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Board Box

December 2017

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December 29, 2017

TO: BOARD OF DIRECTORS
FROM: MELISSA THOMPSON, 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	Sep-17	Oct-17	Nov-17	YTD
Vehicle Trips		279,900	300,786	282,657	1,432,931
Passenger Trips		363,044	391,804	364,073	1,880,563
No Shows		4.1%	3.9%	3.9%	3.9%
On Time Performance (Next Day Trips)	≥ 91%	89.5%	89.1%	91.3%	90.6%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.14%	0.13%	0.08%	0.10%
Excessively Long Trips*	≤ 5%	-	-	-	-
Missed Trips	≤ 0.75%	0.85%	0.83%	0.64%	0.72%
Denials	≤ 0%	0.22%	0.00%	0.99%	0.45%
On Time Performance (Access to Work)	≥ 94%	91.6%	92.6%	92.9%	93.3%

*Data not available

Call Performance

	Goal	Sep-17	Oct-17	Nov-17	YTD
<i>Reservations</i>					
Answered Calls		269,177	285,109	267,834	1,369,867
Average Initial Hold Time	≤ 120	76	89	76	81
Calls On Hold > 5 Minutes	≤ 5%	3.4%	4.4%	3.5%	4.1%
<i>Estimated Time of Arrival (ETAs)</i>					
Answered Calls		90,147	95,178	101,091	459,754
Average Initial Hold Time		239	192	143	205
Calls On Hold > 5 Minutes	≤ 10%	29.6%	23.9%	15.8%	24.8%

Complaints/Commendations

	Goal	Sep-17	Oct-17	Nov-17	YTD
Complaints Per 1,000 Trips	≤ 4.0	4.1	3.7	2.9	3.9
Commendations Per 1,000 Trips		2.1	1.7	1.6	2.0

Safety

	Goal	Sep-17	Oct-17	Nov-17	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.26	0.30	0.20	0.21
Preventable Collisions Per 100,000 Miles	≤ 0.50	0.95	0.54	0.60	0.66
Miles Between Road Calls	≥ 25,000	27,226	29,573	46,182	31,759

Antelope Valley Region Trip Performance

	Goal	Sep-17	Oct-17	Nov-17	YTD
Vehicle Trips		12,865	13,953	12,445	65,887
Passenger Trips		17,319	18,819	16,658	89,262
No Shows		3.8%	2.2%	3.5%	2.9%
On Time Performance (Next Day Trips)	≥ 91%	88.4%	88.9%	90.5%	89.9%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.06%	0.01%	0.01%	0.02%
Excessively Long Trips*	≤ 5%	-	-	-	-
Missed Trips	≤ 0.75%	0.85%	0.49%	0.67%	0.60%
Denials	≤ 0%	0.00%	0.00%	5.26%	1.06%
On Time Performance (Access to Work)	≥ 94%	100.0%	100.0%	100.0%	100.0%

*Data not available

Call Performance

	Goal	Sep-17	Oct-17	Nov-17	YTD
<i>Reservations</i>					
Answered Calls		8,047	8,772	8,100	42,371
Average Initial Hold Time	≤ 120	102	103	105	103
Calls On Hold > 5 Minutes	≤ 5%	3.9%	3.7%	3.9%	3.6%

Complaints/Commendations

	Goal	Sep-17	Oct-17	Nov-17	YTD
Complaints Per 1,000 Trips	≤ 4.0	2.3	3.1	1.8	2.7
Commendations Per 1,000 Trips		2.8	2.1	1.5	2.3

Safety

	Goal	Sep-17	Oct-17	Nov-17	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.00	0.00	0.00	0.13
Preventable Collisions Per 100,000 Miles	≤ 0.50	1.33	0.00	0.67	0.38
Miles Between Road Calls	≥ 25,000	13,790	20,738	16,920	20,780

Eastern Region Trip Performance

	Goal	Sep-17	Oct-17	Nov-17	YTD
Vehicle Trips		78,942	85,276	81,481	408,415
Passenger Trips		104,698	112,523	107,779	541,358
No Shows		2.7%	2.7%	2.6%	2.6%
On Time Performance (Next Day Trips)	≥ 91%	89.5%	89.2%	92.1%	91.2%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.11%	0.13%	0.04%	0.09%
Excessively Long Trips*	≤ 5%	-	-	-	-
Missed Trips	≤ 0.75%	0.66%	0.64%	0.42%	0.51%
Denials	≤ 0%	0.00%	0.00%	0.00%	0.27%
On Time Performance (Access to Work)	≥ 94%	91.7%	93.1%	94.1%	94.1%

*Data not available

Call Performance

	Goal	Sep-17	Oct-17	Nov-17	YTD
<i>Reservations</i>					
Answered Calls		67,949	75,291	70,815	353,096
Average Initial Hold Time	≤ 120	65	71	50	64
Calls On Hold > 5 Minutes	≤ 5%	3.9%	4.7%	1.9%	4.2%

<i>Estimated Time of Arrival (ETA)</i>					
Answered Calls		9,893	10,983	10,592	50,384
Average Initial Hold Time		147	137	54	126
Calls On Hold > 5 Minutes	≤ 10%	17.0%	16.2%	3.2%	14.0%

Complaints/Commendations

	Goal	Sep-17	Oct-17	Nov-17	YTD
Complaints Per 1,000 Trips	≤ 4.0	3.4	3.3	2.9	3.1
Commendations Per 1,000 Trips		2.3	2.3	1.8	2.3

Safety

	Goal	Sep-17	Oct-17	Nov-17	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.39	0.28	0.10	0.17
Preventable Collisions Per 100,000 Miles	≤ 0.50	0.97	0.83	0.38	0.74
Miles Between Road Calls	≥ 25,000	36,736	30,997	94,982	44,002

Santa Clarita Region Trip Performance

	Goal	Sep-17	Oct-17	Nov-17	YTD
Vehicle Trips		3,356	3,780	3,206	16,846
Passenger Trips		3,886	4,404	3,716	19,691
No Shows		2.4%	2.6%	3.0%	2.7%
On Time Performance (Next Day Trips)	≥ 91%	95.8%	94.7%	94.5%	95.3%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.06%	0.00%	0.10%	0.05%
Excessively Long Trips*	≤ 5%	-	-	-	-
Missed Trips	≤ 0.75%	0.53%	0.69%	0.76%	0.56%
Denials	≤ 0%	0.00%	0.00%	0.00%	0.00%
On Time Performance (Access to Work)	≥ 94%	-	-	-	-

*Data not available

Call Performance

	Goal	Sep-17	Oct-17	Nov-17	YTD
<i>Reservations</i>					
Answered Calls		3,228	3,765	3,193	18,496
Average Initial Hold Time	≤ 120	47	61	59	53
Calls On Hold > 5 Minutes	≤ 5%	1.9%	2.6%	2.4%	2.3%

Complaints/Commendations

	Goal	Sep-17	Oct-17	Nov-17	YTD
Complaints Per 1,000 Trips	≤ 4.0	0.0	0.0	0.0	0.4
Commendations Per 1,000 Trips		0.3	0.0	0.3	0.6

Safety

	Goal	Sep-17	Oct-17	Nov-17	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.00	2.89	0.00	1.29
Preventable Collisions Per 100,000 Miles	≤ 0.50	0.00	0.00	0.00	0.65
Miles Between Road Calls	≥ 25,000	82,257	86,951	108,105	77,592

SF Valley Region Trip Performance

	Goal	Sep-17	Oct-17	Nov-17	YTD
Vehicle Trips		50,301	53,725	49,736	256,215
Passenger Trips		62,175	66,351	61,570	318,028
No Shows		4.3%	4.1%	4.2%	4.2%
On Time Performance (Next Day Trips)	≥ 91%	91.2%	91.2%	91.9%	91.5%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.23%	0.12%	0.14%	0.12%
Excessively Long Trips*	≤ 5%	-	-	-	-
Missed Trips	≤ 0.75%	0.83%	0.70%	0.62%	0.70%
Denials	≤ 0%	0.00%	0.00%	0.00%	0.26%
On Time Performance (Access to Work)	≥ 94%	88.4%	90.9%	89.4%	90.0%

*Data not available

Call Performance

	Goal	Sep-17	Oct-17	Nov-17	YTD
<i>Reservations</i>					
Answered Calls		45,232	46,552	44,648	227,602
Average Initial Hold Time	≤ 120	85	104	94	95
Calls On Hold > 5 Minutes	≤ 5%	3.0%	4.0%	3.8%	3.9%
<i>Estimated Time of Arrival (ETA)</i>					
Answered Calls		6,622	6,738	6,716	30,850
Average Initial Hold Time		66	76	75	68
Calls On Hold > 5 Minutes	≤ 10%	4.8%	4.7%	4.7%	4.2%

Complaints/Commendations

	Goal	Sep-17	Oct-17	Nov-17	YTD
Complaints Per 1,000 Trips	≤ 4.0	2.2	1.6	1.4	2.0
Commendations Per 1,000 Trips		2.2	1.5	1.8	2.0

Safety

	Goal	Sep-17	Oct-17	Nov-17	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.30	0.58	0.15	0.27
Preventable Collisions Per 100,000 Miles	≤ 0.50	0.46	0.29	0.31	0.42
Miles Between Road Calls	≥ 25,000	30,536	34,565	30,950	51,583

Southern Region Trip Performance

	Goal	Sep-17	Oct-17	Nov-17	YTD
Vehicle Trips		91,305	98,194	92,770	465,720
Passenger Trips		117,561	128,667	116,754	618,592
No Shows		4.8%	4.9%	4.6%	4.7%
On Time Performance (Next Day Trips)	≥ 91%	88.8%	87.7%	90.1%	89.6%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.12%	0.18%	0.10%	0.11%
Excessively Long Trips*	≤ 5%	-	-	-	-
Missed Trips	≤ 0.75%	0.98%	1.12%	0.84%	0.90%
Denials	≤ 0%	0.00%	0.00%	0.00%	0.78%
On Time Performance (Access to Work)	≥ 94%	95.0%	100.0%	94.1%	96.7%

*Data not available

Call Performance

	Goal	Sep-17	Oct-17	Nov-17	YTD
<i>Reservations</i>					
Answered Calls		93,436	95,756	90,740	471,760
Average Initial Hold Time	≤ 120	84	106	101	96
Calls On Hold > 5 Minutes	≤ 5%	2.6%	4.1%	5.6%	4.2%
<i>Estimated Time of Arrival (ETA)</i>					
Answered Calls		66,140	69,330	75,984	341,588
Average Initial Hold Time		280	220	170	237
Calls On Hold > 5 Minutes	≤ 10%	35.3%	28.0%	19.9%	29.4%

Complaints/Commendations

	Goal	Sep-17	Oct-17	Nov-17	YTD
Complaints Per 1,000 Trips	≤ 4.0	6.7	5.8	4.4	6.4
Commendations Per 1,000 Trips		1.3	1.1	1.2	1.5

Safety

	Goal	Sep-17	Oct-17	Nov-17	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.27	0.17	0.28	0.23
Preventable Collisions Per 100,000 Miles	≤ 0.50	1.10	0.43	0.83	0.75
Miles Between Road Calls	≥ 25,000	17,357	19,435	25,321	19,348

West Central Region Trip Performance

	Goal	Sep-17	Oct-17	Nov-17	YTD
Vehicle Trips		43,120	45,848	42,999	219,778
Passenger Trips		57,394	61,030	57,576	293,562
No Shows		4.4%	4.0%	3.8%	4.1%
On Time Performance (Next Day Trips)	≥ 91%	89.1%	88.9%	91.3%	90.7%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.13%	0.11%	0.08%	0.09%
Excessively Long Trips*	≤ 5%	-	-	-	-
Missed Trips	≤ 0.75%	0.82%	0.70%	0.52%	0.61%
Denials	≤ 0%	1.32%	0.00%	0.00%	0.30%
On Time Performance (Access to Work)	≥ 94%	95.7%	92.3%	95.5%	95.5%

*Data not available

Call Performance

	Goal	Sep-17	Oct-17	Nov-17	YTD
<i>Reservations</i>					
Answered Calls		51,285	54,973	50,338	256,542
Average Initial Hold Time	≤ 120	67	70	49	63
Calls On Hold > 5 Minutes	≤ 5%	4.4%	5.2%	2.0%	4.4%
<i>Estimated Time of Arrival (ETA)</i>					
Answered Calls		7,492	8,127	7,799	36,932
Average Initial Hold Time		148	127	53	123
Calls On Hold > 5 Minutes	≤ 10%	17.9%	14.7%	2.5%	13.7%

Complaints/Commendations

	Goal	Sep-17	Oct-17	Nov-17	YTD
Complaints Per 1,000 Trips	≤ 4.0	3.1	2.8	1.9	2.8
Commendations Per 1,000 Trips		2.0	1.4	1.4	1.8

Safety

	Goal	Sep-17	Oct-17	Nov-17	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.00	0.17	0.37	0.11
Preventable Collisions Per 100,000 Miles	≤ 0.50	1.09	0.69	0.92	0.68
Miles Between Road Calls	≥ 25,000	30,542	38,606	77,768	39,391

Eligibility and Appeals

Eligibility

	Goal	Sep-17	Oct-17	Nov-17	YTD
ADA Evaluations Performed		2,099	2,469	2,625	11,232
Days From Application to Decision (avg)	≤ 21	13	13	13	15

Eligibility Determinations

	Goal	Sep-17	Oct-17	Nov-17	YTD
Unrestricted		1,241	1,324	1,422	6,373
Restricted		371	482	484	1,997
Temporary		173	174	150	857
Not Eligible		314	489	569	2,005
Total		2,099	2,469	2,625	11,232

Appeals

	Goal	Sep-17	Oct-17	Nov-17	YTD
Appeals Performed		60	70	49	487
Days From Appeal to Decision (avg)	≤ 30	8	7	10	8

Customer Service Phone Statistics

Customer Service

	Goal	Sep-17	Oct-17	Nov-17	YTD
Customer Service Calls		33,373	33,292	29,261	166,123
Average Initial Hold Time	≤ 180 sec	316	347	258	239
Calls on Hold over 5 Minutes	≤ 10%	44.9%	48.6%	34.8%	32.5%
Call Duration	≤ 300 sec	327	335	317	330
Calls Abandoned	≤ 10%	10.0%	10.7%	8.3%	7.9%

Operations Monitoring Center

	Goal	Sep-17	Oct-17	Nov-17	YTD
Customer Service Calls		11,831	11,461	10,181	57,464
Average Initial Hold Time	≤ 180 sec	208	229	175	171
Calls on Hold over 5 Minutes	≤ 10%	27.8%	30.3%	22.5%	22.0%
Call Duration	≤ 300 sec	458	432	401	449
Calls Abandoned	≤ 10%	14.3%	16.1%	12.2%	12.3%

December 29, 2017

TO: BOARD OF DIRECTORS
FROM: HECTOR RODRIGUEZ, DEPUTY EX. DIRECTOR, FINANCE
RE: FINANCIAL REPORT FOR OCTOBER 2017

Attached for your review are the draft financial reports for October 2017.

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

- Passengers: 2.7% under budget
- Contract Revenue Miles: 3.9% under budget
- Trips: 3.4% under budget
- Completed Eligibility Interviews: 43% under budget
- Average Trip Distance: 0.6% under budget at 9.31 miles
- Total cost per Passenger (before depreciation): 7.2% under budget
- Administration Function is 2% over budget
- Eligibility Determination Function is 54% under budget
- Purchased Transportation Function is 4.2% under budget
- Paratransit Operations Function is 14% under budget

Attached are the following reports for your review:

- Statistical Comparison: October 2016 to October 2017
- 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 October 2017**

	% of Cost	YTD Actual	YTD Budget	Variance	% Over / (Under) Budget	% Over / (Under) Prior Yr
Purchased Transportation	81%	\$40,925,281	\$42,701,662	(\$1,776,381)	-4.2%	5%
Paratransit Operations	9%	\$4,742,436	\$5,539,320	(\$796,884)	-14%	-18%
Eligibility Determination	5%	\$2,367,225	\$5,194,864	(\$2,827,639)	-54%	-29%
CTSA/Ride Information	0.1%	\$65,381	\$104,752	(\$39,371)	-38%	-70%
Administrative	5%	\$2,473,663	\$2,419,540	\$54,123	2%	25%
Total Exp before Depreciation		\$50,573,986	\$55,960,138	(\$5,386,152)	-9.6%	0.9%

Statistics - - For the YTD Period Ended October 2017

	YTD Actual	YTD Budget	Variance	% Over / (Under) Budget	% Over / (Under) Prior Yr
Number of Completed Cert Interviews	8,151	14,345	(6,194)	-43.2%	-43.1%
Number of PAX	1,500,955	1,542,517	(41,562)	-2.7%	0.9%
Number of Contract Revenue Miles	10,590,207	11,019,187	(428,980)	-3.9%	0.8%
Number of Trips	1,136,945	1,176,697	(39,752)	-3.4%	-1.4%
Average Trip Distance	9.31	9.36	(0.05)	-0.6%	2.1%
Purchased Transportation Cost					
Cost per Trip	\$36.00	\$36.29	(\$0.29)	-0.8%	6.9%
Cost per PAX	\$27.27	\$27.68	(\$0.41)	-1.5%	4.5%
Cost per Contract Rev Mile	\$3.86	\$3.88	(\$0.02)	-0.5%	4.7%
Total Cost per Pax before Depreciation	\$33.69	\$36.28	(\$2.59)	-7.2%	0.0%

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

	YTD Actual	YTD Budget	Variance	% Over / (Under) Budget	% Over / (Under) Prior Yr
Revenue					
Passenger Fares	\$2,980,226	\$3,328,892	(\$348,666)		
Other Revenue	\$48,196	\$106,664	(\$58,468)		
Total Revenue	\$3,028,422	\$3,435,556	(\$407,134)	-11.9%	17%
 Total Exp before Capital	 \$50,573,986	 \$55,960,138	 (\$5,386,152)	 -10%	 1%
Capital Expenditures					
Vehicles	\$0	\$0	\$0		
Other Capital Expenditures	\$0	\$0	\$0		
Total Capital Expenditures	\$0	\$0	\$0		
 Over/(Under) Budget October 2017			 (\$5,386,152)		

YTD COST PER PASSENGER BEFORE DEPRECIATION AND CAPITAL COST

