

Business Intelligence Solution

June 5, 2019

Background

- Business Intelligence refers to software that integrates and presents data from multiple sources to create insightful information

Operations



Caltrain



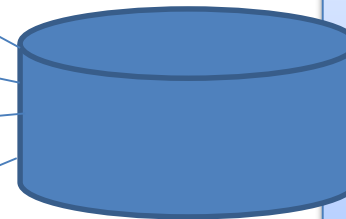
Paratransit



Finance/HR



**Continuity
Consolidation
Control
Compliance
Collaboration**

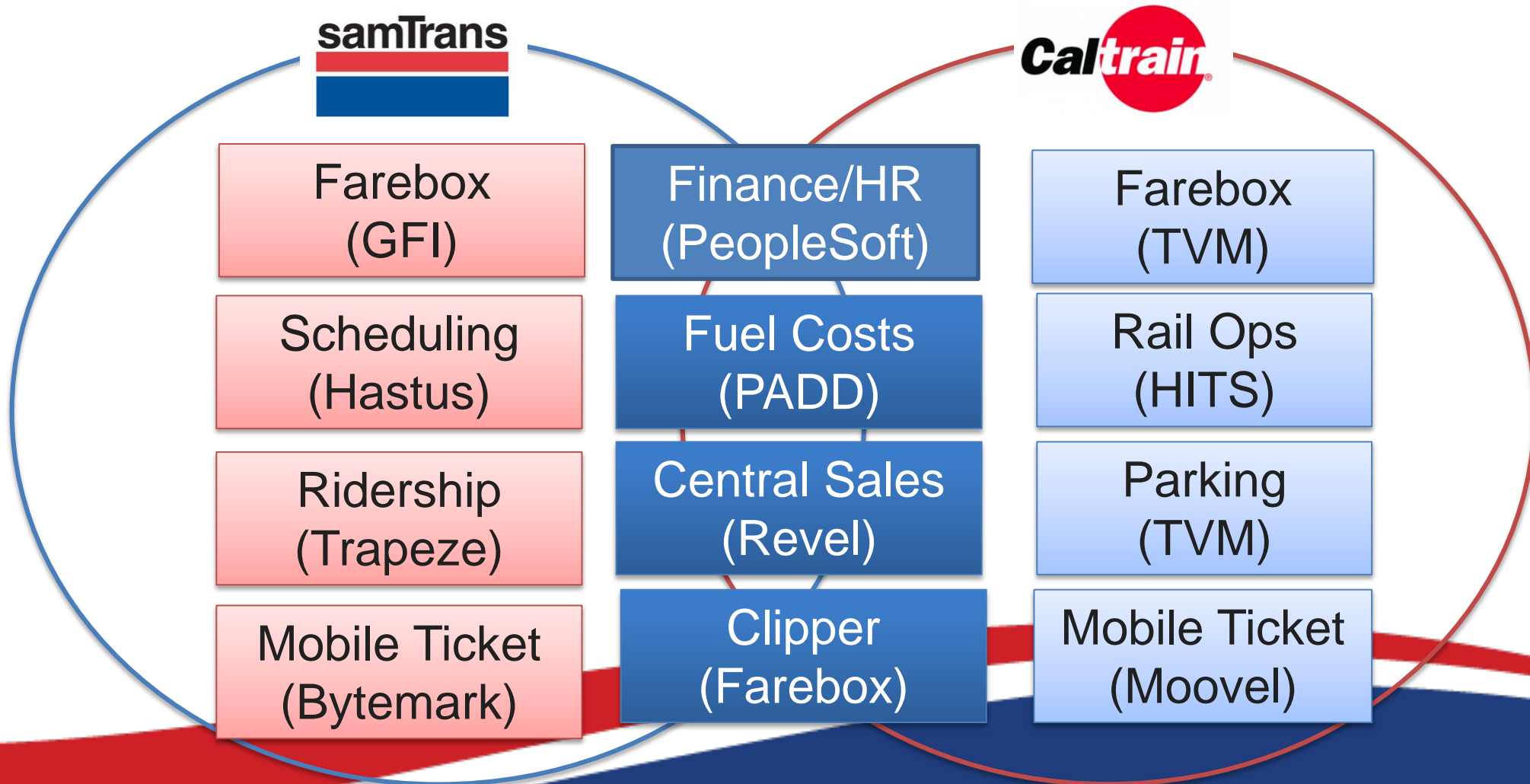


BI Platform

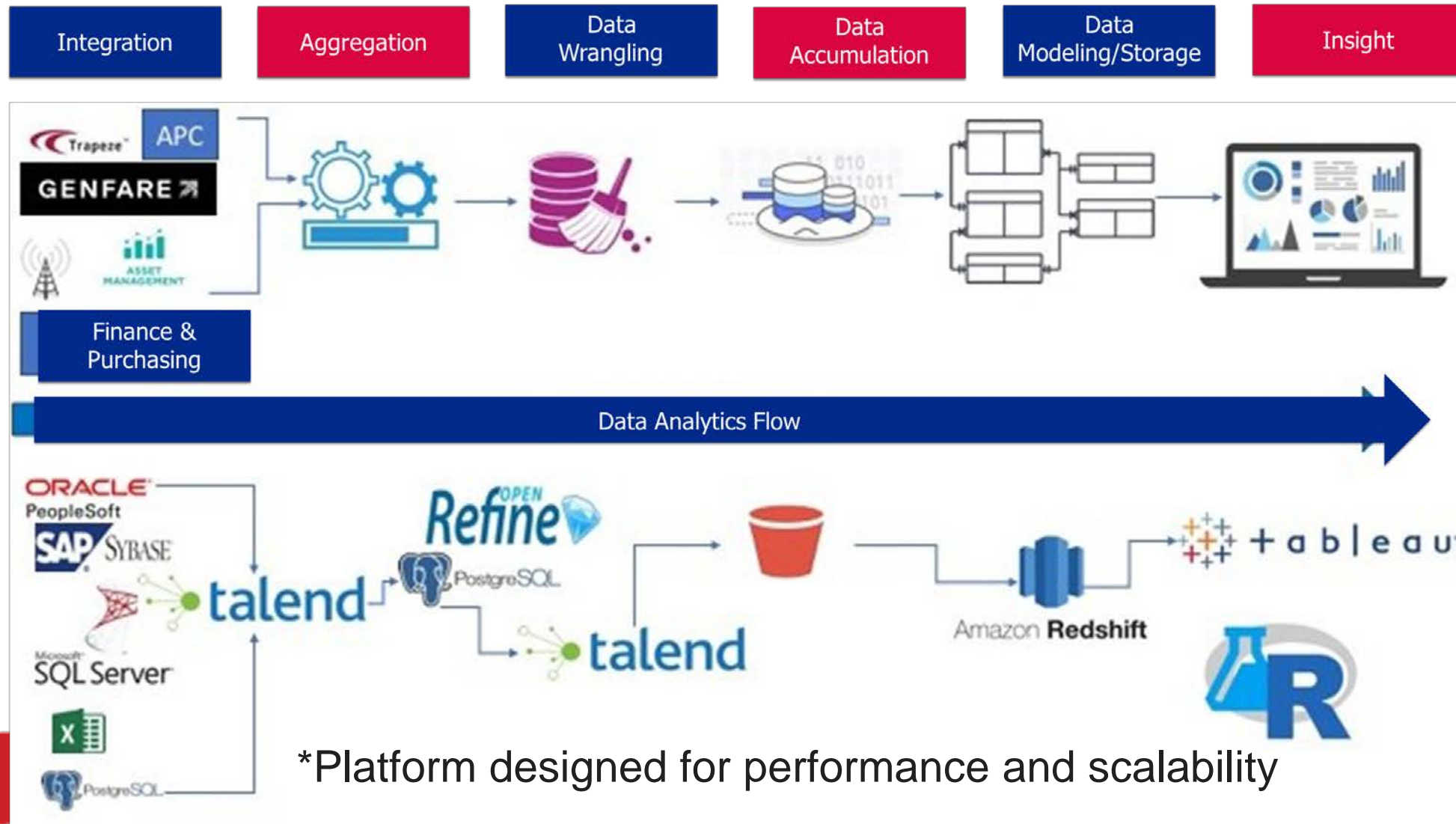
BI Benefits

1. Easy access to information
2. Develop key performance indicators and create dashboards that influence timely/specific actions
3. Better insights and analysis
4. More accurate planning
5. Improve decisions

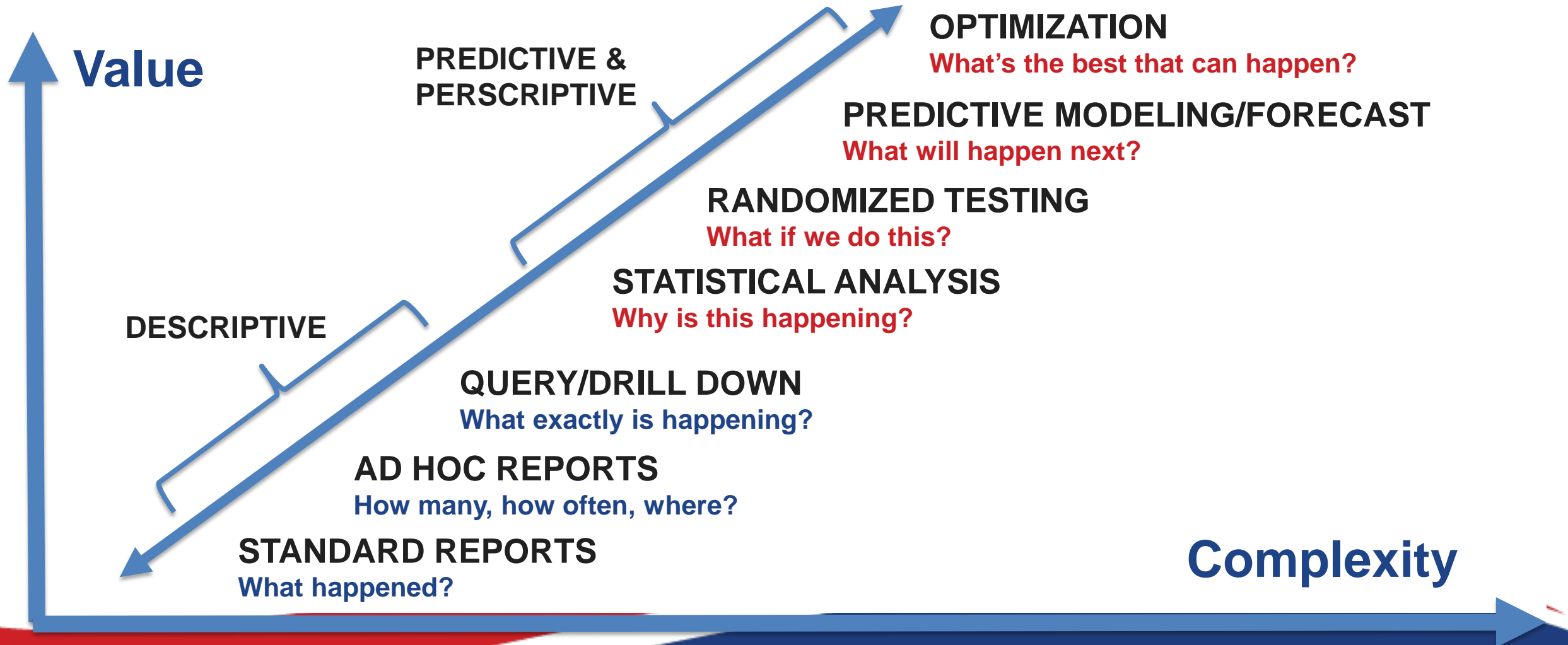
Sample of Current District Data Sources



BI Platform Data Flow



Analytics and Reporting



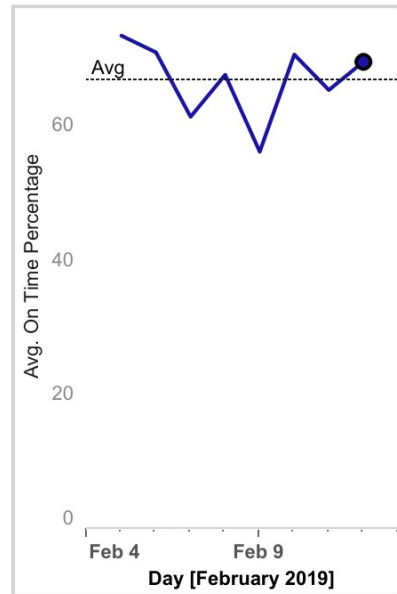
Dashboard Sample - I

Executive Dashboard

Actuals

[Click to see the projections](#)

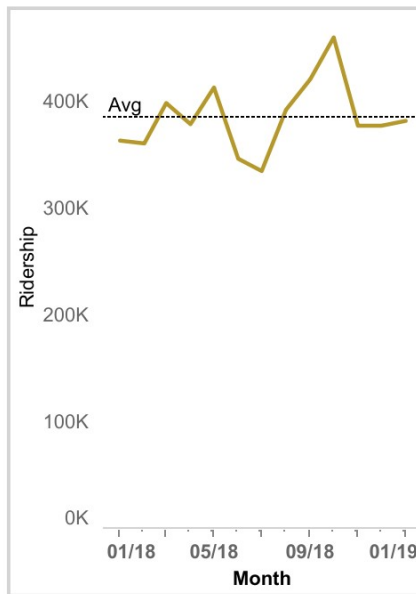
On-Time Performance



Feb 12th **6.41%**
vs previous day

▲
Source :SamTrans

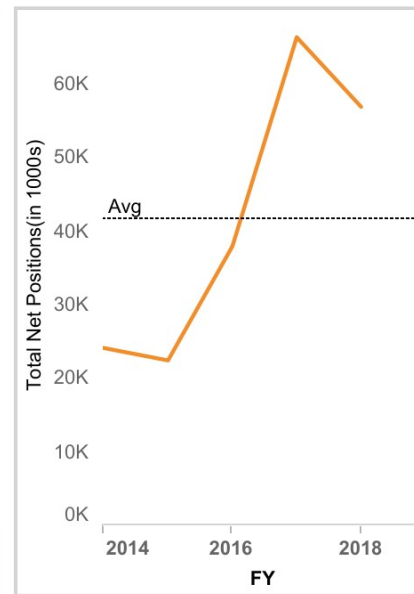
Ridership



Jan 2019 **5.08 %**
vs Jan 2018

▲
Source:Tri-Delta

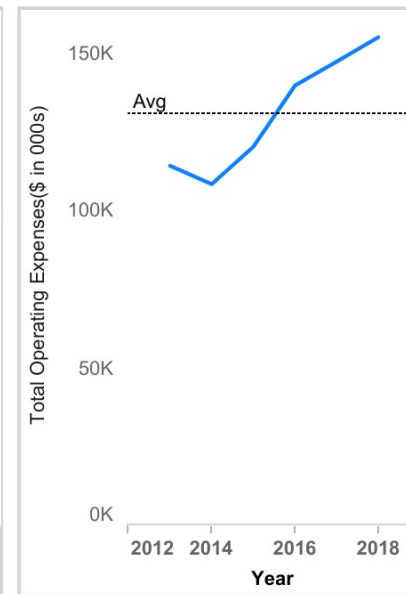
Total Net Position



2018 **14.24%**
vs 2017

▼
Source:SamTrans

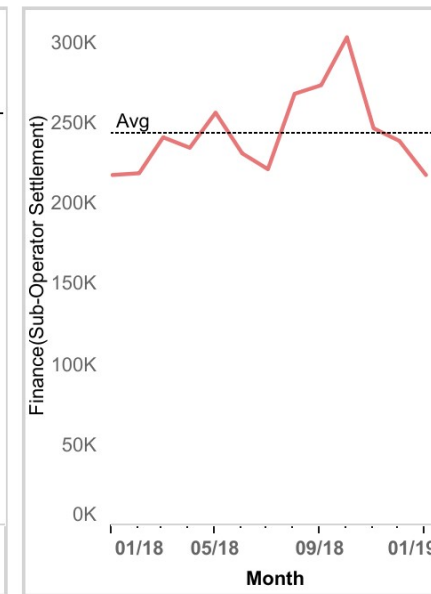
Total Operating Expenses



2018 **5.26%**
vs 2017

▲
Source: SamTrans

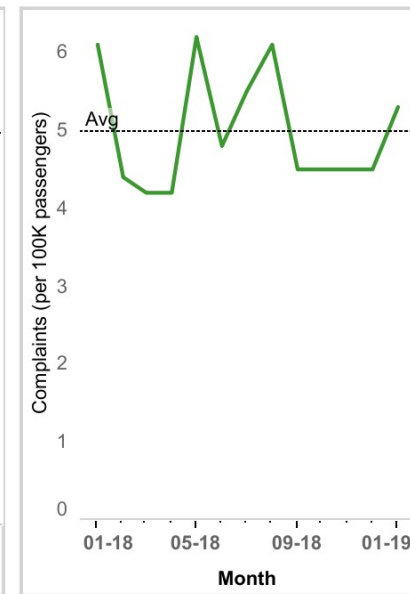
Clipper Fare Revenue



Jan 2019 **0%**
vs Jan 2018

—
Source:SamTrans

Average Verified Complaints



Jan 2019 **15.09%**
vs Jan 2018

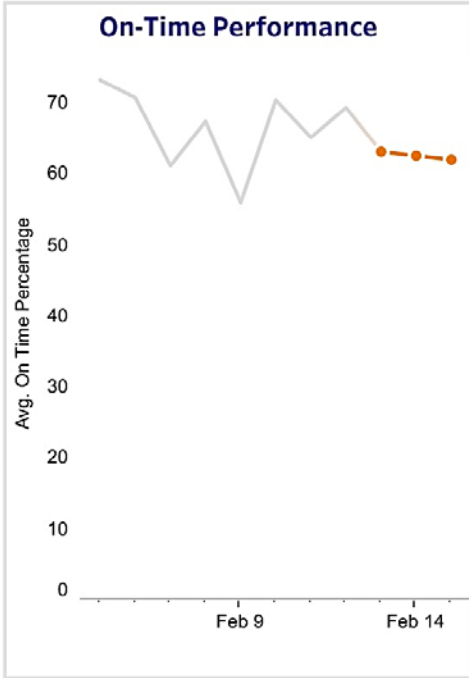
▼
Source:Sample

Dashboard Sample - II (with Predictions)

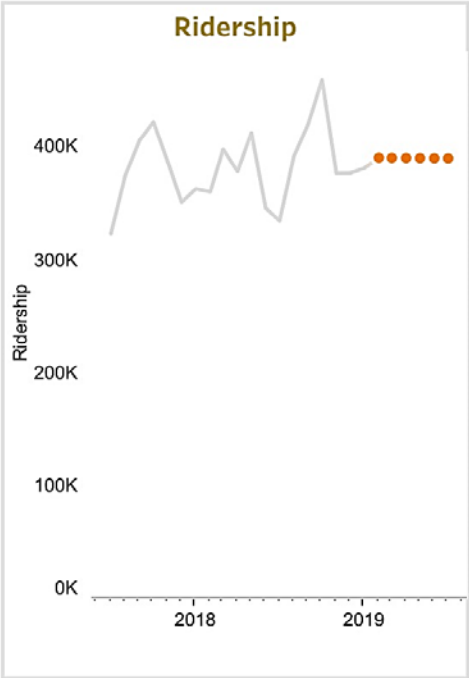
Executive Dashboard

Projections

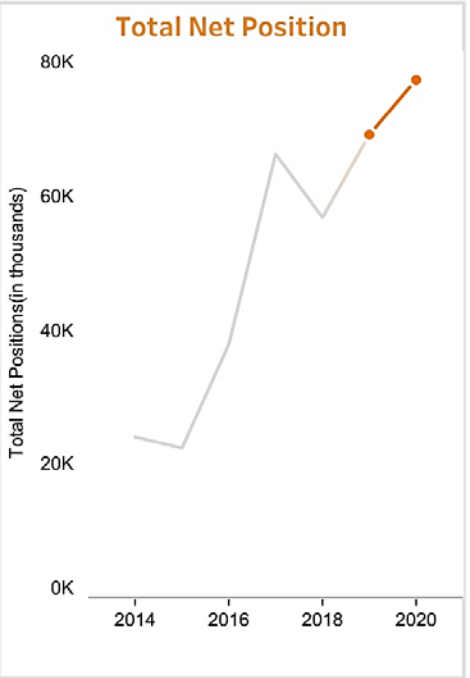
[Click to see the Actuals](#)



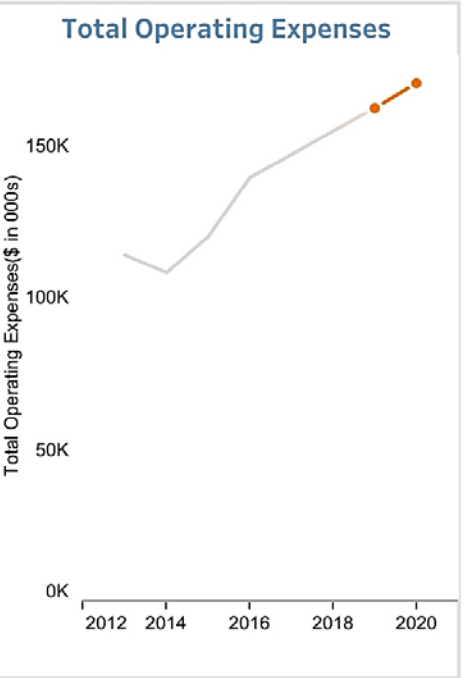
Source : SamTrans



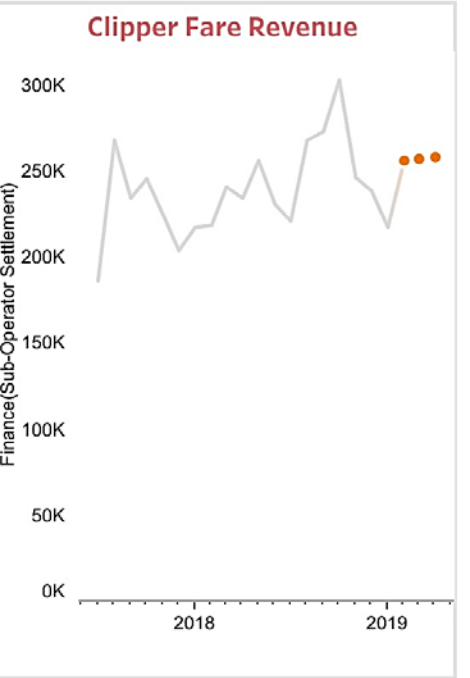
Source : Tri-Delta(GFI)



Source: SamTrans



Source: SamTrans



Source: SamTrans

Confidence Interval = .95

Actual Estimate

Dashboard Sample - III

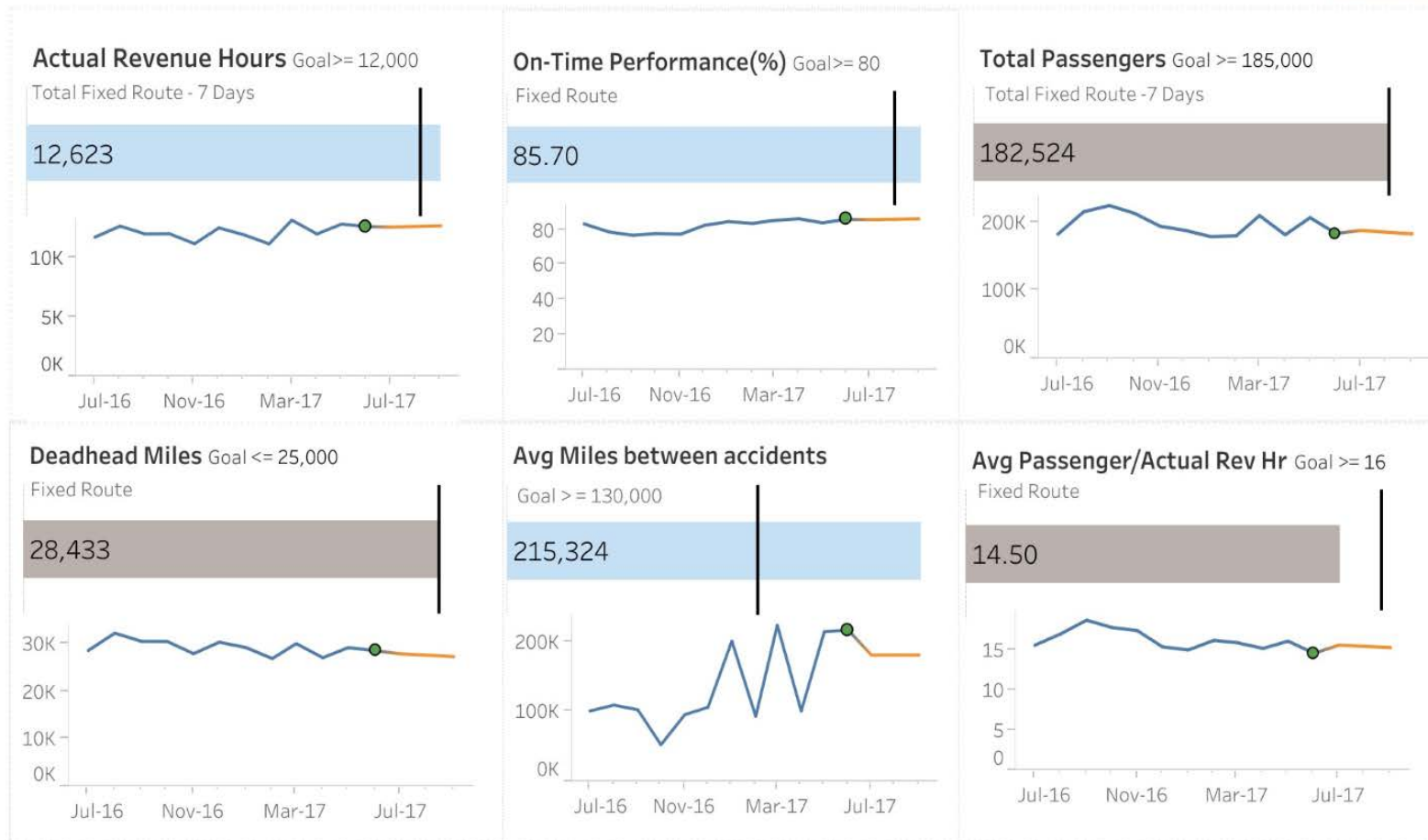
Operational Dashboard

June 2017 Performance vs Goal

Select a month:
June 2017

■ Actual ■ Estimate
 Goals met Goals not met

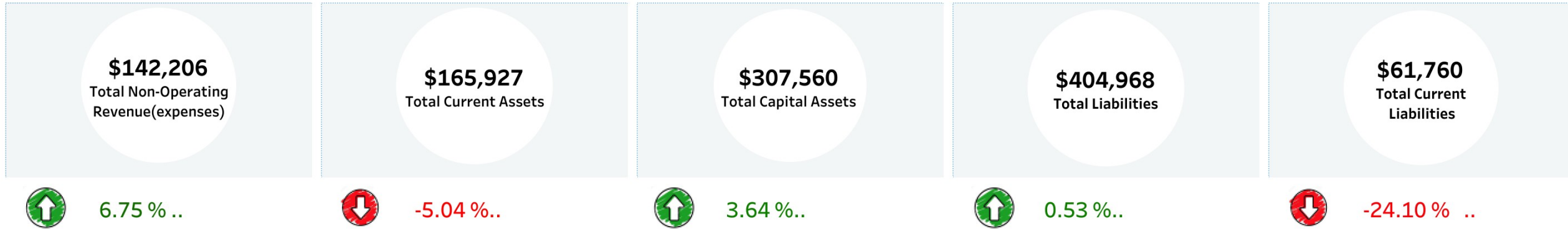
[Learn more](#)



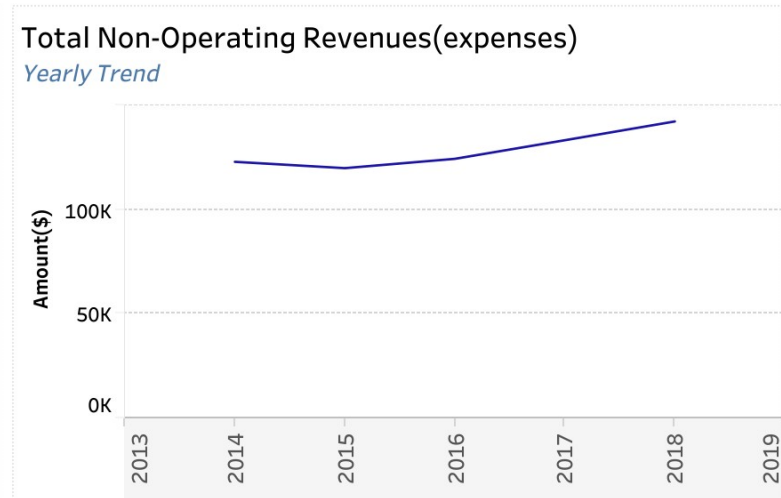
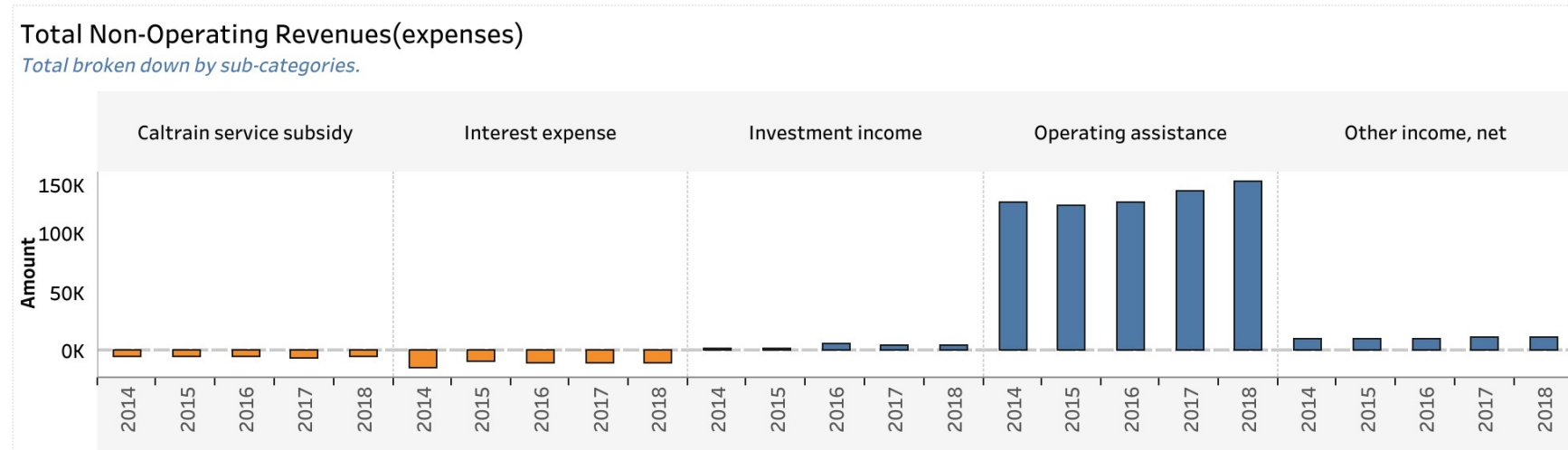
Dashboard Sample - IV

Source: SamTrans

Financial Dashboard



[Click inside the circle to see the yearly trend and split by sub-categories.](#)



Summary

- The BI solution is a powerful tool to compile and process raw data from multiple sources to create visual representations to inform better business decisions
- Enable staff to better predict outcomes of investments and capital programs
- It will help measure performance against goals, improve efficiency and effectiveness, and develop strategy

Next steps

- The estimated timeline for implementation is about 6 months
- Following implementation there is a 3 month warranty period
- Staff is recommending the board approve awarding the contract for the BI solution to TransSight