Board Box

June 2023

June 28, 2023

TO: BOARD OF DIRECTORS

FROM: VY VU, SYSTEM ADMINISTRATOR - DATA

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	Mar-23	Apr-23	May-23	YTD
Vehicle Trips		264,198	253,531	275,095	2,621,476
Passenger Trips		324,658	313,623	339,479	3,245,700
Backup Trips		39	28	38	428
No Shows		2.5%	2.4%	2.2%	2.6%
On Time Performance (Next Day Trips)	≥ 91%	90.8%	91.8%	91.7%	91.1%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.03%	0.05%	0.05%	0.05%
Excessively Long Trips	≤ 5%	3.6%	3.3%	3.3%	3.7%
Missed Trips	≤ 0.75%	0.42%	0.42%	0.39%	0.44%
Denials	≤ 0	0	1	0	4
On Time Performance (Access to Work)	≥ 94%	94.7%	97.2%	96.6%	95.2%

Call Performance

	Goal	Mar-23	Apr-23	May-23	YTD
Reservations					
Answered Calls		199,911	204,764	203,388	2,095,566
Average Initial Hold Time	≤ 120 sec	52	69	63	61
Calls On Hold > 5 Minutes	≤ 5%	1.7%	3.7%	2.2%	2.4%
Estimated Time of Arrival (ETAs)					
Answered Calls		48,800	44,561	41,349	483,001
Average Initial Hold Time		43	46	52	49
Calls On Hold > 5 Minutes	≤ 10%	1.6%	1.8%	2.7%	2.0%

Complaints/Commendations

	Goal	Mar-23	Apr-23	May-23	YTD
Complaints Per 1,000 Trips	≤ 4.0	2.6	1.9	2.4	2.8
Commendations Per 1,000 Trips		1.0	0.9	1.0	0.9

Safety

	Goal	Mar-23	Apr-23	May-23	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.09	0.21	0.20	0.19
Preventable Collisions Per 100,000 Miles	≤ 0.75	0.92	0.84	0.76	0.85
Miles Between Road Calls	≥ 25,000	32,667	44,342	46,368	40,888

Antelope Valley Region

Trip Performance

	Goal	Mar-23	Apr-23	May-23	YTD
Vehicle Trips		12,403	12,035	12,543	128,310
Passenger Trips		14,546	14,391	14,905	153,468
No Shows		3.2%	3.0%	3.0%	3.6%
On Time Performance (Next Day Trips)	≥ 91%	95.7%	94.9%	95.0%	95.5%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.00%	0.00%	0.00%	0.01%
Excessively Long Trips	≤ 5%	1.2%	1.2%	1.4%	1.5%
Missed Trips	≤ 0.75%	0.14%	0.23%	0.20%	0.25%
Denials	≤ 0	0	0	0	0
On Time Performance (Access to Work)	≥ 94%	100.0%	100.0%	100.0%	98.2%

Call Performance

	Goal	Mar-23	Apr-23	May-23	YTD
Reservations					
Answered Calls		7,921	7,888	8,165	85,505
Average Initial Hold Time	≤ 120 sec	37	45	46	41
Calls On Hold > 5 Minutes	≤ 5%	0.9%	1.5%	1.9%	1.4%

	Goal	Mar-23	Apr-23	May-23	YTD
Estimated Time of Arrival (ETAs)					
Answered Calls		2,400	2,465	2,580	25,351
Average Initial Hold Time		27	27	30	30
Calls On Hold > 5 Minutes	≤ 10%	0.8%	0.5%	0.9%	0.8%

Complaints/Commendations

	Goal	Mar-23	Apr-23	May-23	YTD
Complaints Per 1,000 Trips	≤ 4.0	2.8	2.3	2.7	2.5
Commendations Per 1,000 Trips		0.8	0.5	1.4	1.2

Safety

	Goal	Mar-23	Apr-23	May-23	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.00	0.00	0.00	0.17
Preventable Collisions Per 100,000 Miles	≤ 0.75	0.00	0.47	0.00	0.47
Miles Between Road Calls	≥ 25,000	163,871	80,043	166,836	59,919

Contractual Requirement

Eastern Region

Trip Performance

	Goal	Mar-23	Apr-23	May-23	YTD
Vehicle Trips		76,755	73,879	80,578	751,387
Passenger Trips		96,028	92,818	100,936	946,435
No Shows		2.2%	2.1%	1.9%	2.3%
On Time Performance (Next Day Trips)	≥ 91%	91.0%	92.9%	92.5%	91.0%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.01%	0.01%	0.01%	0.04%
Excessively Long Trips	≤ 5%	1.2%	1.0%	1.1%	1.2%
Missed Trips	≤ 0.75%	0.29%	0.24%	0.21%	0.32%
Denials	≤ 0	0	0	0	0
On Time Performance (Access to Work)	≥ 94%	94.2%	98.2%	98.3%	95.4%

Call Performance

	Goal	Mar-23	Apr-23	May-23	YTD
Reservations					
Answered Calls		54,117	55,734	56,041	563,963
Average Initial Hold Time	≤ 120 sec	23	41	28	35
Calls On Hold > 5 Minutes	≤ 5%	0.7%	2.8%	0.9%	1.4%

	Goal	Mar-23	Apr-23	May-23	YTD
Estimated Time of Arrival (ETA)					
Answered Calls		11,333	10,643	11,424	117,565
Average Initial Hold Time		11	13	15	21
Calls On Hold > 5 Minutes	≤ 10%	0.1%	0.2%	0.2%	0.5%

Complaints/Commendations

	Goal	Mar-23	Apr-23	May-23	YTD
Complaints Per 1,000 Trips	≤ 4.0	1.6	1.1	1.4	1.9
Commendations Per 1,000 Trips		0.4	0.8	0.7	0.5

Safety

	Goal	Mar-23	Apr-23	May-23	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.11	0.22	0.30	0.14
Preventable Collisions Per 100,000 Miles	≤ 0.75	0.67	0.62	0.86	0.76
Miles Between Road Calls	≥ 25,000	18,074	34,184	42,788	29,929

Contractual Requirement

Santa Clarita Region
Trip Performance

	Goal	Mar-23	Apr-23	May-23	YTD
Vehicle Trips		2,603	2,357	2,546	27,145
Passenger Trips		2,873	2,609	2,795	30,088
No Shows		1.3%	1.4%	1.6%	1.9%
On Time Performance (Next Day Trips)	≥ 91%	95.5%	92.8%	92.5%	93.1%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.00%	0.04%	0.12%	0.11%
Excessively Long Trips	≤ 5%	4.0%	3.5%	3.7%	3.4%
Missed Trips	≤ 0.75%	1.06%	1.26%	0.66%	1.00%
Denials	≤ 0	0	1	0	2
On Time Performance (Access to Work)	≥ 94%	-	-	-	-

Call Performance

	Goal	Mar-23	Apr-23	May-23	YTD
Reservations					
Answered Calls		1,763	1,659	1,793	20,010
Average Initial Hold Time	≤ 120 sec	83	76	72	78
Calls On Hold > 5 Minutes	≤ 5%	5.7%	5.3%	5.7%	5.2%

	Goal	Mar-23	Apr-23	May-23	YTD
Estimated Time of Arrival (ETA)					
Answered Calls		292	225	213	2,540
Average Initial Hold Time		79	40	75	75
Calls On Hold > 5 Minutes	≤ 10%	6.8%	2.7%	6.6%	6.3%

Complaints/Commendations

	Goal	Mar-23	Apr-23	May-23	YTD
Complaints Per 1,000 Trips	≤ 4.0	0.8	1.3	1.2	1.6
Commendations Per 1,000 Trips		0.4	0.0	0.4	0.2

Safety

	Goal	Mar-23	Apr-23	May-23	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.00	0.00	0.00	0.00
Preventable Collisions Per 100,000 Miles	≤ 0.75	0.00	0.00	0.00	0.27
Miles Between Road Calls	≥ 25,000	*	*	*	273,073

Contractual Requirement

*Notes: There were zero (0) road calls for these months.

Northern Region

Trip Performance

	Goal	Mar-23	Apr-23	May-23	YTD
Vehicle Trips		37,958	36,300	39,256	373,319
Passenger Trips		46,258	44,440	48,358	460,052
No Shows		2.3%	2.1%	2.0%	2.5%
On Time Performance (Next Day Trips)	≥ 91%	90.9%	92.4%	91.2%	90.2%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.07%	0.08%	0.16%	0.10%
Excessively Long Trips	≤ 5%	5.8%	4.2%	4.9%	5.3%
Missed Trips	≤ 0.75%	0.61%	0.68%	0.70%	0.62%
Denials	≤ 0	0	0	0	1
On Time Performance (Access to Work)	≥ 94%	96.3%	97.9%	96.4%	94.8%

Call Performance

	Goal	Mar-23	Apr-23	May-23	YTD
Reservations					
Answered Calls		31,019	30,541	26,397	328,596
Average Initial Hold Time	≤ 120 sec	83	103	97	82
Calls On Hold > 5 Minutes	≤ 5%	3.7%	6.0%	3.5%	3.7%
Estimated Time of Arrival (ETA)					
Answered Calls		7,883	5,740	686	72,486
Average Initial Hold Time		65	75	114	60
Calls On Hold > 5 Minutes	≤ 10%	2.9%	4.0%	5.5%	2.4%

Complaints/Commendations

	Goal	Mar-23	Apr-23	May-23	YTD
Complaints Per 1,000 Trips	≤ 4.0	3.8	2.3	3.2	3.7
Commendations Per 1,000 Trips		1.8	1.6	2.1	1.8

Safety

	Goal	Mar-23	Apr-23	May-23	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.00	0.18	0.16	0.07
Preventable Collisions Per 100,000 Miles	≤ 0.75	0.76	0.92	0.53	0.59
Miles Between Road Calls	≥ 25,000	55,835	113,604	51,532	55,529

Contractual Requirement

Southern Region
Trip Performance

	Goal	Mar-23	Apr-23	May-23	YTD
Vehicle Trips		90,542	87,274	94,216	905,193
Passenger Trips		109,612	106,594	114,411	1,102,438
No Shows		2.4%	2.3%	2.2%	2.5%
On Time Performance (Next Day Trips)	≥ 91%	90.9%	90.6%	91.3%	91.8%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.04%	0.10%	0.06%	0.03%
Excessively Long Trips	≤ 5%	5.3%	5.4%	4.9%	5.9%
Missed Trips	≤ 0.75%	0.43%	0.51%	0.40%	0.43%
Denials	≤ 0	0	0	0	1
On Time Performance (Access to Work)	≥ 94%	94.7%	95.9%	94.7%	94.7%

Call Performance

	Goal	Mar-23	Apr-23	May-23	YTD
Reservations					
Answered Calls		67,171	69,744	70,996	712,333
Average Initial Hold Time	≤ 120 sec	77	93	98	89
Calls On Hold > 5 Minutes	≤ 5%	2.1%	3.8%	3.4%	3.1%
Estimated Time of Arrival (ETA)					
Answered Calls		18,354	17,561	17,715	179,090
Average Initial Hold Time		68	74	94	77
Calls On Hold > 5 Minutes	≤ 10%	2.6%	3.0%	5.5%	3.7%

Complaints/Commendations

	Goal	Mar-23	Apr-23	May-23	YTD
Complaints Per 1,000 Trips	≤ 4.0	2.8	2.4	2.5	3.0
Commendations Per 1,000 Trips		1.2	0.9	0.8	0.8

Safety

	Goal	Mar-23	Apr-23	May-23	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.18	0.18	0.26	0.30
Preventable Collisions Per 100,000 Miles	≤ 0.75	1.20	1.15	1.09	1.13
Miles Between Road Calls	≥ 25,000	41,605	38,884	43,376	61,392

Contractual Requirement

West Central Region

Trip Performance

	Goal	Mar-23	Apr-23	May-23	YTD
Vehicle Trips		43,898	41,658	45,918	435,694
Passenger Trips		55,302	52,743	58,036	552,791
No Shows		3.3%	3.3%	3.0%	3.4%
On Time Performance (Next Day Trips)	≥ 91%	88.7%	90.8%	90.4%	89.0%
Excessively Late Trips (45+ min late)	≤ 0.10%	0.04%	0.02%	0.03%	0.06%
Excessively Long Trips	≤ 5%	3.0%	2.5%	2.8%	2.9%
Missed Trips	≤ 0.75%	0.49%	0.35%	0.39%	0.50%
Denials	≤ 0	0	0	0	0
On Time Performance (Access to Work)	≥ 91%	91.0%	96.2%	97.0%	95.6%

Call Performance

	Goal	Mar-23	Apr-23	May-23	YTD
Reservations					
Answered Calls		37,920	39,198	39,996	385,159
Average Initial Hold Time	≤ 120 sec	25	44	29	36
Calls On Hold > 5 Minutes	≤ 5%	0.9%	3.2%	0.9%	1.6%
Estimated Time of Arrival (ETA)					
Answered Calls		8,538	7,927	8,731	85,969
Average Initial Hold Time		13	15	17	23
Calls On Hold > 5 Minutes	≤ 5%	0.1%	0.3%	0.3%	0.6%

Complaints/Commendations

	Goal	Mar-23	Apr-23	May-23	YTD
Complaints Per 1,000 Trips	≤ 4.0	3.1	1.9	3.3	3.2
Commendations Per 1,000 Trips		1.0	1.0	0.8	0.9

Safety

	Goal	Mar-23	Apr-23	May-23	YTD
Preventable Incidents Per 100,000 Miles	≤ 0.25	0.00	0.39	0.00	0.16
Preventable Collisions Per 100,000 Miles	≤ 0.75	1.26	0.63	0.40	0.85
Miles Between Road Calls	≥ 25,000	42,640	43,197	42,961	27,520

Contractual Requirement

Eligibility and Appeals
Eligibility

	Goal	Mar-23	Apr-23	May-23	YTD
Eligible Customers		103,663	103,796	104,910	104,910
Total ADA Evaluations Performed		7,677	5,126	4,071	66,048
Days From Application to Decision (avg)	≤ 21	4	5	9	8

In Person Evaluations

	Goal	Mar-23	Apr-23	May-23	YTD
Unrestricted		2,652	1,980	1,332	15,502
Restricted		1,382	1,048	246	5,309
Temporary		1,672	721	63	20,704
Not Eligible		31	21	26	274
Total		5,737	3,770	1,667	41,789

Paper Evaluations

	Goal	Mar-23	Apr-23	May-23	YTD
Unrestricted		1,615	1,200	1,750	19,955
Restricted		325	155	621	4,234
Temporary		0	1	33	70
Not Eligible		0	0	0	0
Total		1,940	1,356	2,404	24,259

Appeals

	Goal	Mar-23	Apr-23	May-23	YTD
Appeals Performed		32	29	11	161
Days From Appeal to Decision (avg)	≤ 30	9	11	6	9

Customer Service

Phone Statistics

Customer Service

	Goal	Mar-23	Apr-23	May-23	YTD
Customer Service Calls		26,528	22,782	24,543	310,099
Average Initial Hold Time	≤ 180 sec	39	61	76	38
Calls On Hold > 5 Minutes	≤ 10%	3.0%	5.7%	7.7%	2.9%
Call Duration	≤ 300 sec	253	264	264	253
Calls Abandoned	≤ 10%	1.3%	2.1%	2.9%	1.1%

Operations Monitoring Center

	Goal	Mar-23	Apr-23	May-23	YTD
Customer Service Calls		8,093	7,611	8,528	75,359
Average Initial Hold Time	≤ 180 sec	48	58	69	50
Calls On Hold > 5 Minutes	≤ 10%	3.5%	5.0%	6.6%	3.9%
Call Duration	≤ 300 sec	287	294	287	305
Calls Abandoned	≤ 10%	4.3%	5.6%	6.6%	4.1%

Contractual Requirement

June 28, 2023

TO: BOARD OF DIRECTORS

FROM: HECTOR RODRIGUEZ, DEPUTY EXECUTIVE DIRECTOR

RE: FINANCIAL REPORT FOR MAY 2023 - DRAFT

Attached for your review are the draft financial reports for MAY 2023.

DRAFT FY 2022/2023 Budget to Actual Fiscal Year-to-Date Comparison:

♦ Passengers: 3.6% over budget
♦ Contract Revenue Miles: 4.4% under budget
♦ Trips: 6.2% over budget
♦ Total Eligibility Evaluations: 29.9% over budget
♦ Average Trip Distance: under budget by 0.94 miles at 8.50 miles
♦ Total cost per Passenger (before depreciation): 6.0% under budget at $59.68
♦ Administration Function is 10.1% under budget
♦ Eligibility Determination Function is 10.6% under budget
♦ Purchased Transportation Function is 1.8% under budget
♦ Paratransit Operations Function is 1.0% under budget

Attached are the following reports for your review:

• Statistical Comparison: MAY 2022 to MAY 2023
• 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 May 2023

	% of Cost	YTD Actual	YTD Budget	Variance	% Over / (Under) Budget	% Over / (Under) Prior Yr
Purchased Transportation	83.8%	$162,300,568	$165,310,414	($3,009,846)	-1.8%	30%
Paratransit Operations	8.0%	$15,425,197	$15,578,283	($153,086)	-1.0%	8%
Eligibility Determination	3.5%	$6,804,705	$7,609,228	($804,523)	-10.6%	30%
CTSA/Ride Information	0.2%	$319,004	$519,359	($200,355)	-38.6%	-32%
Administration	4.6%	$8,843,168	$9,835,113	($991,945)	-10.1%	10%
Total Exp before Depreciation		$193,692,642	$198,852,397	($5,159,755)	-2.6%	27%

Statistics – For the YTD Period Ended May 2023

	YTD Actual	YTD Budget	Variance	% Over / (Under) Budget	% Over / (Under) Prior Yr
Total Eligibility Evaluations	66,048	50,861	15,187	29.9%	29%
Number of PAX	3,245,700	3,131,780	113,920	3.6%	21%
Number of Contract Revenue Miles	22,273,648	23,300,235	(1,026,587)	-4.4%	13%
Number of Trips	2,621,476	2,467,971	153,505	6.2%	24%
Average Trip Distance	8.50	9.44	(0.94)	-10.0%	-8%
Purchased Transportation Cost					
Cost per Contract Rev Mile	$7.29	$7.09	$0.20	2.8%	16%
Total Cost per Trip before Depreciation	$73.89	$80.57	($6.68)	-8.3%	3%
Total Cost per Pax before Depreciation	$59.68	$63.50	($3.82)	-6.0%	5%

Budget Results for FY 2022/2023
For YTD Period Ending May 2023

	YTD Actual	YTD Budget	Variance	% Over / (Under) Budget	% Over / (Under) Prior Yr
Revenue					
Passenger Fares	$7,643,325	$7,845,570	($202,245)		
Other Revenue	$3,143,635	$646,122	$2,497,513		
Total Revenue	$10,786,960	$8,491,692	$2,295,268	27%	67%
Total Exp before Capital	$193,692,642	$198,852,397	($5,159,755)	-3%	27%
Capital Expenditures					
Vehicles	$1,056,701	$29,232,327	($28,175,626)		
Other Capital Expenditures	$53,945	$0	$53,945		
Total Capital Expenditures	$213,278	$0	$213,278		
	$1,323,924	$29,232,327	($27,908,404)	-95%	108%
Over/(Under) Budget May 2023					
			($33,068,159)		

YTD Cost Per Passenger before Depreciation and Capital Cost