Board Box

April 2019

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April 30, 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	Jan-19	Feb-19	Mar-19	YTD
Vehicle Trips		279,759	267,335	297,750	2,578,088
Passenger Trips		358,076	342,085	382,412	3,331,282
Backup Trips		15	29	4	204
No Shows		3.0%	2.9%	3.1%	3.2%
On Time Performance (Next Day Trips)	≥ 91%	92.6%	92.0%	90.4%	92.1%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.05%	0.05%	0.30%	0.09%
Excessively Long Trips	≤ 5%	3.0%	3.2%	3.0%	4.1%
Missed Trips	≤ 0.75%	0.38%	0.41%	0.66%	0.58%
Denials	≤ 0	0	1	1	6
On Time Performance (Access to Work)	≥ 94%	96.1%	94.8%	95.6%	95.6%

Call Performance

	Goal	Jan-19	Feb-19	Mar-19	YTD
Reservations					
Answered Calls		256,662	237,802	259,296	2,333,158
Average Initial Hold Time	≤ 120 sec	67	74	76	82
Calls On Hold > 5 Minutes	≤ 5%	2.1%	2.7%	3.9%	4.4%
Estimated Time of Arrival (ETAs)					
Answered Calls		47,271	43,239	50,737	473,045
Average Initial Hold Time		61	66	85	91
Calls On Hold > 5 Minutes	≤ 10%	2.3%	2.3%	4.9%	5.9%

Complaints/Commendations

	Goal	Jan-19	Feb-19	Mar-19	YTD
Complaints Per 1,000 Trips	≤ 4.0	2.6	2.6	2.9	3.5
Commendations Per 1,000 Trips		1.5	1.6	1.4	1.6

Safety

	Goal	Jan-19	Feb-19	Mar-19	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.06	0.15	0.17	0.20
Preventable Collisions Per 100,000 Miles		0.81	0.71	1.02	0.85
Weighted Preventable Collisions Per 100,000 Miles	≤ 0.50	0.58	0.51	0.82	0.64
Miles Between Road Calls	≥ 25,000	84,229	63,275	67,035	47,303

Antelope Valley Region

Trip Performance

	Goal	Jan-19	Feb-19	Mar-19	YTD
Vehicle Trips		13,145	12,168	13,394	119,359
Passenger Trips		17,103	15,790	16,981	155,516
No Shows		2.5%	2.7%	2.6%	2.7%
On Time Performance (Next Day Trips)	≥ 91%	92.8%	92.0%	91.7%	92.1%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.11%	0.26%	0.19%	0.10%
Excessively Long Trips	≤ 5%	1.6%	2.7%	2.1%	2.0%
Missed Trips	≤ 0.75%	0.99%	0.87%	0.84%	0.88%
Denials	≤ 0	0	0	0	1
On Time Performance (Access to Work)	≥ 92%	95.0%	100.0%	95.0%	97.2%

Call Performance

	Goal	Jan-19	Feb-19	Mar-19	YTD
Reservations					
Answered Calls		9,451	8,754	9,023	82,179
Average Initial Hold Time	≤ 120 sec	100	102	99	91
Calls On Hold > 5 Minutes	≤ 5%	6.4%	5.2%	6.9%	4.5%

	Goal	Jan-19	Feb-19	Mar-19	YTD
Estimated Time of Arrival (ETAs)					
Answered Calls		3,232	3,192	3,098	27,747
Average Initial Hold Time		42	41	44	44
Calls On Hold > 5 Minutes	≤ 10%	1.8%	1.7%	2.0%	1.9%

Complaints/Commendations

	Goal	Jan-19	Feb-19	Mar-19	YTD
Complaints Per 1,000 Trips	≤ 4.0	2.5	2.6	1.9	2.3
Commendations Per 1,000 Trips		2.2	2.1	0.5	1.8

Safety

	Goal	Jan-19	Feb-19	Mar-19	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.00	0.00	0.59	0.13
Preventable Collisions Per 100,000 Miles		2.41	0.66	0.00	0.73
Weighted Preventable Collisions Per 100,000 Miles	≤ 0.50	2.11	0.50	0.00	0.88
Miles Between Road Calls	≥ 25,000	27,610	18,825	33,697	28,845

Contractual Requirement

Eastern Region

Trip Performance

	Goal	Jan-19	Feb-19	Mar-19	YTD
Vehicle Trips		84,784	78,175	86,658	766,248
Passenger Trips		111,398	102,608	114,568	1,012,881
No Shows		2.4%	2.5%	2.7%	2.5%
On Time Performance (Next Day Trips)	≥ 91%	92.9%	90.5%	88.8%	92.2%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.02%	0.05%	0.58%	0.09%
Excessively Long Trips	≤ 5%	1.2%	1.3%	1.0%	1.1%
Missed Trips	≤ 0.75%	0.31%	0.51%	1.01%	0.39%
Denials	≤ 0	0	0	0	1
On Time Performance (Access to Work)	≥ 95%	93.8%	92.5%	94.2%	95.1%

Call Performance

	Goal	Jan-19	Feb-19	Mar-19	YTD
Reservations					
Answered Calls		72,400	67,572	75,014	648,800
Average Initial Hold Time	≤ 120 sec	36	47	50	68
Calls On Hold > 5 Minutes	≤ 5%	1.4%	2.0%	2.9%	5.1%

	Goal	Jan-19	Feb-19	Mar-19	YTD
Estimated Time of Arrival (ETA)					
Answered Calls		9,940	10,061	12,280	91,451
Average Initial Hold Time		31	38	54	53
Calls On Hold > 5 Minutes	≤ 10%	0.9%	1.1%	3.5%	3.5%

Complaints/Commendations

	Goal	Jan-19	Feb-19	Mar-19	YTD
Complaints Per 1,000 Trips	≤ 4.0	2.9	3.5	4.0	3.2
Commendations Per 1,000 Trips		1.8	1.6	1.6	2.0

Safety

	Goal	Jan-19	Feb-19	Mar-19	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.10	0.00	0.19	0.18
Preventable Collisions Per 100,000 Miles		0.86	1.04	1.02	0.99
Weighted Preventable Collisions Per 100,000 Miles	≤ 0.50	0.55	0.65	0.81	0.67
Miles Between Road Calls	≥ 25,000	262,023	95,732	71,752	92,362

Contractual Requirement

Santa Clarita Region

Trip Performance

	Goal	Jan-19	Feb-19	Mar-19	YTD
Vehicle Trips		3,021	3,096	3,425	28,102
Passenger Trips		3,581	3,564	4,068	33,151
No Shows		2.2%	1.6%	2.0%	2.8%
On Time Performance (Next Day Trips)	≥ 91%	95.2%	96.1%	95.2%	94.4%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.06%	0.00%	0.12%	0.07%
Excessively Long Trips	≤ 5%	2.6%	2.3%	2.5%	3.0%
Missed Trips	≤ 0.75%	0.54%	0.86%	0.32%	0.90%
Denials	≤ 0	0	0	1	1
On Time Performance (Access to Work)	≥ 94%	-	-	0.0%	0.0%

Call Performance

	Goal	Jan-19	Feb-19	Mar-19	YTD
Reservations					
Answered Calls		2,556	2,481	2,641	25,052
Average Initial Hold Time	≤ 120 sec	34	36	37	40
Calls On Hold > 5 Minutes	≤ 5%	0.9%	0.7%	1.1%	1.2%

	Goal	Jan-19	Feb-19	Mar-19	YTD
Estimated Time of Arrival (ETA)					
Answered Calls		562	559	590	3,471
Average Initial Hold Time		40	44	45	44
Calls On Hold > 5 Minutes	≤ 10%	2.3%	2.0%	1.9%	2.3%

Complaints/Commendations

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

Safety

	Goal	Jan-19	Feb-19	Mar-19	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.00	3.63	0.00	0.40
Preventable Collisions Per 100,000 Miles		3.64	3.63	0.00	0.79
Weighted Preventable Collisions Per 100,000 Miles	≤ 0.50	2.73	2.72	0.00	1.73
Miles Between Road Calls	≥ 25,000	27,508	27,574	23,403	197,202

Contractual Requirement

Northern Region

Trip Performance

	Goal	Jan-19	Feb-19	Mar-19	YTD
Vehicle Trips		49,207	47,346	51,922	454,772
Passenger Trips		61,104	58,773	64,908	569,958
No Shows		2.3%	2.0%	2.3%	2.2%
On Time Performance (Next Day Trips)	≥ 91%	92.8%	92.0%	92.0%	91.9%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.05%	0.05%	0.29%	0.09%
Excessively Long Trips	≤ 5%	5.4%	5.3%	4.4%	5.5%
Missed Trips	≤ 0.75%	0.28%	0.29%	0.42%	0.35%
Denials	≤ 0	0	0	0	0
On Time Performance (Access to Work)	≥ 94%	96.3%	91.3%	94.5%	95.0%

Call Performance

	Goal	Jan-19	Feb-19	Mar-19	YTD
Reservations					
Answered Calls		44,905	40,936	40,520	386,975
Average Initial Hold Time	≤ 120 sec	113	122	113	105
Calls On Hold > 5 Minutes	≤ 5%	3.4%	4.4%	6.5%	3.4%
Estimated Time of Arrival (ETA)					
Answered Calls		6,970	6,598	6,888	63,154
Average Initial Hold Time		120	132	121	107
Calls On Hold > 5 Minutes	≤ 10%	4.9%	4.8%	8.4%	4.4%

Complaints/Commendations

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

Safety

	Goal	Jan-19	Feb-19	Mar-19	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.00	0.34	0.30	0.20
Preventable Collisions Per 100,000 Miles		1.58	0.50	1.35	0.99
Weighted Preventable Collisions Per 100,000 Miles	≤ 0.50	1.03	0.42	1.01	0.83
Miles Between Road Calls	≥ 25,000	126,577	74,597	95,567	80,302

Contractual Requirement

Southern Region

Trip Performance

	Goal	Jan-19	Feb-19	Mar-19	YTD
Vehicle Trips		86,376	84,714	96,022	811,527
Passenger Trips		107,218	105,466	119,989	1,022,862
No Shows		3.8%	3.7%	3.7%	4.4%
On Time Performance (Next Day Trips)	≥ 91%	92.0%	93.9%	91.5%	91.9%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.05%	0.01%	0.15%	0.10%
*Excessively Long Trips	≤ 5%	3.4%	3.5%	3.7%	6.7%
*Missed Trips	≤ 0.75%	0.42%	0.28%	0.49%	0.94%
Denials	≤ 0	0	0	0	2
On Time Performance (Access to Work)	≥ 92%	97.4%	97.9%	97.1%	96.1%

Call Performance

	Goal	Jan-19	Feb-19	Mar-19	YTD
Reservations					
Answered Calls		80,481	74,518	83,173	745,925
Average Initial Hold Time	≤ 120 sec	84	87	94	90
Calls On Hold > 5 Minutes	≤ 5%	2.2%	2.6%	3.7%	3.7%
Estimated Time of Arrival (ETA)					
Answered Calls		19,224	15,708	19,433	220,949
Average Initial Hold Time		71	77	117	120
Calls On Hold > 5 Minutes	≤ 10%	2.7%	2.5%	6.2%	8.5%

Complaints/Commendations

	Goal	Jan-19	Feb-19	Mar-19	YTD
*Complaints Per 1,000 Trips	≤ 4.0	2.9	2.3	2.6	5.4
Commendations Per 1,000 Trips		1.1	1.4	1.1	1.2

Safety

	Goal	Jan-19	Feb-19	Mar-19	YTD
*Preventable Incidents Per 100,000 Miles	≤ 0.25	0.00	0.20	0.09	0.28
Preventable Collisions Per 100,000 Miles		0.19	0.50	0.98	0.71
Weighted Preventable Collisions Per 100,000 Miles	≤ 0.50	0.14	0.37	0.93	0.49
*Miles Between Road Calls	≥ 25,000	66,636	55,831	66,273	28,997

*Contractual Requirement beginning 2/1/19

West Central Region

Trip Performance

	Goal	Jan-19	Feb-19	Mar-19	YTD
Vehicle Trips		43,226	41,836	46,329	398,080
Passenger Trips		57,672	55,884	61,898	536,914
No Shows		3.5%	3.6%	4.0%	3.8%
On Time Performance (Next Day Trips)	≥ 91%	92.3%	90.2%	88.2%	91.9%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.08%	0.07%	0.18%	0.06%
Excessively Long Trips	≤ 5%	3.9%	4.2%	3.9%	3.6%
Missed Trips	≤ 0.75%	0.40%	0.50%	0.74%	0.43%
Denials	≤ 0	0	1	0	1
On Time Performance (Access to Work)	≥ 91%	99.2%	96.6%	95.7%	97.4%

Call Performance

	Goal	Jan-19	Feb-19	Mar-19	YTD
Reservations					
Answered Calls		46,869	43,541	48,925	444,227
Average Initial Hold Time	≤ 120 sec	35	45	50	69
Calls On Hold > 5 Minutes	≤ 5%	1.2%	1.8%	3.1%	5.3%
Estimated Time of Arrival (ETA)					
Answered Calls		7,343	7,121	8,448	66,273
Average Initial Hold Time		29	37	46	53
Calls On Hold > 5 Minutes	≤ 5%	0.7%	1.3%	2.7%	3.6%

Complaints/Commendations

	Goal	Jan-19	Feb-19	Mar-19	YTD
Complaints Per 1,000 Trips	≤ 4.0	2.1	2.5	3.1	2.5
Commendations Per 1,000 Trips		1.5	2.3	1.9	1.7

Safety

	Goal	Jan-19	Feb-19	Mar-19	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.19	0.00	0.00	0.08
Preventable Collisions Per 100,000 Miles		0.39	0.61	1.08	0.72
Weighted Preventable Collisions Per 100,000 Miles	≤ 0.50	0.39	0.50	0.67	0.53
Miles Between Road Calls	≥ 25,000	51,934	70,819	55,609	49,781

Contractual Requirement

Eligibility and Appeals

Eligibility

	Goal	Jan-19	Feb-19	Mar-19	YTD
Eligible Customers		151,349	150,850	150,445	150,445
Total ADA Evaluations Performed		5,043	3,503	4,035	41,181
Days From Application to Decision (avg)	≤ 21	6	6	6	7

In Person Evaluations

	Goal	Jan-19	Feb-19	Mar-19	YTD
Unrestricted		1,703	1,250	1,372	13,831
Restricted		761	583	608	6,711
Temporary		203	163	146	1,689
Not Eligible		335	257	280	3,524
Total		3,002	2,253	2,406	25,755

Paper Evaluations

	Goal	Jan-19	Feb-19	Mar-19	YTD
Unrestricted		2,041	1,250	1,629	15,419
Restricted		0	0	0	4
Temporary		0	0	0	1
Not Eligible		0	0	0	2
Total		2,041	1,250	1,629	15,426

Appeals

	Goal	Jan-19	Feb-19	Mar-19	YTD
Appeals Performed		141	140	98	1,508
Days From Appeal to Decision (avg)	≤ 30	7	7	6	9

Customer Service
Phone Statistics
Customer Service

	Goal	Jan-19	Feb-19	Mar-19	YTD
Customer Service Calls		29,725	25,021	29,190	273,025
Average Initial Hold Time	≤ 180 sec	67	97	45	86
Calls On Hold > 5 Minutes	≤ 10%	6.3%	11.1%	4.0%	8.4%
Call Duration	≤ 300 sec	258	272	281	270
Calls Abandoned	≤ 10%	2.2%	3.1%	1.6%	2.9%

Operations Monitoring Center

	Goal	Jan-19	Feb-19	Mar-19	YTD
Customer Service Calls		9,723	8,442	9,152	99,564
Average Initial Hold Time	≤ 180 sec	41	58	64	64
Calls On Hold > 5 Minutes	≤ 10%	3.0%	5.8%	6.5%	5.9%
Call Duration	≤ 300 sec	384	364	378	391
Calls Abandoned	≤ 10%	2.6%	4.3%	5.7%	4.7%

Contractual Requirement

April 23, 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: 2.3% under budget
- Contract Revenue Miles: 0.54% under budget
- Trips: 1.2% under budget
- Total Eligibility Evaluations: 10.8% over budget
- Average Trip Distance: over budget by 0.06 miles at 9.31 miles
- Total cost per Passenger(before depreciation): 0.4% over budget at $37.65
- Administration Function is 0.7% under budget
- Eligibility Determination Function is 12% over budget
- Purchased Transportation Function is 2.5% under budget
- Paratransit Operations Function is 3.2% under budget

Attached are the following reports for your review:

- Statistical Comparison: March 2018 to March 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 March 2019

	% of Cost	YTD Actual	YTD Budget	Variance	% Over / (Under) Budget	% Over / (Under) Prior Yr
Purchased Transportation	81.2%	$101,850,631	$104,451,410	($2,600,779)	-2.5%	11%
Paratransit Operations	9.2%	$11,596,262	$11,974,323	($378,061)	-3.2%	16%
Eligibility Determination	5.2%	$6,492,395	$5,803,643	$688,752	12%	-3%
CTSA/Ride Information	0.2%	$268,599	$493,602	($225,003)	-46%	232%
Administration	4.2%	$5,230,278	$5,195,267	$35,011	0.7%	2%
Total Exp before Depreciation		**$125,438,165**	**$127,918,245**	**($2,480,080)**	**-1.9%**	**10%**

Statistics - - For the YTD Period Ended March 2019

	YTD Actual	YTD Budget	Variance	% Over / (Under) Budget	% Over / (Under) Prior Yr
Total Eligibility Evaluations	41,181	37,179	4,002	10.8%	76.6%
Number of PAX	3,331,282	3,410,376	(79,094)	-2.3%	1.0%
Number of Contract Revenue Miles	24,000,341	24,130,396	(130,055)	-0.54%	1.8%
Number of Trips	2,578,088	2,608,632	(30,544)	-1.2%	2.0%
Average Trip Distance	9.31	9.25	0.06	0.6%	-0.2%
Purchased Transportation Cost					
Cost per Trip	$39.51	$40.04	($0.53)	-1.3%	8.7%
Cost per PAX	$30.57	$30.63	($0.06)	-0.2%	9.8%
Cost per Contract Rev Mile	$4.24	$4.33	($0.09)	0.0%	8.8%
Total Cost per Pax before Depreciation	$37.65	$37.51	$0.14	0.4%	9.2%

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

	YTD Actual	YTD Budget	Variance	% Over / (Under) Budget	% Over / (Under) Prior Yr
Revenue					
Passenger Fares	$7,597,155	$7,137,253	$459,902		
Other Revenue	$627,707	$302,329	$325,378		
Total Revenue	$8,224,862	$7,439,582	$785,280	10.6%	6%
Total Exp before Capital	$125,438,165	$127,918,245	($2,480,080)	-1.9%	10%
Capital Expenditures					
Vehicles	$5,284,227	$9,000,000	($3,715,773)		
Other Capital Expenditures	$436,007	$0	$436,007		
Total Capital Expenditures	$5,720,234	$9,000,000	($3,279,766)	-36.4%	573%
Over/(Under) Budget March 2018			($5,759,846)		

YTD COST PER PASSENGER BEFORE DEPRECIATION AND CAPITAL COST