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August 2018

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July 26, 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	May-18	Jun-18	Jul-18	YTD
Vehicle Trips		300,206	283,395	286,243	286,243
Passenger Trips		388,398	369,895	374,195	374,195
Backup Trips		12	14	3	3
No Shows		3.6%	3.6%	3.5%	3.5%
On Time Performance (Next Day Trips)	≥ 91%	93.0%	93.6%	93.8%	93.8%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.05%	0.04%	0.06%	0.06%
Excessively Long Trips	≤ 5%	4.9%	5.0%	3.9%	3.9%
Missed Trips	≤ 0.75%	0.59%	0.58%	0.59%	0.59%
Denials	≤ 0	4	0	0	0
On Time Performance (Access to Work)	≥ 94%	94.7%	96.9%	97.0%	97.0%

Call Performance

	Goal	May-18	Jun-18	Jul-18	YTD
<i>Reservations</i>					
Answered Calls		268,869	246,234	256,767	256,767
Average Initial Hold Time	≤ 120	73	112	70	70
Calls On Hold > 5 Minutes	≤ 5%	4.3%	10.2%	4.3%	4.3%
<i>Estimated Time of Arrival (ETAs)</i>					
Answered Calls		48,345	44,874	43,897	43,897
Average Initial Hold Time		85	76	73	73
Calls On Hold > 5 Minutes	≤ 10%	6.7%	5.7%	5.3%	5.3%

Complaints/Commendations

	Goal	May-18	Jun-18	Jul-18	YTD
Complaints Per 1,000 Trips	≤ 4.0	3.4	3.6	3.2	3.2
Commendations Per 1,000 Trips		1.4	1.5	1.5	1.5

Safety

	Goal	May-18	Jun-18	Jul-18	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.16	0.28	0.28	0.28
Preventable Collisions Per 100,000 Miles	≤ 0.50	0.79	0.70	0.74	0.74
*Weighted Preventable Collisions Per 100,000 Miles		0.65	0.57	0.57	0.57
Miles Between Road Calls	≥ 25,000	38,832	40,132	36,273	36,273

*Weighted Preventable Collisions Per 100,000 Miles refers to the rate of preventable collisions weighted by severity.

Antelope Valley Region Trip Performance

	Goal	May-18	Jun-18	Jul-18	YTD
Vehicle Trips		13,717	13,198	13,108	13,108
Passenger Trips		18,515	18,432	17,868	17,868
No Shows		2.7%	3.0%	2.7%	2.7%
On Time Performance (Next Day Trips)	≥ 91%**	92.2%	92.6%	92.6%	92.6%
Excessively Late Trips (45+ min late)	≤ 0.10%*	0.07%	0.09%	0.03%	0.03%
Excessively Long Trips	≤ 5%	2.6%	2.0%	1.9%	1.9%
Missed Trips	≤ 0.75%	0.90%	1.06%	1.01%	1.01%
Denials	≤ 0**	0	0	0	0
On Time Performance (Access to Work)	≥ 94%	87.0%	97.6%	100.0%	100.0%

Call Performance

	Goal	May-18	Jun-18	Jul-18	YTD
<i>Reservations</i>					
Answered Calls		8,205	8,139	8,437	8,437
Average Initial Hold Time	≤ 120**	54	57	55	55
Calls On Hold > 5 Minutes	≤ 5%**	0.7%	2.5%	2.5%	2.5%

<i>Estimated Time of Arrival (ETAs)</i>					
Answered Calls		2,878	2,832	2,730	2,730
Average Initial Hold Time		29	37	40	40
Calls On Hold > 5 Minutes	≤ 10%	1.0%	1.4%	1.6%	1.6%

Complaints/Commendations

	Goal	May-18	Jun-18	Jul-18	YTD
Complaints Per 1,000 Trips	≤ 4.0	2.0	2.5	2.1	2.1
Commendations Per 1,000 Trips		1.9	2.1	2.4	2.4

Safety

	Goal	May-18	Jun-18	Jul-18	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.00	0.60	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	42,819	20,819	33,749	33,749

*Weighted Preventable Collisions Per 100,000 Miles refers to the rate of preventable collisions weighted by severity.

**Contractual Requirement

Eastern Region

Trip Performance

	Goal	May-18	Jun-18	Jul-18	YTD
Vehicle Trips		88,505	81,946	83,939	83,939
Passenger Trips		116,450	108,889	111,819	111,819
No Shows		2.3%	2.3%	2.4%	2.4%
On Time Performance (Next Day Trips)	≥ 91%**	94.4%	95.6%	95.7%	95.7%
Excessively Late Trips (45+ min late)	≤ 0.10%**	0.01%	0.00%	0.00%	0.00%
Excessively Long Trips	≤ 5%	1.2%	0.9%	0.8%	0.8%
Missed Trips	≤ 0.75%	0.19%	0.15%	0.14%	0.14%
Denials	≤ 0**	0	0	0	0
On Time Performance (Access to Work)	≥ 94%	95.7%	98.2%	97.2%	97.2%

Call Performance

	Goal	May-18	Jun-18	Jul-18	YTD
<i>Reservations</i>					
Answered Calls		72,780	65,584	70,346	70,346
Average Initial Hold Time	≤ 120**	68	159	67	67
Calls On Hold > 5 Minutes	≤ 5%**	5.5%	18.6%	5.6%	5.6%

<i>Estimated Time of Arrival (ETA)</i>					
Answered Calls		9,516	8,599	8,813	8,813
Average Initial Hold Time		60	76	53	53
Calls On Hold > 5 Minutes	≤ 10%	4.6%	6.8%	3.7%	3.7%

Complaints/Commendations

	Goal	May-18	Jun-18	Jul-18	YTD
Complaints Per 1,000 Trips	≤ 4.0	2.8	3.2	2.6	2.6
Commendations Per 1,000 Trips		1.7	1.9	1.9	1.9

Safety

	Goal	May-18	Jun-18	Jul-18	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.18	0.19	0.48	0.48
Preventable Collisions Per 100,000 Miles	≤ 0.50**	0.90	0.87	0.95	0.95
*Weighted Preventable Collisions Per 100,000 Miles		0.79	0.72	0.69	0.69
Miles Between Road Calls	≥ 25,000	73,894	36,996	95,482	95,482

*Weighted Preventable Collisions Per 100,000 Miles refers to the rate of preventable collisions weighted by severity.

**Contractual Requirement

Santa Clarita Region Trip Performance

	Goal	May-18	Jun-18	Jul-18	YTD
Vehicle Trips		3,443	3,002	3,071	3,071
Passenger Trips		4,020	3,543	3,643	3,643
No Shows		2.4%	2.4%	3.2%	3.2%
On Time Performance (Next Day Trips)	≥ 91%**	93.9%	95.1%	95.5%	95.5%
Excessively Late Trips (45+ min late)	≤ 0.10%**	0.06%	0.10%	0.06%	0.06%
Excessively Long Trips	≤ 5%	2.9%	3.1%	2.2%	2.2%
Missed Trips	≤ 0.75%	0.58%	0.94%	1.00%	1.00%
Denials	≤ 0**	1	0	0	0
On Time Performance (Access to Work)	≥ 94%	-	-	-	-

Call Performance

	Goal	May-18	Jun-18	Jul-18	YTD
<i>Reservations</i>					
Answered Calls		2,992	3,019	3,385	3,385
Average Initial Hold Time	≤ 120**	37	40	45	45
Calls On Hold > 5 Minutes	≤ 5%**	1.1%	1.4%	1.5%	1.5%

Complaints/Commendations

	Goal	May-18	Jun-18	Jul-18	YTD
Complaints Per 1,000 Trips	≤ 4.0	2.0	1.3	0.7	0.7
Commendations Per 1,000 Trips		0.0	2.3	0.3	0.3

Safety

	Goal	May-18	Jun-18	Jul-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	30,722	27,530	25,599	25,599

*Weighted Preventable Collisions Per 100,000 Miles refers to the rate of preventable collisions weighted by severity.

**Contractual Requirement

Northern Region Trip Performance

	Goal	May-18	Jun-18	Jul-18	YTD
Vehicle Trips		53,250	50,920	50,400	50,400
Passenger Trips		66,394	64,277	63,633	63,633
No Shows		3.4%	3.5%	3.4%	3.4%
On Time Performance (Next Day Trips)	≥ 91%**	92.2%	91.7%	92.1%	92.1%
Excessively Late Trips (45+ min late)	≤ 0.10%**	0.06%	0.06%	0.03%	0.03%
Excessively Long Trips	≤ 5%	5.9%	5.9%	5.6%	5.6%
Missed Trips	≤ 0.75%	0.65%	0.52%	0.48%	0.48%
Denials	≤ 0**	1	0	0	0
On Time Performance (Access to Work)	≥ 94%	96.6%	98.1%	96.7%	96.7%

Call Performance

	Goal	May-18	Jun-18	Jul-18	YTD
<i>Reservations</i>					
Answered Calls		41,896	40,227	41,513	41,513
Average Initial Hold Time	≤ 120**	82	88	95	95
Calls On Hold > 5 Minutes	≤ 5%**	2.6%	3.5%	3.2%	3.2%
<i>Estimated Time of Arrival (ETA)</i>					
Answered Calls		2,221	2,315	2,307	2,307
Average Initial Hold Time		46	44	49	49
Calls On Hold > 5 Minutes	≤ 10%	2.7%	2.2%	2.8%	2.8%

Complaints/Commendations

	Goal	May-18	Jun-18	Jul-18	YTD
Complaints Per 1,000 Trips	≤ 4.0	1.5	1.9	2.2	2.2
Commendations Per 1,000 Trips		1.1	1.5	1.7	1.7

Safety

	Goal	May-18	Jun-18	Jul-18	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.00	0.62	0.00	0.00
Preventable Collisions Per 100,000 Miles	≤ 0.50**	0.89	0.78	0.92	0.92
*Weighted Preventable Collisions Per 100,000 Miles		0.86	0.50	0.77	0.77
Miles Between Road Calls	≥ 25,000	48,008	71,507	50,218	50,218

*Weighted Preventable Collisions Per 100,000 Miles refers to the rate of preventable collisions weighted by severity.

**Contractual Requirement

Southern Region Trip Performance

	Goal	May-18	Jun-18	Jul-18	YTD
Vehicle Trips		95,096	90,708	91,121	91,121
Passenger Trips		121,018	115,728	116,504	116,504
No Shows		4.9%	4.7%	4.4%	4.4%
***On Time Performance (Next Day Trips)	≥ 91%**	91.8%	92.5%	92.8%	92.8%
***Excessively Late Trips (45+ min late)	≤ 0.10%**	0.11%	0.06%	0.14%	0.14%
Excessively Long Trips	≤ 5%	9.4%	9.8%	6.9%	6.9%
Missed Trips	≤ 0.75%	0.96%	1.05%	1.12%	1.12%
Denials	≤ 0**	2	0	0	0
On Time Performance (Access to Work)	≥ 94%	91.4%	94.9%	96.5%	96.5%

Call Performance

	Goal	May-18	Jun-18	Jul-18	YTD
<i>Reservations</i>					
Answered Calls		90,557	81,978	82,838	82,838
Average Initial Hold Time	≤ 120**	76	61	64	64
Calls On Hold > 5 Minutes	≤ 5%**	3.7%	2.4%	3.1%	3.1%
<i>Estimated Time of Arrival (ETA)</i>					
Answered Calls		26,641	24,280	23,093	23,093
Average Initial Hold Time		111	82	93	93
Calls On Hold > 5 Minutes	≤ 10%	9.1%	5.7%	7.1%	7.1%

Complaints/Commendations

	Goal	May-18	Jun-18	Jul-18	YTD
Complaints Per 1,000 Trips	≤ 4.0	5.9	5.6	5.0	5.0
Commendations Per 1,000 Trips		1.1	1.1	1.2	1.2

Safety

	Goal	May-18	Jun-18	Jul-18	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.08	0.09	0.34	0.34
Preventable Collisions Per 100,000 Miles	≤ 0.50**	0.80	0.69	0.50	0.50
*Weighted Preventable Collisions Per 100,000 Miles		0.58	0.62	0.40	0.40
Miles Between Road Calls	≥ 25,000	19,918	33,366	21,663	21,663

*Weighted Preventable Collisions Per 100,000 Miles refers to the rate of preventable collisions weighted by severity.

**Contractual Requirement

***Driver Reported data used for 7/10/18

West Central Region Trip Performance

	Goal	May-18	Jun-18	Jul-18	YTD
Vehicle Trips		46,195	43,621	44,604	44,604
Passenger Trips		62,001	59,026	60,728	60,728
No Shows		3.9%	3.7%	3.7%	3.7%
On Time Performance (Next Day Trips)	≥ 91%**	93.6%	94.5%	94.5%	94.5%
Excessively Late Trips (45+ min late)	≤ 0.10%**	0.01%	0.01%	0.01%	0.01%
Excessively Long Trips	≤ 5%**	3.6%	3.0%	2.8%	2.8%
Missed Trips	≤ 0.75%**	0.39%	0.29%	0.27%	0.27%
Denials	≤ 0**	0	0	0	0
On Time Performance (Access to Work)	≥ 94%**	96.3%	97.2%	99.1%	99.1%

Call Performance

	Goal	May-18	Jun-18	Jul-18	YTD
<i>Reservations</i>					
Answered Calls		52,439	47,287	50,248	50,248
Average Initial Hold Time	≤ 120**	72	169	68	68
Calls On Hold > 5 Minutes	≤ 5%**	5.7%	19.5%	5.8%	5.8%
<i>Estimated Time of Arrival (ETA)</i>					
Answered Calls		7,089	6,848	6,954	6,954
Average Initial Hold Time		60	80	53	53
Calls On Hold > 5 Minutes	≤ 5%**	4.5%	7.3%	3.6%	3.6%

Complaints/Commendations

	Goal	May-18	Jun-18	Jul-18	YTD
Complaints Per 1,000 Trips	≤ 4.0**	2.0	2.3	2.3	2.3
Commendations Per 1,000 Trips		1.4	1.5	1.0	1.0

Safety

	Goal	May-18	Jun-18	Jul-18	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25**	0.52	0.37	0.18	0.18
Preventable Collisions Per 100,000 Miles	≤ 0.50**	0.70	0.56	0.92	0.92
*Weighted Preventable Collisions Per 100,000 Miles		0.52	0.47	0.64	0.64
Miles Between Road Calls	≥ 25,000**	287,110	59,695	33,922	33,922

*Weighted Preventable Collisions Per 100,000 Miles refers to the rate of preventable collisions weighted by severity.

**Contractual Requirement

Eligibility and Appeals

Eligibility

	Goal	May-18	Jun-18	Jul-18	YTD
Eligible Customers		158,175	157,560	159,438	159,438
ADA Evaluations Performed		3,770	2,838	3,168	3,168
Days From Application to Decision (avg)	≤ 21	12	12	12	12

Eligibility Determinations

	Goal	May-18	Jun-18	Jul-18	YTD
Unrestricted		1,978	1,424	1,659	1,659
Restricted		987	783	851	851
Temporary		231	194	179	179
Not Eligible		574	437	479	479
Total		3,770	2,838	3,168	3,168

Appeals

	Goal	May-18	Jun-18	Jul-18	YTD
Appeals Performed		162	163	214	214
Days From Appeal to Decision (avg)	≤ 30	8	9	10	10

Customer Service

Phone Statistics

Customer Service

	Goal	May-18	Jun-18	Jul-18	YTD
Customer Service Calls		37,002	34,313	33,921	33,921
Average Initial Hold Time	≤ 180 sec	22	41	78	78
Calls on Hold over 5 Minutes	≤ 10%	1.4%	3.3%	6.9%	6.9%
Call Duration	≤ 300 sec	249	256	264	264
Calls Abandoned	≤ 10%	0.8%	1.5%	2.9%	2.9%

Operations Monitoring Center

	Goal	May-18	Jun-18	Jul-18	YTD
Customer Service Calls		11,673	10,818	10,577	10,577
Average Initial Hold Time	≤ 180 sec	37	36	52	52
Calls on Hold over 5 Minutes	≤ 10%	2.7%	3.1%	4.7%	4.7%
Call Duration	≤ 300 sec	351	351	371	371
Calls Abandoned	≤ 10%	3.4%	3.4%	3.9%	3.9%

August 9, 2018

TO: BOARD OF DIRECTORS

FROM: HECTOR RODRIGUEZ, DEPUTY EX. DIRECTOR, FINANCE

RE: FINANCIAL REPORT FOR JUNE 2018

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

Approved FY 2017/18 Budget to Actual Fiscal Year-to-Date Comparison:

- Passengers: 4.3% under budget
- Contract Revenue Miles: 4.3% under budget
- Trips: 3.7% under budget
- Completed Eligibility Interviews: 20.6% under budget
- Average Trip Distance: on budget at 9.35 miles
- Total cost per Passenger (before depreciation): 4.3% under budget
- Administration Function is 1% under budget
- Eligibility Determination Function is 34% under budget
- Purchased Transportation Function is 0.5% under budget
- Paratransit Operations Function is 15% under budget

Attached are the following reports for your review:

- Statistical Comparison: June 2017 to June 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 June 2018

	% of Cost	YTD Actual	YTD Budget	Variance	% Over / (Under) Budget	% Over / (Under) Prior Yr
Purchased Transportation *	81%	\$129,492,101	\$130,129,549	(\$637,448)	-0.5%	10%
Paratransit Operations	9%	\$14,167,272	\$16,617,988	(\$2,450,716)	-15%	-15%
Eligibility Determination	5%	\$8,325,631	\$12,589,365	(\$4,263,734)	-34%	-18%
CTSA/Ride Information	0.1%	\$90,994	\$314,222	(\$223,228)	-71%	-82%
Administrative **	5%	\$7,191,209	\$7,251,038	(\$59,829)	-1%	9%
Total Exp before Depreciation		\$159,267,206	\$166,902,162	(\$7,634,956)	-4.6%	4.8%

* Includes \$5.9MM of Prepaid Insurance for Vehicles

** Includes \$433K of Prepaid Expenses

Statistics - - For the YTD Period Ended June 2018

	YTD Actual	YTD Budget	Variance	% Over / (Under) Budget	% Over / (Under) Prior Yr
Number of Completed Cert Interviews	32,925	41,460	(8,535)	-20.6%	-12.3%
Number of PAX	4,428,705	4,625,794	(197,089)	-4.3%	2.0%
Number of Contract Revenue Miles	31,760,164	33,039,011	(1,278,847)	-3.9%	2.7%
Number of Trips	3,397,569	3,528,356	(130,787)	-3.7%	0.5%
Average Trip Distance	9.35	9.36	(0.01)	-0.1%	2.2%
Purchased Transportation Cost					
Cost per Trip	\$36.37	\$36.88	(\$0.51)	-1.4%	5.7%
Cost per PAX	\$27.90	\$28.13	(\$0.23)	-0.8%	4.1%
Cost per Contract Rev Mile	\$3.89	\$3.94	(\$0.05)	0.0%	3.3%
Total Cost per Pax before Depreciation	\$34.53	\$36.08	(\$1.55)	-4.3%	-0.6%

Budget Results for FY 2017/2018 For YTD Period Ending June 2018

	YTD Actual	YTD Budget	Variance	% Over / (Under) Budget	% Over / (Under) Prior Yr
Revenue					
Passenger Fares	\$9,926,432	\$9,792,020	\$134,412		
Other Revenue	\$698,006	\$320,000	\$378,006		
Total Revenue	\$10,624,439	\$10,112,020	\$512,419	5.1%	0%
 Total Exp before Capital	 \$159,267,206	 \$166,902,162	 (\$7,634,956)	 -4.6%	 5%
 Capital Expenditures					
Vehicles ***	\$513,168	\$10,130,925	(\$9,617,757)		
Other Capital Expenditures	\$810,334	\$0	\$810,334		
Total Capital Expenditures	\$1,323,502	\$10,130,925	(\$8,807,423)	-86.9%	-88%

*** \$10MM of vehicles slated for FY19 delivery

YTD COST PER PASSENGER BEFORE DEPRECIATION AND CAPITAL COST

