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Board Box

March 2018

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March 22, 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	Dec-17	Jan-18	Feb-18	YTD
Vehicle Trips		261,713	275,654	264,841	2,235,389
Passenger Trips		341,659	355,507	342,544	2,920,594
Backup Trips		16	12	15	117
No Shows		5.0%	4.4%	4.1%	4.1%
On Time Performance (Next Day Trips)	≥ 91%	92.4%	93.0%	92.9%	91.4%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.06%	0.04%	0.06%	0.08%
Excessively Long Trips	≤ 5%	4.2%	4.5%	5.6%	4.6%
Missed Trips	≤ 0.75%	0.70%	0.63%	0.71%	0.71%
Denials	≤ 0%	0.00%	0.00%	0.00%	0.30%
On Time Performance (Access to Work)	≥ 94%	95.1%	93.5%	95.0%	94.3%

Call Performance

	Goal	Dec-17	Jan-18	Feb-18	YTD
<i>Reservations</i>					
Answered Calls		252,969	262,811	250,352	2,135,051
Average Initial Hold Time	≤ 120	79	68	89	80
Calls On Hold > 5 Minutes	≤ 5%	5.5%	3.2%	5.2%	4.0%
<i>Estimated Time of Arrival (ETAs)</i>					
Answered Calls		45,178	43,937	45,407	408,057
Average Initial Hold Time		164	136	100	173
Calls On Hold > 5 Minutes	≤ 10%	19.3%	13.8%	8.3%	20.0%

Complaints/Commendations

	Goal	Dec-17	Jan-18	Feb-18	YTD
Complaints Per 1,000 Trips	≤ 4.0	2.6	3.0	3.3	3.5
Commendations Per 1,000 Trips		1.4	1.9	1.6	1.8

Safety

	Goal	Dec-17	Jan-18	Feb-18	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.20	0.28	0.11	0.20
Preventable Collisions Per 100,000 Miles	≤ 0.50	0.70	0.67	0.60	0.66
Miles Between Road Calls	≥ 25,000	36,077	51,350	41,324	34,841

Antelope Valley Region Trip Performance

	Goal	Dec-17	Jan-18	Feb-18	YTD
Vehicle Trips		11,612	12,329	12,342	102,525
Passenger Trips		15,787	16,812	16,516	138,851
No Shows		3.9%	3.7%	2.9%	3.1%
On Time Performance (Next Day Trips)	≥ 91%	92.3%	94.9%	93.2%	91.2%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.07%	0.04%	0.09%	0.04%
Excessively Long Trips	≤ 5%	2.0%	2.0%	2.4%	2.6%
Missed Trips	≤ 0.75%	0.76%	0.86%	0.98%	0.75%
Denials	≤ 0%	0.00%	0.00%	0.00%	0.67%
On Time Performance (Access to Work)	≥ 94%	100.0%	-	-	100.0%

Call Performance

	Goal	Dec-17	Jan-18	Feb-18	YTD
<i>Reservations</i>					
Answered Calls		7,577	8,069	7,843	64,912
Average Initial Hold Time	≤ 120	101	76	74	96
Calls On Hold > 5 Minutes	≤ 5%	3.7%	0.9%	1.1%	2.9%

<i>Estimated Time of Arrival (ETAs)</i>					
Answered Calls		-	2,571	2,691	5,262
Average Initial Hold Time		-	78	77	78
Calls On Hold > 5 Minutes	≤ 10%	-	13.2%	13.4%	13.3%

Complaints/Commendations

	Goal	Dec-17	Jan-18	Feb-18	YTD
Complaints Per 1,000 Trips	≤ 4.0	1.4	1.9	2.5	2.4
Commendations Per 1,000 Trips		1.7	2.1	2.1	2.2

Safety

	Goal	Dec-17	Jan-18	Feb-18	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.00	0.00	0.00	0.08
Preventable Collisions Per 100,000 Miles	≤ 0.50	0.00	0.63	1.29	0.48
Miles Between Road Calls	≥ 25,000	36,954	19,771	77,424	24,073

Eastern Region Trip Performance

	Goal	Dec-17	Jan-18	Feb-18	YTD
Vehicle Trips		76,579	80,073	76,684	641,752
Passenger Trips		102,418	105,933	101,450	851,160
No Shows		2.8%	2.4%	2.3%	2.6%
On Time Performance (Next Day Trips)	≥ 91%	93.1%	94.6%	94.5%	92.2%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.06%	0.02%	0.02%	0.07%
Excessively Long Trips	≤ 5%	1.3%	1.2%	1.2%	1.3%
Missed Trips	≤ 0.75%	0.34%	0.24%	0.24%	0.42%
Denials	≤ 0%	0.00%	0.00%	0.00%	0.17%
On Time Performance (Access to Work)	≥ 94%	95.6%	95.5%	97.7%	94.8%

Call Performance

	Goal	Dec-17	Jan-18	Feb-18	YTD
<i>Reservations</i>					
Answered Calls		65,799	68,366	64,395	551,656
Average Initial Hold Time	≤ 120	55	69	92	67
Calls On Hold > 5 Minutes	≤ 5%	3.2%	3.7%	6.0%	3.2%

<i>Estimated Time of Arrival (ETA)</i>					
Answered Calls		10,154	9,195	8,696	78,429
Average Initial Hold Time		53	49	78	102
Calls On Hold > 5 Minutes	≤ 10%	3.9%	2.9%	6.3%	10.6%

Complaints/Commendations

	Goal	Dec-17	Jan-18	Feb-18	YTD
Complaints Per 1,000 Trips	≤ 4.0	2.4	2.1	2.3	2.8
Commendations Per 1,000 Trips		1.5	2.6	2.1	2.1

Safety

	Goal	Dec-17	Jan-18	Feb-18	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.20	0.29	0.21	0.19
Preventable Collisions Per 100,000 Miles	≤ 0.50	0.80	0.49	0.93	0.74
Miles Between Road Calls	≥ 25,000	76,690	127,192	74,641	53,669

Santa Clarita Region Trip Performance

	Goal	Dec-17	Jan-18	Feb-18	YTD
Vehicle Trips		2,811	3,216	3,175	26,050
Passenger Trips		3,254	3,749	3,667	30,340
No Shows		3.3%	2.6%	2.7%	2.8%
On Time Performance (Next Day Trips)	≥ 91%	94.7%	94.0%	95.4%	95.1%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.04%	0.09%	0.03%	0.05%
Excessively Long Trips	≤ 5%	3.7%	3.0%	2.9%	3.1%
Missed Trips	≤ 0.75%	0.64%	0.73%	0.61%	0.60%
Denials	≤ 0%	0.00%	0.00%	0.00%	0.00%
On Time Performance (Access to Work)	≥ 94%	-	-	-	-

Call Performance

	Goal	Dec-17	Jan-18	Feb-18	YTD
<i>Reservations</i>					
Answered Calls		2,995	3,567	3,660	28,718
Average Initial Hold Time	≤ 120	55	51	105	60
Calls On Hold > 5 Minutes	≤ 5%	2.5%	2.3%	4.6%	2.6%

Complaints/Commendations

	Goal	Dec-17	Jan-18	Feb-18	YTD
Complaints Per 1,000 Trips	≤ 4.0	0.0	0.6	0.9	0.4
Commendations Per 1,000 Trips		0.0	0.0	0.0	0.4

Safety

	Goal	Dec-17	Jan-18	Feb-18	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	3.90	0.00	0.00	1.26
Preventable Collisions Per 100,000 Miles	≤ 0.50	0.00	0.00	0.00	0.42
Miles Between Road Calls	≥ 25,000	25,650	28,974	30,000	59,466

SF Valley Region Trip Performance

	Goal	Dec-17	Jan-18	Feb-18	YTD
Vehicle Trips		44,999	48,510	46,739	396,353
Passenger Trips		56,949	60,431	58,366	493,635
No Shows		5.1%	4.0%	3.6%	4.2%
On Time Performance (Next Day Trips)	≥ 91%	93.7%	92.9%	92.4%	92.0%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.09%	0.04%	0.05%	0.10%
Excessively Long Trips	≤ 5%	6.2%	6.8%	7.0%	7.2%
Missed Trips	≤ 0.75%	0.59%	0.55%	0.48%	0.65%
Denials	≤ 0%	0.00%	0.00%	0.00%	0.16%
On Time Performance (Access to Work)	≥ 94%	93.7%	89.9%	91.7%	92.3%

Call Performance

	Goal	Dec-17	Jan-18	Feb-18	YTD
<i>Reservations</i>					
Answered Calls		43,036	40,907	42,026	353,571
Average Initial Hold Time	≤ 120	77	82	96	91
Calls On Hold > 5 Minutes	≤ 5%	2.9%	3.0%	3.6%	3.6%
<i>Estimated Time of Arrival (ETA)</i>					
Answered Calls		2,701	2,654	2,400	23,180
Average Initial Hold Time		68	53	58	65
Calls On Hold > 5 Minutes	≤ 10%	4.5%	1.9%	2.7%	3.8%

Complaints/Commendations

	Goal	Dec-17	Jan-18	Feb-18	YTD
Complaints Per 1,000 Trips	≤ 4.0	1.3	1.6	1.5	1.8
Commendations Per 1,000 Trips		1.9	1.6	1.5	1.9

Safety

	Goal	Dec-17	Jan-18	Feb-18	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.16	0.32	0.17	0.25
Preventable Collisions Per 100,000 Miles	≤ 0.50	0.49	0.96	0.50	0.50
Miles Between Road Calls	≥ 25,000	47,295	56,980	35,521	61,685

Southern Region Trip Performance

	Goal	Dec-17	Jan-18	Feb-18	YTD
Vehicle Trips		86,300	89,771	85,540	727,330
Passenger Trips		110,045	112,979	108,730	950,349
No Shows		6.8%	6.5%	6.5%	5.4%
On Time Performance (Next Day Trips)	≥ 91%	90.6%	90.9%	91.6%	90.1%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.03%	0.06%	0.12%	0.10%
Excessively Long Trips	≤ 5%	6.3%	7.4%	10.1%	6.9%
Missed Trips	≤ 0.75%	1.06%	1.03%	1.44%	1.01%
Denials	≤ 0%	0.00%	0.00%	0.00%	0.49%
On Time Performance (Access to Work)	≥ 94%	100.0%	97.1%	93.9%	95.2%

Call Performance

	Goal	Dec-17	Jan-18	Feb-18	YTD
<i>Reservations</i>					
Answered Calls		87,067	92,425	85,069	736,321
Average Initial Hold Time	≤ 120	111	65	83	92
Calls On Hold > 5 Minutes	≤ 5%	10.2%	2.3%	4.3%	4.7%
<i>Estimated Time of Arrival (ETA)</i>					
Answered Calls		25,488	22,376	24,763	243,421
Average Initial Hold Time		250	210	122	224
Calls On Hold > 5 Minutes	≤ 10%	31.3%	23.4%	10.0%	27.1%

Complaints/Commendations

	Goal	Dec-17	Jan-18	Feb-18	YTD
Complaints Per 1,000 Trips	≤ 4.0	3.9	5.4	6.0	5.9
Commendations Per 1,000 Trips		0.9	1.4	1.2	1.4

Safety

	Goal	Dec-17	Jan-18	Feb-18	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.26	0.32	0.08	0.21
Preventable Collisions Per 100,000 Miles	≤ 0.50	0.71	0.48	0.24	0.63
Miles Between Road Calls	≥ 25,000	21,408	34,802	29,476	21,947

West Central Region Trip Performance

	Goal	Dec-17	Jan-18	Feb-18	YTD
Vehicle Trips		39,412	41,743	40,361	341,293
Passenger Trips		53,190	55,591	53,815	456,157
No Shows		4.3%	3.9%	3.8%	4.1%
On Time Performance (Next Day Trips)	≥ 91%	93.5%	93.8%	93.0%	91.7%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.08%	0.04%	0.03%	0.07%
Excessively Long Trips	≤ 5%	3.3%	3.1%	3.9%	3.6%
Missed Trips	≤ 0.75%	0.49%	0.39%	0.37%	0.54%
Denials	≤ 0%	0.00%	0.00%	0.00%	0.33%
On Time Performance (Access to Work)	≥ 94%	97.1%	94.4%	97.4%	95.7%

Call Performance

	Goal	Dec-17	Jan-18	Feb-18	YTD
<i>Reservations</i>					
Answered Calls		46,495	49,477	47,359	399,873
Average Initial Hold Time	≤ 120	52	63	91	65
Calls On Hold > 5 Minutes	≤ 5%	3.1%	4.7%	8.0%	4.7%
<i>Estimated Time of Arrival (ETA)</i>					
Answered Calls		6,835	7,141	6,857	57,765
Average Initial Hold Time		49	44	66	98
Calls On Hold > 5 Minutes	≤ 10%	3.0%	2.6%	4.7%	10.0%

Complaints/Commendations

	Goal	Dec-17	Jan-18	Feb-18	YTD
Complaints Per 1,000 Trips	≤ 4.0	2.1	1.9	1.9	2.5
Commendations Per 1,000 Trips		1.3	1.7	1.6	1.7

Safety

	Goal	Dec-17	Jan-18	Feb-18	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.00	0.19	0.00	0.09
Preventable Collisions Per 100,000 Miles	≤ 0.50	0.99	1.15	0.80	0.79
Miles Between Road Calls	≥ 25,000	46,128	74,624	49,907	43,693

Eligibility and Appeals

Eligibility

	Goal	Dec-17	Jan-18	Feb-18	YTD
Eligible Customers		164,836	161,536	162,363	162,363
ADA Evaluations Performed		2,823	3,069	3,062	20,186
Days From Application to Decision (avg)	≤ 21	14	13	12	14

Eligibility Determinations

	Goal	Dec-17	Jan-18	Feb-18	YTD
Unrestricted		1,378	1,473	1,442	10,666
Restricted		574	559	616	3,746
Temporary		150	179	161	1,347
Not Eligible		721	858	843	4,427
Total		2,823	3,069	3,062	20,186

Appeals

	Goal	Dec-17	Jan-18	Feb-18	YTD
Appeals Performed		70	80	125	762
Days From Appeal to Decision (avg)	≤ 30	12	13	9	9

Customer Service

Phone Statistics

Customer Service

	Goal	Dec-17	Jan-18	Feb-18	YTD
Customer Service Calls		29,729	36,810	32,782	265,444
Average Initial Hold Time	≤ 180 sec	106	55	78	179
Calls on Hold over 5 Minutes	≤ 10%	13.2%	5.3%	8.7%	23.6%
Call Duration	≤ 300 sec	308	275	267	312
Calls Abandoned	≤ 10%	3.7%	2.1%	2.9%	6.1%

Operations Monitoring Center

	Goal	Dec-17	Jan-18	Feb-18	YTD
Customer Service Calls		9,720	11,004	10,185	88,373
Average Initial Hold Time	≤ 180 sec	102	54	66	137
Calls on Hold over 5 Minutes	≤ 10%	12.3%	4.6%	6.7%	17.0%
Call Duration	≤ 300 sec	437	421	411	440
Calls Abandoned	≤ 10%	8.2%	4.3%	5.9%	10.3%

March 22, 2018

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

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

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

- Passengers: 3.5% under budget
- Contract Revenue Miles: 3.8% under budget
- Trips: 3.4% under budget
- Completed Eligibility Interviews: 26.4% under budget
- Average Trip Distance: 0.3% under budget at 9.33 miles
- Total cost per Passenger (before depreciation): 4.3% under budget
- Administration Function is 4% under budget
- Eligibility Determination Function is 31% under budget
- Purchased Transportation Function is 4% under budget
- Paratransit Operations Function is 18% under budget

Attached are the following reports for your review:

- Statistical Comparison: January 2017 to January 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 January 2018**

	% of Cost	YTD Actual	YTD Budget	Variance	% Over / (Under) Budget	% Over / (Under) Prior Yr
Purchased Transportation	80%	\$71,480,751	\$74,369,169	(\$2,888,418)	-4%	6%
Paratransit Operations	9%	\$7,922,092	\$9,693,810	(\$1,771,718)	-18%	-28%
Eligibility Determination	6%	\$5,376,042	\$7,782,697	(\$2,406,655)	-31%	-3%
CTSA/Ride Information	0.1%	\$71,133	\$183,316	(\$112,183)	-61%	-81%
Administrative	5%	\$4,074,870	\$4,255,695	(\$180,825)	-4%	16%
Total Exp before Depreciation		\$88,924,888	\$96,284,687	(\$7,359,799)	-7.6%	1.2%

Statistics - - For the YTD Period Ended January 2018

	<u>YTD Actual</u>	<u>YTD Budget</u>	<u>Variance</u>	<u>% Over / (Under) Budget</u>	<u>% Over / (Under) Prior Yr</u>
Number of Completed Cert Interviews	16,668	22,637	(5,969)	-26.4%	-14.8%
Number of PAX	2,554,722	2,647,378	(92,656)	-3.5%	16.6%
Number of Contract Revenue Miles	18,189,048	18,906,853	(717,805)	-3.8%	17.0%
Number of Trips	1,950,199	2,019,122	(68,923)	-3.4%	14.8%
Average Trip Distance	9.33	9.36	(0.03)	-0.3%	1.9%
Purchased Transportation Cost					
Cost per Trip	\$36.65	\$36.83	(\$0.18)	-0.5%	8.3%
Cost per PAX	\$27.98	\$28.09	(\$0.11)	-0.4%	6.7%
Cost per Contract Rev Mile	\$3.93	\$3.93	(\$0.00)	0.0%	6.2%
Total Cost per Pax before Depreciation	\$34.81	\$36.37	(\$1.56)	-4.3%	1.4%

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

	YTD Actual	YTD Budget	Variance	% Over / (Under) Budget	% Over / (Under) Prior Yr
Revenue					
Passenger Fares	\$4,673,932	\$5,697,285	(\$1,023,353)		
Other Revenue	\$105,700	\$186,662	(\$80,962)		
Total Revenue	<u>\$4,779,632</u>	<u>\$5,883,947</u>	<u>(\$1,104,315)</u>	-18.8%	-10%
Total Exp before Capital	\$88,924,888	\$96,284,687	(\$7,359,799)	-8%	1%
Capital Expenditures					
Vehicles	\$75,081	\$2,026,185	(\$1,951,104)		
Other Capital Expenditures	\$309,597	\$0	\$309,597		
Total Capital Expenditures	<u>\$384,678</u>	<u>\$2,026,185</u>	<u>(\$1,641,507)</u>		
Over/(Under) Budget January 2018			<u>(\$9,001,306)</u>		

YTD COST PER PASSENGER BEFORE DEPRECIATION AND CAPITAL COST

