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October 2017

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OCTOBER 23, 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
- Eligibility and Appeals
- Safety
- Customer Service

Performance Summary

	Standard	Jul-17	Aug-17	Sep-17	YTD
Certified Riders		168,288	167,771	167,649	167,649
Vehicle Trips		275,194	294,394	279,900	849,488
Passenger Trips		361,897	399,745	363,044	1,124,686
On-Time Performance	≥ 91%	91.8%	91.5%	89.6%	91.0%
Excessively Late Trips (L4)	≤ 0.10%	0.09%	0.05%	0.13%	0.09%
Answered Calls (Reservations)		269,337	278,410	269,177	816,924
Average Hold Time	≤ 120	80	83	76	80
Calls on Hold over 5 Minutes	≤ 5%	4.5%	4.7%	3.4%	4.2%
Denials (Negotiations outside 1 hr)	≤ 1.0%	0.87%	0.22%	0.22%	0.44%

Trips Summary

Vehicle Trips

	Jul-17	Aug-17	Sep-17	YTD
System	275,194	294,394	279,900	849,488
Antelope Valley	12,589	14,035	12,865	39,489
Eastern	78,791	83,925	78,942	241,658
Northern	49,641	52,812	50,301	152,754
Santa Clarita	2,971	3,533	3,356	9,860
Southern	88,159	95,292	91,305	274,756
West Central	43,020	44,791	43,120	130,931
Backup	23	6	11	40

Passenger Trips – includes PCA's, Guests, Children

	Jul-17	Aug-17	Sep-17	YTD
System	361,897	399,745	363,044	1,124,686
Antelope Valley	17,665	18,801	17,319	53,785
Eastern	104,867	111,491	104,698	321,056
Northern	62,401	65,531	62,175	190,107
Santa Clarita	3,534	4,151	3,886	11,571
Southern	115,673	139,937	117,561	373,171
West Central	57,734	59,828	57,394	174,956
Backup	23	6	11	40

No-Shows

	Jul-17	Aug-17	Sep-17	YTD
System	3.8%	3.9%	4.0%	3.9%
Antelope Valley	2.9%	1.6%	1.6%	1.7%
Eastern	2.6%	2.6%	2.7%	2.6%
Northern	4.1%	4.3%	4.3%	4.2%
Santa Clarita	2.8%	2.9%	2.4%	2.7%
Southern	4.5%	4.8%	4.8%	4.7%
West Central	4.2%	4.3%	4.4%	4.3%

Comparability of Access to Fixed Route Travel Times

	Jul-17	Aug-17*	Sep-17*	YTD
Equal to or Less	88.9%			88.9%
1-20 minutes longer	7.6%			7.6%
21-40 minutes longer	2.5%			2.5%
41-60 minutes longer	0.7%			0.7%
60 minutes or longer	0.4%			0.4%

*Data not yet available

The data above highlights the degree to which Access trips are comparable in terms of travel time to trips of a similar distance, origin and destination taken on local fixed route transit.

Key Performance Indicators

On-Time Performance – 91 percent or better

	Jul-17	Aug-17	Sep-17	YTD
System	91.8%	91.5%	89.6%	91.0%
Antelope Valley	90.2%	91.1%	88.4%	90.1%
Eastern	92.3%	92.7%	89.5%	91.5%
Northern	92.3%	91.1%	91.2%	91.5%
Santa Clarita	96.9%	94.9%	95.8%	95.8%
Southern	91.2%	90.4%	88.9%	90.1%
West Central	92.3%	91.9%	89.1%	91.1%

Excessively Late Trips (Over 45 minutes late) – 0.10 percent or less

	Jul-17	Aug-17	Sep-17	YTD
System	0.09%	0.05%	0.13%	0.09%
Antelope Valley	0.01%	0.07%	0.06%	0.03%
Eastern	0.18%	0.02%	0.11%	0.10%
Northern	0.07%	0.07%	0.23%	0.12%
Santa Clarita	0.03%	0.06%	0.06%	0.05%
Southern	0.07%	0.06%	0.12%	0.09%
West Central	0.06%	0.05%	0.13%	0.08%

Denials (Negotiations outside 1 hour window) – 1 percent or less

	Jul-17	Aug-17	Sep-17	YTD
System	0.87%	0.22%	0.22%	0.44%
Antelope Valley	0.00%	0.00%	0.00%	0.00%
Eastern	0.00%	1.33%	0.00%	0.44%
Northern	1.28%	0.00%	0.00%	0.43%
Santa Clarita	0.00%	0.00%	0.00%	0.00%
Southern	3.80%	0.00%	0.00%	1.28%
West Central	0.00%	0.00%	1.32%	0.44%

Answered Calls (Reservations)

	Jul-17	Aug-17	Sep-17	YTD
System	269,337	278,410	269,177	816,924
Antelope Valley	8,283	9,169	8,047	25,499
Eastern	67,834	71,207	67,949	206,990
Northern	44,802	46,368	45,232	136,402
Santa Clarita	4,790	3,520	3,228	11,538
Southern	94,848	96,980	93,436	285,264
West Central	48,780	51,166	51,285	151,231

Average Initial Hold Time (Reservations) – 120 seconds or less

	Jul-17	Aug-17	Sep-17	YTD
System	80	83	76	80
Antelope Valley	101	104	102	102
Eastern	66	66	65	66
Northern	91	99	85	92
Santa Clarita	48	51	47	49
Southern	90	98	84	91
West Central	66	61	67	65

Calls on Hold over 5 minutes (Reservations) – 5 percent or less

	Jul-17	Aug-17	Sep-17	YTD
System	4.5%	4.7%	3.4%	4.2%
Antelope Valley	2.9%	3.5%	3.9%	3.4%
Eastern	5.8%	4.7%	3.9%	4.8%
Northern	3.6%	5.0%	3.0%	3.9%
Santa Clarita	2.0%	2.4%	1.9%	2.1%
Southern	3.5%	5.0%	2.6%	3.7%
West Central	5.9%	4.3%	4.4%	4.9%

Complaints and Commendations

System (Ratio by 1,000 trips)

Category	Jul-17	Aug-17	Sep-17	YTD
ADA	0.0	0.0	0.0	0.0
Booking	0.7	0.6	0.5	0.6
Conduct	0.9	0.9	0.7	0.8
General Service	0.1	0.1	0.1	0.1
Late Trips	0.2	0.3	0.4	0.3
“Late 4” (+45 mins)	0.1	0.2	0.2	0.2
Procedure	1.6	1.9	1.7	1.7
Routing	0.4	0.4	0.4	0.4
Securement	0.0	0.0	0.0	0.0
Service Animal	0.0	0.0	0.0	0.0
Travel Time	0.1	0.1	0.0	0.0
Vehicle	0.0	0.0	0.0	0.0
Total	4.1	4.6	4.1	4.3

Complaints by Region (Ratio per 1,000 trips)

	Jul-17	Aug-17	Sep-17	YTD
System	4.1	4.6	4.1	4.3
Antelope Valley	2.7	3.6	2.4	2.9
Eastern	3.0	3.3	3.6	3.3
Northern	2.3	2.3	2.1	2.3
Santa Clarita	1.0	0.8	0.0	0.6
Southern	7.1	8.1	6.6	7.3
West Central	3.1	3.1	3.0	3.0

Commendations (Ratio per 1,000 trips)

	Jul-17	Aug-17	Sep-17	YTD
System	2.5	2.3	2.1	2.3

Complaint Response Time - 14 days or less

	Jul-17	Aug-17	Sep-17	YTD
Complaints requesting response	328	371	384	1,083
Average days for response	23.0	22.5	19.6	21.7

Eligibility and Appeals

Eligibility - 21 days or less

	Jul-17	Aug-17	Sep-17	YTD
ADA Evaluations Performed	1,989	2,050	2,099	6,138
Days From Application to Decision (avg)	19	15	13	16

Eligibility Determinations

	Jul-17	Aug-17	Sep-17	YTD
Unrestricted	1,146	1,240	1,241	3,627
Restricted	349	311	371	1,031
Temporary	177	183	173	533
Not Eligible	317	316	314	947
Total	1,989	2,050	2,099	6,138

Appeals - 30 days or less

	Jul-17	Aug-17	Sep-17	YTD
Appeals Performed	190	118	60	368
Days From Appeal to Decision (avg)	8	7	8	8

Safety

Preventable Collisions per 100,000 Miles - 0.50 or less

	Jul-17	Aug-17	Sep-17	YTD
System	0.45	0.76	0.87	0.70
Antelope Valley	0.00	0.00	1.67	0.51
Eastern	0.58	1.10	1.01	0.90
Northern	0.46	0.29	0.29	0.35
Santa Clarita	0.00	3.23	0.00	1.08
Southern	0.45	1.02	1.11	0.87
West Central	0.36	0.17	0.70	0.41

Customer Service

Phone Statistics

Customer Service

	Standard	Jul-17	Aug-17	Sep-17	YTD
Customer Service Calls		31,232	38,965	33,373	103,570
Average Initial Hold Time	≤ 180 sec	139	148	316	199
Calls on Hold over 5 Minutes	≤ 10%	16.3%	19.3%	44.9%	26.6%
Call Duration	≤ 300 sec	330	337	327	332
Calls Abandoned	≤ 10%	4.9%	5.2%	10.0%	6.8%

Operations Monitoring Center

	Standard	Jul-17	Aug-17	Sep-17	YTD
Customer Service Calls		11,100	12,891	11,831	35,822
Average Initial Hold Time	≤ 180 sec	121	126	208	152
Calls on Hold over 5 Minutes	≤ 10%	14.4%	15.6%	27.8%	19.2%
Call Duration	≤ 300 sec	457	488	458	468
Calls Abandoned	≤ 10%	9.3%	9.4%	14.3%	11.1%

OCTOBER 23, 2017

TO: BOARD OF DIRECTORS

FROM: HECTOR RODRIGUEZ, DEPUTY EX. DIRECTOR, FINANCE

RE: FINANCIAL REPORT FOR AUGUST 2017

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

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

- Passengers: 1.7% under budget
- Contract Revenue Miles: 3.7% under budget
- Trips: 3.8% under budget
- Completed Eligibility Interviews: 47% under budget
- Average Trip Distance: 0.1% Over budget at 9.37 miles
- Total cost per Passenger (before depreciation): 10% under budget
- Administration Function is 6% over budget
- Eligibility Determination Function is 57% under budget
- Purchased Transportation Function is 1.3% under budget
- Paratransit Operations Function is 34% under budget

Attached are the following reports for your review:

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

	% of Cost	YTD Actual	YTD Budget	Variance	% over/ (Under) Budget	% Over / (Under) Prior Yr
Purchased Transportation	80%	\$20,116,989	\$20,388,372	(\$271,383)	-1.3%	4%
Paratransit Operations	9%	\$2,371,036	\$3,573,144	(\$1,202,108)	-34%	-12%
Eligibility Determinations	6%	\$1,435,287	\$3,333,188	(\$1,897,901)	-57%	-1%
CTSA/Ride Information	0.1%	\$30,083	\$52,376	(\$22,293)	-43%	-74%
Administrative	5%	\$1,264,989	\$1,189,770	\$75,219	6%	30%
Total Exp before Depreciation		\$25,218,384	\$28,536,850	(\$3,318,466)	-11.6%	2%

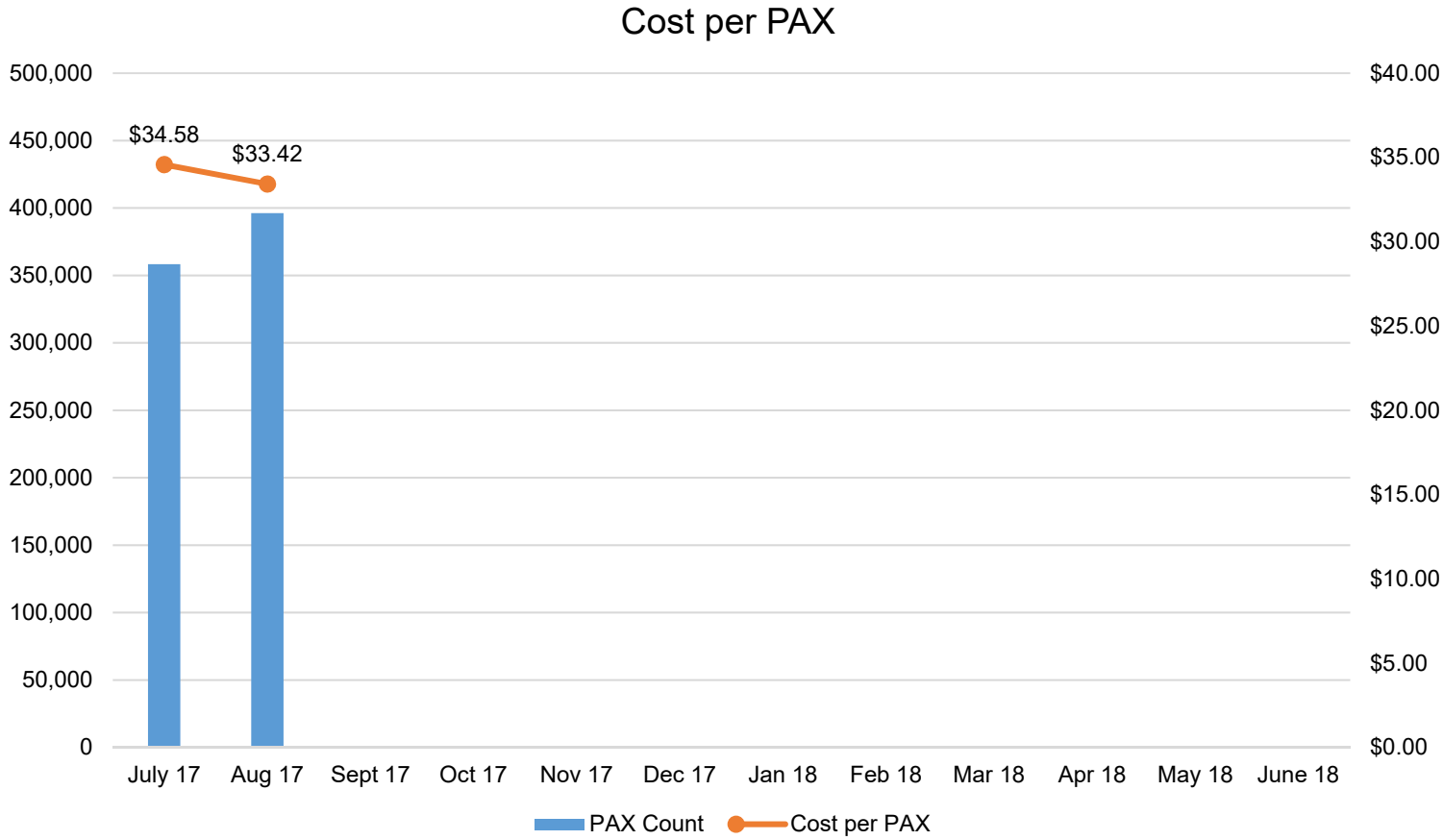
Statistics - For the YTD Period Ended August 2017

	YTD Actual	YTD Budget	Variance	% Over / (Under) Budget	% Over / (Under) Prior Yr
Number of Completed Cert Interviews	4,037	7,619	(3,582)	-47.0%	-47%
Number of PAX	754,523	767,749	(13,226)	-1.7%	2%
Number of Contract Revenue Miles	5,280,240	5,483,728	(203,488)	-3.7%	1%
Number of Trips	563,432	585,670	(22,238)	-3.8%	-1%
Average Trip Distance	9.37	9.36	0.01	0.1%	3%
Purchased Transportation Cost					
Cost per Trip	\$35.70	\$34.81	\$0.89	3%	5%
Cost per PAX	\$26.66	\$26.56	\$0.10	0%	2%
Cost per Contract Rev Mile	\$3.81	\$3.72	\$0.09	2%	2%
Total Cost per PAX before Depreciation	\$33.42	\$37.17	(\$3.75)	-10%	0%

Budget Result for FY 2017-2018 For YTD Period Ending August 2017

	YTD Actual	YTD Budget	Variance	% Over / (Under) Budget	% Over / (Under) Prior Yr
Total Exp before Capital	\$25,218,384	\$28,536,850	(\$3,318,466)	-12%	2%
Revenue					
Passenger Fares	\$1,669,602	\$1,644,726	\$24,876		
Other Revenue	\$34,743	\$53,332	(\$18,589)		
Total Revenue	\$1,704,345	\$1,698,058	\$6,287	0.4%	2%
Capital Expenditures					
Vehicles	\$0	\$0	\$0		
Other Capital Expenditures	\$0	\$0	\$0		
Total Capital Expenditures	\$0	\$0	\$0		
Over/(Under) Budget Feb 2017			(\$3,318,466)		

YTD COST PER PASSENGER BEFORE DEPRECIATION AND CAPITAL COST



OCTOBER 23, 2017

TO: BOARD OF DIRECTORS

FROM: ERIC HAACK, STRATEGIC PLANNER

RE: ACCESS SERVICES TRAVEL TRAINING PROGRAM

Access Services, through its contractor, Mobility Management Partners (MMP), offers Travel Training services to between 130 and 250 Access eligible customers every year. Travel Training teaches customers how to use fixed route services for their transportation needs. Travel Trainers provide one-on-one instruction on how to be safe while using fixed route, how to understand a bus schedule, and how to integrate existing bus and rail systems into their transportation needs.

MMP's Travel Training program incorporates elements from other Travel Training programs (ex. Easter Seals Project Action) and the objective of Access' Travel Training program is similar to programs operated by other transit agencies locally and throughout the United States.

The objectives of the Access Travel Training program are as follows:

- Provide an additional transportation option for Access eligible customers other than paratransit travel; and
- Reduce Access' overall operating/per trip costs by empowering customers to use fixed route services when they otherwise would have been reliant exclusively on paratransit for their public transportation needs. Access' Free Fare program incentivizes paratransit-eligible customers, if they are able, to use existing seat capacity on buses and trains.

Individual Travel Training

MMP has historically calculated the success rate of the Travel Training program by performing follow-up telephone surveys of the 'graduates' of Travel Training. MMP calls these individuals one week, one month, two months and six months after the completion of their Travel Training course. The telephone surveys ask

(1) if the individual is still taking fixed route service trips, and (2) how frequently is the customer taking trips on fixed route over the course of a week. Past calculations about the Access Travel Training program's ROI used this data from MMP.

Access staff, for the past three years, has performed its own analysis of the success of the Travel Training program. Access examined TAP data from the 860 customers who had received travel training between the period of July 2013 and September 2017. Access staff also examined the frequency at which travel trained customers took Access paratransit trips.

Using existing TAP and Access trip data, Access was able to analyze each customer's usage of public transit since their travel training. A problem with MMP's telephone survey process is, on occasion, MMP could not reach each person that had taken the travel training courses.

With TAP and Access trip data, however, Access has a greater ability to estimate a customer's usage of different public transport modes.

Access staff reviewed the telephone survey results MMP conducted from their travel trained customers two months after the completion of their travel training session. Access staff felt that the two month period results would be the most valuable for comparison purposes because it is generally assumed that a customer's transit choices at this time point are reflective of a "habit" that is likely to continue forward.

Access staff then reviewed the TAP data and Access trip data gathered from all of the approximately 860 travel trained customers and reached the following conclusions:

- Using two-month follow-up data of these customers, they had taken, on average, 17.62 trips per month. This was very similar to results drawn from TAP data of 17.92 trips per month.
- Most of the customers seeking Travel Training had no fixed route transit experience and benefited from the assistance and encouragement provided by MMP travel training staff.
- In Fiscal Year 2017, 128 Access-eligible customers received one-on-one travel training. Those 128 customers took approximately 9,000 fixed route trips during the fiscal year according to TAP data received from Metro. This resulted in a regional savings of nearly \$315,000 assuming that one fixed-route trip replaced a comparable paratransit trip at \$35 a

trip. In addition, given that the Travel Training program has been in existence since 2005, the cumulative savings to the region are far greater.

- Lastly, the travel trained customers are infrequently using Access. Each customer (on average) uses Access just under 2.4 times per month, which is far less than the average Access using customer, who took Access at a rate of 8.5 trips per month in FY 2017.

Group Travel Training

In Spring 2015, Access, working with its contractor, MMP, launched a pilot Group Travel Training program. After the initial success of hosting Group Travel Training workshops at centers in West Los Angeles and the San Fernando Valley, Access modified some elements of the existing agreement with MMP so that they would perform approximately two (2) Group Travel Training workshops per month. There was a corresponding reduction in the number of Individual Travel Training sessions so to not increase the budget for the work performed by MMP.

The Group Travel Training workshops are classroom-based education sessions. Contractor staff visit a senior center, community center, or job skills training facility for persons with disabilities and provide a day-long workshop on the skills needed to use fixed route transit safely and to meet an individual's transportation needs.

It was Access' intention that through Group Travel Trainings, Access could introduce fixed route travel to a greater number of persons than the individual travel training sessions.

Between January 2017 and September 2017, MMP performed 24 Group Travel Training classes at centers throughout the Los Angeles Basin and San Gabriel and San Fernando Valleys. These classes have had on average 18 attendees, totaling 418 persons.

Unlike One-on-one Travel Training, Group Travel Training is not provided exclusively to Access-eligible customers. A potential benefit in this was for persons who were not Access customers, these workshops could delay a participant from applying for Access by educating them about other transportation options. For the Group Travel Training workshops held between January and September 2017, 10% or 41 attendees were current Access customers.

Following the training workshop, attendees were asked, now with information about how to use fixed route, whether they intended to apply for Access within the next six months, the next year or if they did not plan to apply for Access. Of the respondents, 34% (94 attendees) indicated they would be applying for Access within the next six months; 29% (81 attendees) indicated they may apply between six months to a year following the training and the largest single group

with 37% (104 attendees) indicated they had no intention to apply for Access in the future.

Next Steps

The cost to Access in providing Individual Travel Training sessions at a contract cost of just over \$400,000 annually. Through trips diverted through fixed route service and the much lower rate of use of paratransit by travel training "graduates," cost savings are realized. When one factors in the compounded savings generated by the over 1,000 individuals trained since the program started in 2005, the savings are even greater. Furthermore, it is impossible to quantify on a numerical basis the benefit of giving Access customers additional transit options that allow them to lead more independent lives.

Access has recently released a new Request for Proposals (RFP) for a new Travel Training contract. In that contract, Access hopes to increase the realized benefit of this program with the new contract.

Access feels the greatest benefits from the Travel Training program comes from the one-on-one knowledge that comes from individual travel training, in which a trainee's route is designed on a fixed route trip. In the new RFP, the number of individuals who may be trained through one-on-one training will increase from 130 to 300.

Group Travel Training workshops provide important benefits and, for this reason, Access has had discussions with Metro's On the Move program, which provides Group Travel Training to senior citizens throughout Los Angeles County. Metro and Access are currently proposing to work together so that Metro's On the Move program will be able to perform Group Travel Training for centers. Access intends to reduce the number of Group Travel Trainings that its own contractor provides. However, with the increased number of individual travel trainings and in partnership with Metro's On the Move Program, Access intends to reach a large number of prospective candidates who can be educated on how to safely and effectively use fixed route transit as an alternative to Access' paratransit service.

Access will continue to evaluate the effectiveness of its travel training program and can present such results to the Board at annual intervals.