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May 2019

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June 3, 2019

TO: BOARD OF DIRECTORS
FROM: MELISSA MUNGIA, BUSINESS 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	Feb-19	Mar-19	Apr-19	YTD
Vehicle Trips		267,335	297,750	304,309	2,882,397
Passenger Trips		342,085	382,412	390,482	3,721,764
Backup Trips		29	47	38	285
No Shows		2.9%	3.1%	2.7%	3.2%
On Time Performance (Next Day Trips)	≥ 91%	92.0%	90.4%	92.0%	92.1%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.05%	0.30%	0.07%	0.09%
Excessively Long Trips	≤ 5%	3.2%	3.0%	2.5%	3.9%
Missed Trips	≤ 0.75%	0.41%	0.66%	0.35%	0.56%
Denials	≤ 0	1	1	2	8
On Time Performance (Access to Work)	≥ 94%	94.8%	95.6%	97.2%	95.7%

Call Performance

	Goal	Feb-19	Mar-19	Apr-19	YTD
<i>Reservations</i>					
Answered Calls		237,802	259,296	254,209	2,587,367
Average Initial Hold Time	≤ 120 sec	74	76	78	81
Calls On Hold > 5 Minutes	≤ 5%	2.7%	3.9%	3.0%	4.2%
<i>Estimated Time of Arrival (ETAs)</i>					
Answered Calls		43,239	50,737	46,490	519,535
Average Initial Hold Time		66	85	70	89
Calls On Hold > 5 Minutes	≤ 10%	2.3%	4.9%	2.8%	5.6%

Complaints/Commendations

	Goal	Feb-19	Mar-19	Apr-19	YTD
Complaints Per 1,000 Trips	≤ 4.0	2.6	2.9	2.4	3.4
Commendations Per 1,000 Trips		1.6	1.4	1.5	1.6

Safety

	Goal	Feb-19	Mar-19	Apr-19	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.15	0.17	0.22	0.20
Preventable Collisions Per 100,000 Miles		0.71	1.02	1.04	0.87
Weighted Preventable Collisions Per 100,000 Miles	≤ 0.50	0.51	0.82	0.86	0.69
Miles Between Road Calls	≥ 25,000	63,275	67,035	98,709	49,956

Antelope Valley Region Trip Performance

	Goal	Feb-19	Mar-19	Apr-19	YTD
Vehicle Trips		12,168	13,394	13,689	133,048
Passenger Trips		15,790	16,981	17,109	172,625
No Shows		2.7%	2.6%	2.3%	2.7%
On Time Performance (Next Day Trips)	≥ 91%	92.0%	91.7%	91.2%	92.0%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.26%	0.19%	0.05%	0.10%
*Excessively Long Trips	≤ 5%	2.7%	2.1%	2.4%	2.1%
*Missed Trips	≤ 0.75%	0.87%	0.84%	0.82%	0.88%
Denials	≤ 0	0	0	0	1
On Time Performance (Access to Work)	≥ 92%	100.0%	95.0%	95.5%	97.0%

Call Performance

	Goal	Feb-19	Mar-19	Apr-19	YTD
<i>Reservations</i>					
Answered Calls		8,754	9,023	9,431	91,610
Average Initial Hold Time	≤ 120 sec	102	99	86	91
Calls On Hold > 5 Minutes	≤ 5%	5.2%	6.9%	2.0%	4.2%

<i>Estimated Time of Arrival (ETAs)</i>					
Answered Calls		3,192	3,098	3,089	30,836
Average Initial Hold Time		41	44	49	44
*Calls On Hold > 5 Minutes	≤ 10%	1.7%	2.0%	2.5%	2.0%

Complaints/Commendations

	Goal	Feb-19	Mar-19	Apr-19	YTD
*Complaints Per 1,000 Trips	≤ 4.0	2.6	1.9	3.4	2.4
Commendations Per 1,000 Trips		2.1	0.5	1.2	1.7

Safety

	Goal	Feb-19	Mar-19	Apr-19	YTD
*Preventable Incidents Per 100,000 Miles	≤ 0.25	0.00	0.59	0.59	0.18
Preventable Collisions Per 100,000 Miles		0.66	0.00	0.59	0.72
Weighted Preventable Collisions Per 100,000 Miles	≤ 0.50	0.50	0.00	0.44	0.64
*Miles Between Road Calls	≥ 25,000	18,825	33,697	34,037	29,300

Contractual Requirement

*Contractual Requirement effective 4/1/19

Eastern Region Trip Performance

	Goal	Feb-19	Mar-19	Apr-19	YTD
Vehicle Trips		78,175	86,658	89,390	855,638
Passenger Trips		102,608	114,568	117,694	1,130,575
No Shows		2.5%	2.7%	2.4%	2.5%
On Time Performance (Next Day Trips)	≥ 91%	90.5%	88.8%	91.0%	92.1%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.05%	0.58%	0.03%	0.08%
*Excessively Long Trips	≤ 5%	1.3%	1.0%	0.8%	1.1%
*Missed Trips	≤ 0.75%	0.51%	1.01%	0.37%	0.39%
Denials	≤ 0	0	0	0	1
On Time Performance (Access to Work)	≥ 95%	92.5%	94.2%	94.8%	95.0%

Call Performance

	Goal	Feb-19	Mar-19	Apr-19	YTD
<i>Reservations</i>					
Answered Calls		67,572	75,014	73,509	722,309
Average Initial Hold Time	≤ 120 sec	47	50	45	65
Calls On Hold > 5 Minutes	≤ 5%	2.0%	2.9%	1.7%	4.8%

<i>Estimated Time of Arrival (ETA)</i>					
Answered Calls		10,061	12,280	10,591	102,042
Average Initial Hold Time		38	54	36	52
Calls On Hold > 5 Minutes	≤ 10%	1.1%	3.5%	1.5%	3.3%

Complaints/Commendations

	Goal	Feb-19	Mar-19	Apr-19	YTD
*Complaints Per 1,000 Trips	≤ 4.0	3.5	4.0	3.0	3.1
Commendations Per 1,000 Trips		1.6	1.6	1.7	2.0

Safety

	Goal	Feb-19	Mar-19	Apr-19	YTD
*Preventable Incidents Per 100,000 Miles	≤ 0.25	0.00	0.19	0.09	0.17
Preventable Collisions Per 100,000 Miles		1.04	1.02	1.18	1.00
Weighted Preventable Collisions Per 100,000 Miles	≤ 0.50	0.65	0.81	0.93	0.78
*Miles Between Road Calls	≥ 25,000	95,732	71,752	156,938	96,471

Contractual Requirement

*Contractual Requirement effective 4/1/19

Santa Clarita Region Trip Performance

	Goal	Feb-19	Mar-19	Apr-19	YTD
Vehicle Trips		3,096	3,425	3,680	31,782
Passenger Trips		3,564	4,068	4,193	37,344
No Shows		1.6%	2.0%	2.3%	2.7%
On Time Performance (Next Day Trips)	≥ 91%	96.1%	95.2%	93.7%	94.3%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.00%	0.12%	0.37%	0.10%
Excessively Long Trips	≤ 5%	2.3%	2.5%	2.8%	3.0%
Missed Trips	≤ 0.75%	0.86%	0.32%	0.67%	0.87%
Denials	≤ 0	0	1	1	2
On Time Performance (Access to Work)	≥ 94%	-	-	-	-

Call Performance

	Goal	Feb-19	Mar-19	Apr-19	YTD
<i>Reservations</i>					
Answered Calls		2,481	2,641	2,892	27,944
Average Initial Hold Time	≤ 120 sec	36	37	41	40
Calls On Hold > 5 Minutes	≤ 5%	0.7%	1.1%	1.1%	1.2%

<i>Estimated Time of Arrival (ETA)</i>					
Answered Calls		559	590	602	4,073
Average Initial Hold Time		44	45	57	47
Calls On Hold > 5 Minutes	≤ 10%	2.0%	1.9%	4.0%	2.6%

Complaints/Commendations

	Goal	Feb-19	Mar-19	Apr-19	YTD
Complaints Per 1,000 Trips	≤ 4.0	0.3	0.9	0.8	0.8
Commendations Per 1,000 Trips		0.0	0.0	0.3	0.3

Safety

	Goal	Feb-19	Mar-19	Apr-19	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	3.63	0.00	0.00	0.36
Preventable Collisions Per 100,000 Miles		3.63	0.00	3.55	1.07
Weighted Preventable Collisions Per 100,000 Miles	≤ 0.50	2.72	0.00	2.66	0.80
Miles Between Road Calls	≥ 25,000	27,574	23,403	28,200	280,753

Contractual Requirement

Northern Region Trip Performance

	Goal	Feb-19	Mar-19	Apr-19	YTD
Vehicle Trips		47,346	51,922	53,372	508,144
Passenger Trips		58,773	64,908	66,854	636,812
No Shows		2.0%	2.3%	1.9%	2.2%
On Time Performance (Next Day Trips)	≥ 91%	92.0%	92.0%	92.5%	92.0%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.05%	0.29%	0.06%	0.09%
Excessively Long Trips	≤ 5%	5.3%	4.4%	4.0%	5.4%
Missed Trips	≤ 0.75%	0.29%	0.42%	0.29%	0.35%
Denials	≤ 0	0	0	1	1
On Time Performance (Access to Work)	≥ 94%	91.3%	94.5%	98.1%	95.3%

Call Performance

	Goal	Feb-19	Mar-19	Apr-19	YTD
<i>Reservations</i>					
Answered Calls		40,936	40,520	39,758	426,733
Average Initial Hold Time	≤ 120 sec	122	113	132	107
Calls On Hold > 5 Minutes	≤ 5%	4.4%	6.5%	4.5%	3.5%
<i>Estimated Time of Arrival (ETA)</i>					
Answered Calls		6,598	6,888	6,583	69,737
Average Initial Hold Time		132	121	114	107
Calls On Hold > 5 Minutes	≤ 10%	4.8%	8.4%	4.3%	4.4%

Complaints/Commendations

	Goal	Feb-19	Mar-19	Apr-19	YTD
Complaints Per 1,000 Trips	≤ 4.0	2.2	1.8	1.7	2.1
Commendations Per 1,000 Trips		1.3	1.3	1.4	1.4

Safety

	Goal	Feb-19	Mar-19	Apr-19	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.34	0.30	0.15	0.20
Preventable Collisions Per 100,000 Miles		0.50	1.35	1.61	1.05
Weighted Preventable Collisions Per 100,000 Miles	≤ 0.50	0.42	1.01	1.28	0.82
Miles Between Road Calls	≥ 25,000	74,597	95,567	85,352	80,801

Contractual Requirement

Southern Region Trip Performance

	Goal	Feb-19	Mar-19	Apr-19	YTD
Vehicle Trips		84,714	96,022	98,036	909,563
Passenger Trips		105,466	119,989	122,752	1,145,614
No Shows		3.7%	3.7%	3.1%	4.2%
On Time Performance (Next Day Trips)	≥ 91%	93.9%	91.5%	93.0%	92.0%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.01%	0.15%	0.01%	0.09%
Excessively Long Trips	≤ 5%	3.5%	3.7%	3.3%	6.3%
Missed Trips	≤ 0.75%	0.28%	0.49%	0.25%	0.87%
Denials	≤ 0	0	0	0	2
On Time Performance (Access to Work)	≥ 92%	97.9%	97.1%	98.5%	96.4%

Call Performance

	Goal	Feb-19	Mar-19	Apr-19	YTD
<i>Reservations</i>					
Answered Calls		74,518	83,173	81,772	827,697
Average Initial Hold Time	≤ 120 sec	87	94	100	91
Calls On Hold > 5 Minutes	≤ 5%	2.6%	3.7%	4.2%	3.7%
<i>Estimated Time of Arrival (ETA)</i>					
Answered Calls		15,708	19,433	17,710	238,659
Average Initial Hold Time		77	117	93	118
Calls On Hold > 5 Minutes	≤ 10%	2.5%	6.2%	3.9%	8.2%

Complaints/Commendations

	Goal	Feb-19	Mar-19	Apr-19	YTD
Complaints Per 1,000 Trips	≤ 4.0	2.3	2.6	2.1	5.1
Commendations Per 1,000 Trips		1.4	1.1	1.4	1.3

Safety

	Goal	Feb-19	Mar-19	Apr-19	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.20	0.09	0.45	0.30
Preventable Collisions Per 100,000 Miles		0.50	0.98	0.62	0.70
Weighted Preventable Collisions Per 100,000 Miles	≤ 0.50	0.37	0.93	0.56	0.60
Miles Between Road Calls	≥ 25,000	55,831	66,273	112,041	31,279

Contractual Requirement

West Central Region

Trip Performance

	Goal	Feb-19	Mar-19	Apr-19	YTD
Vehicle Trips		41,836	46,329	46,142	444,222
Passenger Trips		55,884	61,898	61,880	598,794
No Shows		3.6%	4.0%	3.5%	3.7%
On Time Performance (Next Day Trips)	≥ 91%	90.2%	88.2%	91.4%	91.9%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.07%	0.18%	0.04%	0.06%
Excessively Long Trips	≤ 5%	4.2%	3.9%	2.3%	3.5%
Missed Trips	≤ 0.75%	0.50%	0.74%	0.47%	0.43%
Denials	≤ 0	1	0	0	1
On Time Performance (Access to Work)	≥ 91%	96.6%	95.7%	96.8%	97.3%

Call Performance

	Goal	Feb-19	Mar-19	Apr-19	YTD
<i>Reservations</i>					
Answered Calls		43,541	48,925	46,847	491,074
Average Initial Hold Time	≤ 120 sec	45	50	45	66
Calls On Hold > 5 Minutes	≤ 5%	1.8%	3.1%	1.9%	5.0%
<i>Estimated Time of Arrival (ETA)</i>					
Answered Calls		7,121	8,448	7,915	74,188
Average Initial Hold Time		37	46	32	51
Calls On Hold > 5 Minutes	≤ 5%	1.3%	2.7%	0.9%	3.3%

Complaints/Commendations

	Goal	Feb-19	Mar-19	Apr-19	YTD
Complaints Per 1,000 Trips	≤ 4.0	2.5	3.1	2.5	2.5
Commendations Per 1,000 Trips		2.3	1.9	1.4	1.6

Safety

	Goal	Feb-19	Mar-19	Apr-19	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.00	0.00	0.00	0.07
Preventable Collisions Per 100,000 Miles		0.61	1.08	0.90	0.74
Weighted Preventable Collisions Per 100,000 Miles	≤ 0.50	0.50	0.67	0.81	0.58
Miles Between Road Calls	≥ 25,000	70,819	55,609	79,228	51,763

Contractual Requirement

Eligibility and Appeals

Eligibility

	Goal	Feb-19	Mar-19	Apr-19	YTD
Eligible Customers		150,850	150,445	150,115	150,115
Total ADA Evaluations Performed		3,503	4,035	5,272	46,453
Days From Application to Decision (avg)	≤ 21	6	6	6	7

In Person Evaluations

	Goal	Feb-19	Mar-19	Apr-19	YTD
Unrestricted		1,250	1,372	1,721	15,552
Restricted		583	608	820	7,531
Temporary		163	146	204	1,893
Not Eligible		257	280	329	3,853
Total		2,253	2,406	3,074	28,829

Paper Evaluations

	Goal	Feb-19	Mar-19	Apr-19	YTD
Unrestricted		1,250	1,629	2,198	17,617
Restricted		0	0	0	4
Temporary		0	0	0	1
Not Eligible		0	0	0	2
Total		1,250	1,629	2,198	17,624

Appeals

	Goal	Feb-19	Mar-19	Apr-19	YTD
Appeals Performed		140	98	121	1,629
Days From Appeal to Decision (avg)	≤ 30	7	6	6	8

Customer Service

Phone Statistics

Customer Service

	Goal	Feb-19	Mar-19	Apr-19	YTD
Customer Service Calls		25,021	29,190	31,504	304,529
Average Initial Hold Time	≤ 180 sec	97	45	43	82
Calls On Hold > 5 Minutes	≤ 10%	11.1%	4.0%	3.5%	7.9%
Call Duration	≤ 300 sec	272	281	268	270
Calls Abandoned	≤ 10%	3.1%	1.6%	1.6%	2.7%

Operations Monitoring Center

	Goal	Feb-19	Mar-19	Apr-19	YTD
Customer Service Calls		8,442	9,152	8,319	107,883
Average Initial Hold Time	≤ 180 sec	58	64	33	62
Calls On Hold > 5 Minutes	≤ 10%	5.8%	6.5%	2.3%	5.7%
Call Duration	≤ 300 sec	364	378	341	387
Calls Abandoned	≤ 10%	4.3%	5.7%	2.7%	4.5%

Contractual Requirement

June 3, 2019

TO: BOARD OF DIRECTORS

FROM: HECTOR RODRIGUEZ, DEPUTY EXECUTIVE DIRECTOR

RE: DRAFT FINANCIAL REPORT FOR FEBRUARY 2019

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

- Passengers: 1.8% under budget
- Contract Revenue Miles: 0.32% under budget
- Trips: 0.6% under budget
- Total Eligibility Evaluations: 11.4% over budget
- Average Trip Distance: over budget by 0.03 miles at 9.28 miles
- Total cost per Passenger(before depreciation): 0.5% over budget at \$37.77
- Administration Function is 1.2% over budget
- Eligibility Determination Function is 13% over budget
- Purchased Transportation Function is 1.9% under budget
- Paratransit Operations Function is 3.4% under budget

Attached are the following reports for your review:

- Statistical Comparison: April 2018 to April 2019
- 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 April 2019**

	% of Cost	YTD Actual	YTD Budget	Variance	% Over / (Under) Budget	% Over / (Under) Prior Yr
Purchased Transportation	81.3%	\$114,255,348	\$116,458,118	(\$2,202,770)	-1.9%	12%
Paratransit Operations	9.2%	\$12,866,363	\$13,316,671	(\$450,308)	-3.4%	15%
Eligibility Determination	5.2%	\$7,301,212	\$6,459,434	\$841,778	13%	-1%
CTSA/Ride Information	0.2%	\$301,743	\$548,447	(\$246,704)	-45%	250%
Administration	4.1%	\$5,831,896	\$5,761,186	\$70,710	1.2%	2%
Total Exp before Depreciation		\$140,556,562	\$142,543,856	(\$1,987,294)	-1.4%	11%

Statistics - - For the YTD Period Ended April 2019

	YTD Actual	YTD Budget	Variance	% Over / (Under) Budget	% Over / (Under) Prior Yr
Total Eligibility Evaluations	46,449	41,682	4,767	11.4%	76.5%
Number of PAX	3,721,616	3,790,562	(68,946)	-1.8%	1.4%
Number of Contract Revenue Miles	26,735,604	26,820,705	(85,101)	-0.32%	1.7%
Number of Trips	2,882,123	2,899,510	(17,387)	-0.6%	2.4%
Average Trip Distance	9.28	9.25	0.03	0.3%	-0.7%
Purchased Transportation Cost					
Cost per Trip	\$39.64	\$40.16	(\$0.52)	-1.3%	8.9%
Cost per PAX	\$30.70	\$30.72	(\$0.02)	-0.1%	10.0%
Cost per Contract Rev Mile	\$4.27	\$4.34	(\$0.07)	0.0%	9.5%
Total Cost per Pax before Depreciation	\$37.77	\$37.60	\$0.17	0.5%	9.4%

Budget Results for FY 2018/2019 For YTD Period Ending April 2019

	YTD Actual	YTD Budget	Variance	% Over / (Under) Budget	% Over / (Under) Prior Yr
Revenue					
Passenger Fares	\$8,398,065	\$7,932,601	\$465,464		
Other Revenue	\$687,360	\$336,345	\$351,015		
Total Revenue	\$9,085,425	\$8,268,946	\$816,479	9.9%	6%
 Total Exp before Capital	 \$140,556,562	 \$142,543,856	 (\$1,987,294)	 -1.4%	 11%
Capital Expenditures					
Vehicles	\$5,284,227	\$10,000,000	(\$4,715,773)		
Other Capital Expenditures	\$437,858	\$0	\$437,858		
Total Capital Expenditures	\$5,722,085	\$10,000,000	(\$4,277,915)	-42.8%	572%
 Over/(Under) Budget April 2018			 (\$6,265,209)		

YTD COST PER PASSENGER BEFORE DEPRECIATION AND CAPITAL COST

