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July 2019

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August 26, 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	Apr-19	May-19	Jun-19	YTD
Vehicle Trips		304,305	314,966	294,181	3,491,521
Passenger Trips		390,483	402,333	379,650	4,503,721
Backup Trips		38	57	54	399
No Shows		2.7%	2.6%	2.6%	3.1%
On Time Performance (Next Day Trips)	≥ 91%	92.0%	90.9%	92.4%	92.0%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.07%	0.06%	0.03%	0.08%
Excessively Long Trips	≤ 5%	2.5%	3.2%	3.0%	3.8%
Missed Trips	≤ 0.75%	0.35%	0.38%	0.34%	0.52%
Denials	≤ 0	2	0	2	10
On Time Performance (Access to Work)	≥ 94%	97.2%	94.6%	97.5%	95.8%

Call Performance

	Goal	Apr-19	May-19	Jun-19	YTD
<i>Reservations</i>					
Answered Calls		254,209	257,065	244,365	3,088,797
Average Initial Hold Time	≤ 120 sec	78	83	76	81
Calls On Hold > 5 Minutes	≤ 5%	3.0%	4.0%	3.8%	4.2%
<i>Estimated Time of Arrival (ETAs)</i>					
Answered Calls		46,490	48,339	44,359	612,233
Average Initial Hold Time		70	79	73	87
Calls On Hold > 5 Minutes	≤ 10%	2.8%	3.6%	3.5%	5.3%

Complaints/Commendations

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

Safety

	Goal	Apr-19	May-19	Jun-19	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.22	0.34	0.14	0.21
Preventable Collisions Per 100,000 Miles		1.04	0.48	0.45	0.79
Weighted Preventable Collisions Per 100,000 Miles	≤ 0.50	0.86	0.38	0.35	0.63
Miles Between Road Calls	≥ 25,000	98,709	108,192	119,389	55,228

Antelope Valley Region Trip Performance

	Goal	Apr-19	May-19	Jun-19	YTD
Vehicle Trips		13,689	13,811	12,757	159,616
Passenger Trips		17,109	17,366	16,638	206,629
No Shows		2.3%	2.5%	2.6%	2.7%
On Time Performance (Next Day Trips)	≥ 91%	91.2%	92.3%	92.9%	92.1%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.05%	0.07%	0.10%	0.10%
*Excessively Long Trips	≤ 5%	2.4%	2.3%	1.5%	2.0%
*Missed Trips	≤ 0.75%	0.82%	0.74%	0.78%	0.86%
Denials	≤ 0	0	0	0	1
On Time Performance (Access to Work)	≥ 92%	95.5%	100.0%	100.0%	97.5%

Call Performance

	Goal	Apr-19	May-19	Jun-19	YTD
<i>Reservations</i>					
Answered Calls		9,431	9,920	10,439	111,969
Average Initial Hold Time	≤ 120 sec	86	95	90	91
Calls On Hold > 5 Minutes	≤ 5%	2.0%	1.8%	2.2%	3.8%

<i>Estimated Time of Arrival (ETAs)</i>					
Answered Calls		3,089	3,166	2,923	36,925
Average Initial Hold Time		49	47	54	45
Calls On Hold > 5 Minutes	≤ 10%	2.5%	2.4%	2.9%	2.1%

Complaints/Commendations

	Goal	Apr-19	May-19	Jun-19	YTD
Complaints Per 1,000 Trips	≤ 4.0	3.4	2.7	3.0	2.4
Commendations Per 1,000 Trips		1.2	0.7	1.2	1.6

Safety

	Goal	Apr-19	May-19	Jun-19	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.59	0.00	0.00	0.15
Preventable Collisions Per 100,000 Miles		0.59	0.00	0.00	0.60
Weighted Preventable Collisions Per 100,000 Miles	≤ 0.50	0.44	0.00	0.00	0.54
Miles Between Road Calls	≥ 25,000	34,037	34,481	32,454	29,922

Contractual Requirement

Eastern Region Trip Performance

	Goal	Apr-19	May-19	Jun-19	YTD
Vehicle Trips		89,390	92,299	85,810	1,033,747
Passenger Trips		117,694	121,013	113,298	1,364,886
No Shows		2.4%	2.3%	2.2%	2.5%
On Time Performance (Next Day Trips)	≥ 91%	91.0%	90.4%	92.6%	92.0%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.03%	0.02%	0.01%	0.07%
Excessively Long Trips	≤ 5%	0.8%	1.2%	1.0%	1.1%
Missed Trips	≤ 0.75%	0.37%	0.35%	0.28%	0.38%
Denials	≤ 0	0	0	0	1
On Time Performance (Access to Work)	≥ 95%	94.8%	92.2%	95.3%	94.8%

Call Performance

	Goal	Apr-19	May-19	Jun-19	YTD
<i>Reservations</i>					
Answered Calls		73,509	74,334	68,988	865,631
Average Initial Hold Time	≤ 120 sec	45	58	54	64
Calls On Hold > 5 Minutes	≤ 5%	1.7%	4.1%	4.9%	4.7%

<i>Estimated Time of Arrival (ETA)</i>					
Answered Calls		10,591	10,919	10,020	122,981
Average Initial Hold Time		36	42	37	49
Calls On Hold > 5 Minutes	≤ 10%	1.5%	2.0%	2.3%	3.1%

Complaints/Commendations

	Goal	Apr-19	May-19	Jun-19	YTD
Complaints Per 1,000 Trips	≤ 4.0	3.0	3.3	2.8	3.1
Commendations Per 1,000 Trips		1.7	1.6	1.6	1.9

Safety

	Goal	Apr-19	May-19	Jun-19	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.09	0.26	0.09	0.16
Preventable Collisions Per 100,000 Miles		1.18	0.53	0.84	0.93
Weighted Preventable Collisions Per 100,000 Miles	≤ 0.50	0.93	0.37	0.67	0.72
Miles Between Road Calls	≥ 25,000	156,938	228,372	358,545	108,723

Contractual Requirement

Santa Clarita Region Trip Performance

	Goal	Apr-19	May-19	Jun-19	YTD
Vehicle Trips		3,680	3,852	3,367	39,001
Passenger Trips		4,199	4,387	4,053	45,790
No Shows		2.3%	2.3%	2.5%	2.7%
On Time Performance (Next Day Trips)	≥ 91%	93.7%	94.9%	94.6%	94.4%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.37%	0.10%	0.20%	0.11%
Excessively Long Trips	≤ 5%	2.8%	2.6%	2.5%	2.9%
Missed Trips	≤ 0.75%	0.67%	0.50%	0.51%	0.79%
Denials	≤ 0	1	0	0	2
On Time Performance (Access to Work)	≥ 94%	-	-	-	-

Call Performance

	Goal	Apr-19	May-19	Jun-19	YTD
<i>Reservations</i>					
Answered Calls		2,892	2,219	2,842	33,005
Average Initial Hold Time	≤ 120 sec	41	39	52	41
Calls On Hold > 5 Minutes	≤ 5%	1.1%	0.8%	1.3%	1.2%

<i>Estimated Time of Arrival (ETA)</i>					
Answered Calls		602	435	493	5,001
Average Initial Hold Time		57	49	65	49
Calls On Hold > 5 Minutes	≤ 10%	4.0%	2.3%	3.9%	2.7%

Complaints/Commendations

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

Safety

	Goal	Apr-19	May-19	Jun-19	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.00	2.97	0.00	0.58
Preventable Collisions Per 100,000 Miles		3.55	0.00	0.00	0.87
Weighted Preventable Collisions Per 100,000 Miles	≤ 0.50	2.66	0.00	0.00	0.65
Miles Between Road Calls	≥ 25,000	28,200	33,651	31,734	346,138

Contractual Requirement

Northern Region Trip Performance

	Goal	Apr-19	May-19	Jun-19	YTD
Vehicle Trips		53,368	55,088	50,883	614,107
Passenger Trips		66,849	68,732	63,626	769,160
No Shows		1.9%	2.1%	2.0%	2.2%
On Time Performance (Next Day Trips)	≥ 91%	92.5%	90.8%	92.2%	91.9%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.06%	0.10%	0.05%	0.09%
Excessively Long Trips	≤ 5%	4.0%	4.8%	4.5%	5.3%
Missed Trips	≤ 0.75%	0.29%	0.33%	0.26%	0.34%
Denials	≤ 0	1	0	0	1
On Time Performance (Access to Work)	≥ 94%	98.1%	93.2%	97.1%	95.2%

Call Performance

	Goal	Apr-19	May-19	Jun-19	YTD
<i>Reservations</i>					
Answered Calls		39,758	38,107	36,990	501,830
Average Initial Hold Time	≤ 120 sec	132	137	111	110
Calls On Hold > 5 Minutes	≤ 5%	4.5%	4.6%	2.4%	3.5%
<i>Estimated Time of Arrival (ETA)</i>					
Answered Calls		6,583	6,523	6,079	82,339
Average Initial Hold Time		114	121	108	108
Calls On Hold > 5 Minutes	≤ 10%	4.3%	4.1%	2.5%	4.2%

Complaints/Commendations

	Goal	Apr-19	May-19	Jun-19	YTD
Complaints Per 1,000 Trips	≤ 4.0	1.7	1.9	1.9	2.1
Commendations Per 1,000 Trips		1.4	1.3	1.5	1.4

Safety

	Goal	Apr-19	May-19	Jun-19	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.15	0.28	0.00	0.19
Preventable Collisions Per 100,000 Miles		1.61	0.43	0.30	0.94
Weighted Preventable Collisions Per 100,000 Miles	≤ 0.50	1.28	0.32	0.19	0.72
Miles Between Road Calls	≥ 25,000	85,352	88,076	82,544	81,544

Contractual Requirement

Southern Region Trip Performance

	Goal	Apr-19	May-19	Jun-19	YTD
Vehicle Trips		98,036	101,816	96,350	1,107,729
Passenger Trips		122,752	126,828	121,530	1,393,972
No Shows		3.1%	2.9%	3.0%	4.0%
On Time Performance (Next Day Trips)	≥ 91%	93.0%	91.2%	93.0%	92.0%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.01%	0.04%	0.01%	0.08%
Excessively Long Trips	≤ 5%	3.3%	4.5%	4.4%	6.0%
Missed Trips	≤ 0.75%	0.25%	0.36%	0.31%	0.78%
Denials	≤ 0	0	0	2	4
On Time Performance (Access to Work)	≥ 92%	98.5%	96.2%	98.9%	96.7%

Call Performance

	Goal	Apr-19	May-19	Jun-19	YTD
<i>Reservations</i>					
Answered Calls		81,772	84,573	80,287	992,557
Average Initial Hold Time	≤ 120 sec	100	95	91	91
Calls On Hold > 5 Minutes	≤ 5%	4.2%	3.8%	3.0%	3.7%
<i>Estimated Time of Arrival (ETA)</i>					
Answered Calls		17,710	19,223	17,365	275,247
Average Initial Hold Time		93	108	100	116
Calls On Hold > 5 Minutes	≤ 10%	3.9%	5.4%	5.0%	7.8%

Complaints/Commendations

	Goal	Apr-19	May-19	Jun-19	YTD
Complaints Per 1,000 Trips	≤ 4.0	2.1	2.8	2.2	4.6
Commendations Per 1,000 Trips		1.4	1.5	1.1	1.3

Safety

	Goal	Apr-19	May-19	Jun-19	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.45	0.34	0.27	0.30
Preventable Collisions Per 100,000 Miles		0.62	0.52	0.45	0.67
Weighted Preventable Collisions Per 100,000 Miles	≤ 0.50	0.56	0.45	0.36	0.57
Miles Between Road Calls	≥ 25,000	112,041	165,778	122,324	35,917

Contractual Requirement

West Central Region

Trip Performance

	Goal	Apr-19	May-19	Jun-19	YTD
Vehicle Trips		46,142	48,100	45,014	537,321
Passenger Trips		61,880	64,007	60,505	723,284
No Shows		3.5%	3.5%	3.6%	3.7%
On Time Performance (Next Day Trips)	≥ 91%	91.4%	90.0%	90.4%	91.6%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.04%	0.09%	0.09%	0.07%
Excessively Long Trips	≤ 5%	2.3%	3.0%	2.8%	3.4%
Missed Trips	≤ 0.75%	0.47%	0.47%	0.50%	0.44%
Denials	≤ 0	0	0	0	1
On Time Performance (Access to Work)	≥ 91%	96.8%	97.8%	98.4%	97.4%

Call Performance

	Goal	Apr-19	May-19	Jun-19	YTD
<i>Reservations</i>					
Answered Calls		46,847	47,912	44,819	583,805
Average Initial Hold Time	≤ 120 sec	45	56	54	65
Calls On Hold > 5 Minutes	≤ 5%	1.9%	4.1%	5.0%	4.9%
<i>Estimated Time of Arrival (ETA)</i>					
Answered Calls		7,915	8,073	7,479	89,740
Average Initial Hold Time		32	39	38	49
Calls On Hold > 5 Minutes	≤ 5%	0.9%	1.7%	2.8%	3.1%

Complaints/Commendations

	Goal	Apr-19	May-19	Jun-19	YTD
Complaints Per 1,000 Trips	≤ 4.0	2.5	2.4	2.4	2.5
Commendations Per 1,000 Trips		1.4	1.6	1.7	1.6

Safety

	Goal	Apr-19	May-19	Jun-19	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.00	0.52	0.18	0.12
Preventable Collisions Per 100,000 Miles		0.90	0.52	0.00	0.66
Weighted Preventable Collisions Per 100,000 Miles	≤ 0.50	0.81	0.43	0.00	0.51
Miles Between Road Calls	≥ 25,000	79,228	58,139	111,736	54,819

Contractual Requirement

Eligibility and Appeals

Eligibility

	Goal	Apr-19	May-19	Jun-19	YTD
Eligible Customers		150,115	150,069	149,724	149,724
Total ADA Evaluations Performed		5,272	4,875	4,225	55,553
Days From Application to Decision (avg)	≤ 21	6	6	5	7

In Person Evaluations

	Goal	Apr-19	May-19	Jun-19	YTD
Unrestricted		1,721	1,660	1,458	18,670
Restricted		820	777	632	8,940
Temporary		204	191	164	2,248
Not Eligible		329	338	332	4,523
Total		3,074	2,966	2,586	34,381

Paper Evaluations

	Goal	Apr-19	May-19	Jun-19	YTD
Unrestricted		2,198	1,909	1,638	21,164
Restricted		0	0	0	4
Temporary		0	0	0	1
Not Eligible		0	0	0	2
Total		2,198	1,909	1,638	21,171

Appeals

	Goal	Apr-19	May-19	Jun-19	YTD
Appeals Performed		121	116	95	1,840
Days From Appeal to Decision (avg)	≤ 30	6	5	5	8

Customer Service

Phone Statistics

Customer Service

	Goal	Apr-19	May-19	Jun-19	YTD
Customer Service Calls		31,504	31,324	28,444	364,297
Average Initial Hold Time	≤ 180 sec	43	36	54	76
Calls On Hold > 5 Minutes	≤ 10%	3.5%	3.4%	5.5%	7.3%
Call Duration	≤ 300 sec	268	267	266	269
Calls Abandoned	≤ 10%	1.6%	1.6%	2.7%	2.6%

Operations Monitoring Center

	Goal	Apr-19	May-19	Jun-19	YTD
Customer Service Calls		8,319	9,220	8,548	125,651
Average Initial Hold Time	≤ 180 sec	33	31	40	58
Calls On Hold > 5 Minutes	≤ 10%	2.3%	2.1%	3.5%	5.3%
Call Duration	≤ 300 sec	341	346	363	382
Calls Abandoned	≤ 10%	2.7%	2.7%	2.9%	4.3%

Contractual Requirement

August 26, 2019

TO: BOARD OF DIRECTORS

FROM: HECTOR RODRIGUEZ, DEPUTY EXECUTIVE DIRECTOR

RE: DRAFT FINANCIAL REPORT FOR JUNE 2019

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

- Passengers: 1.6% under budget
- Contract Revenue Miles: 0.49% under budget
- Trips: 0.2% under budget
- Total Eligibility Evaluations: 9.5% over budget
- Average Trip Distance: over budget by 0.02 miles at 9.23 miles
- Total cost per Passenger(before depreciation): 1.4% over budget at \$38.20
- Administration Function is 13.6% over budget
- Eligibility Determination Function is 13% over budget
- Purchased Transportation Function is 0.9% under budget
- Paratransit Operations Function is 4.3% under budget

Attached are the following reports for your review:

- Statistical Comparison: June 2018 to June 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 June 2019

	% of Cost	YTD Actual	YTD Budget	Variance	% Over / (Under) Budget	% Over / (Under) Prior Yr
Purchased Transportation	81.2%	\$139,772,418	\$141,047,740	(\$1,275,322)	-0.9%	13%
Paratransit Operations	8.9%	\$15,275,072	\$15,964,376	(\$689,304)	-4.3%	8%
Eligibility Determination	5.1%	\$8,818,767	\$7,770,475	\$1,048,292	13%	6%
CTSA/Ride Information	0.2%	\$365,203	\$650,376	(\$285,173)	-44%	301%
Administration	4.5%	\$7,797,728	\$6,861,955	\$935,773	13.6%	15%
Total Exp before Depreciation		\$172,029,188	\$172,294,922	(\$265,734)	-0.2%	12%

Statistics - - For the YTD Period Ended June 2019

	YTD Actual	YTD Budget	Variance	% Over / (Under) Budget	% Over / (Under) Prior Yr
Total Eligibility Evaluations	55,552	50,720	4,832	9.5%	68.7%
Number of PAX	4,503,721	4,574,728	(71,007)	-1.6%	1.7%
Number of Contract Revenue Miles	32,212,996	32,370,650	(157,655)	-0.49%	1.4%
Number of Trips	3,491,521	3,499,413	(7,892)	-0.2%	2.8%
Average Trip Distance	9.23	9.25	(0.02)	-0.3%	-1.3%
Purchased Transportation Cost					
Cost per Trip	\$40.03	\$40.31	(\$0.28)	-0.7%	10.1%
Cost per PAX	\$31.03	\$30.83	\$0.20	0.6%	11.2%
Cost per Contract Rev Mile	\$4.34	\$4.36	(\$0.02)	0.0%	11.6%
Total Cost per Pax before Depreciation	\$38.20	\$37.66	\$0.54	1.4%	10.6%

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

	YTD Actual	YTD Budget	Variance	% Over / (Under) Budget	% Over / (Under) Prior Yr
Revenue					
Passenger Fares	\$10,260,844	\$9,573,737	\$687,107		
Other Revenue	\$883,722	\$420,000	\$463,722		
Total Revenue	\$11,144,566	\$9,993,737	\$1,150,829	11.5%	5%
 Total Exp before Capital	 \$172,029,188	 \$172,294,922	 (\$265,734)	 -0.2%	 12%
Capital Expenditures					
Vehicles	\$5,285,911	\$12,000,000	(\$6,714,089)		
Other Capital Expenditures	\$517,212	\$0	\$517,212		
Total Capital Expenditures	\$5,803,123	\$12,000,000	(\$6,196,877)	-51.6%	338%
 Over/(Under) Budget June 2018			 (\$6,462,611)		

YTD COST PER PASSENGER BEFORE DEPRECIATION AND CAPITAL COST

