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# Board Box

November 2018

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**November 21, 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	Aug-18	Sep-18	Oct-18	YTD
Vehicle Trips		304,877	285,421	313,329	1,189,868
Passenger Trips		396,484	370,670	402,893	1,544,239
Backup Trips		52	5	12	72
No Shows		3.2%	3.3%	3.3%	3.3%
On Time Performance (Next Day Trips)	≥ 91%	92.1%	91.9%	91.8%	92.4%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.10%	0.06%	0.04%	0.06%
Excessively Long Trips	≤ 5%	4.0%	4.7%	5.1%	4.4%
Missed Trips	≤ 0.75%	0.69%	0.67%	0.65%	0.65%
Denials	≤ 0	1	0	0	1
On Time Performance (Access to Work)	≥ 94%	95.9%	94.7%	94.5%	95.5%

## Call Performance

	Goal	Aug-18	Sep-18	Oct-18	YTD
<i>Reservations</i>					
Answered Calls		268,749	261,019	281,988	1,068,523
Average Initial Hold Time	≤ 120	85	106	103	91
Calls On Hold > 5 Minutes	≤ 5%	5.5%	7.6%	5.9%	5.8%
<i>Estimated Time of Arrival (ETAs)</i>					
Answered Calls		52,189	48,443	56,873	201,402
Average Initial Hold Time		121	121	99	104
Calls On Hold > 5 Minutes	≤ 10%	11.2%	10.9%	6.6%	8.5%

## Complaints/Commendations

	Goal	Aug-18	Sep-18	Oct-18	YTD
Complaints Per 1,000 Trips	≤ 4.0	3.7	4.2	4.7	4.0
Commendations Per 1,000 Trips		1.5	1.6	1.7	1.6

## Safety

	Goal	Aug-18	Sep-18	Oct-18	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.31	0.17	0.31	0.28
Preventable Collisions Per 100,000 Miles	≤ 0.50	1.05	0.83	0.64	0.82
Weighted Preventable Collisions Per 100,000 Miles		0.94	0.73	0.50	0.69
Miles Between Road Calls	≥ 25,000	35,665	37,203	53,605	39,695

## Antelope Valley Region Trip Performance

	Goal	Aug-18	Sep-18	Oct-18	YTD
Vehicle Trips		14,728	13,197	14,947	55,980
Passenger Trips		19,208	16,946	19,178	73,200
No Shows		2.7%	3.0%	2.5%	2.7%
On Time Performance (Next Day Trips)	≥ 91%	92.2%	92.2%	91.9%	92.2%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.04%	0.03%	0.05%	0.04%
Excessively Long Trips	≤ 5%	1.8%	1.8%	2.0%	1.9%
Missed Trips	≤ 0.75%	0.84%	0.92%	0.71%	0.86%
Denials	≤ 0	0	0	0	0
On Time Performance (Access to Work)	≥ 92%	100.0%	88.2%	100.0%	97.6%

## Call Performance

	Goal	Aug-18	Sep-18	Oct-18	YTD
<i>Reservations</i>					
Answered Calls		9,351	8,442	9,748	35,978
Average Initial Hold Time	≤ 120	66	71	97	73
Calls On Hold > 5 Minutes	≤ 5%	1.9%	2.3%	4.4%	2.8%

<i>Estimated Time of Arrival (ETAs)</i>					
Answered Calls		3,326	2,890	3,209	12,155
Average Initial Hold Time		37	42	47	41
Calls On Hold > 5 Minutes	≤ 10%	1.2%	1.1%	1.9%	1.5%

## Complaints/Commendations

	Goal	Aug-18	Sep-18	Oct-18	YTD
Complaints Per 1,000 Trips	≤ 4.0	2.0	2.3	2.3	2.2
Commendations Per 1,000 Trips		1.8	2.3	1.3	1.9

## Safety

	Goal	Aug-18	Sep-18	Oct-18	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.55	0.00	0.00	0.14
Preventable Collisions Per 100,000 Miles	≤ 0.50	1.09	0.00	1.09	0.57
Weighted Preventable Collisions Per 100,000 Miles		1.23	0.00	0.95	0.57
Miles Between Road Calls	≥ 25,000	20,355	23,438	183,809	33,324

Contractual Requirement

## Eastern Region Trip Performance

	Goal	Aug-18	Sep-18	Oct-18	YTD
Vehicle Trips		90,176	85,193	93,932	353,240
Passenger Trips		119,533	112,949	123,557	467,858
No Shows		2.4%	2.5%	2.5%	2.5%
On Time Performance (Next Day Trips)	≥ 91%	93.8%	92.4%	91.6%	93.3%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.01%	0.01%	0.01%	0.01%
Excessively Long Trips	≤ 5%	1.0%	1.1%	1.2%	1.0%
Missed Trips	≤ 0.75%	0.21%	0.29%	0.32%	0.24%
Denials	≤ 0	0	0	0	0
On Time Performance (Access to Work)	≥ 95%	95.2%	95.1%	95.1%	95.6%

## Call Performance

	Goal	Aug-18	Sep-18	Oct-18	YTD
<i>Reservations</i>					
Answered Calls		72,690	72,095	77,003	292,134
Average Initial Hold Time	≤ 120	81	117	102	92
Calls On Hold > 5 Minutes	≤ 5%	7.4%	12.0%	8.9%	8.5%

<i>Estimated Time of Arrival (ETA)</i>					
Answered Calls		9,942	9,837	10,488	39,080
Average Initial Hold Time		56	82	67	65
Calls On Hold > 5 Minutes	≤ 10%	4.7%	7.5%	4.4%	5.1%

## Complaints/Commendations

	Goal	Aug-18	Sep-18	Oct-18	YTD
Complaints Per 1,000 Trips	≤ 4.0	3.0	3.0	3.3	3.0
Commendations Per 1,000 Trips		1.9	1.9	2.7	2.1

## Safety

	Goal	Aug-18	Sep-18	Oct-18	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.36	0.28	0.09	0.30
Preventable Collisions Per 100,000 Miles	≤ 0.50	1.08	1.32	0.69	1.01
Weighted Preventable Collisions Per 100,000 Miles		0.97	1.09	0.54	0.82
Miles Between Road Calls	≥ 25,000	69,343	75,646	115,436	85,749

Contractual Requirement

## Santa Clarita Region Trip Performance

	Goal	Aug-18	Sep-18	Oct-18	YTD
Vehicle Trips		3,307	3,103	3,355	12,836
Passenger Trips		3,984	3,672	3,915	15,214
No Shows		2.8%	3.4%	3.2%	3.1%
On Time Performance (Next Day Trips)	≥ 91%	94.2%	91.5%	92.7%	93.5%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.06%	0.10%	0.06%	0.07%
Excessively Long Trips	≤ 5%	3.4%	3.2%	3.8%	3.2%
Missed Trips	≤ 0.75%	1.14%	0.94%	1.21%	1.08%
Denials	≤ 0	0	0	0	0
On Time Performance (Access to Work)	≥ 94%	-	-	-	-

## Call Performance

	Goal	Aug-18	Sep-18	Oct-18	YTD
<i>Reservations</i>					
Answered Calls		3,393	3,081	2,722	12,581
Average Initial Hold Time	≤ 120	40	45	40	42
Calls On Hold > 5 Minutes	≤ 5%	1.2%	1.3%	1.2%	1.3%

## Complaints/Commendations

	Goal	Aug-18	Sep-18	Oct-18	YTD
Complaints Per 1,000 Trips	≤ 4.0	0.3	0.6	0.9	0.6
Commendations Per 1,000 Trips		0.6	1.0	0.0	0.5

## Safety

	Goal	Aug-18	Sep-18	Oct-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	28,101	28,397	30,298	112,395

Contractual Requirement

## Northern Region Trip Performance

	Goal	Aug-18	Sep-18	Oct-18	YTD
Vehicle Trips		54,270	50,117	55,995	210,780
Passenger Trips		68,286	63,383	69,569	264,868
No Shows		1.8%	2.1%	2.0%	2.2%
On Time Performance (Next Day Trips)	≥ 91%	91.9%	91.7%	91.5%	91.8%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.08%	0.10%	0.07%	0.07%
Excessively Long Trips	≤ 5%	6.0%	5.9%	6.2%	5.9%
Missed Trips	≤ 0.75%	0.33%	0.33%	0.34%	0.36%
Denials	≤ 0	0	0	0	0
On Time Performance (Access to Work)	≥ 94%	95.9%	93.3%	93.6%	94.9%

## Call Performance

	Goal	Aug-18	Sep-18	Oct-18	YTD
<i>Reservations</i>					
Answered Calls		44,474	42,961	46,987	175,935
Average Initial Hold Time	≤ 120	94	89	104	96
Calls On Hold > 5 Minutes	≤ 5%	2.1%	1.9%	3.0%	2.6%
<i>Estimated Time of Arrival (ETA)</i>					
Answered Calls		2,612	2,383	2,280	9,582
Average Initial Hold Time		60	58	56	56
Calls On Hold > 5 Minutes	≤ 10%	4.9%	4.5%	3.8%	4.0%

## Complaints/Commendations

	Goal	Aug-18	Sep-18	Oct-18	YTD
Complaints Per 1,000 Trips	≤ 4.0	2.1	2.2	2.0	2.1
Commendations Per 1,000 Trips		1.3	1.3	1.0	1.3

## Safety

	Goal	Aug-18	Sep-18	Oct-18	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.29	0.00	0.28	0.19
Preventable Collisions Per 100,000 Miles	≤ 0.50	1.02	0.46	0.99	0.85
Weighted Preventable Collisions Per 100,000 Miles		0.83	0.38	0.78	0.70
Miles Between Road Calls	≥ 25,000	57,424	93,030	140,742	72,887

Contractual Requirement

## Southern Region Trip Performance

	Goal	Aug-18	Sep-18	Oct-18	YTD
Vehicle Trips		95,948	90,349	97,305	374,723
Passenger Trips		122,000	114,893	122,548	475,945
No Shows		4.8%	4.8%	4.8%	4.7%
On Time Performance (Next Day Trips)	≥ 91%	89.3%	91.0%	91.7%	91.4%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.29%	0.10%	0.05%	0.12%
Excessively Long Trips	≤ 5%	7.4%	8.7%	9.6%	8.2%
Missed Trips	≤ 0.75%	1.54%	1.39%	1.27%	1.33%
Denials	≤ 0	1	0	0	1
On Time Performance (Access to Work)	≥ 92%	95.8%	95.3%	94.3%	95.5%

## Call Performance

	Goal	Aug-18	Sep-18	Oct-18	YTD
<i>Reservations</i>					
Answered Calls		87,940	84,007	91,011	345,796
Average Initial Hold Time	≤ 120	89	103	106	91
Calls On Hold > 5 Minutes	≤ 5%	4.9%	4.5%	3.5%	4.0%
<i>Estimated Time of Arrival (ETA)</i>					
Answered Calls		28,650	26,420	33,285	111,448
Average Initial Hold Time		176	159	124	139
Calls On Hold > 5 Minutes	≤ 10%	16.9%	14.7%	8.2%	11.8%

## Complaints/Commendations

	Goal	Aug-18	Sep-18	Oct-18	YTD
Complaints Per 1,000 Trips	≤ 4.0	6.4	7.4	9.3	7.0
Commendations Per 1,000 Trips		1.6	1.3	1.3	1.3

## Safety

	Goal	Aug-18	Sep-18	Oct-18	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.32	0.25	0.71	0.43
Preventable Collisions Per 100,000 Miles	≤ 0.50	0.96	0.93	0.47	0.72
Weighted Preventable Collisions Per 100,000 Miles		0.90	0.89	0.38	0.64
Miles Between Road Calls	≥ 25,000	21,860	22,272	23,899	22,406

Contractual Requirement



## West Central Region Trip Performance

	Goal	Aug-18	Sep-18	Oct-18	YTD
Vehicle Trips		46,448	43,462	47,795	182,309
Passenger Trips		63,473	58,827	64,126	247,154
No Shows		3.8%	3.7%	3.8%	3.7%
On Time Performance (Next Day Trips)	≥ 91%	93.2%	92.5%	91.7%	93.0%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.02%	0.04%	0.03%	0.03%
Excessively Long Trips	≤ 5%	2.8%	3.3%	4.2%	3.3%
Missed Trips	≤ 0.75%	0.31%	0.33%	0.47%	0.35%
Denials	≤ 0	0	0	0	0
On Time Performance (Access to Work)	≥ 91%	97.8%	96.9%	94.6%	97.1%

## Call Performance

	Goal	Aug-18	Sep-18	Oct-18	YTD
<i>Reservations</i>					
Answered Calls		50,901	50,433	54,517	206,099
Average Initial Hold Time	≤ 120	83	121	101	93
Calls On Hold > 5 Minutes	≤ 5%	7.9%	12.4%	8.8%	8.8%
<i>Estimated Time of Arrival (ETA)</i>					
Answered Calls		7,659	6,913	7,611	29,137
Average Initial Hold Time		58	85	71	67
Calls On Hold > 5 Minutes	≤ 5%	4.9%	7.9%	5.2%	5.4%

## Complaints/Commendations

	Goal	Aug-18	Sep-18	Oct-18	YTD
Complaints Per 1,000 Trips	≤ 4.0	2.2	2.8	2.3	2.4
Commendations Per 1,000 Trips		1.1	2.0	1.8	1.5

## Safety

	Goal	Aug-18	Sep-18	Oct-18	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.18	0.00	0.00	0.09
Preventable Collisions Per 100,000 Miles	≤ 0.50	1.24	0.38	0.34	0.72
Weighted Preventable Collisions Per 100,000 Miles		1.06	0.38	0.26	0.59
Miles Between Road Calls	≥ 25,000	43,482	33,240	116,202	44,417

Contractual Requirement

## Eligibility and Appeals

### Eligibility

	Goal	Aug-18	Sep-18	Oct-18	YTD
Eligible Customers		155,298	154,135	153,550	153,550
ADA Evaluations Performed		3,452	3,034	3,469	13,123
Days From Application to Decision (avg)	≤ 21	9	7	7	9

### Eligibility Determinations

	Goal	Aug-18	Sep-18	Oct-18	YTD
Unrestricted		1,735	1,559	1,915	6,868
Restricted		891	793	974	3,509
Temporary		247	183	248	857
Not Eligible		579	499	512	2,069
Total		3,452	3,034	3,649	13,303

### Appeals

	Goal	Aug-18	Sep-18	Oct-18	YTD
Appeals Performed		191	131	248	784
Days From Appeal to Decision (avg)	≤ 30	8	11	7	9

## Customer Service

### Phone Statistics

#### Customer Service

	Goal	Aug-18	Sep-18	Oct-18	YTD
Customer Service Calls		36,739	30,906	35,316	136,882
Average Initial Hold Time	≤ 180 sec	93	102	95	92
Calls On Hold > 5 Minutes	≤ 10%	7.9%	10.8%	9.3%	8.7%
Call Duration	≤ 300 sec	264	277	268	268
Calls Abandoned	≤ 10%	2.9%	3.4%	3.1%	3.1%

### Operations Monitoring Center

	Goal	Aug-18	Sep-18	Oct-18	YTD
Customer Service Calls		13,124	12,019	13,975	49,695
Average Initial Hold Time	≤ 180 sec	80	64	73	68
Calls On Hold > 5 Minutes	≤ 10%	8.1%	5.3%	6.7%	6.3%
Call Duration	≤ 300 sec	444	404	400	407
Calls Abandoned	≤ 10%	5.2%	4.6%	5.2%	4.8%

Contractual Requirement

**November 5, 2018**

**TO: BOARD OF DIRECTORS**

**FROM: HECTOR RODRIGUEZ, DEPUTY EXECUTIVE DIRECTOR**

**RE: FINANCIAL REPORT FOR SEPTEMBER 2018**

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

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

- Passengers: 0.6% over budget
- Contract Revenue Miles: 5.8% over budget
- Trips: 5.7% over budget
- Completed Eligibility Interviews: 12.3% over budget
- Average Trip Distance: over budget by 0.1% at 9.36 miles
- Total cost per Passenger (before depreciation): 1.7% under budget
- Administration Function is 1.8% under budget
- Eligibility Determination Function is 7% over budget
- Purchased Transportation Function is 2% under budget
- Paratransit Operations Function is 3% over budget

Attached are the following reports for your review:

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

	% of Cost	YTD Actual	YTD Budget	Variance	% Over / (Under) Budget	% Over / (Under) Prior Yr
Purchased Transportation	81%	\$33,748,043	\$34,320,293	(\$572,250)	-2%	12%
Paratransit Operations	9%	\$3,899,924	\$3,801,475	\$98,449	3%	8%
Eligibility Determination	5%	\$2,254,496	\$2,110,262	\$144,234	7%	24%
CTSA/Ride Information	0.2%	\$86,344	\$164,534	(\$78,190)	-48%	97%
Administration	4%	\$1,651,529	\$1,681,636	(\$30,107)	-1.8%	-8%
<b>Total Exp before Depreciation</b>		<b>\$41,640,336</b>	<b>\$42,078,200</b>	<b>(\$437,864)</b>	<b>-1.0%</b>	<b>11.0%</b>

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

	YTD Actual	YTD Budget	Variance	% Over / (Under) Budget	% Over / (Under) Prior Yr
Number of Completed Cert Interviews	9,654	8,594	1,060	12.3%	54.8%
Number of PAX	1,141,048	1,133,698	7,350	0.6%	1.4%
Number of Contract Revenue Miles	8,200,634	7,749,470	451,164	5.8%	3.5%
Number of Trips	876,285	828,715	47,570	5.7%	3.1%
Average Trip Distance	9.36	9.35	0.01	0.1%	0.3%
<b>Purchased Transportation Cost</b>					
Cost per Trip	\$38.51	\$41.41	(\$2.90)	-7.0%	11.9%
Cost per PAX	\$29.58	\$30.27	(\$0.69)	-2.3%	10.3%
Cost per Contract Rev Mile	\$4.12	\$4.43	(\$0.31)	0.0%	9.4%
Total Cost per Pax before Depreciation	\$36.49	\$37.12	(\$0.63)	-1.7%	5.1%

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

	YTD Actual	YTD Budget	Variance	% Over / (Under) Budget	% Over / (Under) Prior Yr
Revenue					
Passenger Fares	\$2,144,111	\$2,372,820	(\$228,709)		
Other Revenue	\$139,144	\$99,453	\$39,691		
Total Revenue	\$2,283,255	\$2,472,273	(\$189,018)	-7.6%	6%
 Total Exp before Capital	 \$41,640,336	 \$42,078,200	 (\$437,864)	 -1.0%	 11%
Capital Expenditures					
Vehicles	\$2,976,928	\$3,000,000	(\$23,072)		
Other Capital Expenditures	\$165,325	\$0	\$165,325		
Total Capital Expenditures	\$3,142,254	\$3,000,000	\$142,254	4.7%	1656%
 Over/(Under) Budget September 2018			 (\$295,610)		

# YTD COST PER PASSENGER BEFORE DEPRECIATION AND CAPITAL COST

