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Budget and Performance Report for the Period October-December 1984

SOUTHERN CALIFORNIA RAPID TRANSIT DISTRICT

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John A. Dyer
General Manager

March 12, 1985

TO: Board of Directors

FROM: John A. Dyer

SUBJECT: Revised Quarterly Budget and Performance Report

BACKGROUND

The revised Quarterly Budget and Performance Report covering the second quarter of Fiscal Year 1985 is hereby submitted.

The District made the transition to an automated payroll system during the second quarter of this fiscal year. Reports generated by the payroll system are the source of data on employee hours, labor costs and the composition of the District's labor force. Due to the conversion from the old to the new system, certain elements of data included in the Quarterly Budget and Performance Report dated February 13, 1985 were not valid. The reports produced by the new payroll system have been corrected and the results incorporated herein. Until the reports generated by the new system are further refined, some of the data usually included in the Quarterly Budget and Performance Report is not available. As a result, this quarterly report does not include Appendix D, the Equal Employment Opportunity Summary, and in Appendix C, data on Employee Turnover is missing.

PERFORMANCE SUMMARY

The District's performance continues to be influenced by the Proposition A Fare Reduction Program. Weekday boardings averaged 1.6 million during the second quarter of Fiscal Year 1985, an increase of 4% over the same quarter last year. The sharpest increase in weekday passenger boardings occurred in October and is attributable to students returning to school and using the District's service. Average weekday boardings exceeded 1.6 million on 20 of the 23 weekdays in October, and on three of those days exceeded 1.7 million. A record was achieved on Monday, October 15, 1984, when 1,722,000 boardings were recorded. Average weekday boardings declined slightly in November and December due to changing travel patterns during the holidays.

The increase in total boardings, from 119 million last quarter to 125 million this quarter, impacted all of the passenger utilization indicators. Boardings Per Revenue Vehicle Service Mile increased 6%, Boardings Per Revenue Vehicle Service Hour increased 5%, Boardings Per Peak Bus increased 5% and Passenger Miles Per Revenue Vehicle Service Mile increased 6%.

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Farebox Revenue Per Boarding declined to $0.24 this quarter because of decreased ridership during the holidays and increased use of passes. Pass sales revenue as a percentage of farebox revenue increased from 28% to 31% due to a substantial increase in the number of passes sold to students. Almost half of the 967,000 passes sold this quarter were bought by students.

The maintenance efficiency indicator Hub Miles Between Road Calls increased substantially this quarter, from 2,203 to 3,410 miles, due to a 35% reduction in road calls. The cooler weather experienced this quarter minimized the number of cooling system failures and transmission breakdowns. In contrast, the first quarter was marked by a prolonged heat wave in August and September which greatly impacted this ratio. The District's performance peaked in November at 3,702 miles per road call, as resolutions of some of the Neoplan problems improved their in-service reliability. However, this indicator dropped to 3,364 miles in December as structural problems discovered on the Neoplans forced the District to place older buses back in service. The year-to-date average for Fiscal Year 1985 is 2,678 hub miles per road call, which is short of the District's goal of 3,000 miles.

Hub Miles Per Peak Bus increased slightly from 4,511 hub miles last quarter to 4,542 hub miles this quarter, bringing the average for Fiscal Year 1985 to 4,526, which is above the District goal of 4,500 miles per peak bus. Hub Miles Per Maintenance Employee increased 6% this quarter, due to the curtailment of overtime which effectively reduced the number of full-time equivalent maintenance employees. This indicator peaked in November at 5,010 miles when maintenance overtime hours were reduced. An increase in overtime, due to the Neoplan crack problem, as well as a decrease in hub miles contributed to the decline in December to 4,721 miles. The year-to-date average of 4,670 miles falls below the District-established goal of 5,000 miles per maintenance employee.

Overall during the second quarter, the District operated under-budget. However, because of the increasing cost trends in liability insurance and workers' compensation, due to increased reserve requirements, the budget will be very carefully monitored during the third and fourth quarters. Indicators reflecting operating costs were impacted by the curtailment of maintenance overtime in October and a retroactive adjustment to the District's financial reporting system to correctly expense bus parts.

For the fiscal year-to-date, the Operating Cost Per Boarding has averaged $0.92, which is better than the District goal of $0.95 per boarding. For the current quarter, operating cost per boarding averaged $0.87. A sharp decline in October to $0.79 is the result of a large increase in boardings coupled with reduced operating costs. Operating Cost Per Revenue Vehicle Service Hour declined 5% this quarter to $61.41. However, due to high costs in the first quarter the current average for Fiscal Year 1985 ($63.10) exceeds the District goal of $62.00.

Operator Pay Hours Per Revenue Vehicle Service Hour increased 1% to 1.65 this quarter. An annual fluctuation occured in November as a result of Veterans

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Day. While the District operates full service levels on that day, it is a holiday for UTU employees and results in increased operator pay hours. The year-to-date average for this indicator (1.64) exceeds the District goal of 1.50. Employee productivity as measured by the number of Revenue Vehicle Service Hours Per Employee increased 2% to 66 hours this quarter. Like operator pay hours per revenue vehicle service hour, this indicator declined in November as a result of Veterans Day.

The number of traffic accidents per 100,000 hub miles declined 4% to 5.0 this quarter. During the quarter, traffic accidents peaked in December because of rainy weather. In addition, Division Instructors were required to devote a large portion of their time to qualifying operators for the December shake-up, which reduced the bus operator ride checks and follow-up rides on chargeable accidents that Instructors were able to perform.

Total crime incidents increased 20% in the second quarter to 262. Expressed in terms of boardings, crime incidents increased from 1.8 to 2.1 per 100,000 boardings. Crime aboard buses typically increases in September and October when schools reopen. The same pattern was observed this fiscal year, with incidents of crime increasing each month through October and declining in November and December.

The District fell below its DBE/WBE goals during the second quarter, awarding 6.2% and 1.8% of total contract dollars respectively. Since this year's goals were based in part on the prospect of Metro Rail construction activity, the timing of the start of Metro Rail construction will determine the District's ability to attain these goals. The majority of second quarter contract dollars were awarded to suppliers of bus parts. This, as well as the low level of construction contracts, contributed to the continuing low level of these two indicators.

Sincerely,

for John A. Dyer

By: John Richeson
Assistant General Manager for Management

By: Lambertus H. Becker
Director of the Office of Management and Budget

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BUDGET AND PERFORMANCE REPORT
FOR THE PERIOD
OCTOBER - DECEMBER 1984

SECOND QUARTER FISCAL YEAR 1985
REISSUED MARCH 7, 1985

Prepared by
Office of Management and Budget
Southern California Rapid Transit District
425 South Main Street
Los Angeles, California 90013
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TABLE OF CONTENTS

		Page
1.0	Significant Issues	1
1.1	Post-Proposition A Fare Reduction Fare Proposals	1
1.2	Articulated Buses	1
1.3	Methanol Buses and Cleaner Emissions	1
1.4	Fareboxes	2
1.5	Potential Federal Funding Reductions for Mass Transit	2
1.6	Proposition A Discretionary Fund	2
2.0	Summary of Indicator Trends	4
2.1	Relationships Among Indicators	4
2.2	Revenue Indicators	6
2.2.1	Farebox Revenue Per Boarding	7
2.3	Cost Indicators	7
2.3.1	Operating Cost Per Boarding	8
2.3.2	Expense Recovery Ratio	9
2.3.3	Operating Cost Per Revenue Vehicle Service Hour	10
2.4	Passenger Utilization Indicators	11
2.4.1	Boardings Per Revenue Vehicle Service Mile	11
2.4.2	Boardings Per Revenue Vehicle Service Hour	12
2.4.3	Boardings Per Peak Bus	13
2.4.4	Passenger Miles Per Revenue Vehicle Service Mile	14
2.5	Labor Utilization Indicators	15
2.5.1	Revenue Vehicle Service Hours Per Employee	15
2.5.2	Operator Pay Hours Per Revenue Vehicle Service Hour	16
2.5.3	Hub Miles Per Maintenance Employee	17
2.6	Vehicle Utilization Indicators	18
2.6.1	Hub Miles Between Road Calls	18
2.6.2	Hub Miles Per Peak Bus	19

Word Searchable Version not a True Copy

Page

2.7 Other Indicators 20

2.7.1 Traffic Accident Frequency (Traffic Accidents Per 100,000 Hub Miles) 20

2.7.2 DBE Dollars and WBE Dollars Per Total Contract Dollars 21

3.0 District-Wide Implementation of Objectives 22

3.1 Bus Operations Objectives 22

3.2 Facilities Construction Objectives 24

3.3 Cost Control Objectives 25

3.4 Policy and Management Objectives 27

4.0 Survey of Other Transit Properties 30

5.0 Priority Capital Projects 33

5.1 Significant Issues 33

5.2 Proposed Federal Funding Cuts 33

5.3 Metro Rail 33

5.4 Fiscal Year 1985 Section 9 Grant Application 33

5.5 Buses 33

5.6 Fiscal Year 1986-90 Transportation Improvement Program 34

5.7 Central Maintenance Facility 34

Appendix A - Purpose of the Quarterly Budget and Performance Report A-1

Appendix B - Glossary of Key Terms B-1

Appendix C - Operating Performance Indicators C-1

1.0 Categorized by Type or Program Area C-1

2.0 Notes on Key Sources of Data C-4

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1.0 SIGNIFICANT ISSUES

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1.0 Significant Issues

During the second quarter of Fiscal Year 1985, there were major developments in several areas which will have significant impacts on the District's budget and performance.

1.1 Post-Proposition A Fare Reduction Fare Proposals

Staff developed a fare and service proposal for presentation to the Board of Directors at the November 28, 1984 meeting. The three fare scenarios include $0.65, $0.75, and $0.85 fare packages. The Board reviewed plans which will be presented to the public at the February 2, 1985 public hearing. Fares and service changes will be finalized thereafter.

1.2 Articulated Buses

As a result of a recent District study on their cost effectiveness, the District will not purchase 130 articulated buses. Instead, the District will request 150 standard buses (120 diesel, 30 methanol) in the Fiscal Year 1985 Section 9 Grant application. The study shows that 2.4 times more hours of maintenance per 100,000 miles are required for our older articualted buses than for RTS-II's, with more maintenance required in air conditioning, cooling system, air system, transmission and preventive maintenance categories. The study further showed that compared to RTS-II's, articulated buses are 73% as fuel efficient, experience 3.5 times the number of road calls per 100,000 miles and have tire costs that are twice as high.

Accident rates and liability costs were evaluated for the six-month period from October, 1983 to March, 1984 and showed articulated buses experienced over 2.5 times the number of accidents per 100,000 miles as RTS-II's. Additional studies will be conducted and the experience of other transit properties analyzed regarding the operation of newer articulated buses before a decision is made on the purchase of articulated buses out of the Fiscal Year 1986 Section 9 Grant.

1.3 Methanol Buses and Cleaner Emissions

The District has taken two major steps in an effort to reduce bus emissions: initiating the purchase of 30 methanol-fueled buses for a two-year test program and testing a District-designed particulate trap for diesel buses.

The District Board of Directors on October 25, 1984 authorized the purchase of 30 methanol-powered buses to determine whether the fuel, made from natural gas or coal, can be used successfully on a large scale as an alternative to diesel fuel. Thus far, there has been only one small-scale test of methanol buses, and that one involves only two buses in use in San Francisco.

The District is also testing, through a private engine laboratory firm in

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San Antonio, Texas, the effectiveness of a diesel engine particulate trap designed by the Maintenance Department. If the particulate trap proves successful in reducing emissions, it will be installed on District buses.

1.4 Fareboxes

The District's new fareboxes are distinctly different from present equipment. With the new fareboxes, coins and tokens must be placed through a small slot or aperture. Patrons will "feed" the coins into the aperture instead of merely "dumping" them into the farebox, as is the current practice.

The new electronic fareboxes will have a coin counting mechanism which requires that coins pass through one at a time to be counted. Coins can be inserted at a rate of ten coins per second, allowing for rapid fare collection.

Dollar bills and tickets will be inserted into a separate transport mechanism located on the top of the farebox and adjacent to the coin aperture. This mechanism will accept only dollar bills and tickets in an unfolded, flat condition.

Testing of the new electronic fare collection system is expected to begin January 14, 1985, at Division 6 in Venice. There will be a 90-day test which concludes in April. If the test is successful, District-wide installations of the new electronic farebox will commence August 8, 1985.

1.5 Potential Federal Funding Reductions for Mass Transit

The Federal Office of Management and Budget (OMB) has targeted Urban Mass Transportation Administration programs for budget reductions. The Administration's specific legislative proposals are not yet known. However, proposed cuts are expected in the Section 9 formula program. It appears the Presidents Budget could adversely affect both capital and operating grants. By 1987, the District could lose all of its operating assistance funds which currently represent about 10% of the District's operating budget.

The specifics of the Administration's funding proposals will not be known until February when the President submits his Fiscal Year 1986 Budget to Congress.

1.6 Proposition A Discretionary Fund

The Los Angeles County Transportation Commission, on November 28, 1984, adopted its policy on the Proposition A Discretionay Fund, which equals

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40% of total Proposition A receipts beginning in Fiscal Year 1986. The Commission's policy is intended to ease the transition from the Fare Reduction Program to the second phase of the Proposition A program, with its diminished bus subsidy funds. Under the policy, all of the Proposition A Discretionary Funds ($116 million in Fiscal Year 1986) would be allocated to general public transit and paratransit operations for the next two fiscal years.

In order to receive Proposition A Discretionary Funds, transit operators will be required to comply with certain conditions regarding operating standards, service levels, subsidy level per passenger and notification of service reductions.

Ninety percent of the Discretionary funds will be allocated through a formula grant program that rewards low base fares and high fare revenues, in addition to mileage, and deletes reference to ridership levels. The other operating subsidies (Transportation Development Act Funds, State Transit Assistance and UMTA Section 9) are allocated to operators based on ridership and mileage.

The net result of the proposed allocation procedure is that the District's share of Discretionary Funds will be 85.6% as compared with the 86.1% received for the past few years.

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2.0 SUMMARY OF INDICATOR TRENDS

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2.0 Summary of Indicator Trends

This section provides an in-depth analysis of sixteen performance indicators. These indicators have been selected on the basis of their importance as established by District management, the transit industry in general, and the governmental transportation agencies to which SCRTD reports.

2.1 Relationships Among Indicators

The performance indicators which are reported in this section, as well as those presented in Appendix C, have been categorized according to the area of performance they measure. To facilitate comparison, review, and analysis, the following categories of indicators have been established: Revenue, Cost, Passenger Utilization, Labor Utilization, and Vehicle Utilization. The DBE/WBE indicator is of special interest. These indicators provide a variety of ways of looking at both the District's performance within an area, and relationships among the areas. The current results for each of the District's key performance indicators are summarized in Figure 1.

Revenue

Revenue and Cost are the two areas dealing with the District's financial performance. Farebox Revenue Per Boarding is dependent upon the District's fare structure and the method of payment selected by the public, such as passes, tickets, transfers, and other discounted fares. Increases in the number of passholders, riders paying reduced fare, or linked or transfer trips result in lower Farebox Revenue per Boarding.

Cost

Operating Cost Per Boarding varies with changes in ridership and is also impacted by labor and fleet costs. A comparison of the Operating Cost per Boarding with the Farebox Revenue per Boarding gives the Expense Recovery Ratio. Either a rise in Farebox Revenue per Boarding or a decrease in Operating Cost per Boarding improves the Expense Recovery Ratio.

Another method of measuring operating cost which is not dependent on ridership is Operating Cost Per Revenue Vehicle Service Hour. These costs are impacted by the same factors as Operating Cost per Boarding. However, in this indicator, the cost of supplying bus service is measured in terms of hours rather than the number of passengers served. Traffic Accident Frequency is primarily a safety measure. However, it should be noted that a higher incidence of traffic accidents also impacts operating costs.

Passenger Utilization

Three of the indicators measuring passenger utilization are: Boardings Per Revenue Vehicle Service Mile, Boardings Per Revenue Vehicle Service Hour, and Boardings Per Peak Bus. In these indicators, the number of riders is compared to three different measures: miles of service, hours of service, and number of buses.

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In addition, Passenger Miles per Revenue Vehicle Service Mile is an estimate of the length of passenger trips, measuring total miles traveled by passengers against total miles of service. Variances in these indicators are limited by equipment capacity and service standards which require that service be added when patronage rises above certain levels.

Labor and Vehicle Utilization

The efficiency of District operations is also measured by labor and vehicle utilization indicators. The efficient use of personnel and equipment determines the level of service that can be provided with District resources. These factors also determine the operating costs described above. Two indicators, Revenue Vehicle Service Hours Per Employee and Operator Pay Hours Per Revenue Vehicle Service Hour, describe how much bus service is provided in comparison to the total number of District employees and total bus operator pay hours.

Indicators of productivity and prior year comparisons are important determinants of the trend in District-wide productivity improvements. The District's efficiency in utilizing maintenance employees and in getting the greatest possible use of each bus is described by three indicators: Hub Miles Per Maintenance Employee, Hub Miles Between Road Calls, and Hub Miles Per Peak Bus.

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KEY PERFORMANCE INDICATORS

STATISTICAL SUMMARY

INDICATORS	OCTOBER 1984	NOVEMBER 1984	DECEMBER 1984	CURRENT QUARTER	LAST QUARTER	% CHANGE	THIS QTR LAST YEAR	% CHANGE	FISCAL YR TO DATE
REVENUE									
FAREBOX REVENUE/BOARDING	$0.26	$0.24	$0.23	$0.24	$0.26	-8%	$0.24	0%	$0.25
COST									
OPERATING COST/BOARDING	$0.79	$0.90	$0.92	$0.87	$0.97	-10%	$0.91	-4%	$0.92
EXPENSE RECOVERY RATIO	33.4%	26.6%	25.1%	27.9%	26.7%	4%	27.1%	3%	27.3%
OPERATING COST/REV VEH SER HOUR	$57.10	$63.48	$63.28	$61.41	$64.78	-5%	$60.46	2%	$63.10
PASSENGER UTILIZATION									
BOARDINGS/REV VEH SER MILE	5.5	5.3	5.2	5.3	5.0	6%	5.0	6%	5.2
BOARDINGS/REV VEH SER HOUR	72.2	70.4	68.9	70.4	66.8	5%	66.8	5%	68.6
BOARDINGS/PEAK BUS	21,173	20,221	19,883	20,328	19,294	5%	19,137	6%	19,811
PASSENGER MILES/REV VER SER MILE	21.3	20.8	20.3	20.8	19.7	6%	19.6	6%	20.2
LABOR UTILIZATION									
REV VEH SER HOURS/EMPLOYEE (FTE)	67	64	67	66	65	2%	66	0%	65
OPERATOR PAY HOURS/REV VEH SER HOUR	1.61	1.72	1.62	1.65	1.63	1%	1.60	3%	1.64
HUB MILES/MAINT EMPLOYEE	4,594	5,010	4,721	4,809	4,538	6%	4,793	0%	4,670
VEHICLE UTILIZATION									
HUB MILES/ROAD CALL	3,204	3,702	3,364	3,410	2,203	55%	2,718	25%	2,678
HUB MILES/PEAK BUS	4,529	4,611	4,377	4,542	4,511	1%	4,446	2%	4,526
OTHER									
TRAFFIC ACCIDENTS/100,000 HUB MILES	4.9	4.8	5.4	5.0	5.2	-4%	5.1	-2%	5.1
DBE DOLLARS/TOTAL CONTRACT DOLLARS	9.0%	4.8%	3.5%	6.2%	5.3%	17%	18.6%	-67%	5.8%
WBE DOLLARS/TOTAL CONTRACT DOLLARS	2.6%	1.5%	1.1%	1.8%	1.0%	80%	4.4%	-59%	1.5%

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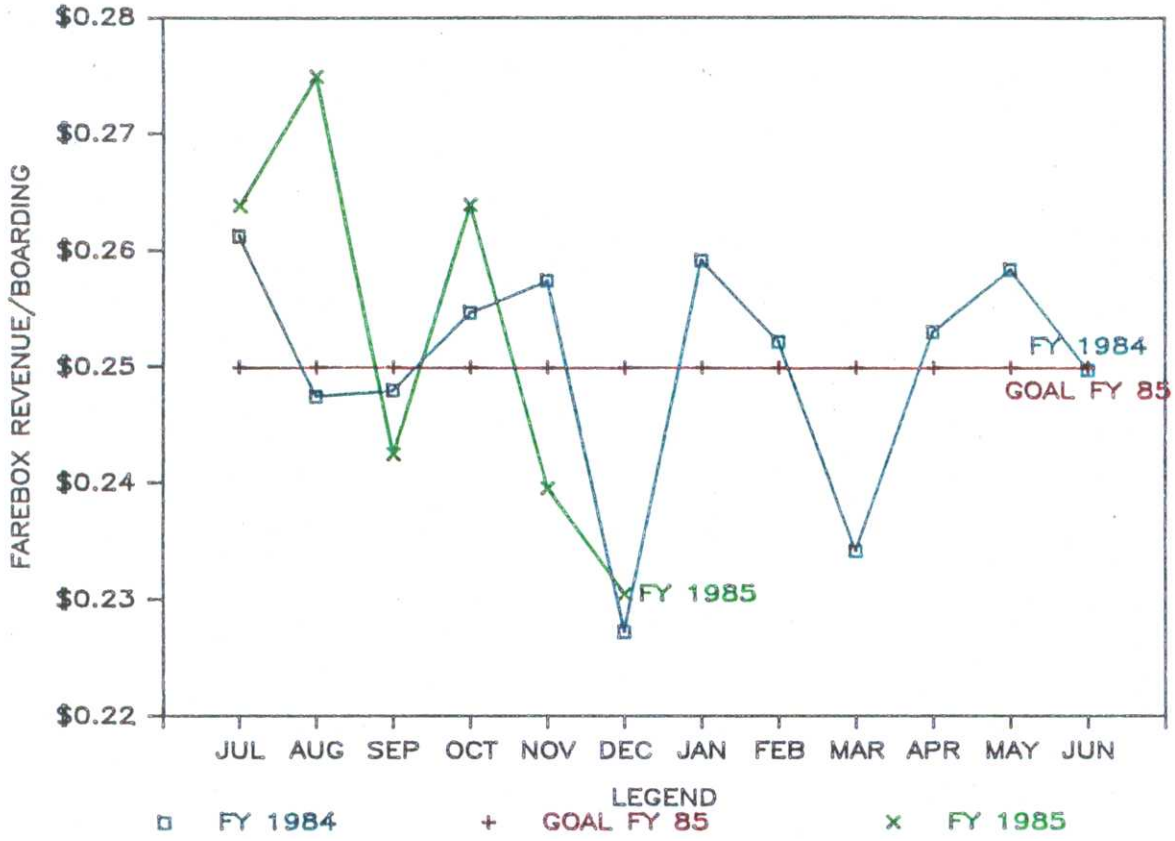
FIGURE 2

FAREBOX REVENUE PER BOARDING

BY 4–4–5 ACCOUNTING PERIOD



Farebox Revenue Per Boarding

Farebox revenue per boarding is a measure of average fare paid. Increases in the number of passholders, riders paying reduced fares, or linked transfer trips result in lower farebox revenue per boarding. Also, the Proposition A Fare Reduction Program limits the District's ability to control this indicator.

The slight increase in farebox revenue per boarding in October can be attributed to students returning to school and using District services. The decline in November and December was caused by decreased ridership during the holidays and increased use of passes. The average during the quarter was $0.24.

The Fiscal Year 1984 nationwide average was $0.36; the all-bus average was $0.44. Like the District, the local average was lower as a consequence of the Proposition A Fare Reduction Program.

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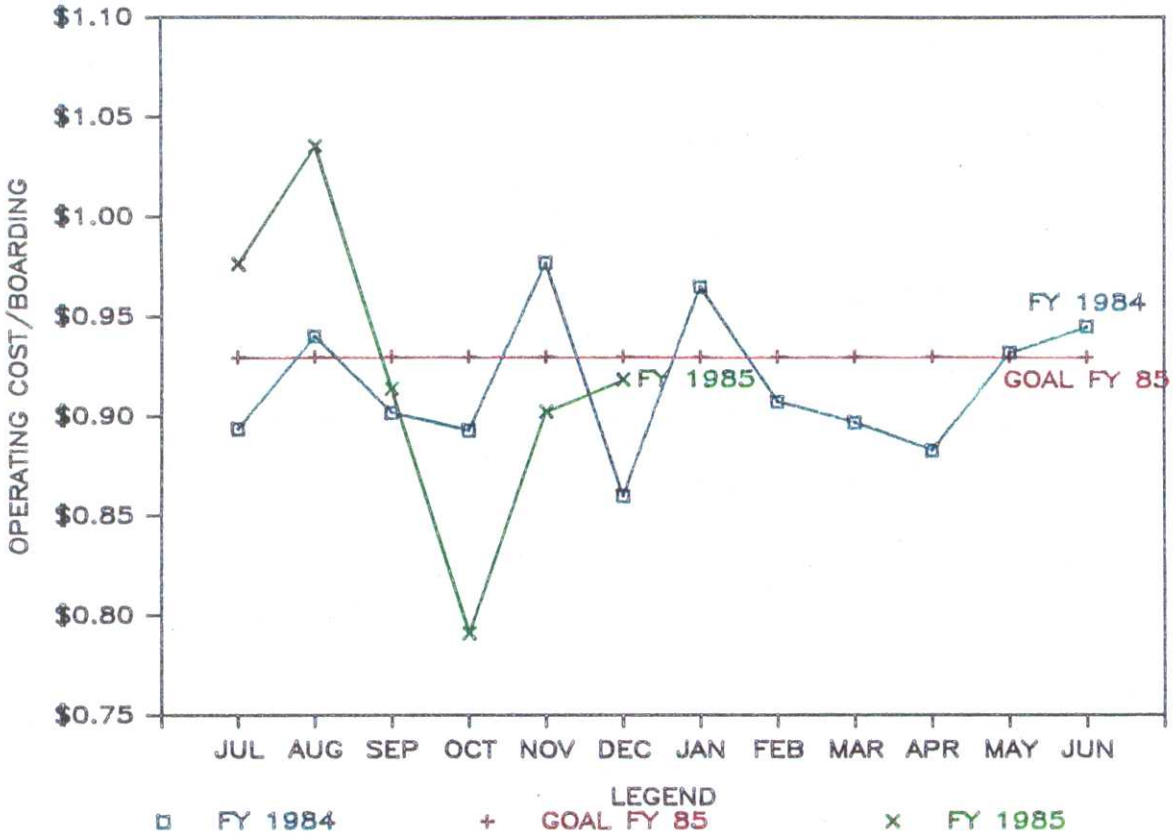
FIGURE 3

OPERATING COST PER BOARDING

BY 4–4–5 ACCOUNTING PERIOD



Operating Cost Per Boarding

Operating cost per boarding is another measure of cost efficiency. With this indicator, productivity is measured in terms of the cost of providing service in relationship to the number of passenger boardings. Either increases in cost or decreases in ridership could cause this indicator to increase.

Operating cost per boarding declined 10% to $0.87 this quarter, substantially better than the goal of $0.95. The sharp decline in October is the result of an increase in boardings and a reduction of operating costs due to the curtailment of maintenance overtime and a retroactive adjustment to the District's financial reporting system to correctly expense bus parts.

The nationwide average operating cost per boarding was $0.83 in Fiscal Year 1984. The local municipalities' average was $0.97; for all-bus properties it was $1.43.

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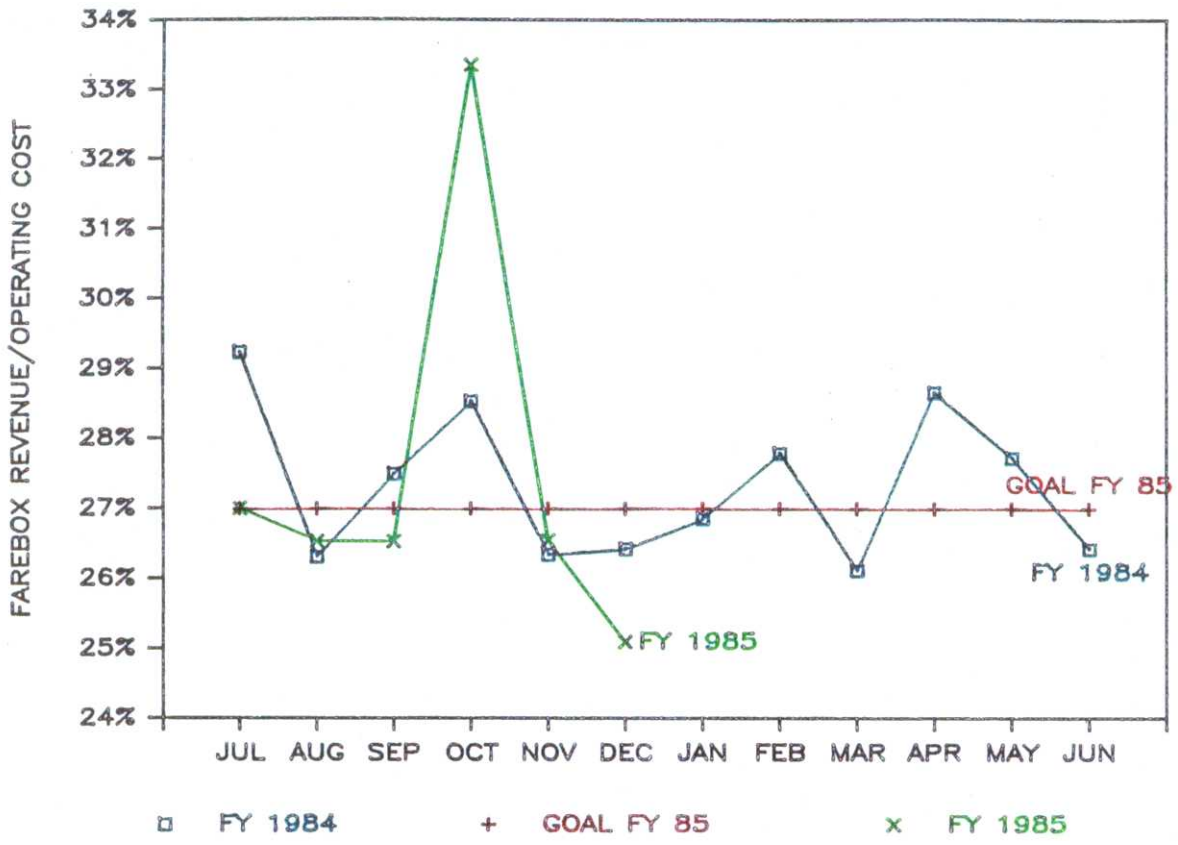
FIGURE 4

EXPENSE RECOVERY RATIO

BY 4–4–5 ACCOUNTING PERIOD



Expense Recovery Ratio

This is an indicator of the proportion of operating costs borne by District passengers. The indicator is the ratio of farebox revenue to total operating cost. Farebox revenue includes all forms of passenger revenue including pass sales. The difference between total operating costs and farebox revenue is the amount of subsidy required to provide public transit services. The expense recovery ratio is directly related to the previous two graphs (Figures 2 and 3).

The expense recovery ratio increased from 26.7% last quarter to 27.9% this quarter. This increase can be attributed to the sharp increase in boardings as students returned to school in October and the corresponding increase in farebox revenue. This was followed by seasonal decreases in boardings and farebox revenues in November and December as patrons changed their travel patterns during the holidays.

Like the District, the local municipalities' experienced lower expense recovery ratios in Fiscal Year 1984 than either the national or the all-bus properties. For the local municipalities, the average was 22%. It was 42% nationwide and 31% for all-bus.

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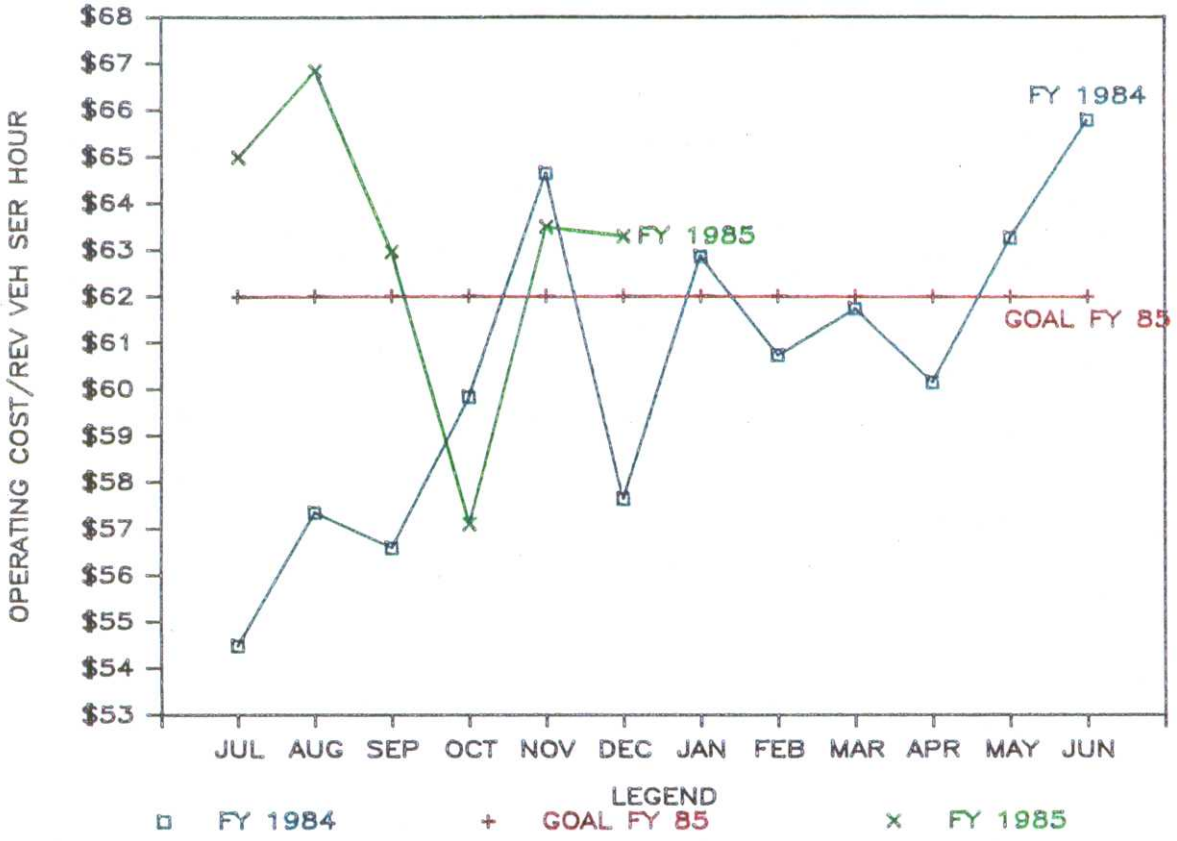
FIGURE 5

OPERATING COST PER REV VEH SER HOUR

BY 4–4–5 ACCOUNTING PERIOD



Operating Cost Per Revenue Vehicle Service Hour

This is an indicator of cost efficiency. The basic concept of productivity measurement involves computing resources expended to produce a unit of output. In the transit industry, the revenue vehicle service hour is one of the primary measures of output or production available. This indicator is one measure of how efficiently the District produces bus service.

Operating cost per revenue vehicle service hour declined 5% from last quarter ($64.78) to this quarter ($61.41). Operating costs were reduced in October by the curtailment of maintenance overtime and a retroactive adjustment to the District's financial reporting system to correctly expense bus parts.

For Fiscal Year 1984, operating cost per revenue vehicle service hour averaged $52.20 nationwide, $50.89 for all-bus properties and $41.64 locally.

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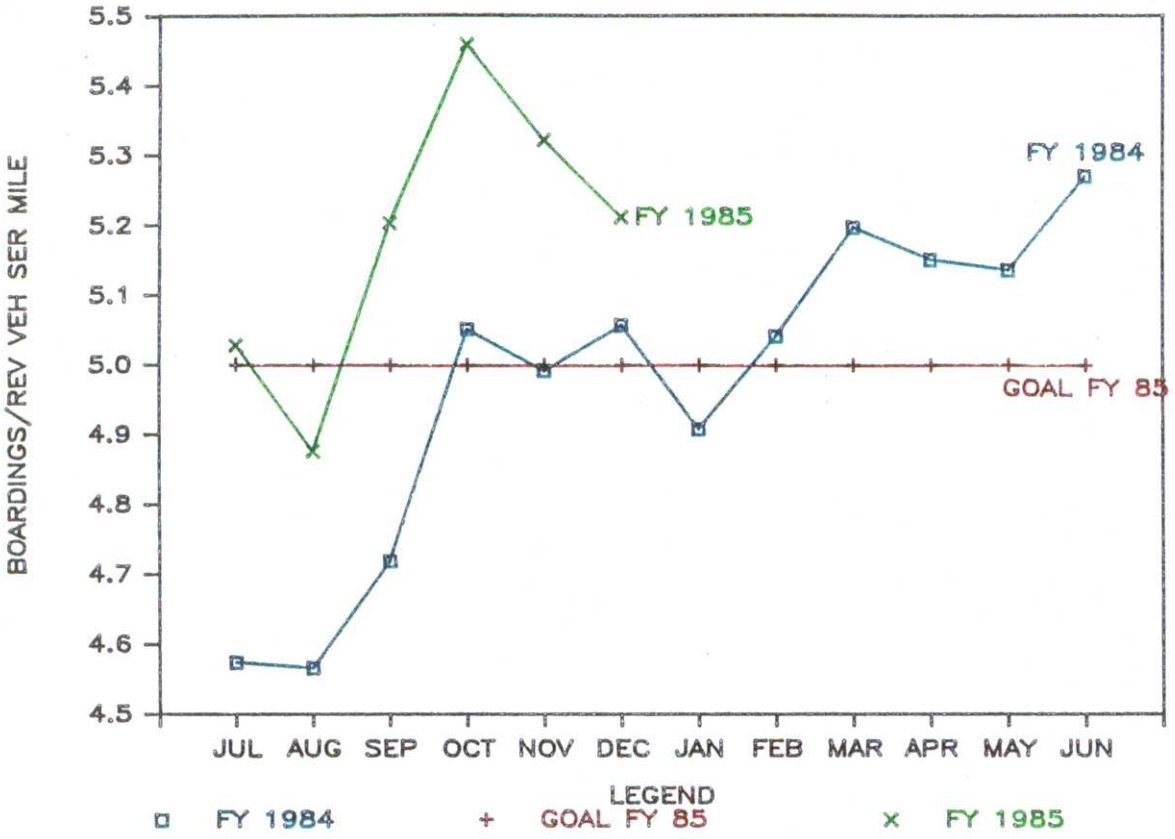
FIGURE 6

BOARDINGS PER REV VEH SER MILE

BY 4–4–5 ACCOUNTING PERIOD



Boardings Per Revenue Vehicle Service Mile

This indicator is a measure of service utilization. It is derived by dividing the number of passenger boardings for the period by the number of miles of bus service for the same period. The goal on this indicator represents a projection of passenger utilization as described in the Short Range Transit Plan.

Boardings per revenue vehicle service mile increased 6% to 5.3 this quarter. With the opening of schools, boardings increased in October pushing this indicator upward. The decline in November and December can be attributed to commuters changing their travel patterns during the holidays.

Fiscal Year 1984 boardings per revenue vehicle service mile averaged 5.7 nationwide, 3.4 for local municipalities and 2.6 for all-bus properties.

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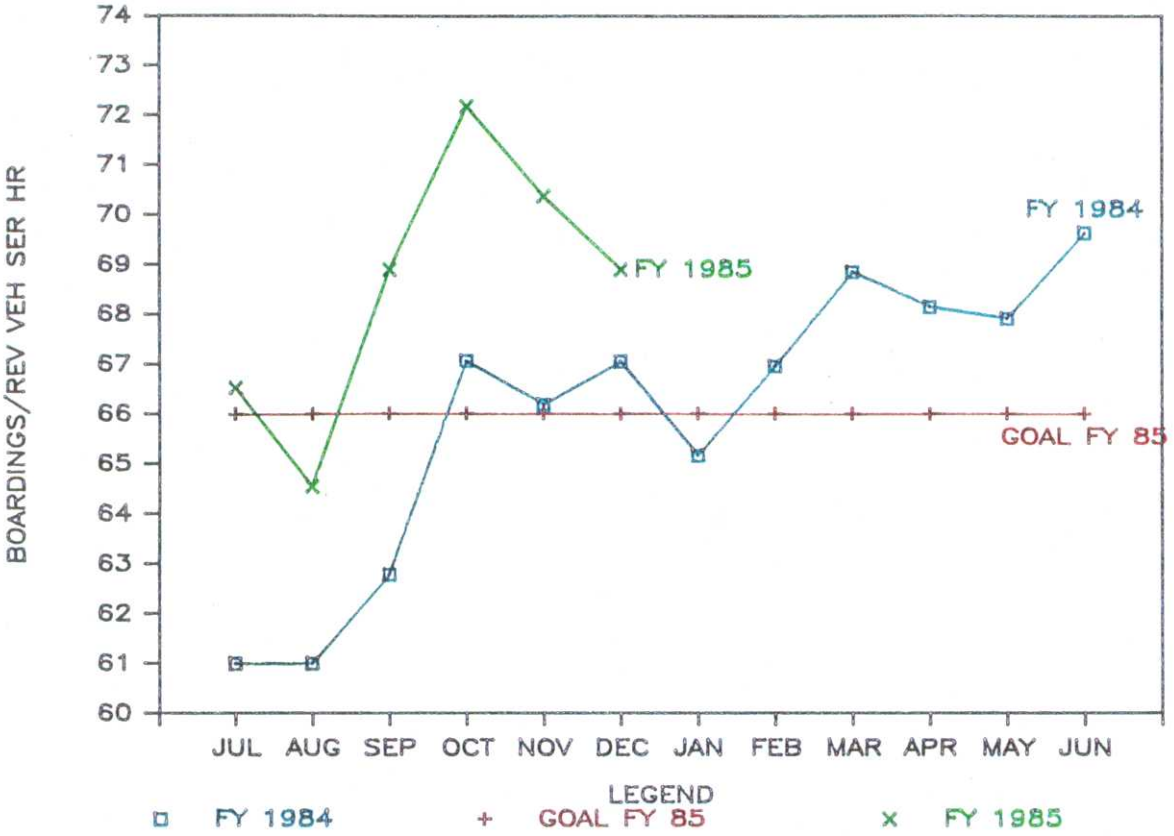
FIGURE 7

BOARDINGS PER REV VEH SER HOUR

BY 4–4–5 ACCOUNTING PERIOD



Boardings Per Revenue Vehicle Service Hour

This indicator is a measure of vehicle utilization. It is derived by dividing the total number of passenger boardings for the period by the total number of hours of bus service for the same period.

Since September 1984 this indicator has consistently exceeded the District goal of 66 boardings per revenue vehicle service hour. This is an indication that overcrowding continues to affect District service. The peak in October can be attributed to students returning to school and using District service. The decline in November and December represents a seasonal fluctuation caused by commuters changing their travel patterns during the holidays.

Boardings per revenue vehicle service hour averaged 62.7 nationally, 43.1 locally and 35.5 for all-bus properties in Fiscal Year 1984.

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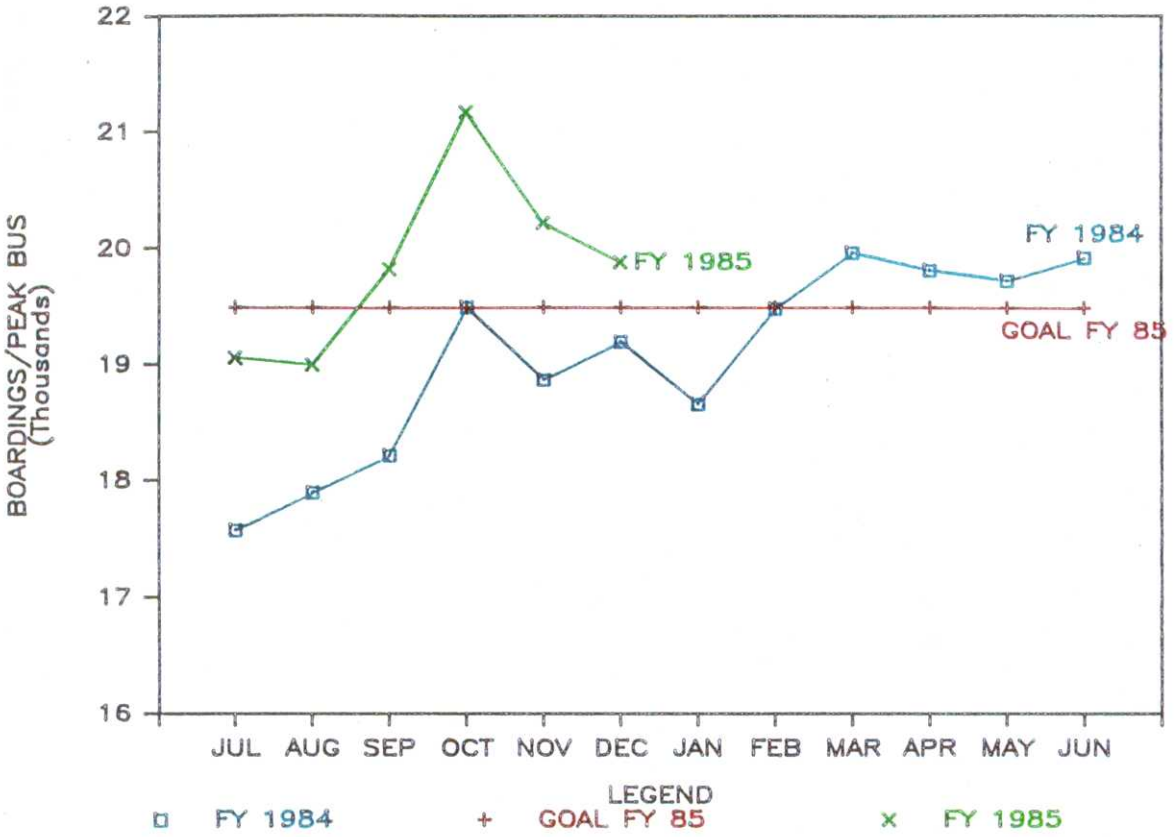
FIGURE 8

BOARDINGS PER PEAK BUS

BY 4–4–5 ACCOUNTING PERIOD



Boardings Per Peak Bus

This indicator is a measure of vehicle utilization. It is derived by dividing the total number of boardings for the period by the number of buses in use during peak service hours.

Passenger boardings per peak bus have steadily increased since August, 1984. The ratio increased 5% to 20,328 this quarter. This may indicate that the number of buses in peak service has not kept pace with growing ridership. Boardings increased in October with the opening of schools, pushing this indicator upward. The decline in November and December represents a seasonal fluctuation caused by changing travel patterns during the holidays.

Boardings per peak bus in Fiscal Year 1984 averaged 16,145 nationally, 12,897 locally and 8,080 for all-bus properties.

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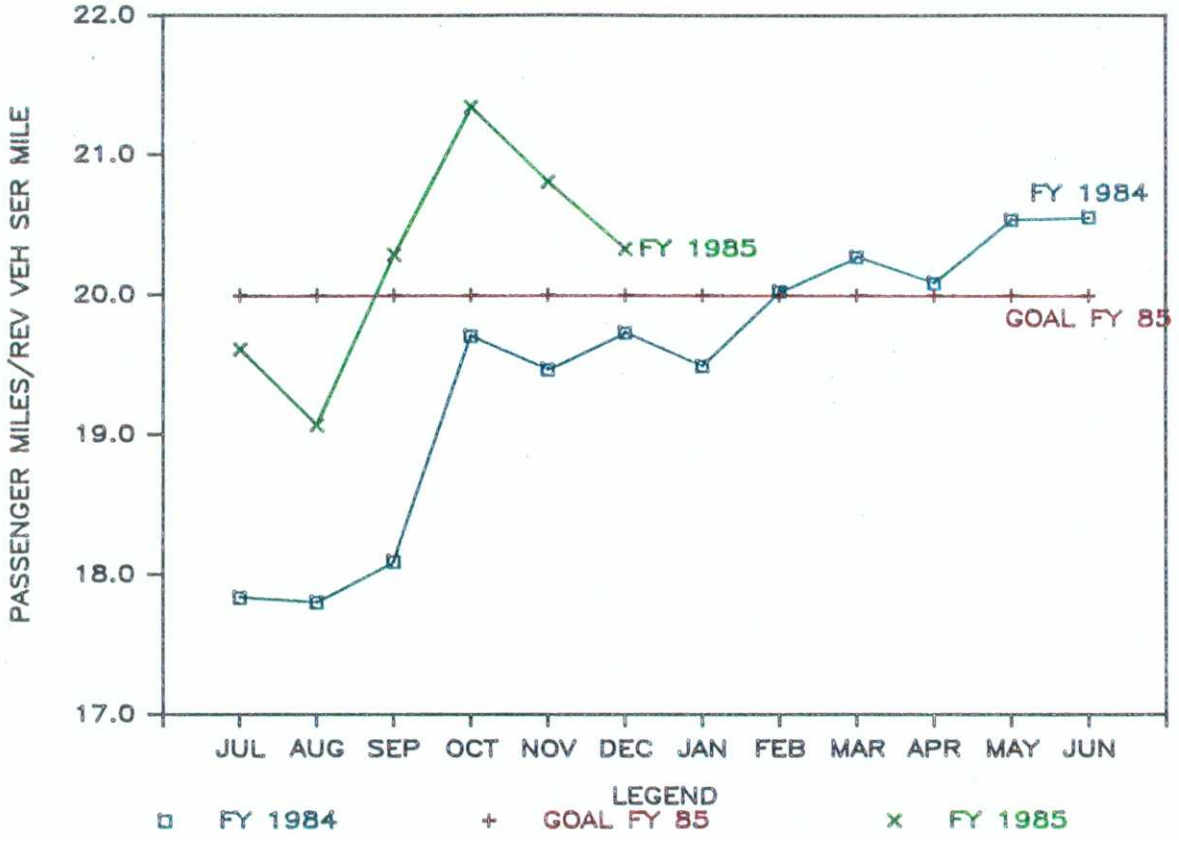
FIGURE 9

PASSENGER MILES PER REV VEH SER MILE

BY 4–4–5 ACCOUNTING PERIOD



Passenger Miles Per Revenue Vehicle Service Mile

This indicator is a measure of service utilization. It is derived by dividing the total number of miles traveled by District passengers during the period by the total number of miles of bus service provided during the same period.

The average increased slightly from 19.7 miles last quarter to 20.8 miles this quarter. Passenger miles peaked between September and October as students returned to school. There was a seasonal fluctuation in November and December as many commuters altered their travel patterns during the holidays.

In Fiscal Year 1984, the national average passenger miles per revenue vehicle service mile was 16.5. It was 12.1 for local properties and 11.6 for all-bus properties.

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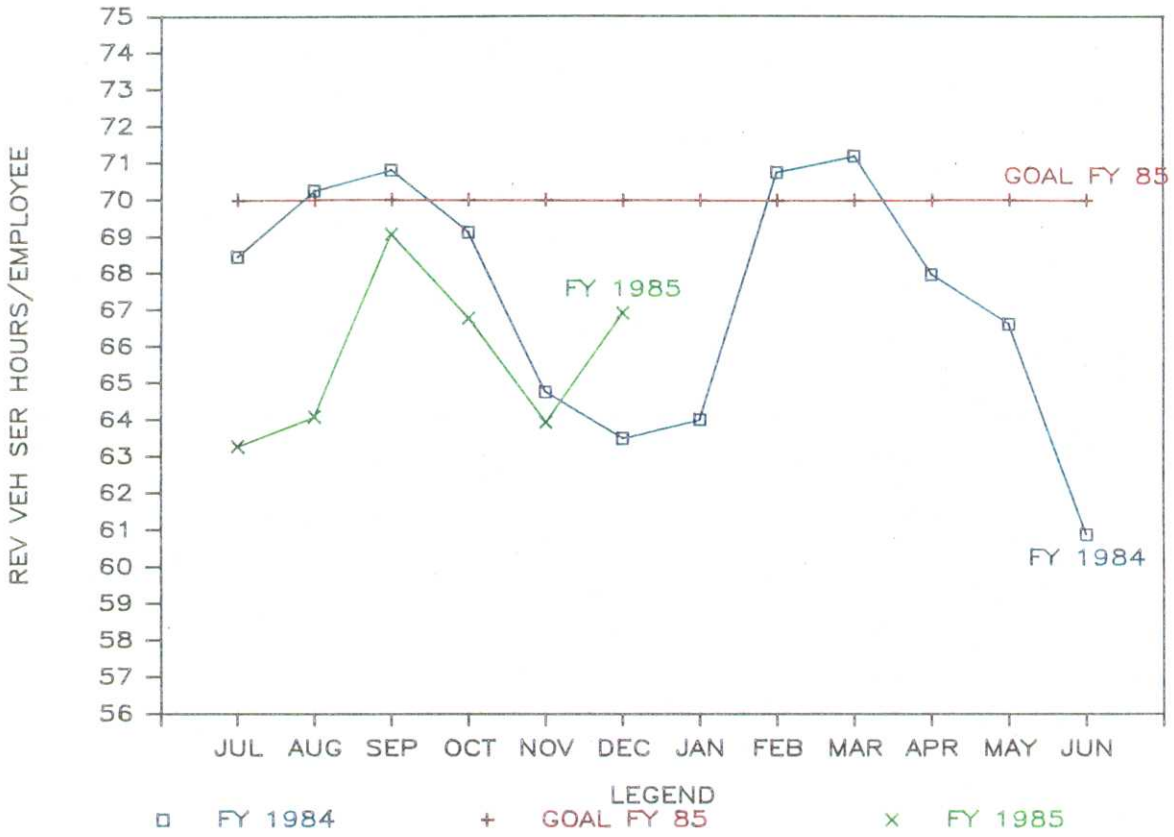
FIGURE 10

REV VEH SER HOURS PER EMPLOYEE

BY 4–4–5 ACCOUNTING PERIOD



Revenue Vehicle Service Hours Per Employee

This indicator is a measure of labor utilization. It is derived by dividing the number of hours of bus service for the period by the average number of District employees for the period, expressed in Full-Time Equivalents. The State of California requires that data be maintained on this indicator.

Revenue vehicle service hours per employee increased 2% to 66 for the quarter. The decline in November is a result of Veterans Day, which is a holiday for UTU employees although the District operates full service levels.

Revenue vehicle service hours per employee for Fiscal Year 1984 averaged 72 both nationally and for all-bus properties. The local ratio of 115 is high because of the comparatively smaller scale of local operations and because certain common functions are shared with the municipalities.

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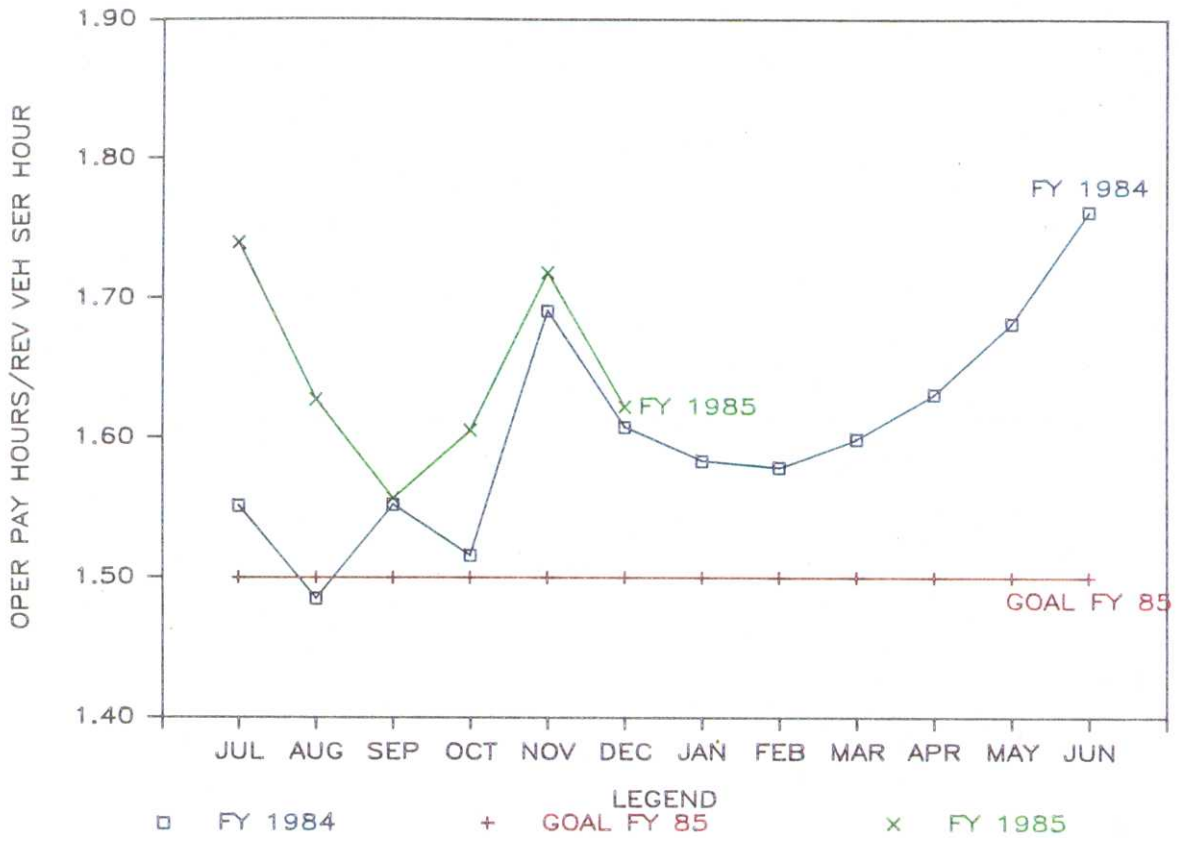
FIGURE 11

OPER PAY HOURS PER REV VEH SER HR

BY 4–4–5 ACCOUNTING PERIOD



Operator Pay Hours Per Revenue Vehicle Service Hour

This is an indicator of operating efficiency. This indicator shows how many hours of operator labor the District must pay for to produce one hour of bus passenger service. The Los Angeles County Transportation Commission requires that data be maintained on this indicator.

Operator pay hours per revenue vehicle service hour increased 1% to 1.65 this quarter. The sharp increase in the month of November is an annual fluctuation caused by Veterans Day. While the District operates full service levels on that day, it is a holiday for UTU employees and results in increased operator pay hours.

For Fiscal Year 1984, average operator pay hours per revenue vehicle service hour were 1.52 for national, 1.33 for all-bus and 1.27 for local properties.

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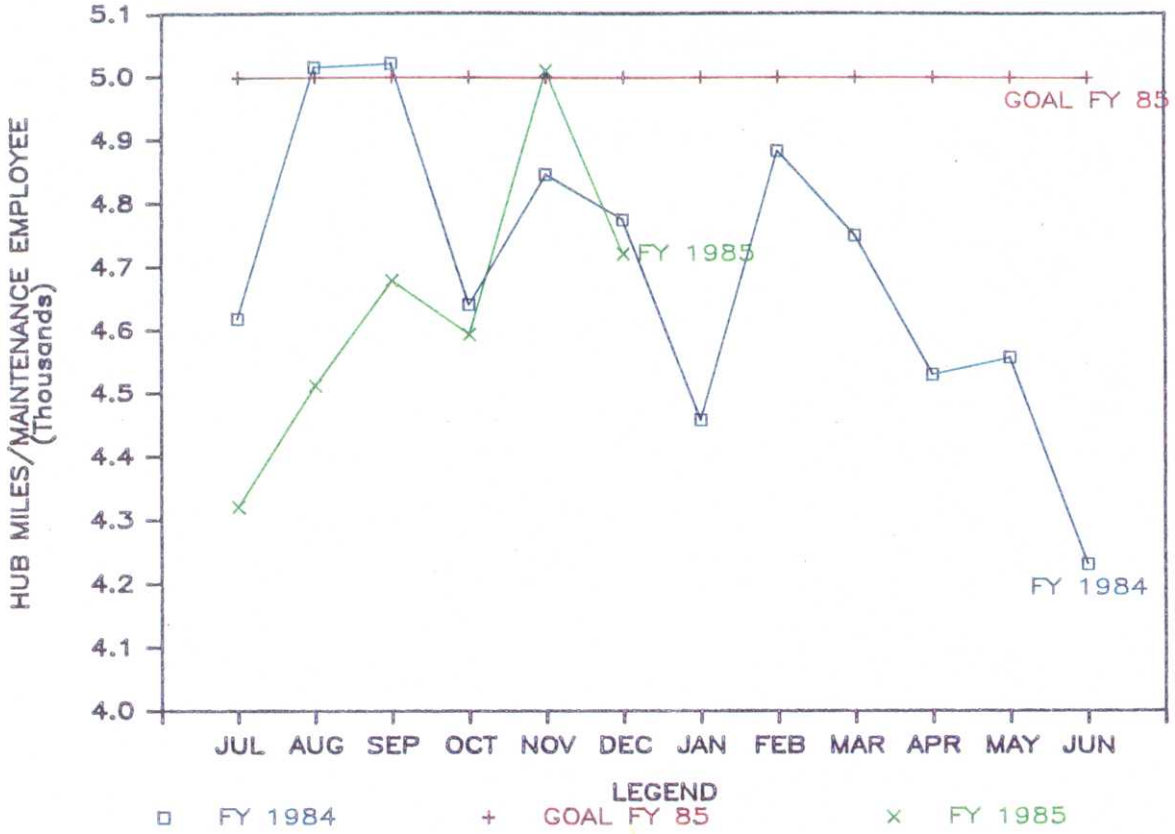
FIGURE 12

HUB MILES PER MAINTENANCE EMPLOYEE

BY CALENDAR MONTH



Hub Miles Per Maintenance Employee

In the transit industry, this indicator is one of the primary measures of output used to evaluate the productivity of maintenance personnel. Hub miles per maintenance employee is also one measure of how efficiently maintenance employees are utilized. The components of this indicator are reported by the District to the Urban Mass Transportation Administration.

Hub miles per maintenance employee increased 6% to 4,809 this quarter. The indicator peaked in November when maintenance overtime hours were reduced by 94%, thus reducing the number of full-time equivalent maintenance employees. An increase in overtime in response to the Neoplan situation as well as a decrease in hub miles caused by holiday schedules contributed to the decline in December.

The maintenance efficiency ratios were 4,283 nationally, 5,059 for all-bus properties and 8,847 locally in Fiscal Year 1984. The higher average for the local properties reflected the small size of their maintenance departments and their practices of contracting out heavy maintenance and sharing services with the municipalities. All but one of the local properties had less than fifteen mechanics.

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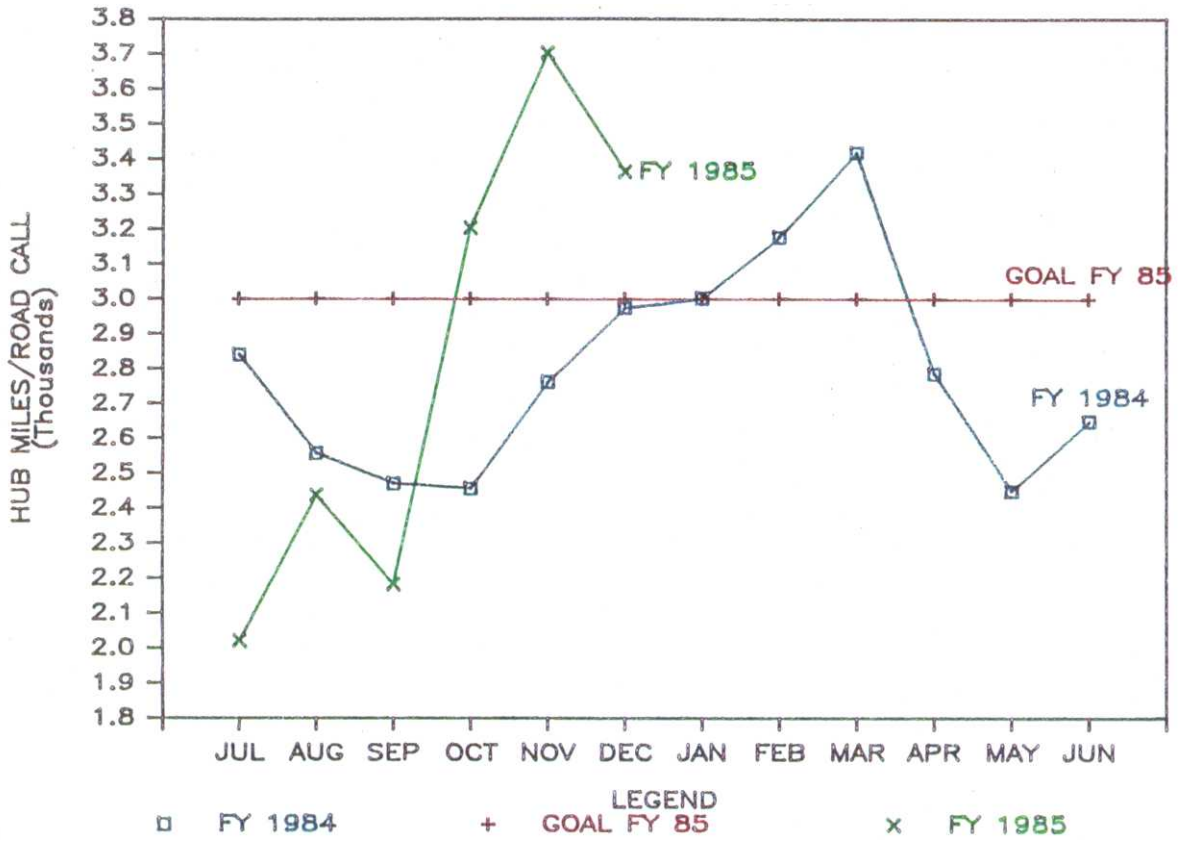
FIGURE 13

HUB MILES BETWEEN ROAD CALLS

BY CALENDAR MONTH



Hub Miles Between Road Calls

This is an indicator of both service reliability and maintenance efficiency. Road calls entail significant costs in both labor and materials. They also impede service and inconvenience passengers. The District strives for a combination of equipment reliability and preventive maintenance to minimize road calls. A performance standard of 3,000 hub miles between maintenance road calls is one of the District-wide objectives for Fiscal Year 1985.

The average hub miles between road calls increased 55% to 3,410 this quarter. This quarter's improvement can be attributed to VMS system refinements and cooler weather. The cooler weather minimizes cooling system failures and transmission breakdowns. The District's performance peaked in November as older buses were replaced by new Neoplan buses. In December, structural problems were discovered on the Neoplans which forced the District to place older buses back in service.

In Fiscal Year 1984, local properties reported 1,638 hub miles between road calls. The national average was 1,736 and the average for all-bus properties was 2,111.

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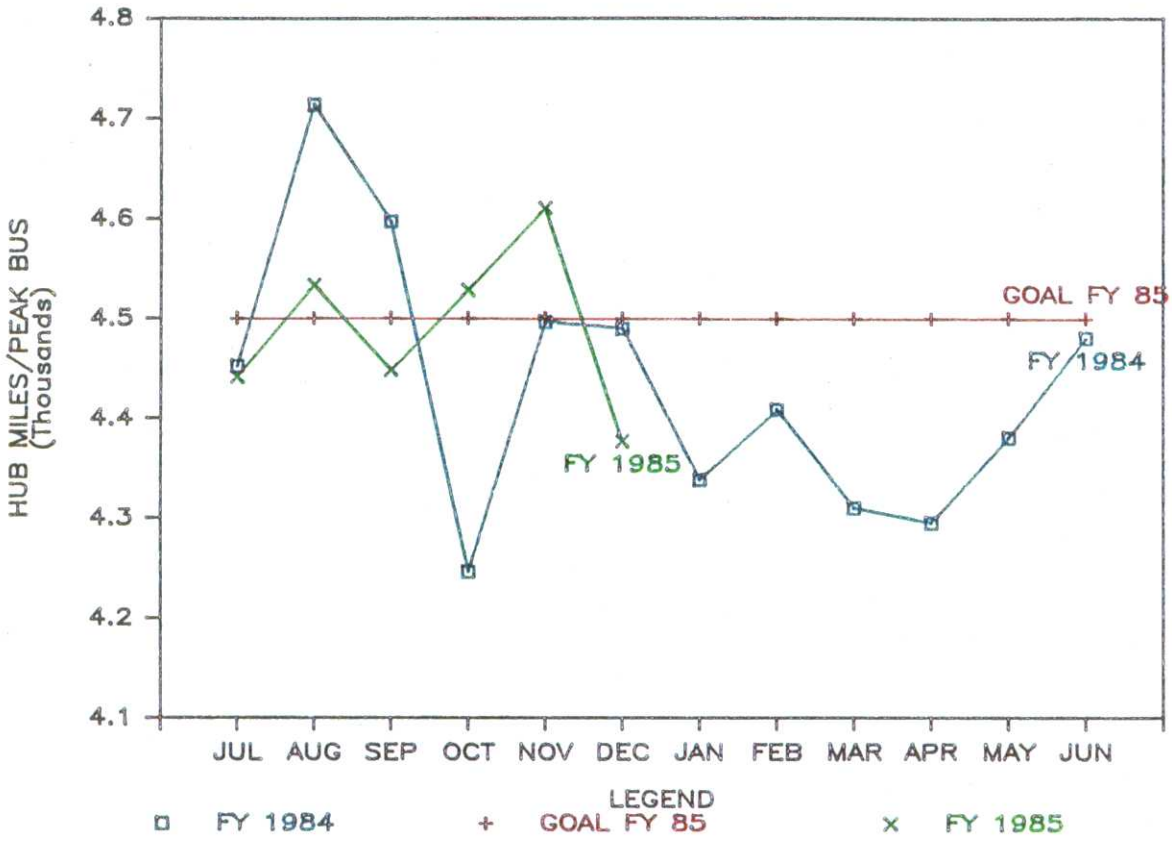
FIGURE 14

HUB MILES PER PEAK BUS

BY CALENDAR MONTH



Hub Miles Per Peak Bus

This is an indicator of vehicle efficiency and is computed by dividing hub miles by the number of buses in service during peak periods. The number of hub miles traveled per peak bus is one of several indicators transit properties use to determine how heavily a bus is utilized. The components of this indicator are reported by the District to the Urban Mass Tranportation Administration.

Hub miles per peak bus increased slightly from 4,511 last quarter to 4,542. The increase is due to an overall increase in hub miles while peak buses remained constant. A decrease in hub miles caused by holiday schedules contributed to the decline in December.

Hub miles per peak bus in Fiscal Year 1984 averaged 3,212 nationally, 3,406 for all-bus properties and 3,999 locally.

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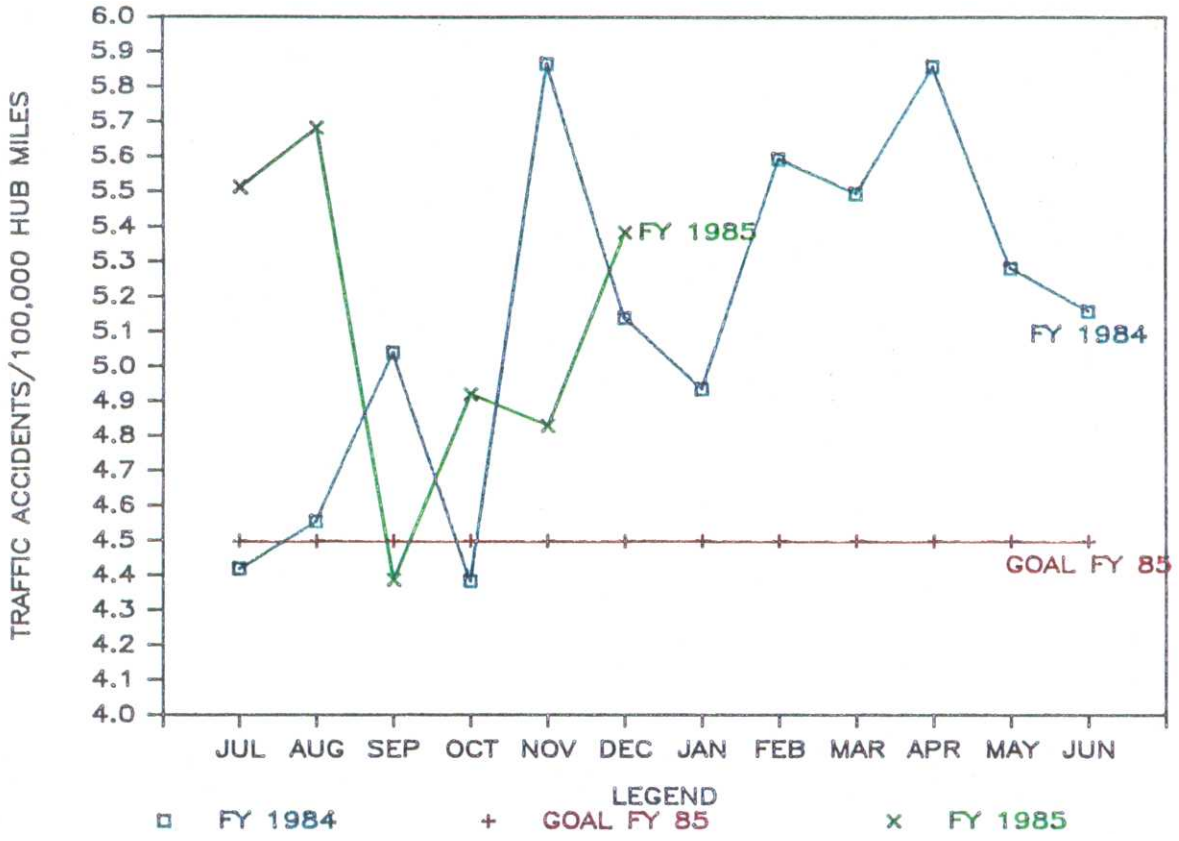
FIGURE 15

TRAFFIC ACCIDENT FREQUENCY

BY CALENDAR MONTH



Traffic Accident Frequency

This is a safety indicator used throughout the transit industry. Traffic accidents per 100,000 hub miles provides a more appropriate measure of performance than the actual number of traffic accidents because it takes into account the higher accident potential of providing more service. Traffic accidents increase District costs in terms of absenteeism due to injury, increased insurance claims, and increased bus repair costs.

The number of traffic accidents per 100,000 hub miles declined 4% to 5.0 this quarter. Traffic accidents peaked in December during the rainy weather. In addition, Division Instructors were required to devote a large portion of their time to qualifying operators for the December shake-up. This prevented them from performing an adequate number of bus operator ride checks and follow-up rides on chargeable accidents.

Fiscal Year 1984 traffic accident frequencies averaged 6.4 nationally, 6.0 locally and 5.2 for all-bus properties.

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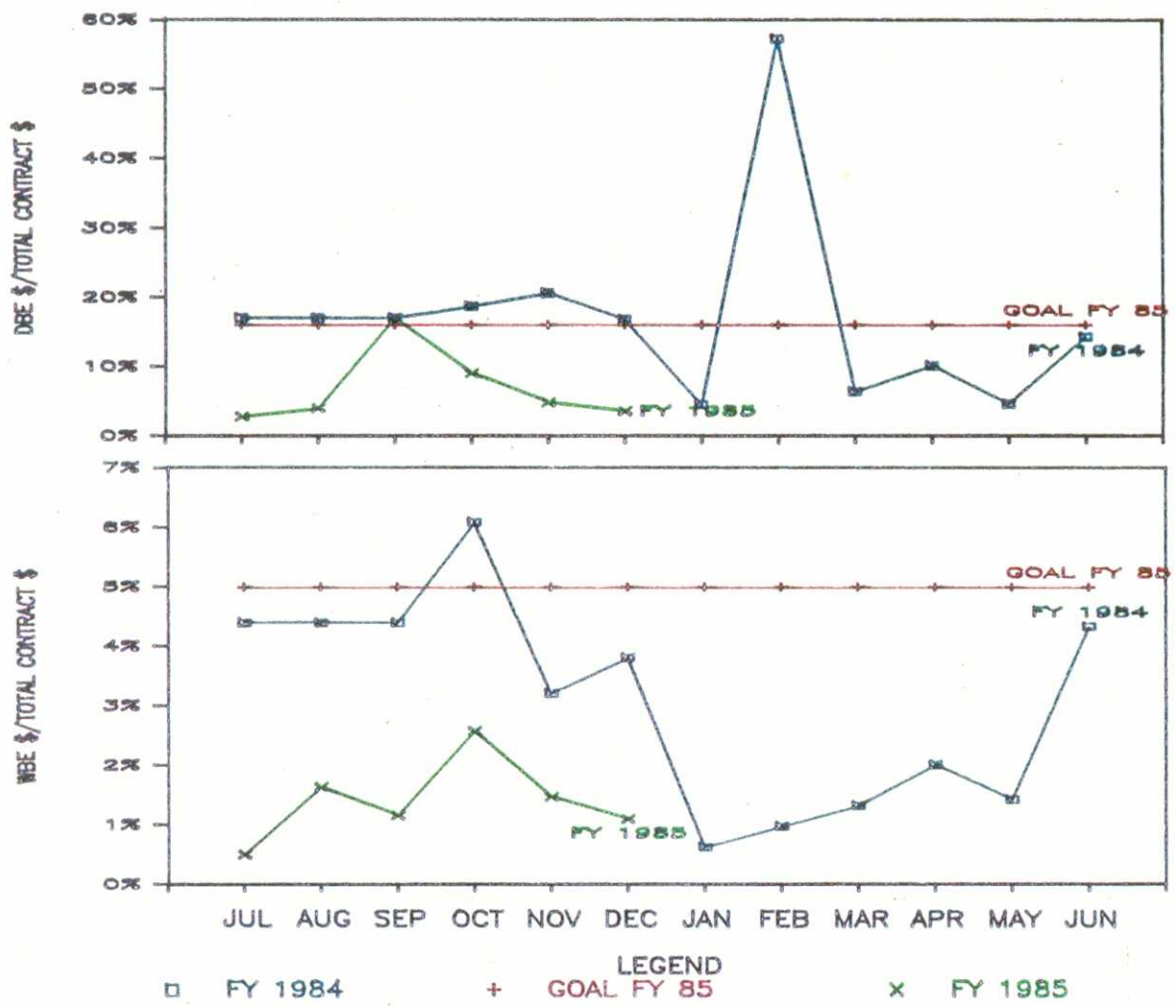
FIGURE 16

DBE $ & WBE $ PER TOTAL CONTRACT $

BY 4–4–5 ACCOUNTING PERIOD



DBE Dollars and WBE Dollars Per Total Contract Dollars

Federal requirements stipulate that federally-funded contracts must include DBE and WBE participation. This indicator shows the share of total contract dollars awarded by the District to both DBE's and WBE's. This year's DBE/WBE goals were based in part on the prospect of Metro Rail construction activity. If this effort does not materialize early in Fiscal Year 1985, DBE/WBE goals will not be met.

The District fell below its DBE/WBE goals for the current quarter, awarding 6.2% and 1.8% of all contract dollars to DBE's and WBE's respectively. Heavy bus parts purchases and a sharp drop in District construction activity which provided minimal opportunities for DBE/WBE subcontracting were the major reasons for these decreases.

DBE dollars as a percentage of total contract dollars averaged 13.5% nationally, 9.8% locally and 12.3% for all-bus properties during Fiscal Year 1984.

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3.0 DISTRICT-WIDE IMPLEMENTATION OF OBJECTIVES

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3.0 District-Wide Implementation of Objectives

The District-wide objectives listed below correspond exactly to the objectives listed in Part 3.0 of the Fiscal Year 1985 Budget document. The BOLDFACE TYPE after each objective states what action has taken place relative to that objective in the quarter being reported.

3.1 Bus Operations Objectives

3.1.1 To meet increasing service demands resulting from the Proposition A Fare Reduction Program by:

3.1.1.1 Reallocating fleet deployment from low occupancy lines to increasing demand corridors.

METHODOLOGY AND CRITERIA HAVE BEEN ESTABLISHED FOR IDENTIFYING LOW OCCUPANCY LINES. SERVICE REALLOCATIONS ARE CONDUCTED ON AN ON-GOING BASIS BY THE SCHEDULING DEPARTMENT.

3.1.1.2 Increasing annualized revenue vehicle service hours by 2.3% to 7,326,000 annual hours authorized under the LACTC Memorandum of Understanding.

THE DISTRICT PREVIOUSLY RECEIVED AUTHORIZATION TO INCREASE ANNUALIZED REVENUE VEHICLE SERVICE HOURS TO 7,326,000 HOURS. ON AN ANNUALIZED BASIS, THE DISTRICT IS AT 7,172,000 HOURS, WHICH IS WITHIN 2% OF THE AUTHORIZED LEVEL.

3.1.2 To minimize operating cost while maintaining service reliability by:

3.1.2.1 Maintaining a weighted average of 1.30 Operator/assignment ratio, within a range of 1.27 to 1.33, while providing a minimum 99% on-time pull-out rate;

THE OPERATOR/ASSIGNMENT RATIO HAS AVERAGED 1.33 DURING EACH OF THE PAST TWO QUARTERS. DISTRICT PLANS CALL FOR ALLOWING ATTRITION TO GRADUALLY BRING THIS RATIO WITHIN THE STATED OBJECTIVE AND IT IS MOVING IN THAT DIRECTION.

3.1.2.2 Keeping the part-time Operator ratio at or near the maximum eligible rate of 15%.

THE PART-TIME OPERATOR RATIO AVERAGED 14% DURING THE SECOND QUARTER.

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3.1.3 To maximize revenue fleet availability by:

3.1.3.1 Increasing the ratio of hub miles between maintenance road calls to 3,000 miles;

THE GOAL FOR THIS OBJECTIVE WAS SURPASSED THIS QUARTER AS THE DISTRICT AVERAGED 3,410 HUB MILES BETWEEN ROAD CALLS.

3.1.3.2 Implementing a program to stabilize fleet size and mix.

IN APRIL, 1984, THE DISTRICT PROPOSED TO UMTA THAT 589 RESERVE FLEET BUSES BE DISPOSED OF AFTER THE OLYMPIC GAMES. APPROXIMATELY 76 BUSES WERE SOLD DURING THE SECOND QUARTER, BRINGING THE TOTAL SOLD SINCE THE OLYMPICS TO 227. ONE EFFECT OF THESE SALES WILL BE TO STABILIZE THE DISTRICT'S FLEET SIZE AND MIX.

3.1.4 To implement the Olympics Budget and Service Plan while maintaining the integrity of the regular bus service system.

THE OLYMPICS BUDGET AND SERVICE PLAN WAS IMPLEMENTED WITHOUT MISSING ANY PULL-OUTS ON EITHER OLYMPIC OR REGULAR SERVICE.

3.1.5 To evaluate the Olympics service experience by November, 1984.

THE OLYMPICS TASK FORCE AND THE PLANNING DEPARTMENT COMPLETED THEIR EVALUATION REPORT IN OCTOBER, 1984.

3.1.6 To improve schedule adherence for the riding public by:

3.1.6.1 Identifying baseline standards for ideal schedule performance and the relative impacts of the variation;

DATA WAS COLLECTED AND ANALYZED AND A REPORT WAS PREPARED WHICH PROPOSES A STANDARD FOR ON-TIME PERFORMANCE. THE REPORT RECOMMENDS THAT BUSES BE CONSIDERED ON-TIME IF THEY ARE NO MORE THAN 30 SECONDS EARLY AND NO MORE THAN 2.5 MINUTES LATE.

3.1.6.2 Determining current schedule adherence as a basis for measuring improvement;

THE MANUAL CHECK ON SCHEDULE ADHERENCE WAS CARRIED OUT. DATA WAS ANALYZED AND A REPORT WRITTEN, WHICH CONCLUDED THAT APPROXIMATELY 41% OF DISTRICT BUSES RUN ON TIME, GIVEN AN ON-TIME PERFORMANCE STANDARD OF NO MORE THAN 30 SECONDS EARLY AND NO MORE THAN 2.5 MINUTES LATE. THIS DATA WILL BE USED TO DEVELOP A PROGRAM FOR IMPROVING ON-TIME PERFORMANCE.

3.1.6.3 Devising and implementing a program for improving on-time performance.

PROGRESS TOWARD THIS OBJECTIVE IS CONTINGENT UPON THE TWO PREVIOUS OBJECTIVES.

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3.1.7 To maintain at least 95% Accessible Service reliability.

OF ALL THE ATTEMPTS TO USE THE DISTRICT'S ACCESSIBLE SERVICE DURING THE SECOND QUARTER, 86% WERE SUCCESSFUL. BROKEN WHEELCHAIR LIFTS AND OVERCROWED BUSES ARE THE TWO MAJOR REASONS THAT PEOPLE WERE UNABLE TO BOARD ACCESSIBLE SERVICE. DURING THE QUARTER, THE PLANNING DEPARTMENT BEGAN PREPARING A SERIES OF REPORTS DESIGNED TO BRING ACCESSIBLE SERVICE PROBLEMS TO THE ATTENTION OF THE OPERATING DEPARTMENTS. ONE REPORT IDENTIFIES SPECIFIC PROBLEMS BY BUS, A SECOND REPORT IDENTIFIES OPERATORS WHO REPORT MALFUNCTIONING LIFTS, AND A THIRD REPORT CORRELATES PASSENGER COMMENTS WITH OPERATOR COMPLAINTS.

3.2 Facilities Construction Objectives

3.2.1 To complete final design and begin construction of the Metro Rail Project.

THE DISTRICT CONTINUED ITS EFFORTS TO SECURE A LETTER OF INTENT FOR THE MINIMUM OPERABLE SEGMENT-1 (MOS-1) AND A LETTER OF NO PREJUDICE FOR THE BALANCE OF THE PROJECT. THE DISTRICT RECEIVED UMTA CONCURRENCE ON THE ENVIRONMENTAL ASSESSMENT FOR MOS-1. MONITORING AND COORDINATION OF DESIGN ON MOS-1 CONTRACTS CONTINUED. ALL SECTION DESIGN CONTRACTS BEYOND MOS-1 HAVE BEEN RENEGOTIATED TO ACHIEVE THE 85% LEVEL OF DESIGN COMPLETION.

3.2.2 To complete the adoption of a rail network phasing plan in conjunction with LACTC.

THE LACTC ADOPTED A PROPOSAL FOR FORMALIZING INTER-AGENCY COORDINATION OF RAIL TRANSIT PROJECTS AND REQUESTED THE DISTRICT'S BOARD OF DIRECTORS TO ADOPT THE PROPOSAL. THE BOARD OF DIRECTORS INSTEAD ADOPTED A RESOLUTION TO DELAY ESTABLISHING FORMAL INTERAGENCY COORDINATION OF RAIL TRANSIT PROJECTS UNTIL THE LACTC HAS COMPLETED DESIGN DEFINITION AND EIR ADOPTION FOR THE LONG BEACH LOS ANGELES LIGHT RAIL SYSTEM.

3.2.3 To begin construction of the Central Maintenance Facility.

DESIGN AND DEMOLITION ARE COMPLETE. EARTHWORK IS 99% COMPLETE. THE FOUNDATION AND STRUCTURAL STEEL CONTRACT IS 99% COMPLETE. TWO EQUIPMENT CONTRACTS ARE IN PROGRESS. THE AUTOMATIC STORAGE AND RETRIEVAL SYSTEM CONTRACT HAS BEEN AWARDED AND CONSTRUCTION BEGUN. THE CONTRACT TO PROCURE SWITCHGEAR AND SUBSTATIONS HAS BEEN ADVERTISED.

3.2.4 To identify and evaluate alternative sites for Division 6 and determine the best long tern alternative for service, facilities and residents in the area.

A REPORT WAS PREPARED IDENTIFYING THIRTEEN POTENTIAL SITES AND RECOMMENDING ONE PRIMARY LOCATION AND THREE ALTERNATIVE SITES.

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3.3 Cost Control Objectives

3.3.1 To increase budgetary control and review of expenditures by:

3.3.1.1 Refining the financial control capability of TRANSMIS I;

THE DATA PROCESSING DEPARTMENT WORKED WITH THE TRANSMIS I CONSULTANTS TO BRING THE FIXED ASSETS PACKAGE ON-LINE. WHEN THIS IS ACCOMPLISHED IN JANUARY, 1985, ALL OF THE TRANSMIS I COMPONENTS WILL BE IN PRODUCTION.

3.3.1.2 Improving the timeliness and accuracy of variance reporting;

DEPARTMENTS PREPARED BUDGET VARIANCE ANALYSES AND THE OFFICE OF MANAGEMENT AND BUDGET ISSUED A BUDGET VARIANCE REPORT AT THE CLOSE OF THE FIRST QUARTER. DEPARTMENTAL VARIANCES WERE IDENTIFIED AND REMEDIAL ACTION WAS TAKEN TO CORRECT POTENTIAL BUDGET DEFICITS. THIS ANALYSIS WILL BE CONTINUED ON A QUARTERLY BASIS.

3.3.1.3 Fully integrating the capital and operating budget and accounting systems.

THE ACCOUNTING DEPARTMENT HAS PREPARED A DRAFT CONSOLIDATED BUDGET REPORT WHICH INCLUDES BOTH OPERATING AND CAPITAL BUDGET AND EXPENDITURE INFORMATION. THE DRAFT HAS BEEN REVIEWED BY VARIOUS USER DEPARTMENTS AND IS BEING REVISED TO REFLECT THEIR COMMENTS.

3.3.2 To maintain a maximum operating cost per boarding of $0.95.

OPERATING COST PER BOARDING AVERAGED $0.87 DURING THE SECOND QUARTER OF FISCAL YEAR 1985 AND ON A MONTHLY BASIS NEVER EXCEEDED $0.92.

3.3.3 To reduce personal injury and liability losses by:

3.3.3.1 Reducing traffic accident frequency to 4.5 per 100,000 miles.

THE TRAFFIC ACCIDENT FREQUENCY RATE DECREASED TO 5.0 PER 100,000 MILES FROM 5.2 THE PREVIOUS QUARTER. THE REDUCTION IS ATTRIBUTED TO THE INSTRUCTION DEPARTMENT'S ACCIDENT PREVENTION TRAINING PROGRAMS. THE SAFETY DEPARTMENT WILL BE IMPLEMENTING AN ACCIDENT PREVENTION PROGRAM TO IDENTIFY AND CORRECT UNSAFE OPERATOR PATTERNS NEXT QUARTER. IT IS EXPECTED THAT THIS EFFORT WILL FURTHER REDUCE THE ACCIDENT RATE BY THE END OF THE FISCAL YEAR.

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3.3.3.2 Reducing Transportation industrial accident frequency to 7.0 per 100,000 hours.

IN THE SECOND QUARTER, THE TRANSPORTATION INDUSTRIAL ACCIDENT FREQUENCY DROPPED TO 7.4 FROM 8.6 THE PREVIOUS QUARTER. THE REDUCTION IN TRAFFIC ACCIDENTS IN COMBINATION WITH POST-ACCIDENT COUNSELLING AND OPERATOR SAFETY TRAINING SESSIONS CONTRIBUTED TO THIS IMPROVEMENT.

3.3.3.3 Reducing Maintenance industrial accident frequency to 9.0 per 100,000 hours.

THE MAINTENANCE INDUSTRIAL ACCIDENT RATE WAS 7.4 DURING THE SECOND QUARTER, WHICH WAS DOWN FROM 10.3 THE PREVIOUS QUARTER. THE REDUCTION IS ATTRIBUTED TO INCREASES IN INSPECTIONS, TRAINING SESSIONS AND OCCUPATIONAL HEALTH PROGRAMS.

3.3.4 To improve the District's overall manpower and scheduling control and planning capability by completing and implementing Phase I of TRANSMIS II.

THE INTERACTIVE SCHEDULING SYSTEM WAS IMPLEMENTED DURING THE SECOND QUARTER. THIS PROVIDES THE SCHEDULING DEPARTMENT WITH INTERACTIVE TOOLS TO BUILD AND REVISE SCHEDULES AND PERFORM RUNCUTTING AND ROSTERING. ADDITIONAL ENHANCEMENTS TO THIS SYSTEM WILL BE DESIGNED DURING THE NEXT QUARTER.

3.3.5 To implement manpower allocation capability at the Division Manager level.

TRANSPORTATION DEPARTMENT ADMINISTRATIVE STAFF IS DEVELOPING NEW TOOLS FOR DATA COLLECTION AND ANALYSIS TO PROVIDE DEPARTMENT MANAGEMENT WITH IMPROVED DIVISION LEVEL PERFORMANCE MONITORING. THE MANPOWER PLANNING STUDY CONSULTANTS COMPLETED MOST OF THE DATA COLLECTION PHASE AND BEGAN DEVELOPING RECOMMENDATIONS.

3.3.6 To document productivity improvements and savings resulting from TRANSMIS applications.

A COMPREHENSIVE REPORT OF PRODUCTIVITY IMPROVEMENTS AND SAVINGS RESULTING FROM TRANSMIS APPLICATIONS WILL BE PREPARED LATER IN THE FISCAL YEAR.

3.3.7 To minimize all service changes requiring Bus Operator assignment changes.

THERE WERE FEW ASSIGNMENT BUMPS DUE TO SCHEDULE REVISIONS DURING THE PAST QUARTER. MOST PERMANENT CHANGES IN SERVICE WERE IMPLEMENTED IN THE DECEMBER 30, 1984 SHAKE-UP.

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3.3.8 To develop a management plan for the transition from manual to automated systems.

A STUDY IDENTIFYING THE IMPACTS OF TRANSMIS ON DISTRICT STAFFING REQUIREMENTS WILL BE COMPLETED DURING THE THIRD QUARTER AND USED IN DEVELOPING THE FISCAL YEAR 1986 BUDGET.

3.3.9 To reduce unscheduled Operator overtime by:

3.3.9.1 Maintaining a labor force consisting of 15% part-time Operators.

THE PART-TIME OPERATOR RATIO AVERAGED 14% DURING THE SECOND QUARTER OF FISCAL YEAR 1985.

3.3.9.2 Completing various studies related to Bus Operators' absenteeism and implementing appropriate recommendations.

THE MANPOWER PLANNING STUDY CONSULTANTS COMPLETED MOST OF THE DATA COLLECTION PHASE AND BEGAN DEVELOPING RECOMMENDATIONS.

3.4 Policy and Management Objectives

3.4.1 To prepare plans to minimize the impact of the post-Proposition A funding reduction on ridership, service levels and the general public during Fiscal Year 1986 by:

3.4.1.1 Developing long-term strategies for financing bus and rail systems under Proposition A requirements;

THE PLANNING DEPARTMENT COMPLETED THE FARE STRUCTURE ALTERNATIVE STUDY. THE PUBLIC HEARING ON PROPOSED FARE AND SERVICE CHANGES WILL BE HELD NEXT QUARTER.

3.4.1.2 Developing a plan for post-Proposition A staffing levels;

A SPECIAL STUDY OF THE DISTRICT'S POST-PROPOSITION A STAFFING REQUIREMENTS WILL BE CONDUCTED DURING THE THIRD QUARTER AND USED IN CONJUNCTION WITH DEVELOPMENT OF THE FISCAL YEAR 1986 BUDGET.

3.4.1.3 Completing municipal service agreements covering the Cities' share of Proposition A funds.

THE CONTRACT FOR THE PASADENA SHUTTLE SERVICE WAS EXECUTED AND THE SERVICE WAS IMPLEMENTED ON NOVEMBER 6, 1984.

3.4.2 To achieve mutually beneficial modifications for labor and management to all labor agreements expiring during this fiscal year.

STAFF CONTINUES PREPARATION OF PROPOSALS TO BE SUBMITTED TO ATU, UTU, BRAC, AND TPOA. LABOR NEGOTIATIONS ARE IN PROGRESS.

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3.4.3 To improve minority participation in District programs and activities by implementing UMTA approved EEO and MBE plans and the Affirmative Action Career Development Project.

THE AFFIRMATIVE ACTION PLAN AND THE DBE/WBE PLAN HAVE BEEN APPROVED BY THE BOARD AND FOUND BY UMTA TO BE IN COMPLIANCE WITH THEIR REQUIREMENTS. ALL POSITIONS FOR THE AFFIRMATIVE ACTION CAREER DEVELOPMENT PROJECT HAVE BEEN FILLED AND THE PROJECT IS ON-GOING.

3.4.4 To establish a regular series of inter-local coordination meetings with other public agencies.

THE COMMUNITY RELATIONS DEPARTMENT CONTINUES TO MEET WITH THE LOS ANGELES CITY COUNCIL AND MUNICIPAL OPERATORS MONTHLY, AS WELL AS COMMUNITY LEADERS, CITY COUNCILS, AND MUNICIPAL ASSOCIATIONS. THE PLANNING DEPARTMENT ATTENDED LACTC, SCAG AND CITY OF LOS ANGELES COMMITTEE MEETINGS, CONSULTED WITH PALOS VERDES TRANSIT ON PARA-TRANSIT ISSUES AND PARTICIPATED IN SCAG'S SAN FERNANDO VALLEY STUDY OF TRANSPORTATION PROBLEMS. IN ADDITION TO ON-GOING CONTACT WITH PUBLIC OFFICIALS, THE GOVERNMENT AFFAIRS DEPARTMENT BRIEFED ONE STATE ASSEMBLYMAN, THE NEW EXECUTIVE DIRECTOR OF THE CALIFORNIA TRANSPORTATION COALITION AND TWO STATE OFFICIALS ON METRO RAIL.

3.4.5 To implement standardization of data elements for TRANSMIS applications.

THE DATA PROCESSING DEPARTMENT HAS ASSIGNED THE "OWNING" DEPARTMENTS OF THE VARIOUS TRANSMIS DATA BASES THE RESPONSIBILITY OF ASSURING THAT DATA ELEMENTS ARE STANDARDIZED AND THAT REDUNDANCIES ARE MINIMIZED.

3.4.6 To implement standardization of data for and use of personal computer generated reports.

STANDARDS FOR DATA ON PERSONAL COMPUTERS HAVE BEEN DISCUSSED AT MEETINGS OF THE PC USERS GROUP AND ARE BEING DEVELOPED.

3.4.7 To continue to monitor performance quarterly as outlined in the established departmental and District-wide objectives.

THE OFFICE OF MANAGEMENT AND BUDGET CONTINUES TO PUBLISH THE QUARTERLY BUDGET AND PERFORMANCE REPORT TO OUTLINE PROGRESS ON STATED DEPARTMENTAL AND DISTRICT-WIDE OBJECTIVES.

3.4.8 To obtain UMTA certification for the District's procurement system and procedures.

THE DISTRICT IS AWAITING UMTA'S WRITTEN STATEMENT OF FINDINGS FOLLOWING LAST QUARTER'S REVIEW OF THE DISTRICT'S PROCUREMENT SYSTEM.

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3.4.9 To develop and implement a joint development program and benefit assessment districts that are consistent with the Land Use element of the region's General Plan.

A RESOLUTION OF INTENT TO FORM BENEFIT ASSESSMENT DISTRICTS WAS PASSED BY THE BOARD OF DIRECTORS ON DECEMBER 20, 1984. THE PUBLIC HEARING WILL BE HELD IN JANUARY, 1985. PRELIMINARY DESIGN AND ENGINEERING CONTINUED ON A MIXED-USE COMPLEX AT ONE STATION. NEGOTIATIONS WERE INITIATED ON THE JOINT DESIGN APPROACH AT A FIFTH KEY PORTAL PARCEL.

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4.0 SURVEY OF OTHER TRANSIT PROPERTIES

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4.0 Survey of Other Transit Properties

During the first quarter, the Office of Management and Budget conducted a second annual survey of local and national transit properties to obtain performance data on seventeen key indicators. The indicators were selected to correspond to those analyzed quarterly for the District.

4.1 Fiscal Year 1984 Survey Results

Surveys were sent to 35 properties, of which eight are local municipalities and 27 are large national properties which have bus operations. With the exception of one California transit property (which was included in the interest of obtaining data from other California properties), all of the properties surveyed have at least 500 buses. The survey results were revised during the second quarter to include data supplied by three properties who were unable to respond in time for the first Fiscal Year 1985 Quarterly Budget and Performance Report.

Of the agencies surveyed, 74% of the national properties and 63% of the local properties responded. The 20 responding national properties are: Massachusetts Bay Transportation Authority (Boston), Chicago Transit Authority, Greater Cleveland Regional Transit Authority, Dallas Transit System, Regional Transportation District (Denver), Metropolitan Transit Authority of Harris County, Texas (Houston), Metropolitan Suburban Bus Authority (Nassau County, NY), MetroDade Transportation Administration (Miami), Milwaukee County Transit System, Metropolitan Transit Commission (Minneapolis/St.Paul), New York City Transit Authority, Alameda-Contra Costa Transit District (Oakland), Orange County Transit District, Tri-County Metropolitan Transportation District of Oregon (Portland), Sacramento Regional Transit District, Bi-State Development Agency (St. Louis), San Diego Transit, San Francisco Municipal Railway, Municipality of Metropolitan Seattle, and Washington Metropolitan Area Transit Authority. The five responding local properties are: Culver City Municipal Bus Lines, Gardena Municipal Bus Lines, Long Beach Transit, City of Norwalk, and Torrance Transit System.

The purpose of the survey was not to compare individual properties, but to develop composite indexes of local, national and all-bus properties to provide the Board of Directors and others with a frame of reference for measuring the District's performance. Each property provided data for its last fiscal year. The all-bus properties are a subset of the national properties, with their data included in the national averages.

Overall, the District's indicators compared favorably to weighted averages for all three groups. While the District's performance did not compare as favorably as last year, the difference is less attributable to a worsening of the District's performance than to improved indicator results from the properties who responded to the survey this year. Among the new respondents are such major properties as Boston, Cleveland, and New York.

As expected, due to Proposition A funding, indicators reflecting farebox revenue were lower for both the District and the local properties than for the larger properties. Conversely, averages involving ridership were generally higher for the District than for the comparison groups.

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Even though local properties are operating under Proposition A fare limitations, the ridership indicators do not show the extreme increase reflected in the District's data. The indicators based on hub miles also reflected favorable District performance for the past fiscal year.

Compared to other all-bus properties, the District's performance was appreciably better for all indicators that reflected boardings. While the District's operating cost per boarding is not as good as the national average, it is significantly better than the average for all-bus properties.

Figure 17 shows the indicators for the District and the local, national and all-bus properties. A brief description of the District's performance in comparison to the survey results is included in the narrative for each key performance indicator.

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FIGURE 17
SURVEY RESULTS FOR KEY PERFORMANCE INDICATORS
FISCAL YEAR 1984

	NATIONAL		ALL-BUS		LOCAL		SCRTD	
Key Indicators	Average	Range	Average	Range	Average	Range	FY 84	FY 85YTD
Farebox Rev/Boarding	$0.36	$0.27-0.62	$0.44	$0.33-0.62	$0.21	$0.20-0.29	$0.25	$0.25
Operating Cost/Boarding	$0.83	$0.50-2.30	$1.43	$0.83-1.94	$0.97	$0.84-1.43	$0.91	$0.92
Expense Recovery Ratio	42%	22-90%	31%	23-48%	22%	18-28%	27%	27%
Operating Cost/RVSH	$52.20	$27.42-77.27	$50.89	$36.74-64.99	$41.64	$35.24-45.21	$60.42	$63.10
Boardings/RVSM	5.7	1.9-13.7	2.6	1.9-3.8	3.4	1.7-4.2	5.0	5.2
Boardings/RVSH	62.7	21.8-109.5	35.5	21.8-47.6	43.1	24.6-50.1	66.1	68.6
Boarding/Peak Bus	16,145	5,301-33,983	8,080	5,301-12,869	12,897	6,091-14,977	19,040	19,811
Passenger Miles/RVSM	16.5	1.2-29.1	11.6	1.2-25.8	12.1	8.8-13.6	19.5	20.2
RVSH/Employee	72	53-87	72	54-87	115	95-123	67	65
Oper Pay Hours/RVSH	1.52	1.09-2.15	1.33	1.09-1.84	1.27	0.97-1.36	1.61	1.64
Hub Miles/Maint Empl	4,283	2,816-8,234	5,059	4,071-8,234	8,847	6,530-13,368	4,700	4,670
Hub Miles Between Road Calls	1,736	661-4,745	2,111	1,253-4,499	1,638	939-2,486	2,762	2,678
Hub Miles/Peak Bus	3,212	2,729-4,624	3,406	2,802-4,148	3,999	3,829-4,812	4,446	4,526
Traffic Accidents/ 100,000 Hub Miles	6.4	2.9-9.8	5.2	2.9-7.7	6.0	0.7-7.8	5.1	5.1
DBE $/Total Contract $	13.5%	2.0-35.7%	12.3%	8.2-35.4%	9.8%	8.9-12.2%	17.5%	5.8%
WBE $/Total Contract $	8.5%	0.3-28.0%	5.1%	0.3-10.0%	3.3%	0.8-12.7%	3.7%	1.5%
Complaints/100,000 Boardings	5	1-30	11	3-30	6	1-7	3	2

RVSH: Revenue Vehicle Service Hours
RVSM: Revenue Vehicle Service Miles

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FIGURE 17
SURVEY RESULTS FOR KEY PERFORMANCE INDICATORS
FISCAL YEAR 1984

	NATIONAL		ALL-BUS		LOCAL		SCRTD	
Key Indicators	Average	Range	Average	Range	Average	Range	FY 84	FY 85YTD
Farebox Rev/Boarding	$0.36	$0.27-0.62	$0.44	$0.33-0.62	$0.21	$0.20-0.29	$0.25	$0.22
Operating Cost/Boarding	$0.83	$0.50-2.30	$1.43	$0.83-1.94	$0.97	$0.84-1.43	$0.91	$0.92
Expense Recovery Ratio	42%	22-90%	31%	23-48%	22%	18-28%	27%	24%
Operating Coast/RVSH	$52.20	$27.42-77.27	$50.89	$36.74-64.99	$41.64	$35.24-45.21	$60.42	$63.10
Boardings/RVSM	5.7	1.9-13.7	2.6	1.9-3.8	3.4	1.7-4.2	5.0	5.2
Boardings/RVSH	62.7	21.8-109.5	35.5	21.8-47.6	43.1	24.6-50.1	66.1	68.6
Boarding/Peak Bus	16,145	5,301-33,983	8,080	5,301-12,869	12,897	6,091-14,977	19,040	19,811
Passenger Miles/RVSM	16.5	1.2-29.1	11.6	1.2-25.8	12.1	8.8-13.6	19.5	20.2
RVSH/Employee	72	53-87	72	54-87	115	95-123	67	64
Oper Pay Hours/RVSH	1.52	1.09-2.15	1.33	1.09-1.84	1.27	0.97-1.36	1.61	1.71
Hub Miles/Maint Empl	4,283	2,816-8,234	5,059	4,071-8,234	8,847	6,530-13.368	4,700	4,964
Hub Miles Between Road Calls	1,736	661-4,745	2,111	1,253-4,499	1,638	939-2,486	2,762	2,678
Hub Miles/Peak Bus	3,212	2,729-4,624	3,406	2,802-4,148	3,999	3,829-4,812	4,446	4,526
Traffic Accidents/ 100,000 Hub Miles	6.4	2.9-9.8	5.2	2.9-7.7	6.0	0.7-7.8	5.1	5.1
DBE $/Total Contract $	13.5%	2.0-35.7%	12.3%	8.2-35.4%	9.8%	8.9-12.2%	17.5%	6.5%
WBE $/Total Contract $	8.5%	0.3-28.0%	5.1%	0.3-10.0%	3.3%	0.8-12.7%	3.7%	1.6%
Complaints/100,000 Boardings	5	1-30	11	3-30	6	1-7	3	2

RVSH: Revenue Vehicle Service Hours
RVSM: Revenue Vehicle Service Miles

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5.0 PRIORITY CAPITAL PROJECTS

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5.0 Priority Capital Projects

This section provides a summary of grant-related activity during the quarter and a status report on the District's priority capital projects.

5.1 Significant Issues

During the second quarter, the major capital development was the Federal government's announcement of proposed funding cuts for mass transit. In addition, the Fiscal Year 1985 Section 9 Capital and Operating Assistance Grant applications were completed, staff recommendations for the FY 1985-90 Transportation Improvement Program were prepared, the decision was made to pursue funding for 30 methanol buses and continue study of articulated buses, funding sources were identified for the Central Maintenance Facility site acquisition cost increase and efforts continued to seek funds and funding commitments for Metro Rail.

5.2 Proposed Federal Funding Cuts

Federal OMB Director David Stockman announced various proposals to curb the national deficit, including heavy cuts for mass transit. The UMTA regional office also asked for more budgetary information on Minimum Operable Segment-1, the 4.4-mile, 5-station, $1.1-billion segment of Metro Rail for which the District has requested funds.

5.3 Metro Rail

The District filed an appliation with CalTrans for $72 million in FY 1986 Article XIX funds as part of the State's contribution to the Metro Rail Project. The District also obtained UMTA's concurrence to use grant funds to relocate Santa Fe railroad tracks.

5.4 FY 1985 Section 9 Grant Application

The District prepared a grant application requesting $113.8 million in Section 9 Federal funds as follows: $47.5 million for operating assistance, $29.7 million for Metro Rail, and $36.6 million for miscellaneous capital projects. The latter included 150 standard buses, Management Information Services, the East Los Angeles Transportation Center, Automated Data Collection System (ADCS), rebuilding of buses, Telecommunications equipment, and maintenance and service vehicles and equipment. The grant application includes a program of projects ranked in priority order. UMTA raised questions on over 20 projects listed in the Transportation Improvement Program, and met with SCAG after receiving responses from the District.

5.5 Buses

The District requested funds for 30 methanol buses, 27 in the Section 9 FY 1985 capital grant application, and 3 using Section 3 funds. The Fiscal Year 1986 request will include articulated buses, which will be the object of further study by the Planning Department to determine where they can be put to best use.

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5.6 FY 1986-90 Transportation Improvement Program (TIP)

Staff prepared recommendations for the General Manager for the 5-year TIP, the District's proposed capital program to accompany the Short Range Transit Plan. The TIP was prepared before the White House announced its proposed funding cuts, and was based on current funding levels. Two major elements of the 5-Year TIP were a systematic bus replacement program (in anticipation of the 940 GMC buses coming up for replacement in 1993) and facilities modernization. Potential projects requiring further study in the latter category include Division 4 (Downey) conversion to a full operating facility, and replacements for Divisions 6 (Venice) and 16 (Pomona). The FY 1986 capital program for UMTA funds was tentatively sized at about $66 million (including local match), and prioritized to accommodate Congressional appropriation at a lower level.

5.7 Central Maintenance Facility

The District requested and obtained from UMTA an extension to August 31, 1985 of the $2.9 million Letter of No Prejudice for the Central Maintenance Facility. The intent of the extension is to allow completion of jury trials scheduled for January, April, and May, 1985 to determine the value of the parcels the District acquired for the Central Maintenance Facility site.

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PRIORITY CAPITAL PROJECTS
STATUS SUMMARY

GRANT NUMBER	PROJECT	ESTIMATED COST ($000)	DOLLARS EXPENSED ($000)	Approved BUDGET AMOUNT ($000)	GOAL		ACTUAL		START DATE	SRTP COMPLETION DATE	STATUS
					DBE	WBE	DBE	WBE			
CA-03-0130	Metro Rail	3,400,000	120,857	229,376	15%	3%	14%	4%	7-79	11-90	Application submitted for MOS-1, 8/14/84 still pending. Percentage of completion for MOS-1 design units is as follows: % Unit 40 A-415 46 A-310 55 A-350 65 A-220, A-430 66 A-140, A-445 68 A-240 70 A-250 77 A-245 85 A-130, A-410 86 A-275 90 A-135, A-165 95 A-133 96 A-170 99 A-115 100 A-112, A-114
CA-03-0125	Division 10, Phase II	8,700	7,547	8,700	N/A	N/A	32%	1%	8-83	6-84	Division 10 Phase II 100% complete.
CA-03-0209	TRANSMIS I	20,800	15,871	19,950	0%	0%	5%	0%	10-81	8-84	TRANSMIS I consultants' work 99% complete as of 12/31/84. TRANSMIS II consultants are on schedule. Operator time-keeping and payroll projects are in final clean-up stages.
CA-03-0259	TRANSMIS II	11,600	5,615	5,714	15%	N/A	N/A	N/A	11-83	9-85	
CA-05-0052											
CA-05-0121											
CA-90-x059											

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GRANT NUMBER	PROJECT	ESTIMATED COST ($000)	DOLLARS EXPENSED ($000)	Approved BUDGET AMOUNT ($000)	GOAL		ACTUAL		START DATE	SRTP COMPLETION DATE	STATUS
					DBE	WBE	DBE	WBE			
	TRANSMIS I TRANSMIS II (Continued)										Interim scheduling projects are complete. Design work is underway for packages including bidding, dispatching and mechanic timekepping.
CA-23-2015 CA-03-0213	Central Maintenance Facility	73,200	10,870	54,760	**	**	**	**	9-82	7-86	LONP request for $2.9m approved 12/21/84. Application for additional $9.3m pending. Design and demolition complete. Earthwork contract #2 100% complete. Equipment contract #1 33% complete; Equipment contract #2 20% complete; Foundation and structural steel contract 82% complete.
CA-03–0161 CA-03-0132 CA-03-0178 CA–03-0259 CA-90-x059	Fare Collection System	11,420	73	15,800	**	**	N/A	N/A	1-84	7-85	Contract awarded 2/12/84 to Cubic Western Data for 900 fareboxes. Option for 2,040 additional fareboxes expires 4/1/85.
CA-03-0247 CA-03–0137 CA-05-0092	Division 18	12,200	16,846	17,200	**	**	**	**	10-83	6-84	Phase III Construction 100% complete; street improvements and landscraping 97% complete.

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PRIORITY CAPITAL PROJECTS
STATUS SUMMARY

GRANT NUMBER	PROJECT	ESTIMATED COST ($000)	DOLLARS EXPENSED ($000)	Approved BUDGET AMOUNT ($000)	GOAL		ACTUAL		START DATE	SRTP COMPLETION DATE	STATUS
					DBE	WBE	DBE	WBE			
CA-90-0022	Advanced Land Acquisition	18,700	5,475	18,700	**	**	N/A	N/A	10-83	10-84	Completed 8 appraisals. Established Just compensation for 3 parcels. Completed escrow closing on 1 parcel. Negotiations underway for 2 parcels.
CA-03-0182 CA-03-0106	Division 5	4,500	9,588	9,675	**	**	**	**	9-82	6-84	Construction 100% complete.
CA-05-0121	Division 3 Employee Parking Structure	1,950	2	1,950					6-84		Design 90% complete.
	Bus Procurement -										
CA-90-x059	30 Small Buses	4,385	3,664	4,385							30 buses accepted as of 12/31/84.
CA-03-0259 CA-90-0022	CCIS	3,400	2,237	3,400	10%	0%	10%	0%	7-82	7-84	Contract awarded to TRANSMAX. Phase I covering San Fernando Valley in operation as of 12/84. Phase II now in development, will cover entire service area. Scheduled to be operational by Winter 1986.

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APPENDIX A

PURPOSE OF THE QUARTERLY BUDGET

AND PERFORMANCE REPORT

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Appendix A

Purpose of the Quarterly Budget and Performance Report

This Quarterly Budget and Performance Report is an integral part of the on-going management improvement process at the SCRTD. The District is already in the process of expanding its base from a major bus operator to an organization which has the capacity to carry out a major transit development program. It must be prepared to manage a larger and more diverse program than ever before under conditions of rapid change.

Successfully meeting this challenge requires both an increased emphasis on long-range planning and continuous feedback from actual performance. The Five-Year Short Range Transit Plan (SRTP) incorporates the District's planning initiatives and policy choices in all program areas. Specifically, it includes issues, summaries, alternative five-year service plans, a capital improvement program and a five-year financial plan. Further, it generates the Transportation Improvement Program.

Among the programs addressed in the development of the SRTP are two which most clearly underscore the urgency of sound management and careful planning. These are the Metro Rail Project and the Proposition A Fare Reduction Program. The progression of the Metro Rail Project to construction will move the District into a new phase of its development, one that will last for at least a decade. The Proposition A Fare Reduction Program has meanwhile increased ridership and decreased fare setting problems on the bus side of District operations. This temporary respite for bus operations from many ongoing concerns will end abruptly in 1985 with the potential for producing major upheaval, if not skillfully managed.

To improve its performance under these conditions and to insure implementation of plans and policies, the District has adopted a program of Management by Objectives. Performance objectives are now adopted annually on a District-wide basis. Departmental objectives are adopted in support of the District-wide objectives. Both sets of objectives become the basis for establishing the annual Budget and are incorporated into the Budget document adopted by the Board of Directors.

This consolidated report tracks actual performance, events which impact the District's ability to meet its objectives, the appropriateness of those objectives, and the need for new approaches. This chronicle of actual conditions will in turn become the basis for modifying the District's longer range plans and policies as illustrated in the figure on page A-2.

This Report is intended to provide a comprehensive source of information for the SCRTD Board of Directors, management, members of the public, and governmental entities. In order for Directors, managers, and the political and general communities to cooperate effectively in the provision of rapid transit, all must have a common analytical base and a common definition of terms to permit productive dialogue. This report will help establish such common ground.

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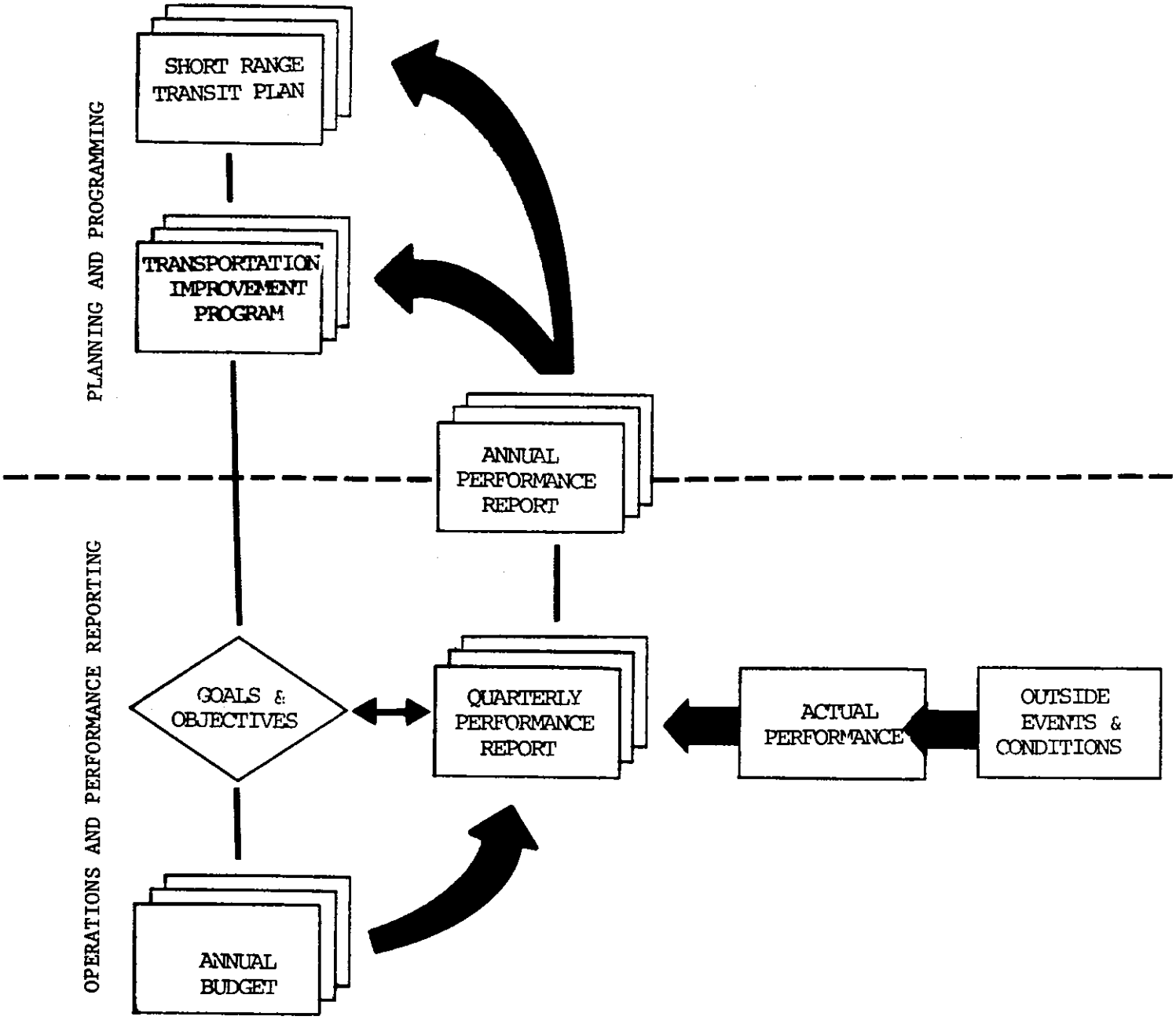
FIGURE 1

THE MANAGING PROCESS
RELATIONSHIP BETWEEN GOALS AND OBJECTIVES



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In creating this Report, the Office of Management and Budget utilized three major sources:

- reports regularly submitted by the District to local, state and federal transportation agencies.
- the various periodic reports issued by individual departments regarding District performance in their discrete areas of concern.
- a series of performance reports issued by other urban transit districts.

The intent is to use all major indicators from the first source and the most useful elements from the last two sources for inclusion in this Report. This Report, then, provides an overview of progress on all established District Objectives and on those performance indicators considered most important by District management, the transit industry as a whole, and the transportation agencies to which we report.

Part 1 of the Quarterly Budget and Performance Report provides a narrative description of Significant Issues which have surfaced during the current quarter. Rather than focus on administrative units, such as departments, this part focuses on specific programs or issues and alternative actions that may be indicated by each of them. In each instance, information has been contributed by various departments and compiled and integrated by OMB staff.

Part 2, Summary of Indicator Trends, reviews sixteen key performance indicators selected in accordance with the criteria described above. For each indicator, this year's performance, last year's performance, and the current performance objective are displayed graphically. Performance trends and outstanding factors contributing to these trends are discussed in an accompanying narrative.

Part 3 details the status of District-Wide Implementation of Objectives for Fiscal Year 1985. The objectives were adopted by the Board of Directors as part of the Fiscal Year 1985 Budget document. Reporting on the status of each objective on a quarterly basis will complete the integration of the goal-setting, budgeting, and day-to-day management processes in the District. This Report provides the opportunity for management and the Board of Directors to consider remedial action in the case of unmet objectives, modification of objectives if required, or reinforcement of actions leading to successful objective achievement.

Part 4 reports the results of the District's survey of other national and local transit properties. Composite indexes of other properties' performance indicator results have been developed and are presented along with the District's results as a means of measuring the SCRTD's performance.

Part 5 is a summary of grant-related activity during the reporting quarter and a status report on the District's priority capital projects.

Three appendices in addition to this explanation of the purpose of the Quarterly Budget and Performance Report conclude the report. These

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appendicies contain more detailed reference materials. They are a glossary of terms, a statistical summary of performance indicators, and an Equal Employment Opportunity summary. Again, all District departments have participated in providing information for input into these sections. Particular care has been taken to insure that uniform definitions of terms are utilized in the compilation of statistics and that the measures used are in fact appropriate for comparison.

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APPENDIX B

GLOSSARY OF KEY TERMS

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Appendix B - Glossary of Key Terms

Actual Service - Service that is actually provided, differing from scheduled service to the extent that unforeseen events require established plans for bus and operator utilization to be modified.

Boardings (Unlinked Trip) - One trip per passenger.

DBE - Disadvantaged Business Enterprise.

Employees - The number of full-time equivalent employees at the District during the period.

Expense Recovery Ratio - The ratio of farebox revenue to total operating expense.

Farebox Revenue - Revenue received from cash fares as well as tickets, tokens, and passes.

Hub Miles - The total number of miles traveled by all buses in the fleet, whether in revenue or non-revenue operation.

Maintenance Employees - The number of full time equivalent employees in the Maintenance Department including mechanics, service attendants, and administrative personnel.

Off-Route - An out-of-service route that buses follow to get from one point on the line to another, or between two lines.

Operating Cost - Total cost of running the transit operation exclusive of capital expenditures or depreciation.

Operator Pay Hours - The actual number of pay hours accrued for the period by bus operators at transportation operating divisions.

Passenger Miles - Cumulative total distances traveled by all District passengers during the period. Computed from average ride length and boardings.

Peak Buses - The number of buses in service during the two periods of the day when the greatest number of passengers are traveling.

Pull-In - The trip from the end of revenue service back to the division.

Pull-Out - The trip from the division to the point where revenue service begins.

Revenue Vehicle Service Hours - Scheduled hours excluding pull-in, pull-out, and off-route time between lines, but including off-route time within a line.

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Revenue Vehicle Service Miles - The distance a bus travels while in scheduled revenue service including off-route miles within a line, but excluding off-route miles between lines, pull-ins and pull-outs.

Road Calls - The number of times a Maintenance Department employee is dispatched to repair or replace a bus due to a mechanical defect or failure while the bus is away from a division.

Scheduled Service - Service that is formally planned and posted at three-month intervals.

Split Run - A regular driving assignment consisting of two separate parts which pay at least 8 hours a day within a prescribed period.

WBE - Women Business Enterprise.

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APPENDIX C

OPERATING PERFORMANCE INDICATORS

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OPERATING PERFORMANCE INDICATORS

STATISTICAL SUMMARY

INDICATORS	OCTOBER 1984	NOVEMBER 1984	DECEMBER 1984	CURRENT QUARTER	LAST QUARTER	% CHANGE	THIS QTR LAST YEAR	% CHANGE	FISCAL YR TO DATE
BUDGET									
YTD BUDGET VARIANCE ($000)	$3,051	$234	$736	$736	$(2,771)	-127%	$8,452	-91%	$736
SUBSIDY PER BOARDING	$0.63	$0.69	$0.69	$0.67	$0.67	0%	$0.62	8%	$0.67
CASH BALANCE ($000)	$268,039	$253,159	$258,816	$258,816	$250,666	3%	$200,011	29%	$258,816
REVENUE									
OPERATING REVENUE ($000)	$35,728	$35,223	$43,201	$114,152	$110,041	4%	$103,578	10%	$224,193
OPERATING REVENUE/REV VEH SER MILE	$4.89	$4.92	$4.81	$4.87	$4.68	4%	$4.38	11%	$4.78
OPERATING REVENUE/REV VEH SER HOUR	$64.72	$65.11	$63.62	$64.42	$61.96	4%	$58.03	11%	$63.19
OPERATING REVENUE/BOARDING	$0.90	$0.93	$0.92	$0.92	$0.93	-1%	$0.87	6%	$0.92
*FAREBOX REVENUE/BOARDING	$0.26	$0.24	$0.23	$0.24	$0.26	-8%	$0.24	0%	$0.25
PASS SALE REVENUE/FAREBOX REVENUE	30.0%	34.9%	27.5%	30.6%	28.2%	9%	31.9%	-4%	29.4%
NUMBER OF PASSES SOLD	327,508	325,868	314,190	967,566	831,075	16%	932,437	4%	1,798,641
COST									
OPERATING COST ($000)	$31,517	$34,343	$42,965	$108,825	$115,053	-5%	$107,927	1%	$223,878
OPERATING COST/REV VEH SER MILE	$4.32	$4.80	$4.79	$4.65	$4.89	-5%	$4.56	2%	$4.77
*OPERATING COST/REV VEH SER HOUR	$57.10	$63.48	$63.28	$61.41	$64.78	-5%	$60.46	2%	$63.10
*OPERATING/COST BOARDING	$0.79	$0.90	$0.92	$0.87	$0.97	-10%	$0.91	-4%	$0.92
OPERATING COST/PASSENGER MILE	$0.20	$0.23	$0.24	$0.22	$0.25	-12%	$0.23	-4%	$0.24
*EXPENSE RECOVERY RATIO	33.4%	26.6%	25.1%	27.9%	26.7%	4%	27.1%	3%	27.3%
PASSENGER UTILIZATION									
AVERAGE WEEKDAY BOARDINGS (000)	1,638	1,599	1,567	1,601	1,517	6%	1,538	4%	1,559
TOTAL BOARDINGS (000)	39,840	38,067	46,788	124,695	118,677	5%	119,203	5%	243,372
*BOARDINGS/REV VEH SER MILE	5.5	5.3	5.2	5.3	5.0	6%	5.0	6%	5.2
*BOARDINGS/REV VEH SER HOUR	72.2	70.4	68.9	70.4	66.8	5%	66.8	5%	68.6
*BOARDINGS/PEAK BUS	21,173	20,221	19,883	20,328	19,294	5%	19,137	6%	19,811
PASSENGER MILES (000)	155,800	148,800	182,474	487,074	463,154	5%	464,900	5%	950,228
PASSENGER MILES/SEAT MILE	46.4%	45.2%	44.2%	45.2%	42.8%	6%	43.1%	5%	44.0%
*PASSENGER MILES/REV VEH SER MILE	21.3	20.8	20.3	20.8	19.7	6%	19.6	6%	20.2
WHEELCHAIR BOARDINGS	1,793	1,765	1,628	5,186	4,047	28%	3,251	60%	9,233

* KEY PERFORMANCE INDICATOR

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OPERATING PERFORMANCE INDICATORS

STATISTICAL SUMMARY

INDICATORS	OCTOBER 1984	NOVEMBER 1984	DECEMBER 1984	CURRENT QUARTER	LAST QUARTER	% CHANGE	THIS QTR LAST YEAR	% CHANGE	FISCAL YR TO DATE
LABOR UTILIZATION									
EMPLOYEES (FTE)	8,979	9,189	8,815	8,994	9,079	-1%	9,079	-1%	9,037
REV VEH SER MILES/EMPLOYEE (FTE)	883	845	885	868	863	1%	869	0%	866
*REV VEH SER HOURS/EMPLOYEE (FTE)	67	64	67	66	65	2%	66	0%	65
OVERTIME PAY/TOTAL PAY(ALL EMPLOYEES)	13.6%	8.0%	8.9%	10.0%	13.3%	-25%	13.6%	-26%	11.7%
SCHED OPERATOR PAY HOURS/PLATFORM HOUR	1.18	1.18	1.18	1.18	1.17	1%	1.17	1%	1.18
*OPERATOR PAY HOURS/REV VEH SER HOUR	1.61	1.72	1.62	1.65	1.63	1%	1.60	3%	1.64
OPERATOR NWT/TOTAL OPERATOR WORKTIME	10.6%	17.3%	18.7%	15.7%	11.8%	33%	13.0%	21%	13.5%
UNSCHED OPERATOR OT/TOTAL OPERATOR PAY	8.5%	5.1%	6.4%	6.6%	7.0%	-6%	7.6%	-13%	6.8%
BUS OPERATORS (FTE)/EMPLOYEE (FTE)	55.4%	57.4%	56.0%	56.3%	57.1%	-1%	57.0%	-1%	56.7%
MAINT EMPLOYEES (FTE)/EMPLOYEE (FTE)	22.4%	20.5%	21.5%	21.5%	22.5%	-4%	21.2%	1%	22.0%
MAINT NWT/TOTAL MAINT WORKTIME	11.4%	10.0%	27.8%	16.6%	17.3%	-4%	10.9%	52%	16.9%
OTHER NWT/TOTAL OTHER WORKTIME	12.8%	16.2%	26.2%	18.7%	15.2%	23%	12.6%	48%	17.0%
EMPLOYEE TURNOVER	NA	NA	NA	NA	31.5%	NA	10.1%	NA	NA
OVERTIME IN FTE'S	1,417	1,123	1,224	1,252	990	26%	943	33%	1,121
OPERATOR/ASSIGNMENT RATIO	1.34	1.34	1.32	1.33	1.33	0%	1.33	0%	1.33
PART TIME OPERATOR RATIO	14.1%	13.9%	13.9%	14.0%	16.6%	-16%	8.3%	69%	15.3%
*HUB MILES/MAINT EMPLOYEE (FTE)	4,594	5,010	4,721	4,809	4,538	6%	4,793	0%	4,670
BUS OPERATOR AVERAGE HOURLY PAY	$11.36	$11.87	$11.48	$11.57	$11.63	-1%	$11.55	0%	$11.60
VEHICLE UTILIZATION									
REVENUE VEHICLE SERVICE MILES (000)	7,299	7,152	8,976	23,427	23,508	0%	23,669	-1%	46,935
REVENUE VEHICLE SERVICE HOURS (000)	552	541	679	1,772	1,776	0%	1,785	-1%	3,548
PEAK BUSES/BASE BUS	1.72	1.72	1.72	1.72	1.72	0%	1.69	2%	1.72
AVERAGE BUS AGE (YEARS)	8.0	8.0	8.0	8.0	8.0	0%	8.1	-1%	8.0
*HUB MILES/ROAD CALL	3,204	3,702	3,364	3,410	2,203	55%	2,718	25%	2,678
*HUB MILES/PEAK BUS	4,529	4,611	4,377	4,542	4,511	1%	4,446	2%	4,526
EMPLOYEES/PEAK BUS	4.4	4.5	4.3	4.4	4.4	0%	4.4	0%	4.4
HUB MILES/GALLON OF FUEL	3.4	3.7	3.8	3.6	3.2	12%	10.2	-65%	3.4
SCHEDULED PULLOUTS	65,088	62,869	79,141	207,098	NA	NA	201,025	3%	NA
RUNS CANCELLED/SCHEDULED PULLOUT	0.05%	0.10%	0.36%	0.18%	NA	NA	0.24%	-25%	NA
RUNS LATE/SCHEDULED PULLOUT	1.30%	1.23%	1.55%	1.37%	NA	NA	0.15%	813%	NA
REV VEH SER MILES/TOTAL VEH MILE	88.3%	88.2%	88.2%	88.2%	88.1%	0%	88.5%	0%	88.2%
REV VEH SER HOURS/TOTAL VEH HOUR	92.8%	93.0%	92.9%	92.9%	93.1%	0%	93.3%	0%	93.0%
SCHEDULED DEADHEAD MILES (000)	969	953	1,200	3,122	3,177	-2%	3,070	2%	6,299
SCHEDULED DEADHEAD HOURS (000)	43	41	52	136	132	3%	128	6%	268

* KEY PERFORMANCE INDICATOR

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OPERATING PERFORMANCE INDICATORS

STATISTICAL SUMMARY

INDICATORS	OCTOBER 1984	NOVEMBER 1984	DECEMBER 1984	CURRENT QUARTER	LAST QUARTER	% CHANGE	THIS QTR LAST YEAR	% CHANGE	FISCAL YR TO DATE
COMPLAINTS									
TOTAL COMPLAINTS	1,565	1,176	1,039	3,780	2,875	31%	3,397	11%	6,655
COMPLAINTS/100,000 BOARDINGS	3.5	2.9	2.5	3.0	2.4	25%	2.8	7%	2.7
PASSUP COMPLAINTS	311	283	218	812	606	34%	760	7%	1418
E & H SERVICE COMPLAINTS	54	31	22	107	93	15%	28	282%	200
SAFETY/SECURITY									
TRAFFIC ACCIDENTS	464	449	491	1,404	1,444	-3%	1,422	-1%	2,848
PASSENGER ACCIDENTS	75	63	68	206	178	16%	182	13%	384
TOTAL CRIME INCIDENTS	93	88	81	262	219	20%	239	10%	481
*TRAFFIC ACCIDENTS/100,000 HUB MILES	4.9	4.8	5.4	5.0	5.2	-4%	5.1	-2%	5.1
PASSENGER ACCIDENTS/100,000 HUB MILES	0.8	0.7	0.7	0.7	0.6	17%	0.7	0%	0.7
CRIME INCIDENTS/1,000,000 BOARDINGS	2.1	2.2	2.0	2.1	1.8	17%	2.0	5%	2.0
LOST TIME IND INJ/100,000 HOURS OF EXP	5.3	6.2	6.1	5.9	9.3	-37%	6.0	-2%	7.4
OTHER									
*DBE DOLLARS/TOTAL CONTRACT DOLLARS	9.0%	4.8%	3.5%	6.2%	5.3 %	17%	18.6%	-67%	5.8%
*WBE DOLLARS/TOTAL CONTRACT DOLLARS	2.6%	1.5%	1.1%	1.8%	1.0 %	80%	4.4%	-59%	1.5%

* KEY PERFORMANCE INDICATOR

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2.0 Notes on Key Sources of Data

2.1 Budget

2.1.1 Year-to-Date Budget Variance represents the variance between the budgeted figure and the amount expensed. These figures are supplied by the Controller and the Office of Management and Budget.

2.1.2 Subsidy Per Boarding indicates the dollar amount above the farebox revenue necessary to provide service for each boarding. This figure is obtained by subtracting monthly farebox revenue from total revenue, both supplied by the Controller, and dividing the difference by the number of boardings, which is supplied by the Planning Department.

2.1.3 Cash Balance represents the remaining funds available. This figure is supplied by the Controller.

2.2 Revenue

2.2.1 Operating Revenue is the total dollar amount collected to operate the District. This figure includes farebox revenue; local, State, and Federal subsidies; advertising revenue; and interest earned on investments. This figure is supplied by the Controller.

2.2.2 Operating Revenue/Revenue Vehicle Service Mile represents the revenue collected for each mile of scheduled service. The number of service miles is supplied by the Planning Department and is based on scheduled mileage.

2.2.3 Operating Revenue/Revenue Vehicle Service Hour represents the revenue collected for each hour of service. The number of service hours is supplied by the Planning Department and is based on scheduled hours.

2.2.4 Operating Revenue/Boarding represents the revenue collected for each boarding.

2.2.5 Farebox Revenue/Boarding is the average fare per boarding and is based on the total farebox revenue divided by the total number of boardings.

2.2.6 Pass Sale Revenue/Farebox Revenue represents the proportion that revenue received from pass sales is of total fare revenue, which includes pass sales plus cash fares, tickets and tokens. Pass sale revenue figures are supplied by the Marketing Department.

2.2.7 Number of Passes Sold is the total number of all types of passes sold during the period. The number of passes sold is supplied by the Marketing Department.

2.3 Cost

2.3.1 Operating Cost is the cost to the District of providing service. It does not include capital costs or depreciation. This figure is

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2.3.2 Operating Cost/Revenue Vehicle Service Mile represents the total cost of operating each mile of scheduled service.

2.3.3 Operating Cost/Revenue Vehicle Service Hour represents the total cost of each hour of scheduled service.

2.3.4 Operating Cost/Boarding represents the total cost for each boarding.

2.3.5 Operating Cost/Passenger Mile represents the total cost of every passenger mile. The number of passenger miles is supplied by the Planning Department.

2.3.6 Expense Recovery Ratio is the ratio of farebox revenue to total operating expense. These figures are supplied by the Controller.

2.3.7 Transportation and Maintenance Cost/Operating Cost is the portion of total expenses which are required for direct bus operations, i.e., the combined cost of the Transportation and Maintenance Departments. This figure is derived by the Office of Management and Budget from information supplied by the Controller.

2.4 Passenger Utilization

2.4.1 Average Weekday Boardings are estimated from farebox revenue and pass sales. This estimate is supplied by the Planning Department. These estimates are preliminary and may be revised at a later date. Such revisions are historically less than 1%.

2.4.2 Total Boardings represent the total number of passenger trips or the total number of times the District's service has been used. It is also referred to as "unlinked trips." This number is estimated by the Planning Department based on farebox revenue and pass sales. Boarding estimates and indicators using these estimates are preliminary and may be revised at a later date. Such revisions are historically less than 1%.

2.4.3 Boardings/Revenue Vehicle Service Mile is a measurement of efficiency and relates the number of boardings to miles of revenue service. It indicates how heavily the District's service is used.

2.4.4 Boardings/Revenue Vehicle Service Hour is a measurement of efficiency and relates the number of boardings to hours of revenue service. It is another measure of how heavily the District's service is used.

2.4.5 Boardings/Peak Bus relates boardings to the number of buses used during the heaviest daily ridership period. This indicator is based on data supplied by the Planning Department.

2.4.6 Passenger Miles is the combined distance traveled by all District passengers and is computed from average ride length and total boardings. This number is supplied by the Planning Department.

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2.4.7 Passenger Miles/Seat Mile is the proportion of passenger miles traveled to total seating capacity of the bus service. This indicator is based on data supplied by the Planning Department.

2.4.8 Passenger Miles/Revenue Vehicle Service Mile is a measurement of the average occupancy of in-service buses on a mileage basis. This indicator is based on data supplied by the Planning Department.

2.4.9 Wheelchair Boardings represents the total number of successful wheelchair boarding attempts and is derived from information supplied by the Transportation Department.

2.5 Labor Utilization

2.5.1 Employees (FTE) is the number of full-time equivalent (FTE) employees at the RTD during the period. Total hours worked by District employees are adjusted to obtain an "equivalent" of full time or 2,080, the number of hours one full time employee would work in a year, assuming a 40-hour work week. This figure is derived by the Office of Management and Budget from information supplied by the Controller.

2.5.2 Revenue Vehicle Service Miles/Employee (FTE) represents the amount of service, measured in miles, produced per full-time equivalent employee.

2.5.3 Revenue Vehicle Service Hours/Employee (FTE) represents the amount of service, measured in hours, produced per full-time equivalent employee.

2.5.4 Overtime Pay/Total Pay (All Employees) is the proportion of total pay dollars paid for work time exceeding the normal eight-hour work day. Both factors are supplied by the Controller.

2.5.5 Scheduled Operator Pay Hours/Platform Hour compares total planned operator pay hours to total planned service hours, including dead-head time, and is an indication of the proportion of time operators spend driving a bus. This figure is derived from information supplied by the Controller and the Planning Department.

2.5.6 Operator Pay Hours/Revenue Vehicle Service Hour compares actual operator pay hours to hours of passenger service. Pay hours are supplied by the Controller.

2.5.7 Operator Non-Work Time/Total Operator Work Time is the proportion of total operator time used for sick, holiday, vacation, bereavement and military leave. This data is supplied by the Controller.

2.5.8 Unscheduled Operator Overtime/Total Operator Pay is the proportion of operator pay that is paid for overtime that is unplanned and is

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due to unforeseen events. (Scheduled overtime is anticipated and unavoidable due to particular bus schedules and contract provisions.) This data is supplied by the Controller.

2.5.9 Bus Operators (FTE)/Employee (FTE) is the proportion of all District employees required to operate buses. This indicator is based on data supplied by the Controller.

2.5.10 Maintenance Employees (FTE)/Employees (FTE) is the proportion of all District employees required to maintain and repair the buses and includes supervisory, clerical, and mechanical personnel. This data is developed from information supplied by the Controller.

2.5.11 Maintenance Non-Work Time/Total Maintenance Work Time represents the proportion of all ATU employee pay time used for sick, holiday, vacation, bereavement and military leave. This data is supplied by the Controller.

2.5.12 Other Non-Work Time/Total Other Work Time is the proportion of all Non-Operator and Non-ATU employee time used for sick, holiday, vacation, bereavement and military leave. This data is supplied by the Controller.

2.5.13 Employee Turnover represents the percentage of employees leaving District service regardless of reason, compared to the average number of personnel employed during the period. This percentage is calculated on a monthly basis. This data is supplied by the Personnel Department.

2.5.14 Overtime in FTE's is total District overtime hours adjusted to obtain an "equivalent" of full time or 2,080, the number of hours one full-time employee would work in a year, assuming a 40-hour work week. Overtime hours are supplied by the Controller.

2.5.15 Operator/Assignment Ratio is the current number of operators employed compared to the number of assignments required to operate District service. This indicator is based on data supplied by the Transportation Department.

2.5.16 Part-time Operator Ratio is the relationship of part-time to full-time operators. The data is supplied by the Transportation Department.

2.5.17 Hub Miles/Maintenance Employee (FTE) is a productivity indicator and relates the total bus vehicle (revenue and non-revenue) miles to the number of maintenance employees. The mileage data is supplied by the Maintenance Department.

2.5.18 Bus Operator Average Hourly Pay represents the average hourly wage that an operator earns and includes overtime hours and pay. This data is supplied by the Controller.

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2.6 Vehicle Utilization

2.6.1 Revenue Vehicle Service Miles are scheduled miles excluding miles traveled to and from divisions and between lines. Data is supplied by the Planning Department based on schedules. These estimates are preliminary. Historically, revisions to Revenue Vehicle Service Miles have been less than 1%.

2.6.2 Revenue Vehicle Service Hours are scheduled hours excluding hours traveled to and from divisions and between lines and are supplied by the Planning Department based on schedules. These estimates are preliminary. Historically, revisions to Revenue Vehicle Service Hours have been less than 1%.

2.6.3 Peak Buses/Base Bus compares the number of buses used during the peak or heaviest ridership period of the day to the number of buses used during the middle of the day. The peak periods occur immediately preceeding and following the mid-day base period. This data is supplied by the Planning Department.

2.6.4 Average Bus Age (Years) is based on the approximate year of purchase This data is supplied by the Maintenance Department.

2.6.5 Hub Miles/Road Call is a reliability indicator that provides a measurement of the average number of bus miles (revenue and non-revenue) traveled between mechanical failures (road calls). This data is supplied by the Maintenance Department.

2.6.6 Hub Miles/Peak Bus relates total miles to the number of buses used during the heaviest ridership period. This indicator is based on data supplied by the Maintenance and Planning Departments.

2.6.7 Employees/Peak Bus relates total employees (FTE) to the number of peak buses. This indicator is based on data supplied by the Controller and and the Planning Department.

2.6.8 Hub Miles/Gallon of Fuel is an indicator of average bus fuel mileage. Fuel usage data is supplied by the Purchasing Department.

2.6.9 Scheduled Pull-outs represents the total number of scheduled bus trips from the divisions to the start of revenue service. This data is supplied by the Planning Department.

2.6.10 Runs Cancelled/Scheduled Pull-out represents the proportion of scheduled pull-outs that are cancelled for any reason. Data on cancelled runs is supplied by the Transportation Department.

2.6.11 Runs Late/Scheduled Pull-out represents the proportion of scheduled pull-outs that leave the division, for any reason, after the scheduled pull-out time. Data on late runs is supplied by the Transportation Department.

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2.6.12 Revenue Vehicle Service Miles/Total Vehicle Mile represents the proportion of total (revenue and non-revenue) bus miles that are in revenue service. This data is supplied by the Planning Department.

2.6.13 Revenue Vehicle Service Hours/Total Vehicle Hour represents the proportion of total revenue and non-revenue bus miles that are in revenue service and is supplied by the Planning Department.

2.6.14 Scheduled Deadhead Miles are the number of scheduled non-revenue bus miles necessary to provide service. This data is supplied by the Planning Department.

2.6.15 Scheduled Deadhead Hours are the total number of hours that a bus is scheduled to be driven in non-revenue service, and includes pull-outs, pull-ins, and inter-line movement. This data is supplied by the Planning Department.

2.7 Complaints

2.7.1 Total Complaints represents the number of customer complaints received by the District, for whatever reason (pass-ups, operator discourtesy, etc.), as recorded by the Customer Relations Department.

2.7.2 Complaints/100,000 Boardings relates total complaints to the total number of boardings. This data is supplied by the Customer Relations and Planning Departments.

2.7.3 Pass-up Complaints represents the total number of passenger complaints received regarding a bus operator not stopping for a passenger at a designated stop. This data is supplied by the Customer Relations Department.

2.7.4 E & H Service Complaints represents the number of complaints received regarding wheelchair customer service. This data is supplied by the Customer Relations Department.

2.8 Safety/Security

2.8.1 Traffic Accidents are all accidents involving any District vehicle. The data is reported by the Safety Department.

2.8.2 Passenger Accidents are all accidents to passengers on buses, and are reported by the Safety Department.

2.8.3 Total Crime Incidents represents the sum of all incidents of crime occurring on or to a bus while it is in service, excluding citations. This data is supplied by the Transit Police.

2.8.4 Traffic Accidents/100,000 Hub Miles is an indicator used throughout the industry as a measurement of traffic accident frequency. This data is supplies by the Safety and Maintenance Departments.

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2.8.5 Passenger Accidents/100,000 Hub Miles measures the frequency of passenger accidents. The data is supplied by the Safety and Maintenance Departments.

2.8.6 Crime Incidents/1,000,000 Boardings is a measurement of the frequency of crime incidents occurring on buses in service. This data is supplied by the Transit Police and the Planning Department.

2.8.7 Lost Time Industrial Injuries/100,000 Hours of Exposure represents the frequency of bus operator and maintenance employee injuries that result in an employee's absence from work beyond the date of the injury. This data is supplied by the Safety Department.

2.9 Other

2.9.1 DBE Dollars/Total Contract Dollars is the proportion of District contract dollars that are awarded to Disadvantaged Business Enterprises. This data is supplied by the Equal Opportunity Department.

2.9.2 WBE Dollars/Total Contract Dollars is the proportion of District contract dollars that are awarded to Women Business Enterprises. This data is supplied by the Equal Opportunity Department.

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