



## Board Report

File #: 2023-0765, File Type: Contract

Agenda Number: 26.

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### OPERATIONS, SAFETY, AND CUSTOMER EXPERIENCE COMMITTEE MARCH 21, 2024

**SUBJECT: FLEET SCHEDULE SOFTWARE UPGRADE**

**ACTION: APPROVE CONTRACT AWARD**

#### **RECOMMENDATION**

CONSIDER:

- A. AUTHORIZING the Chief Executive Officer to award a non-competitive 36-month firm fixed price Contract No. PS108917000 to Giro, Inc./LE Groupe En Informatique Et Recherche Operatioannelle (Giro, Inc.) for the HASTUS v2024 fleet schedule software upgrade and optional software enhancements in the amount of \$3,445,049, and;
- B. FINDING that there is only a single source of procurement for the item(s) set forth in recommendation A above and that the purchase is for the sole purpose of duplicating or replacing supply, equipment, or material already in use, as defined under Public Utilities Code Section 130237.

(REQUIRES TWO-THIRDS VOTE OF THE FULL BOARD)

#### **ISSUE**

The Scheduling Department of Metro Operations, which has more than 5,000 Transit Operators who run its buses and trains, has been using the HASTUS system since 1997 to make all the bus and operator/fleet schedules for Metro. The HASTUS software is outdated and needs an upgrade to the latest version that Giro, Inc., the software provider, offers. The proposed contract award will enable Giro to update the current HASTUS System software from version 2015 (v2015) to version 2024 (v2024). The HASTUS v2024 software has all the relevant software improvements that the contractor has made in the past nine years.

#### **BACKGROUND**

HASTUS is a specialized, proprietary software product created by Giro, Inc. It enables the creation of efficient operator/vehicle schedules that comply with Metro policies, regulatory requirements, and the union contract's rules. Scheduling and assigning operators and vehicles are essential operational

activities for Metro. The HASTUS software also supports other vital functions within operations, such as: the pay calculation for operators based on their union contract; daily dispatching of operators from the divisions; extra board markup to ensure all work runs have an operator assigned to them; and many other vehicle/operator requirements.

The HASTUS software consists of various software modules that offer key functionality to Metro's bus and rail fleet operation. A brief description of these tools is provided in Attachment A.

## **DISCUSSION**

Metro's current software, HASTUS v2015, is in need of upgrade as does not support some of the latest technological and security features, and it has limited functionality for electric vehicle/charging and rail scheduling. Moreover, it does not allow for scheduling vehicles based on location, charge level, and service priority. These key features are essential for Metro's growing transit network, which requires more coordination between bus and rail modes, as well as for Metro's transition to a Zero Emission Bus (ZEB) bus fleet, which involves new time management challenges for operator/fleet scheduling at charging stations. The software is also an important tool used to assess needed service adjustments as they relate to EFC priorities.

To address these operational limitations, Metro needs to upgrade to HASTUS v2024, which offers more functional capabilities and flexibility for rail scheduling and operator assignments. The upgrade also includes operator bidding enhancements that will enable a user-friendly web and mobile phone application for more efficient operator bidding. Furthermore, Metro will move to a cloud-hosted solution that will improve real-time disaster recovery options and facilitate a smoother operational transition as Metro has tentative plans to relocate to a new and combined Bus and Rail Operations Center.

## **DETERMINATION OF SAFETY IMPACT**

The HASTUS v2024 software helps to ensure appropriate schedules between trip recovery times are respected according to Metro's collective bargaining agreements and continues to ensure that operators have sufficient rest times between shifts, from one day to the next, as mandated by law for safety reasons. For this reason, upgrading and maintaining the HASTUS system is a necessary and critical safety measure.

## **FINANCIAL IMPACT**

Funding of \$3,445,049 is required for this effort. A Life of Project (LOP) budget of \$5,421,000 has been established in project 207169 - HASTUS Upgrade. This contract award is within the project LOP.

Since this is a multi-year project, the project manager and the Chief Operations Officer shall be responsible for future fiscal year budgeting.

### Impact to Budget

The current source of funds for this action is TDA Article 4. This funding is eligible for bus and rail operations.

### EQUITY PLATFORM

The HASTUS system is used to support the daily operation of all bus and rail vehicles and operators across the entire fleet. The recommended upgrade will support operations and service for riders who may have limited mobility options. Further, it will support bus and rail operator shifts and rest times, which is anticipated to yield positive benefits for both Metro's workforce and customers.

### IMPLEMENTATION OF STRATEGIC PLAN GOALS

Improved Customer Information supports Metro Vision 2028 Strategic Goal 2: Deliver outstanding trip experiences for all users of the transportation system.

### ALTERNATIVES CONSIDERED

The Board may elect not to approve the recommendation, which would postpone upgrading this vital system and Metro would continue to operate on v2015. However, this is not recommended as this mission-critical application will continue to fall behind other technological advances and risk incompatibility with new operating systems, database software, advanced cyber security software, and related software maintenance tools.

### NEXT STEPS

Upon approval by the Board, staff will execute Contract No. PS108917000 with Giro, Inc. for the HASTUS v2024 software upgrade.

### ATTACHMENTS

Attachment A - HASTUS Software Module Description

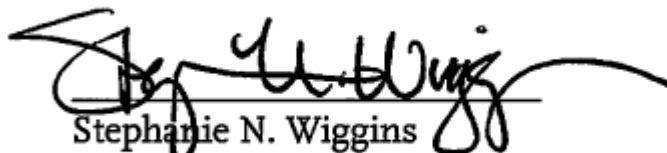
Attachment B - Procurement Summary

Attachment C - DEOD Summary

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Chief Executive Officer

ATTACHMENT A – HASTUS Software Module Description

<b>Module</b>	<b>Functional Description</b>
Vehicle	Explains how to plan the routes, schedules, stops, and durations of public transportation services, and how to assign the best vehicles for each route (“blocking”).
Crew & CrewOpt	Creates optimal workdays for operators based on vehicle schedules using run-cutting automation.
Geo	Geo allows you to set up stops and route patterns on a map that covers the service area. It also helps you measure distances and deadheads automatically. Geo is essential for generating the data that the AVL system needs.
Roster	Roster helps create weekly schedules for operators that comply with work rules and regulations.
MinBus	MinBus is a tool that enhances Vehicle by providing advanced optimization features. It goes beyond the block-creation process and takes into account more factors and preferences, such as interlining with control.
NetPlan	NetPlan is a tool that helps Planners design and optimize service levels on key routes or segments based on ridership data. It also enables the creation of base timetables that balance customer satisfaction and vehicle efficiency. This tool allows Planners to transfer their preliminary service plans directly to the Scheduling Department, saving time and resources. This is the tool used in the development of the Next Gen schedule update.
DailyCrew & DailyVehicle	DailyCrew/DailyVehicle is a software solution that helps with various aspects of driver and vehicle management, such as scheduling, timekeeping, payroll, service adjustments, vehicle assignments, and reporting. It has a user-friendly interface called DispatchAssistant that allows dispatchers to perform most of their tasks with ease and efficiency. It also has a feature called YardAssistant that enables yard-management functions on both tablets and desktops.
Rider	Rider is a tool that helps you import, display, and analyze ridership data from onboard systems. You can use the analysis to adjust routes and trip frequencies to meet the service level that customers need.
ATP	Using advanced algorithms, ATP can calculate run times based on the observed times and the planned times. You can get the observed times from other systems like AVL systems. Every week, about 750,000 data points are imported.

## PROCUREMENT SUMMARY

## HASTUS v2024 UPGRADE / PS108917000

1.	<b>Contract Number:</b> PS108917000	
2.	<b>Recommended Vendor:</b> Giro, Inc./Le Groupe en Informatique et Recherche Operatioannelle (Giro, Inc.)	
3.	<b>Type of Procurement (check one) :</b> <input type="checkbox"/> IFB <input type="checkbox"/> RFIQ <input type="checkbox"/> RFP <input checked="" type="checkbox"/> Non-Competitive <input type="checkbox"/> Modification <input type="checkbox"/> Task Order	
4.	<b>Procurement Dates :</b>	
	<b>A. Issued :</b> July 20, 2023	
	<b>B. Advertised/Publicized:</b> N/A	
	<b>C. Pre-Proposal Conference:</b> N/A	
	<b>D. Proposals Due:</b> September 15, 2023	
	<b>E. Pre-Qualification Completed:</b> February 6, 2024	
	<b>F. Ethics Declaration Forms submitted to Ethics:</b> September 20, 2023	
	<b>G. Protest Period End Date:</b> N/A	
5.	<b>Solicitations Picked up/Downloaded:</b>  1	<b>Proposals Received:</b>  1
6.	<b>Contract Administrator:</b> Annie Duong	<b>Telephone Number:</b> (213) 418-3048
7.	<b>Project Manager:</b> Al Martinez	<b>Telephone Number:</b> (213) 922-2956

**A. Procurement Background**

This Board Action is to award Contract No. PS108917000 to Giro, Inc. for the HASTUS v2024 scheduling software upgrade, which consists of various software modules that offer key functionality to Metro's bus and rail fleet operation. HASTUS is proprietary software developed by Giro, Inc.

On July 20, 2023, Request for Proposal (RFP) No. PS108917000 was issued as a non-competitive procurement in accordance with Metro's Acquisition Policy and the contract type is firm fixed price. The Diversity & Economic Opportunity Department did not recommend a Small Business Enterprise (SBE)/Disabled Veteran Business Enterprise (DVBE) participation goal due to the lack of subcontracting opportunities.

One (1) amendment was issued during the solicitation phase of this RFP:

- Amendment No. 1, issued on August 10, 2023, extended the proposal due date.

A proposal was received from Giro, Inc. on September 15, 2023.

## **B. Evaluation of Proposal**

Metro currently uses HASTUS v2015 to meet Metro’s bus/rail operation and scheduling needs. The software allows for required configuration changes that relate to Metro union agreements (e.g., layovers, breaks, overtime, etc.) and operating conditions to optimize service (e.g. short trips, staggered terminal points, school schedules, special events).

The software upgrade and on-going software support are needed to enable operational changes to Metro’s bus and rail fleet (e.g. addition of new vehicles, new lines and route changes) including the planned transition to electric fleet and electric charging stations at the Divisions.

The Project Manager’s technical analysis of the proposal deemed Giro, Inc. responsive to the requirements of the scope of services. Giro has the knowledge, expertise and skillset required for the design, development, implementation, and maintenance of the HASTUS v2024 upgrade.

## **C. Cost Analysis**

The recommended price has been determined to be fair and reasonable based upon an independent cost estimate (ICE), cost analysis, technical analysis, fact finding and negotiations. Metro’s staff successfully negotiated a cost savings of \$495,502.

	<b>Proposer Name</b>	<b>Proposal Amount</b>	<b>Metro ICE</b>	<b>Negotiated Amount</b>
1.	Giro, Inc.	\$3,940,551	\$3,255,039	\$3,445,049

The ICE included an on-premise environment technology to implement the upgrade. However, after a series of discussions and negotiations, Metro elected to use a cloud computing solution wherein Giro will host the system implementation instead of an on-premise environment. The election of the cloud computing solution resulted in the variance between the ICE and the recommended amount.

## **D. Background on Recommended Contractor**

The recommended firm, Giro, Inc., headquartered in Montreal, Province of Quebec, Canada, was founded in 1979. It is a software development company that provides solutions for public transit, electric buses, rail operations, on-demand transport, and postal operations. Giro's product portfolio includes HASTUS, their modular software for public transit operations, and GeoRoute, their routing software for postal operations.

Giro, Inc. has deployed similar software upgrade solutions for public organizations such as King County Metro Seattle, WA, Massachusetts Bay Transportation

Authority (MBTA), San Diego Metropolitan Transit System (MTS), Pittsburg Regional Transit, Denver Transit Operators, and New York City Transit.

Metro has purchased HASTUS software subscriptions from Giro, Inc. since 1985 and services have been satisfactory.



DEOD SUMMARY

HASTUS UPGRADE / CONTRACT NO. PS108917000

**A. Small Business Participation**

The Diversity and Economic Opportunity Department (DEOD) did not recommend a Small Business Enterprise (SBE)/Disabled Veteran Business Enterprise (DVBE) participation goal for this procurement due to the lack of small business opportunities for this sole source procurement. Giro, Inc. did not make an SBE/DVBE commitment. It is expected that Giro, Inc. will perform the services with its own workforce.

**B. Living Wage and Service Contract Worker Retention Policy Applicability**

The Living Wage and Service Contract Worker Retention Policy is not applicable to this contract.

**C. Prevailing Wage Applicability**

Prevailing wage is not applicable to this contract.

**D. Project Labor Agreement/Construction Careers Policy**

Project Labor Agreement/Construction Careers Policy is not applicable to this Contract. Project Labor Agreement/Construction Careers Policy is applicable only to construction contracts that have a construction contract value in excess of \$2.5 million.