estimated Time of Arrival (ETAs)</i>					
Answered Calls		44,874	43,897	52,189	96,086
Average Initial Hold Time (seconds)		76	73	121	99
Calls On Hold > 5 Minutes	≤ 10%	5.7%	5.3%	11.2%	8.5%

## Complaints/Commendations

	Goal	Jun-18	Jul-18	Aug-18	YTD
Complaints Per 1,000 Trips	≤ 4.0	3.6	3.2	3.7	3.5
Commendations Per 1,000 Trips		1.5	1.5	1.5	1.5

## Safety

	Goal	Jun-18	Jul-18	Aug-18	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.28	0.28	0.31	0.30
Preventable Collisions Per 100,000 Miles	≤ 0.50	0.70	0.74	1.05	0.90
Weighted Preventable Collisions Per 100,000 Miles		0.57	0.57	0.94	0.76
Miles Between Road Calls	≥ 25,000	40,132	36,273	35,665	35,959

## Antelope Valley Region Trip Performance

	Goal	Jun-18	Jul-18	Aug-18	YTD
Vehicle Trips		13,198	13,108	14,728	27,836
Passenger Trips		18,432	17,868	19,208	37,076
No Shows		3.0%	2.7%	2.7%	2.7%
On Time Performance (Next Day Trips)	≥ 91%*	92.6%	92.6%	92.2%	92.4%
Excessively Late Trips (45+ min late)	≤ 0.10%*	0.09%	0.03%	0.04%	0.04%
Excessively Long Trips	≤ 5%	2.0%	1.9%	1.8%	1.9%
Missed Trips	≤ 0.75%	1.06%	1.01%	0.84%	0.92%
Denials	≤ 0*	0	0	0	0
On Time Performance (Access to Work)	≥ 94%	97.6%	100.0%	100.0%	100.0%

## Call Performance

	Goal	Jun-18	Jul-18	Aug-18	YTD
<i>Reservations</i>					
Answered Calls		8,139	8,437	9,351	17,788
Average Initial Hold Time (seconds)	≤ 120*	57	55	66	60
Calls On Hold > 5 Minutes	≤ 5%*	2.5%	2.5%	1.9%	2.2%

	Goal	Jun-18	Jul-18	Aug-18	YTD
<i>Estimated Time of Arrival (ETAs)</i>					
Answered Calls		2,832	2,730	3,326	6,056
Average Initial Hold Time (seconds)		37	40	37	38
Calls On Hold > 5 Minutes	≤ 10%	1.4%	1.6%	1.2%	1.4%

## Complaints/Commendations

	Goal	Jun-18	Jul-18	Aug-18	YTD
Complaints Per 1,000 Trips	≤ 4.0	2.5	2.1	2.0	2.1
Commendations Per 1,000 Trips		2.1	2.4	1.8	2.0

## Safety

	Goal	Jun-18	Jul-18	Aug-18	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.60	0.00	0.55	0.28
Preventable Collisions Per 100,000 Miles	≤ 0.50*	0.00	0.00	1.09	0.57
Weighted Preventable Collisions Per 100,000 Miles		0.00	0.00	1.23	0.64
Miles Between Road Calls	≥ 25,000	20,819	33,749	20,355	25,139

\*Contractual Requirement

## Eastern Region Trip Performance

	Goal	Jun-18	Jul-18	Aug-18	YTD
Vehicle Trips		81,946	83,939	90,176	174,115
Passenger Trips		108,889	111,819	119,533	231,352
No Shows		2.3%	2.4%	2.4%	2.4%
On Time Performance (Next Day Trips)	≥ 91%*	95.6%	95.7%	93.8%	94.7%
Excessively Late Trips (45+ min late)	≤ 0.10%*	0.00%	0.00%	0.01%	0.00%
Excessively Long Trips	≤ 5%	0.9%	0.8%	1.0%	0.9%
Missed Trips	≤ 0.75%	0.15%	0.14%	0.21%	0.18%
Denials	≤ 0*	0	0	0	0
On Time Performance (Access to Work)	≥ 94%	98.2%	97.2%	95.2%	96.1%

## Call Performance

	Goal	Jun-18	Jul-18	Aug-18	YTD
<i>Reservations</i>					
Answered Calls		65,584	70,346	72,690	143,036
Average Initial Hold Time (seconds)	≤ 120	159	67	81	74
Calls On Hold > 5 Minutes	≤ 5%	18.6%	5.6%	7.4%	6.5%

<i>Estimated Time of Arrival (ETA)</i>					
Answered Calls		8,599	8,813	9,942	18,755
Average Initial Hold Time (seconds)		76	53	56	55
Calls On Hold > 5 Minutes	≤ 10%*	6.8%	3.7%	4.7%	4.2%

## Complaints/Commendations

	Goal	Jun-18	Jul-18	Aug-18	YTD
Complaints Per 1,000 Trips	≤ 4.0	3.2	2.6	3.0	2.8
Commendations Per 1,000 Trips		1.9	1.9	1.9	1.9

## Safety

	Goal	Jun-18	Jul-18	Aug-18	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.19	0.48	0.36	0.42
Preventable Collisions Per 100,000 Miles	≤ 0.50*	0.87	0.95	1.08	1.02
Weighted Preventable Collisions Per 100,000 Miles		0.72	0.69	0.97	0.83
Miles Between Road Calls	≥ 25,000	36,996	95,482	69,343	79,992

\*Contractual Requirement

## Santa Clarita Region Trip Performance

	Goal	Jun-18	Jul-18	Aug-18	YTD
Vehicle Trips		3,002	3,071	3,307	6,378
Passenger Trips		3,543	3,643	3,984	7,627
No Shows		2.4%	3.2%	2.8%	3.0%
On Time Performance (Next Day Trips)	≥ 91%*	95.1%	95.5%	94.2%	94.8%
Excessively Late Trips (45+ min late)	≤ 0.10%*	0.10%	0.06%	0.06%	0.06%
Excessively Long Trips	≤ 5%	3.1%	2.2%	3.4%	2.9%
Missed Trips	≤ 0.75%	0.94%	1.00%	1.14%	1.07%
Denials	≤ 0*	0	0	0	0
On Time Performance (Access to Work)	≥ 94%	-	-	-	-

## Call Performance

	Goal	Jun-18	Jul-18	Aug-18	YTD
<i>Reservations</i>					
Answered Calls		3,019	3,385	3,393	6,778
Average Initial Hold Time (seconds)	≤ 120*	40	45	40	43
Calls On Hold > 5 Minutes	≤ 5%*	1.4%	1.5%	1.2%	1.4%

## Complaints/Commendations

	Goal	Jun-18	Jul-18	Aug-18	YTD
Complaints Per 1,000 Trips	≤ 4.0	1.3	0.7	0.3	0.5
Commendations Per 1,000 Trips		2.3	0.3	0.6	0.5

## Safety

	Goal	Jun-18	Jul-18	Aug-18	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
Weighted Preventable Collisions Per 100,000 Miles		0.00	0.00	0.00	0.00
Miles Between Road Calls	≥ 25,000	27,530	25,599	28,101	53,700

\*Contractual Requirement

## Northern Region Trip Performance

	Goal	Jun-18	Jul-18	Aug-18	YTD
Vehicle Trips		50,920	50,400	54,265	104,665
Passenger Trips		64,277	63,633	68,279	131,912
No Shows		3.5%	3.4%	1.8%	2.4%
On Time Performance (Next Day Trips)	≥ 91%*	91.7%	92.1%	91.9%	92.0%
Excessively Late Trips (45+ min late)	≤ 0.10%*	0.06%	0.03%	0.08%	0.06%
Excessively Long Trips	≤ 5%**	5.9%	5.6%	6.0%	5.8%
Missed Trips	≤ 0.75%**	0.52%	0.48%	0.33%	0.39%
Denials	≤ 0*	0	0	0	0
On Time Performance (Access to Work)	≥ 94%**	98.1%	96.7%	95.9%	96.3%

## Call Performance

	Goal	Jun-18	Jul-18	Aug-18	YTD
<i>Reservations</i>					
Answered Calls		40,227	41,513	44,474	85,987
Average Initial Hold Time (seconds)	≤ 120*	88	95	94	94
Calls On Hold > 5 Minutes	≤ 5%*	3.5%	3.2%	2.1%	2.6%
<i>Estimated Time of Arrival (ETA)</i>					
Answered Calls		2,315	2,307	2,612	4,919
Average Initial Hold Time (seconds)		44	49	60	55
Calls On Hold > 5 Minutes	≤ 10%**	2.2%	2.8%	4.9%	3.9%

## Complaints/Commendations

	Goal	Jun-18	Jul-18	Aug-18	YTD
Complaints Per 1,000 Trips	≤ 4.0**	1.9	2.2	2.1	2.2
Commendations Per 1,000 Trips		1.5	1.7	1.3	1.4

## Safety

	Goal	Jun-18	Jul-18	Aug-18	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25**	0.62	0.00	0.29	0.15
Preventable Collisions Per 100,000 Miles	≤ 0.50*	0.78	0.92	1.02	0.97
Weighted Preventable Collisions Per 100,000 Miles		0.50	0.77	0.83	0.80
Miles Between Road Calls	≥ 25,000**	71,507	50,218	57,424	53,676

\*Contractual Requirement

\*\*New contractual requirement starting 8/1/18

## Southern Region Trip Performance

	Goal	Jun-18	Jul-18	Aug-18	YTD
Vehicle Trips		90,708	91,121	95,948	187,069
Passenger Trips		115,728	116,504	122,000	238,504
No Shows		4.7%	4.4%	4.8%	4.6%
On Time Performance (Next Day Trips)	≥ 91%*	92.5%	92.8%	89.3%	91.4%
Excessively Late Trips (45+ min late)	≤ 0.10%*	0.06%	0.14%	0.29%	0.17%
Excessively Long Trips	≤ 5%	9.8%	6.9%	7.4%	7.1%
Missed Trips	≤ 0.75%	1.05%	1.12%	1.54%	1.33%
Denials	≤ 0*	0	0	1	1
On Time Performance (Access to Work)	≥ 94%	94.9%	96.5%	95.8%	96.2%

## Call Performance

	Goal	Jun-18	Jul-18	Aug-18	YTD
<i>Reservations</i>					
Answered Calls		81,978	82,838	87,940	170,778
Average Initial Hold Time (seconds)	≤ 120*	61	64	89	77
Calls On Hold > 5 Minutes	≤ 5%*	2.4%	3.1%	4.9%	4.0%
<i>Estimated Time of Arrival (ETA)</i>					
Answered Calls		24,280	23,093	28,650	51,743
Average Initial Hold Time (seconds)		82	93	176	139
Calls On Hold > 5 Minutes	≤ 10%	5.7%	7.1%	16.9%	12.5%

## Complaints/Commendations

	Goal	Jun-18	Jul-18	Aug-18	YTD
Complaints Per 1,000 Trips	≤ 4.0	5.6	5.0	6.4	5.7
Commendations Per 1,000 Trips		1.1	1.2	1.6	1.4

## Safety

	Goal	Jun-18	Jul-18	Aug-18	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.09	0.34	0.32	0.33
Preventable Collisions Per 100,000 Miles	≤ 0.50*	0.69	0.50	0.96	0.74
Weighted Preventable Collisions Per 100,000 Miles		0.62	0.40	0.90	0.66
Miles Between Road Calls	≥ 25,000	33,366	21,663	21,860	21,764

\*Contractual Requirement



## West Central Region Trip Performance

	Goal	Jun-18	Jul-18	Aug-18	YTD
Vehicle Trips		43,621	44,604	46,448	91,052
Passenger Trips		59,026	60,728	63,473	124,201
No Shows		3.7%	3.7%	3.8%	3.8%
On Time Performance (Next Day Trips)	≥ 91%*	94.5%	94.5%	93.2%	93.9%
Excessively Late Trips (45+ min late)	≤ 0.10%*	0.01%	0.01%	0.02%	0.02%
Excessively Long Trips	≤ 5%*	3.0%	2.8%	2.8%	2.8%
Missed Trips	≤ 0.75%*	0.29%	0.27%	0.31%	0.29%
Denials	≤ 0*	0	0	0	0
On Time Performance (Access to Work)	≥ 94%*	97.2%	99.1%	97.8%	98.4%

## Call Performance

	Goal	Jun-18	Jul-18	Aug-18	YTD
<i>Reservations</i>					
Answered Calls		47,287	50,248	50,901	101,149
Average Initial Hold Time (seconds)	≤ 120*	169	68	83	76
Calls On Hold > 5 Minutes	≤ 5%*	19.5%	5.8%	7.9%	6.9%
<i>Estimated Time of Arrival (ETA)</i>					
Answered Calls		6,848	6,954	7,659	14,613
Average Initial Hold Time (seconds)		80	53	58	56
Calls On Hold > 5 Minutes	≤ 5%*	7.3%	3.6%	4.9%	4.3%

## Complaints/Commendations

	Goal	Jun-18	Jul-18	Aug-18	YTD
Complaints Per 1,000 Trips	≤ 4.0*	2.3	2.3	2.2	2.2
Commendations Per 1,000 Trips		1.5	1.0	1.1	1.0

## Safety

	Goal	Jun-18	Jul-18	Aug-18	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25*	0.37	0.18	0.18	0.18
Preventable Collisions Per 100,000 Miles	≤ 0.50*	0.56	0.92	1.24	1.08
Weighted Preventable Collisions Per 100,000 Miles		0.47	0.64	1.06	0.86
Miles Between Road Calls	≥ 25,000*	59,695	33,922	43,482	38,208

\*Contractual Requirement

## Eligibility and Appeals

### Eligibility

	Goal	Jun-18	Jul-18	Aug-18	YTD
Eligible Customers		157,560	159,438	155,298	155,298
ADA Evaluations Performed		2,838	3,168	3,452	6,620
Days From Application to Decision (avg)	≤ 21	12	12	9	11

### Eligibility Determinations

	Goal	Jun-18	Jul-18	Aug-18	YTD
Unrestricted		1,424	1,659	1,735	3,394
Restricted		783	851	891	1,742
Temporary		194	179	247	426
Not Eligible		437	479	579	1,058
Total		2,838	3,168	3,452	6,620

### Appeals

	Goal	Jun-18	Jul-18	Aug-18	YTD
Appeals Performed		163	214	191	405
Days From Appeal to Decision (avg)	≤ 30	9	10	8	9

## Customer Service

### Phone Statistics

#### Customer Service

	Goal	Jun-18	Jul-18	Aug-18	YTD
Customer Service Calls		34,313	33,921	36,739	70,660
Average Initial Hold Time	≤ 180 sec	41	78	93	86
Calls on Hold over 5 Minutes	≤ 10%	3.3%	6.9%	7.9%	7.4%
Call Duration	≤ 300 sec	256	264	264	264
Calls Abandoned	≤ 10%	1.5%	2.9%	2.9%	2.9%

### Operations Monitoring Center

	Goal	Jun-18	Jul-18	Aug-18	YTD
Customer Service Calls		10,818	10,577	13,124	23,701
Average Initial Hold Time	≤ 180 sec	36	52	80	67
Calls on Hold over 5 Minutes	≤ 10%	3.1%	4.7%	8.1%	6.6%
Call Duration	≤ 300 sec	351	371	444	412
Calls Abandoned	≤ 10%	3.4%	3.9%	5.2%	4.7%

**September 4, 2018**

**TO: BOARD OF DIRECTORS**

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

**RE: FINANCIAL REPORT FOR JULY 2018**

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Attached for your review are the draft financial reports for July 2018.

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

- Passengers: 1.9% over budget
- Contract Revenue Miles: 6.7% over budget
- Trips: 6.7% over budget
- Completed Eligibility Interviews: 10% under budget
- Average Trip Distance: on budget at 9.35 miles
- Total cost per Passenger (before depreciation): 3.3% under budget
- Administration Function is 5% under budget
- Eligibility Determination Function is 15% over budget
- Purchased Transportation Function is 2% under budget
- Paratransit Operations Function is 3% under budget

Attached are the following reports for your review:

- Statistical Comparison: July 2017 to July 2018
- 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 2018**

	% of Cost	YTD Actual	YTD Budget	Variance	% Over / (Under) Budget	% Over / (Under) Prior Yr
Purchased Transportation	81%	\$10,676,054	\$10,872,905	(\$196,851)	-2%	8%
Paratransit Operations	9%	\$1,215,268	\$1,250,213	(\$34,945)	-3%	5%
Eligibility Determination	6%	\$814,353	\$708,456	\$105,897	15%	25%
CTSA/Ride Information	0.1%	\$8,975	\$54,845	(\$45,870)	-84%	-43%
Administrative	4%	\$539,519	\$565,919	(\$26,400)	-5%	-14%
<b>Total Exp before Depreciation</b>		<b>\$13,254,169</b>	<b>\$13,452,338</b>	<b>(\$198,169)</b>	<b>-1.5%</b>	<b>7.8%</b>

## Statistics - - For the YTD Period Ended July 2018

	YTD Actual	YTD Budget	Variance	% Over / (Under) Budget	% Over / (Under) Prior Yr
Number of Completed Cert Interviews	3,168	2,880	288	10.0%	59.2%
Number of PAX	374,195	367,201	6,994	1.9%	3.4%
Number of Contract Revenue Miles	2,677,507	2,510,505	167,003	6.7%	3.5%
Number of Trips	286,243	268,382	17,861	6.7%	4.0%
Average Trip Distance	9.35	9.35	0.01	0.1%	-0.5%
Purchased Transportation Cost					
Cost per Trip	\$37.30	\$40.98	(\$3.68)	-9.0%	8.4%
Cost per PAX	\$28.53	\$29.95	(\$1.42)	-4.7%	6.4%
Cost per Contract Rev Mile	\$3.99	\$4.38	(\$0.39)	0.0%	5.9%
Total Cost per Pax before Depreciation	\$35.42	\$36.63	(\$1.21)	-3.3%	2.0%

## Budget Results for FY 2018/2019 For YTD Period Ending July 2018

	YTD Actual	YTD Budget	Variance	% Over / (Under) Budget	% Over / (Under) Prior Yr
Revenue					
Passenger Fares	\$816,635	\$768,792	\$47,843		
Other Revenue	\$41,854	\$32,260	\$9,594		
Total Revenue	\$858,491	\$801,052	\$57,438	7.2%	5%
 Total Exp before Capital	 \$13,254,168	 \$13,452,336	 (\$198,168)	 -1.5%	 8%
Capital Expenditures					
Vehicles	\$40,203	\$1,000,000	(\$959,797)		
Other Capital Expenditures	\$33,917	\$0	\$33,917		
Total Capital Expenditures	\$74,120	\$10,130,925	(\$10,056,805)	-99.3%	-26%
 Over/(Under) Budget July 2018			 (\$10,254,972)		

# YTD COST PER PASSENGER BEFORE DEPRECIATION AND CAPITAL COST

