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Board Box

October 2018

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October 31, 2018

TO: BOARD OF DIRECTORS
FROM: MELISSA MUNGIA, DATA ANALYST
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	Jul-18	Aug-18	Sep-18	YTD
Vehicle Trips		286,241	304,877	285,421	876,539
Passenger Trips		374,192	396,484	370,670	1,141,346
Backup Trips		3	52	5	60
No Shows		3.5%	3.2%	3.3%	3.3%
On Time Performance (Next Day Trips)	≥ 91%	93.8%	92.1%	91.9%	92.7%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.06%	0.10%	0.06%	0.06%
Excessively Long Trips	≤ 5%	3.9%	4.0%	4.7%	4.2%
Missed Trips	≤ 0.75%	0.59%	0.69%	0.67%	0.65%
Denials	≤ 0	0	1	0	1
On Time Performance (Access to Work)	≥ 94%	97.0%	95.9%	94.7%	95.9%

Call Performance

	Goal	Jul-18	Aug-18	Sep-18	YTD
<i>Reservations</i>					
Answered Calls		256,767	268,749	261,019	786,535
Average Initial Hold Time	≤ 120	70	85	106	87
Calls On Hold > 5 Minutes	≤ 5%	4.3%	5.5%	7.6%	5.8%
<i>Estimated Time of Arrival (ETAs)</i>					
Answered Calls		43,897	52,189	48,443	144,529
Average Initial Hold Time		73	121	121	107
Calls On Hold > 5 Minutes	≤ 10%	5.3%	11.2%	10.9%	9.3%

Complaints/Commendations

	Goal	Jul-18	Aug-18	Sep-18	YTD
Complaints Per 1,000 Trips	≤ 4.0	3.2	3.7	4.2	3.7
Commendations Per 1,000 Trips		1.5	1.5	1.6	1.6

Safety

	Goal	Jul-18	Aug-18	Sep-18	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.28	0.31	0.17	0.26
Preventable Collisions Per 100,000 Miles	≤ 0.50	0.74	1.05	0.83	0.88
Weighted Preventable Collisions Per 100,000 Miles		0.57	0.94	0.73	0.75
Miles Between Road Calls	≥ 25,000	36,273	35,665	37,203	36,355

Antelope Valley Region Trip Performance

	Goal	Jul-18	Aug-18	Sep-18	YTD
Vehicle Trips		13,108	14,728	13,197	41,033
Passenger Trips		17,868	19,208	16,946	54,022
No Shows		2.7%	2.7%	3.0%	2.8%
On Time Performance (Next Day Trips)	≥ 91%	92.6%	92.2%	92.2%	92.3%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.03%	0.04%	0.03%	0.03%
Excessively Long Trips	≤ 5%	1.9%	1.8%	1.8%	1.8%
Missed Trips	≤ 0.75%	1.01%	0.84%	0.92%	0.92%
Denials	≤ 0	0	0	0	0
On Time Performance (Access to Work)	≥ 94%	100.0%	100.0%	88.2%	96.7%

Call Performance

	Goal	Jul-18	Aug-18	Sep-18	YTD
<i>Reservations</i>					
Answered Calls		8,437	9,351	8,442	26,230
Average Initial Hold Time	≤ 120	55	66	71	64
Calls On Hold > 5 Minutes	≤ 5%	2.5%	1.9%	2.3%	2.3%

<i>Estimated Time of Arrival (ETAs)</i>					
Answered Calls		2,730	3,326	2,890	8,946
Average Initial Hold Time		40	37	42	40
Calls On Hold > 5 Minutes	≤ 10%	1.6%	1.2%	1.1%	1.3%

Complaints/Commendations

	Goal	Jul-18	Aug-18	Sep-18	YTD
Complaints Per 1,000 Trips	≤ 4.0	2.1	2.0	2.3	2.1
Commendations Per 1,000 Trips		2.4	1.8	2.3	2.1

Safety

	Goal	Jul-18	Aug-18	Sep-18	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.00	0.55	0.00	0.19
Preventable Collisions Per 100,000 Miles	≤ 0.50	0.00	1.09	0.00	0.39
Weighted Preventable Collisions Per 100,000 Miles		0.00	1.23	0.00	0.44
Miles Between Road Calls	≥ 25,000	33,749	20,355	23,438	24,572

Contractual Requirement

Eastern Region Trip Performance

	Goal	Jul-18	Aug-18	Sep-18	YTD
Vehicle Trips		83,939	90,176	85,193	259,308
Passenger Trips		111,819	119,533	112,949	344,301
No Shows		2.4%	2.4%	2.5%	2.4%
On Time Performance (Next Day Trips)	≥ 91%	95.7%	93.8%	92.4%	94.0%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.00%	0.01%	0.01%	0.01%
Excessively Long Trips	≤ 5%	0.8%	1.0%	1.1%	1.0%
Missed Trips	≤ 0.75%	0.14%	0.21%	0.29%	0.22%
Denials	≤ 0	0	0	0	0
On Time Performance (Access to Work)	≥ 94%	97.2%	95.2%	95.1%	95.8%

Call Performance

	Goal	Jul-18	Aug-18	Sep-18	YTD
<i>Reservations</i>					
Answered Calls		70,346	72,690	72,095	215,131
Average Initial Hold Time	≤ 120	67	81	117	88
Calls On Hold > 5 Minutes	≤ 5%	5.6%	7.4%	12.0%	8.3%

<i>Estimated Time of Arrival (ETA)</i>					
Answered Calls		8,813	9,942	9,837	28,592
Average Initial Hold Time		53	56	82	64
Calls On Hold > 5 Minutes	≤ 10%	3.7%	4.7%	7.5%	5.3%

Complaints/Commendations

	Goal	Jul-18	Aug-18	Sep-18	YTD
Complaints Per 1,000 Trips	≤ 4.0	2.6	3.0	3.0	2.9
Commendations Per 1,000 Trips		1.9	1.9	1.9	1.9

Safety

	Goal	Jul-18	Aug-18	Sep-18	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.48	0.36	0.28	0.37
Preventable Collisions Per 100,000 Miles	≤ 0.50	0.95	1.08	1.32	1.12
Weighted Preventable Collisions Per 100,000 Miles		0.69	0.97	1.09	0.92
Miles Between Road Calls	≥ 25,000	95,482	69,343	75,646	78,508

Contractual Requirement

Santa Clarita Region Trip Performance

	Goal	Jul-18	Aug-18	Sep-18	YTD
Vehicle Trips		3,071	3,307	3,103	9,481
Passenger Trips		3,643	3,984	3,672	11,299
No Shows		3.2%	2.8%	3.4%	3.1%
On Time Performance (Next Day Trips)	≥ 91%	95.5%	94.2%	91.5%	93.8%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.06%	0.06%	0.10%	0.07%
Excessively Long Trips	≤ 5%	2.2%	3.4%	3.2%	3.0%
Missed Trips	≤ 0.75%	1.00%	1.14%	0.94%	1.03%
Denials	≤ 0	0	0	0	0
On Time Performance (Access to Work)	≥ 94%	-	-	-	-

Call Performance

	Goal	Jul-18	Aug-18	Sep-18	YTD
<i>Reservations</i>					
Answered Calls		3,385	3,393	3,081	9,859
Average Initial Hold Time	≤ 120	45	40	45	43
Calls On Hold > 5 Minutes	≤ 5%	1.5%	1.2%	1.3%	1.3%

Complaints/Commendations

	Goal	Jul-18	Aug-18	Sep-18	YTD
Complaints Per 1,000 Trips	≤ 4.0	0.7	0.3	0.6	0.5
Commendations Per 1,000 Trips		0.3	0.6	1.0	0.6

Safety

	Goal	Jul-18	Aug-18	Sep-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	25,599	28,101	28,397	82,097

Contractual Requirement

Northern Region Trip Performance

	Goal	Jul-18	Aug-18	Sep-18	YTD
Vehicle Trips		50,398	54,270	50,117	154,785
Passenger Trips		63,630	68,286	63,383	195,299
No Shows		3.4%	1.8%	2.1%	2.3%
On Time Performance (Next Day Trips)	≥ 91%	92.1%	91.9%	91.7%	91.9%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.03%	0.08%	0.10%	0.07%
Excessively Long Trips	≤ 5%	5.6%	6.0%	5.9%	5.8%
Missed Trips	≤ 0.75%	0.48%	0.33%	0.33%	0.37%
Denials	≤ 0	0	0	0	0
On Time Performance (Access to Work)	≥ 94%	96.7%	95.9%	93.3%	95.4%

Call Performance

	Goal	Jul-18	Aug-18	Sep-18	YTD
<i>Reservations</i>					
Answered Calls		41,513	44,474	42,961	128,948
Average Initial Hold Time	≤ 120	95	94	89	93
Calls On Hold > 5 Minutes	≤ 5%	3.2%	2.1%	1.9%	2.4%
<i>Estimated Time of Arrival (ETA)</i>					
Answered Calls		2,307	2,612	2,383	7,302
Average Initial Hold Time		49	60	58	56
Calls On Hold > 5 Minutes	≤ 10%	2.8%	4.9%	4.5%	4.1%

Complaints/Commendations

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

Safety

	Goal	Jul-18	Aug-18	Sep-18	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.00	0.29	0.00	0.15
Preventable Collisions Per 100,000 Miles	≤ 0.50	0.92	1.02	0.46	0.80
Weighted Preventable Collisions Per 100,000 Miles		0.77	0.83	0.38	0.66
Miles Between Road Calls	≥ 25,000	50,218	57,424	93,030	62,285

Contractual Requirement

Southern Region Trip Performance

	Goal	Jul-18	Aug-18	Sep-18	YTD
Vehicle Trips		91,121	95,948	90,349	277,418
Passenger Trips		116,504	122,000	114,893	353,397
No Shows		4.4%	4.8%	4.8%	4.6%
On Time Performance (Next Day Trips)	≥ 91%	92.8%	89.3%	91.0%	91.2%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.14%	0.29%	0.10%	0.15%
Excessively Long Trips	≤ 5%	6.9%	7.4%	8.7%	7.7%
Missed Trips	≤ 0.75%	1.12%	1.54%	1.39%	1.35%
Denials	≤ 0	0	1	0	1
On Time Performance (Access to Work)	≥ 94%	96.5%	95.8%	95.3%	95.9%

Call Performance

	Goal	Jul-18	Aug-18	Sep-18	YTD
<i>Reservations</i>					
Answered Calls		82,838	87,940	84,007	254,785
Average Initial Hold Time	≤ 120	64	89	103	86
Calls On Hold > 5 Minutes	≤ 5%	3.1%	4.9%	4.5%	4.2%
<i>Estimated Time of Arrival (ETA)</i>					
Answered Calls		23,093	28,650	26,420	78,163
Average Initial Hold Time		93	176	159	146
Calls On Hold > 5 Minutes	≤ 10%	7.1%	16.9%	14.7%	13.3%

Complaints/Commendations

	Goal	Jul-18	Aug-18	Sep-18	YTD
Complaints Per 1,000 Trips	≤ 4.0	5.0	6.4	7.4	6.3
Commendations Per 1,000 Trips		1.2	1.6	1.3	1.4

Safety

	Goal	Jul-18	Aug-18	Sep-18	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.34	0.32	0.25	0.30
Preventable Collisions Per 100,000 Miles	≤ 0.50	0.50	0.96	0.93	0.80
Weighted Preventable Collisions Per 100,000 Miles		0.40	0.90	0.89	0.73
Miles Between Road Calls	≥ 25,000	21,663	21,860	22,272	21,926

Contractual Requirement

West Central Region Trip Performance

	Goal	Jul-18	Aug-18	Sep-18	YTD
Vehicle Trips		44,604	46,448	43,462	134,514
Passenger Trips		60,728	63,473	58,827	183,028
No Shows		3.7%	3.8%	3.7%	3.7%
On Time Performance (Next Day Trips)	≥ 91%	94.5%	93.2%	92.5%	93.4%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.01%	0.02%	0.04%	0.03%
Excessively Long Trips	≤ 5%	2.8%	2.8%	3.3%	3.0%
Missed Trips	≤ 0.75%	0.27%	0.31%	0.33%	0.30%
Denials	≤ 0	0	0	0	0
On Time Performance (Access to Work)	≥ 94%	99.1%	97.8%	96.9%	98.0%

Call Performance

	Goal	Jul-18	Aug-18	Sep-18	YTD
<i>Reservations</i>					
Answered Calls		50,248	50,901	50,433	151,582
Average Initial Hold Time	≤ 120	68	83	121	91
Calls On Hold > 5 Minutes	≤ 5%	5.8%	7.9%	12.4%	8.7%
<i>Estimated Time of Arrival (ETA)</i>					
Answered Calls		6,954	7,659	6,913	21,526
Average Initial Hold Time		53	58	85	65
Calls On Hold > 5 Minutes	≤ 5%	3.6%	4.9%	7.9%	5.4%

Complaints/Commendations

	Goal	Jul-18	Aug-18	Sep-18	YTD
Complaints Per 1,000 Trips	≤ 4.0	2.3	2.2	2.8	2.4
Commendations Per 1,000 Trips		1.0	1.1	2.0	1.4

Safety

	Goal	Jul-18	Aug-18	Sep-18	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.18	0.18	0.00	0.12
Preventable Collisions Per 100,000 Miles	≤ 0.50	0.92	1.24	0.38	0.85
Weighted Preventable Collisions Per 100,000 Miles		0.64	1.06	0.38	0.70
Miles Between Road Calls	≥ 25,000	33,922	43,482	33,240	36,441

Contractual Requirement

Eligibility and Appeals

Eligibility

	Goal	Jul-18	Aug-18	Sep-18	YTD
Eligible Customers		159,438	155,298	154,135	154,135
ADA Evaluations Performed		3,168	3,452	3,034	9,654
Days From Application to Decision (avg)	≤ 21	12	9	7	9

Eligibility Determinations

	Goal	Jul-18	Aug-18	Sep-18	YTD
Unrestricted		1,659	1,735	1,559	4,953
Restricted		851	891	793	2,535
Temporary		179	247	183	609
Not Eligible		479	579	499	1,557
Total		3,168	3,452	3,034	9,654

Appeals

	Goal	Jul-18	Aug-18	Sep-18	YTD
Appeals Performed		214	191	131	536
Days From Appeal to Decision (avg)	≤ 30	10	8	11	10

Customer Service

Phone Statistics

Customer Service

	Goal	Jul-18	Aug-18	Sep-18	YTD
Customer Service Calls		33,921	36,739	30,906	101,566
Average Initial Hold Time	≤ 180 sec	78	93	102	91
Calls on Hold over 5 Minutes	≤ 10%	6.9%	7.9%	10.8%	8.5%
Call Duration	≤ 300 sec	264	264	277	268
Calls Abandoned	≤ 10%	2.9%	2.9%	3.4%	3.1%

Operations Monitoring Center

	Goal	Jul-18	Aug-18	Sep-18	YTD
Customer Service Calls		10,577	13,124	12,019	35,720
Average Initial Hold Time	≤ 180 sec	52	80	64	66
Calls on Hold over 5 Minutes	≤ 10%	4.7%	8.1%	5.3%	6.1%
Call Duration	≤ 300 sec	371	444	404	409
Calls Abandoned	≤ 10%	3.9%	5.2%	4.6%	4.6%

Contractual Requirement

October 31, 2018

TO: BOARD OF DIRECTORS

FROM: HECTOR RODRIGUEZ, DEPUTY EX. DIRECTOR, FINANCE

RE: FINANCIAL REPORT FOR AUGUST 2018

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

Approved FY 2018/19 Budget to Actual Fiscal Year-to-Date Comparison:

- Passengers: 1.1% under budget
- Contract Revenue Miles: 3.5% over budget
- Trips: 3.4% over budget
- Completed Eligibility Interviews: 13.9% over budget
- Average Trip Distance: over budget by 0.1% at 9.36 miles
- Total cost per Passenger (before depreciation): 0.4% over budget
- Administration Function is 5.5% under budget
- Eligibility Determination Function is 11% over budget
- Purchased Transportation Function is 1% under budget
- Paratransit Operations Function is 2% over budget

Attached are the following reports for your review:

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

	<u>% of Cost</u>	<u>YTD Actual</u>	<u>YTD Budget</u>	<u>Variance</u>	<u>% Over / (Under) Budget</u>	<u>% Over / (Under) Prior Yr</u>
Purchased Transportation	81%	\$22,403,729	\$22,709,696	(\$305,967)	-1%	11%
Paratransit Operations	9%	\$2,574,998	\$2,536,588	\$38,410	2%	7%
Eligibility Determination	6%	\$1,581,425	\$1,420,689	\$160,736	11%	26%
CTSA/Ride Information	0.2%	\$59,700	\$109,689	(\$49,989)	-46%	98%
Administrative	4%	<u>\$1,084,917</u>	<u>\$1,147,959</u>	<u>(\$63,042)</u>	<u>-5.5%</u>	<u>-11%</u>
Total Exp before Depreciation		\$27,704,769	\$27,924,621	(\$219,852)	-0.8%	10.7%

Statistics - - For the YTD Period Ended August 2018

	<u>YTD Actual</u>	<u>YTD Budget</u>	<u>Variance</u>	<u>% Over / (Under) Budget</u>	<u>% Over / (Under) Prior Yr</u>
Number of Completed Cert Interviews	6,620	5,814	806	13.9%	63.1%
Number of PAX	748,275	756,928	(8,653)	-1.1%	-1.8%
Number of Contract Revenue Miles	5,354,601	5,174,333	180,268	3.5%	0.5%
Number of Trips	572,355	553,282	19,073	3.4%	0.4%
Average Trip Distance	9.36	9.35	0.01	0.1%	0.1%
Purchased Transportation Cost					
Cost per Trip	\$39.14	\$41.05	(\$1.91)	-4.7%	13.7%
Cost per PAX	\$29.94	\$30.00	(\$0.06)	-0.2%	11.7%
Cost per Contract Rev Mile	\$4.18	\$4.39	(\$0.21)	0.0%	11.0%
Total Cost per Pax before Depreciation	\$37.02	\$36.89	\$0.13	0.4%	6.6%

**Budget Results for FY 2018/2019
For YTD Period Ending August 2018**

	YTD Actual	YTD Budget	Variance	% Over / (Under) Budget	% Over / (Under) Prior Yr
Revenue					
Passenger Fares	\$1,655,378	\$1,584,375	\$71,003		
Other Revenue	\$50,344	\$66,116	(\$15,772)		
Total Revenue	\$1,705,722	\$1,650,491	\$55,231	3.3%	0%
 Total Exp before Capital	 \$27,704,769	 \$27,924,621	 (\$219,852)	 -0.8%	 11%
Capital Expenditures					
Vehicles	\$2,049,170	\$2,000,000	\$49,170		
Other Capital Expenditures	\$165,325	\$0	\$165,325		
Total Capital Expenditures	\$2,214,495	\$2,000,000	\$214,495	10.7%	1263%
 Over/(Under) Budget August 2018			 (\$5,357)		

YTD COST PER PASSENGER BEFORE DEPRECIATION AND CAPITAL COST

