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Board Box

June 2019

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June 21, 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	Mar-19	Apr-19	May-19	YTD
Vehicle Trips		297,750	304,309	314,796	3,197,193
Passenger Trips		382,412	390,482	402,147	4,123,911
Backup Trips		47	38	4	289
No Shows		3.1%	2.7%	2.6%	3.1%
On Time Performance (Next Day Trips)	≥ 91%	90.4%	92.0%	90.9%	92.0%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.30%	0.07%	0.06%	0.08%
Excessively Long Trips	≤ 5%	3.0%	2.5%	3.2%	3.8%
Missed Trips	≤ 0.75%	0.66%	0.35%	0.38%	0.54%
Denials	≤ 0	1	2	0	8
On Time Performance (Access to Work)	≥ 94%	95.6%	97.2%	94.6%	95.7%

Call Performance

	Goal	Mar-19	Apr-19	May-19	YTD
<i>Reservations</i>					
Answered Calls		259,296	254,209	257,065	2,844,432
Average Initial Hold Time	≤ 120 sec	76	78	83	81
Calls On Hold > 5 Minutes	≤ 5%	3.9%	3.0%	4.0%	4.2%
<i>Estimated Time of Arrival (ETAs)</i>					
Answered Calls		50,737	46,490	48,339	567,874
Average Initial Hold Time		85	70	79	88
Calls On Hold > 5 Minutes	≤ 10%	4.9%	2.8%	3.6%	5.4%

Complaints/Commendations

	Goal	Mar-19	Apr-19	May-19	YTD
Complaints Per 1,000 Trips	≤ 4.0	2.9	2.4	2.7	3.3
Commendations Per 1,000 Trips		1.4	1.5	1.5	1.5

Safety

	Goal	Mar-19	Apr-19	May-19	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.17	0.22	0.34	0.22
Preventable Collisions Per 100,000 Miles		1.02	1.04	0.48	0.83
Weighted Preventable Collisions Per 100,000 Miles	≤ 0.50	0.82	0.86	0.38	0.66
Miles Between Road Calls	≥ 25,000	67,035	98,709	108,192	52,667

Antelope Valley Region Trip Performance

	Goal	Mar-19	Apr-19	May-19	YTD
Vehicle Trips		13,394	13,689	13,811	146,859
Passenger Trips		16,981	17,109	17,366	189,991
No Shows		2.6%	2.3%	2.5%	2.7%
On Time Performance (Next Day Trips)	≥ 91%	91.7%	91.2%	92.3%	92.0%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.19%	0.05%	0.07%	0.10%
*Excessively Long Trips	≤ 5%	2.1%	2.4%	2.3%	2.1%
*Missed Trips	≤ 0.75%	0.84%	0.82%	0.74%	0.87%
Denials	≤ 0	0	0	0	1
On Time Performance (Access to Work)	≥ 92%	95.0%	95.5%	100.0%	97.3%

Call Performance

	Goal	Mar-19	Apr-19	May-19	YTD
<i>Reservations</i>					
Answered Calls		9,023	9,431	9,920	101,530
Average Initial Hold Time	≤ 120 sec	99	86	95	91
Calls On Hold > 5 Minutes	≤ 5%	6.9%	2.0%	1.8%	4.0%

<i>Estimated Time of Arrival (ETAs)</i>					
Answered Calls		3,098	3,089	3,166	34,002
Average Initial Hold Time		44	49	47	45
*Calls On Hold > 5 Minutes	≤ 10%	2.0%	2.5%	2.4%	2.0%

Complaints/Commendations

	Goal	Mar-19	Apr-19	May-19	YTD
*Complaints Per 1,000 Trips	≤ 4.0	1.9	3.4	2.7	2.4
Commendations Per 1,000 Trips		0.5	1.2	0.7	1.6

Safety

	Goal	Mar-19	Apr-19	May-19	YTD
*Preventable Incidents Per 100,000 Miles	≤ 0.25	0.59	0.59	0.00	0.16
Preventable Collisions Per 100,000 Miles		0.00	0.59	0.00	0.65
Weighted Preventable Collisions Per 100,000 Miles	≤ 0.50	0.00	0.44	0.00	0.58
*Miles Between Road Calls	≥ 25,000	33,697	34,037	34,481	29,718

Contractual Requirement

*Contractual Requirement effective 4/1/19

Eastern Region

Trip Performance

	Goal	Mar-19	Apr-19	May-19	YTD
Vehicle Trips		86,658	89,390	92,128	947,766
Passenger Trips		114,568	117,694	120,826	1,251,401
No Shows		2.7%	2.4%	2.3%	2.5%
On Time Performance (Next Day Trips)	≥ 91%	88.8%	91.0%	90.4%	91.9%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.58%	0.03%	0.02%	0.08%
*Excessively Long Trips	≤ 5%	1.0%	0.8%	1.2%	1.1%
*Missed Trips	≤ 0.75%	1.01%	0.37%	0.35%	0.39%
Denials	≤ 0	0	0	0	1
On Time Performance (Access to Work)	≥ 95%	94.2%	94.8%	92.2%	94.7%

Call Performance

	Goal	Mar-19	Apr-19	May-19	YTD
<i>Reservations</i>					
Answered Calls		75,014	73,509	74,334	796,643
Average Initial Hold Time	≤ 120 sec	50	45	58	65
Calls On Hold > 5 Minutes	≤ 5%	2.9%	1.7%	4.1%	4.7%

<i>Estimated Time of Arrival (ETA)</i>					
Answered Calls		12,280	10,591	10,919	112,961
Average Initial Hold Time		54	36	42	51
Calls On Hold > 5 Minutes	≤ 10%	3.5%	1.5%	2.0%	3.2%

Complaints/Commendations

	Goal	Mar-19	Apr-19	May-19	YTD
*Complaints Per 1,000 Trips	≤ 4.0	4.0	3.0	3.3	3.2
Commendations Per 1,000 Trips		1.6	1.7	1.6	1.9

Safety

	Goal	Mar-19	Apr-19	May-19	YTD
*Preventable Incidents Per 100,000 Miles	≤ 0.25	0.19	0.09	0.26	0.18
Preventable Collisions Per 100,000 Miles		1.02	1.18	0.53	0.95
Weighted Preventable Collisions Per 100,000 Miles	≤ 0.50	0.81	0.93	0.37	0.74
*Miles Between Road Calls	≥ 25,000	71,752	156,938	228,372	102,206

Contractual Requirement

*Contractual Requirement effective 4/1/19

Santa Clarita Region Trip Performance

	Goal	Mar-19	Apr-19	May-19	YTD
Vehicle Trips		3,425	3,680	3,852	35,634
Passenger Trips		4,068	4,193	4,387	41,731
No Shows		2.0%	2.3%	2.3%	2.7%
*On Time Performance (Next Day Trips)	≥ 91%	95.2%	93.7%	94.9%	94.4%
*Excessively Late Trips (45+ min late)	≤ 0.10%	0.12%	0.37%	0.10%	0.10%
Excessively Long Trips	≤ 5%	2.5%	2.8%	2.6%	2.9%
Missed Trips	≤ 0.75%	0.32%	0.67%	0.50%	0.82%
Denials	≤ 0	1	1	0	2
On Time Performance (Access to Work)	≥ 94%	-	-	-	-

Call Performance

	Goal	Mar-19	Apr-19	May-19	YTD
<i>Reservations</i>					
Answered Calls		2,641	2,892	2,219	30,163
Average Initial Hold Time	≤ 120 sec	37	41	39	40
Calls On Hold > 5 Minutes	≤ 5%	1.1%	1.1%	0.8%	1.2%

<i>Estimated Time of Arrival (ETA)</i>					
Answered Calls		590	602	435	4,508
Average Initial Hold Time		45	57	49	47
Calls On Hold > 5 Minutes	≤ 10%	1.9%	4.0%	2.3%	2.6%

Complaints/Commendations

	Goal	Mar-19	Apr-19	May-19	YTD
Complaints Per 1,000 Trips	≤ 4.0	0.9	0.8	2.3	1.0
Commendations Per 1,000 Trips		0.0	0.3	1.3	0.4

Safety

	Goal	Mar-19	Apr-19	May-19	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.00	0.00	2.97	0.64
Preventable Collisions Per 100,000 Miles		0.00	3.55	0.00	0.95
Weighted Preventable Collisions Per 100,000 Miles	≤ 0.50	0.00	2.66	0.00	0.72
Miles Between Road Calls	≥ 25,000	23,403	28,200	33,651	314,404

Contractual Requirement

Northern Region Trip Performance

	Goal	Mar-19	Apr-19	May-19	YTD
Vehicle Trips		51,922	53,372	55,089	563,233
Passenger Trips		64,908	66,854	68,733	705,545
No Shows		2.3%	1.9%	2.1%	2.2%
On Time Performance (Next Day Trips)	≥ 91%	92.0%	92.5%	90.8%	91.8%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.29%	0.06%	0.10%	0.09%
Excessively Long Trips	≤ 5%	4.4%	4.0%	4.8%	5.3%
Missed Trips	≤ 0.75%	0.42%	0.29%	0.33%	0.34%
Denials	≤ 0	0	1	0	1
On Time Performance (Access to Work)	≥ 94%	94.5%	98.1%	93.2%	95.1%

Call Performance

	Goal	Mar-19	Apr-19	May-19	YTD
<i>Reservations</i>					
Answered Calls		40,520	39,758	38,107	464,840
Average Initial Hold Time	≤ 120 sec	113	132	137	110
Calls On Hold > 5 Minutes	≤ 5%	6.5%	4.5%	4.6%	3.6%
<i>Estimated Time of Arrival (ETA)</i>					
Answered Calls		6,888	6,583	6,523	76,260
Average Initial Hold Time		121	114	121	109
Calls On Hold > 5 Minutes	≤ 10%	8.4%	4.3%	4.1%	4.4%

Complaints/Commendations

	Goal	Mar-19	Apr-19	May-19	YTD
Complaints Per 1,000 Trips	≤ 4.0	1.8	1.7	1.9	2.1
Commendations Per 1,000 Trips		1.3	1.4	1.3	1.4

Safety

	Goal	Mar-19	Apr-19	May-19	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.30	0.15	0.28	0.21
Preventable Collisions Per 100,000 Miles		1.35	1.61	0.43	0.99
Weighted Preventable Collisions Per 100,000 Miles	≤ 0.50	1.01	1.28	0.32	0.77
Miles Between Road Calls	≥ 25,000	95,567	85,352	88,076	81,455

Contractual Requirement

Southern Region Trip Performance

	Goal	Mar-19	Apr-19	May-19	YTD
Vehicle Trips		96,022	98,036	101,816	1,011,379
Passenger Trips		119,989	122,752	126,828	1,272,442
No Shows		3.7%	3.1%	2.9%	4.1%
On Time Performance (Next Day Trips)	≥ 91%	91.5%	93.0%	91.2%	91.9%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.15%	0.01%	0.04%	0.08%
Excessively Long Trips	≤ 5%	3.7%	3.3%	4.5%	6.1%
Missed Trips	≤ 0.75%	0.49%	0.25%	0.36%	0.82%
Denials	≤ 0	0	0	0	2
On Time Performance (Access to Work)	≥ 92%	97.1%	98.5%	96.2%	96.5%

Call Performance

	Goal	Mar-19	Apr-19	May-19	YTD
<i>Reservations</i>					
Answered Calls		83,173	81,772	84,573	912,270
Average Initial Hold Time	≤ 120 sec	94	100	95	92
Calls On Hold > 5 Minutes	≤ 5%	3.7%	4.2%	3.8%	3.7%
<i>Estimated Time of Arrival (ETA)</i>					
Answered Calls		19,433	17,710	19,223	257,882
Average Initial Hold Time		117	93	108	117
Calls On Hold > 5 Minutes	≤ 10%	6.2%	3.9%	5.4%	8.0%

Complaints/Commendations

	Goal	Mar-19	Apr-19	May-19	YTD
Complaints Per 1,000 Trips	≤ 4.0	2.6	2.1	2.8	4.8
Commendations Per 1,000 Trips		1.1	1.4	1.5	1.3

Safety

	Goal	Mar-19	Apr-19	May-19	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.09	0.45	0.34	0.30
Preventable Collisions Per 100,000 Miles		0.98	0.62	0.52	0.69
Weighted Preventable Collisions Per 100,000 Miles	≤ 0.50	0.93	0.56	0.45	0.59
Miles Between Road Calls	≥ 25,000	66,273	112,041	165,778	33,818

Contractual Requirement

West Central Region

Trip Performance

	Goal	Mar-19	Apr-19	May-19	YTD
Vehicle Trips		46,329	46,142	48,100	492,322
Passenger Trips		61,898	61,880	64,007	662,801
No Shows		4.0%	3.5%	3.5%	3.7%
On Time Performance (Next Day Trips)	≥ 91%	88.2%	91.4%	90.0%	91.7%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.18%	0.04%	0.09%	0.06%
Excessively Long Trips	≤ 5%	3.9%	2.3%	3.0%	3.4%
Missed Trips	≤ 0.75%	0.74%	0.47%	0.47%	0.43%
Denials	≤ 0	0	0	0	1
On Time Performance (Access to Work)	≥ 91%	95.7%	96.8%	97.8%	97.4%

Call Performance

	Goal	Mar-19	Apr-19	May-19	YTD
<i>Reservations</i>					
Answered Calls		48,925	46,847	47,912	538,986
Average Initial Hold Time	≤ 120 sec	50	45	56	65
Calls On Hold > 5 Minutes	≤ 5%	3.1%	1.9%	4.1%	4.9%
<i>Estimated Time of Arrival (ETA)</i>					
Answered Calls		8,448	7,915	8,073	82,261
Average Initial Hold Time		46	32	39	50
Calls On Hold > 5 Minutes	≤ 5%	2.7%	0.9%	1.7%	3.1%

Complaints/Commendations

	Goal	Mar-19	Apr-19	May-19	YTD
Complaints Per 1,000 Trips	≤ 4.0	3.1	2.5	2.4	2.5
Commendations Per 1,000 Trips		1.9	1.4	1.6	1.6

Safety

	Goal	Mar-19	Apr-19	May-19	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.00	0.00	0.52	0.12
Preventable Collisions Per 100,000 Miles		1.08	0.90	0.52	0.72
Weighted Preventable Collisions Per 100,000 Miles	≤ 0.50	0.67	0.81	0.43	0.56
Miles Between Road Calls	≥ 25,000	55,609	79,228	58,139	52,322

Contractual Requirement

Eligibility and Appeals

Eligibility

	Goal	Mar-19	Apr-19	May-19	YTD
Eligible Customers		150,445	150,115	150,069	150,069
Total ADA Evaluations Performed		4,035	5,272	4,875	51,328
Days From Application to Decision (avg)	≤ 21	6	6	6	7

In Person Evaluations

	Goal	Mar-19	Apr-19	May-19	YTD
Unrestricted		1,372	1,721	1,660	17,212
Restricted		608	820	777	8,308
Temporary		146	204	191	2,084
Not Eligible		280	329	338	4,191
Total		2,406	3,074	2,966	31,795

Paper Evaluations

	Goal	Mar-19	Apr-19	May-19	YTD
Unrestricted		1,629	2,198	1,909	19,526
Restricted		0	0	0	4
Temporary		0	0	0	1
Not Eligible		0	0	0	2
Total		1,629	2,198	1,909	19,533

Appeals

	Goal	Mar-19	Apr-19	May-19	YTD
Appeals Performed		98	121	116	1,745
Days From Appeal to Decision (avg)	≤ 30	6	6	5	8

Customer Service

Phone Statistics

Customer Service

	Goal	Mar-19	Apr-19	May-19	YTD
Customer Service Calls		29,190	31,504	31,324	335,853
Average Initial Hold Time	≤ 180 sec	45	43	36	77
Calls On Hold > 5 Minutes	≤ 10%	4.0%	3.5%	3.4%	7.5%
Call Duration	≤ 300 sec	281	268	267	269
Calls Abandoned	≤ 10%	1.6%	1.6%	1.6%	2.6%

Operations Monitoring Center

	Goal	Mar-19	Apr-19	May-19	YTD
Customer Service Calls		9,152	8,319	9,220	117,103
Average Initial Hold Time	≤ 180 sec	64	33	31	59
Calls On Hold > 5 Minutes	≤ 10%	6.5%	2.3%	2.1%	5.4%
Call Duration	≤ 300 sec	378	341	346	384
Calls Abandoned	≤ 10%	5.7%	2.7%	2.7%	4.4%

Contractual Requirement

June 21, 2019

TO: BOARD OF DIRECTORS

FROM: HECTOR RODRIGUEZ, DEPUTY EXECUTIVE DIRECTOR

RE: DRAFT FINANCIAL REPORT FOR MAY 2019

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

- Passengers: 1.6% under budget
- Contract Revenue Miles: 0.05% over budget
- Trips: 0.2% under budget
- Total Eligibility Evaluations: 11.1% over budget
- Average Trip Distance: over budget by 0.03 miles at 9.28 miles
- Total cost per Passenger(before depreciation): 0.6% over budget at \$37.85
- Administration Function is 1.9% over budget
- Eligibility Determination Function is 13% over budget
- Purchased Transportation Function is 1.5% under budget
- Paratransit Operations Function is 3.1% under budget

Attached are the following reports for your review:

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

	% of Cost	YTD Actual	YTD Budget	Variance	% Over / (Under) Budget	% Over / (Under) Prior Yr
Purchased Transportation	81.4%	\$127,022,251	\$128,906,658	(\$1,884,407)	-1.5%	12%
Paratransit Operations	9.1%	\$14,192,932	\$14,645,491	(\$452,559)	-3.1%	15%
Eligibility Determination	5.2%	\$8,082,347	\$7,122,133	\$960,214	13%	-2%
CTSA/Ride Information	0.2%	\$334,812	\$603,291	(\$268,479)	-45%	275%
Administration	4.1%	\$6,465,177	\$6,343,226	\$121,951	1.9%	3%
Total Exp before Depreciation		\$156,097,519	\$157,620,799	(\$1,523,280)	-1.0%	11%

Statistics - - For the YTD Period Ended May 2019

	YTD Actual	YTD Budget	Variance	% Over / (Under) Budget	% Over / (Under) Prior Yr
Total Eligibility Evaluations	51,328	46,213	5,115	11.1%	70.6%
Number of PAX	4,123,911	4,189,355	(65,444)	-1.6%	1.6%
Number of Contract Revenue Miles	29,658,736	29,642,479	16,257	0.05%	1.9%
Number of Trips	3,197,193	3,204,531	(7,338)	-0.2%	2.7%
Average Trip Distance	9.28	9.25	0.03	0.3%	-0.7%
Purchased Transportation Cost					
Cost per Trip	\$39.73	\$40.23	(\$0.50)	-1.2%	9.1%
Cost per PAX	\$30.80	\$30.77	\$0.03	0.1%	10.3%
Cost per Contract Rev Mile	\$4.28	\$4.35	(\$0.07)	0.0%	9.7%
Total Cost per Pax before Depreciation	\$37.85	\$37.62	\$0.23	0.6%	9.5%

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

	YTD Actual	YTD Budget	Variance	% Over / (Under) Budget	% Over / (Under) Prior Yr
Revenue					
Passenger Fares	\$9,430,863	\$8,767,182	\$663,681		
Other Revenue	\$782,512	\$371,030	\$411,482		
Total Revenue	\$10,213,375	\$9,138,212	\$1,075,163	11.8%	8%
 Total Exp before Capital	 \$156,097,519	 \$157,620,799	 (\$1,523,280)	 -1.0%	 11%
Capital Expenditures					
Vehicles	\$5,285,911	\$11,000,000	(\$5,714,089)		
Other Capital Expenditures	\$461,728	\$0	\$461,728		
Total Capital Expenditures	\$5,747,639	\$11,000,000	(\$5,252,361)	-47.7%	433%
 Over/(Under) Budget May 2018			 (\$6,775,641)		

YTD COST PER PASSENGER BEFORE DEPRECIATION AND CAPITAL COST

