



**OPERATIONS COMMITTEE  
AUGUST 17, 2006**

**SUBJECT: CONTRACT No. PS-3150-1840, TRANSIT OPERATOR ACTIVITY  
SCHEDULING AND TRACKING PROJECT  
GIRO, INC.**

**ACTION: AWARD CONTRACT FOR THE PURCHASE OF SOFTWARE**

**RECOMMENDATION**

A. The Board finds there is only a single source of procurement for software for the Transit Operator Activity Scheduling and Tracking project and purchase is for the sole purpose of replacing software already in use. The Board hereby authorizes purchase of software pursuant to Public Utilities Code section 130237.

Requires 2/3 vote

B. Authorize the Chief Executive Officer to award a firm fixed price contract, Contract No. PS3150-1840, to Giro, Inc. for the implementation of the HASTUS (Horaires et Assignations pour Systeme de Transport Urbain et Semi-urbain) System, Operations Modules, in an amount not-to-exceed \$2,130,615, effective September 1, 2006.

**ISSUE**

Metro Operations employs over 4,500 people as Transit Operators to drive buses and trains. The FY06 wage budget for this activity was nearly \$230 million. Currently the daily management of Transit Operator activities is performed with the Transit Operator Trends System (TOTS). TOTS compiles information for Payroll processing and Human Resource tracking. The TOTS software was originally developed over 20 years ago by Southern California Rapid Transit District staff. The original software was upgraded as part of Metro's Y2K effort. This upgrade modernized the software to work in a client/server environment with a Microsoft Windows operating system and Oracle database.

Since 1997, the Scheduling Department has used the HASTUS system to create all Metro bus and operator schedules. HASTUS is a commercial off-the-shelf software package developed by Giro, Inc. It provides the capability to develop cost-effective operator schedules while adhering to the United Transportation Union Labor Agreement and state laws. This software upgrade, provided by this contract, will extend this functionality to the daily management of Transit Operator activities, thus rendering the TOTS system obsolete.

## **POLICY IMPLICATIONS**

With the HASTUS system now used exclusively to develop all Transit vehicle, crew and roster schedules, the inclusion of the Operations modules will consolidate the scheduling and daily operations functions into one system. Also, Metro's HASTUS system already contains interface links to feed schedule data to the Customer Information System and ATMS.

## **OPTIONS**

An alternative is to not upgrade to HASTUS Operations Modules and to instead, use a different product to replace TOTS. This is not recommended, as it will prevent consolidation of Transit Scheduling and Daily Operations into a single system. A different vendor's product will not seamlessly integrate into HASTUS, thereby increasing the chances for data discrepancies between the two systems. Also, a different software platform would require additional staff time to develop, synchronize and maintain two systems.

## **FINANCIAL IMPACT**

This project is included in the FY07 budget (Project 207061, Transit Operator Activity Scheduling and Tracking) funded with TDA and STA sales tax. Since this is a multi-year contract, the cost center manager and Executive Officer will be accountable to budget the cost in future years. This contract is within the Life of Project funding approved for this project.

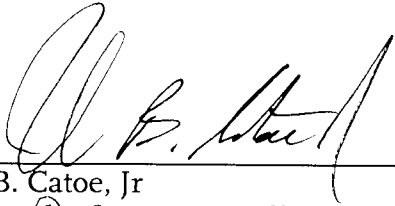
## **DISCUSSION**

The Transit Operator Activity Scheduling and Tracking Project will procure new client/server hardware and off-the-shelf software to track daily Transit Operator activities, and the fund integration of the new software with numerous other Metro systems including Scheduling, Human Resources, Payroll, Training, and the Advanced Transportation Management System (ATMS). Additionally, this contract also includes funds for all Metro labor required to perform a comprehensive testing, training, and migration plan.

## **ATTACHMENT(S)**

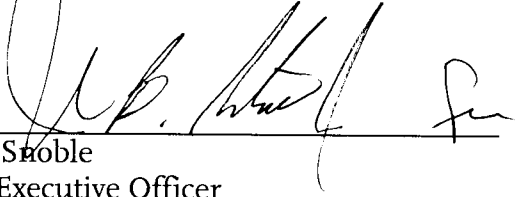
- A. Procurement Summary
- A-1. Procurement History
- A-2. List of Subcontractors

Prepared by: Ed Muncy, Director, Service Performance Analysis



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John B. Catoe, Jr  
Deputy Chief Executive Officer



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Roger Snoble  
Chief Executive Officer

**BOARD REPORT ATTACHMENT A  
PROCUREMENT SUMMARY**

**TRANSIT OPERATOR ACTIVITY SCHEDULING AND TRACKING PROJECT**

1.	Contract Number: PS31501840		
2.	Recommended Vendor: Giro, Inc.		
3.	Cost/Price Analysis Information:		
	A. Bid/Proposed Price: \$2,130,615	Recommended Price: \$2,130,615	
	B. Details of Significant Variances are in Attachment A-1.D		
4.	Contract Type: Fixed Price (Fixed labor rates)		
5.	Procurement Dates:		
	A. Issued: April 17, 2006		
	B. Advertised: Not Applicable (non-competitive procurement)		
	C. Pre-proposal Conference: Not Applicable		
	D. Proposals Due: May 15, 2006		
	E. Pre-Qualification Completed: April 25, 2005		
	F. Conflict of Interest Form Submitted to Ethics: 08/01/06		
6.	Small Business Participation: None		
	A. Bid/Proposal Goal: 0%	Date Small Business Evaluation Completed: March 6, 2006	
	Small Business Commitment: 0% Details are in Attachment A-2		
7.	Invitation for Bid/Request for Proposal Data:		
	Notifications Sent: Not Applicable Non-competitive	Bids/Proposals Picked up:	Bids/Proposals Received: 1
8.	Evaluation Information:		
	A. Bidders/Proposers Names: Giro, Inc.	<u>Bid/Proposal Amount:</u> \$2,130,615	<u>Best and Final Offer Amount:</u> \$2,130,615
	B. Evaluation Methodology: Not Applicable (non-competitive procurement) Details are in Attachment A-1.C		
9.	Protest Information: Not Applicable		
	A. Protest Period End Date:		
	B. Protest Receipt Date:		
	C. Disposition of Protest Date:		
10.	Contract Administrator: Pat Lane-Goodson	Telephone Number: 922-4639	
11.	Project Manager: Ed Muncy	Telephone Number: 922-6950	

**BOARD REPORT ATTACHMENT A-1  
PROCUREMENT HISTORY**

**TRANSIT OPERATOR ACTIVITY SCHEDULING AND TRACKING PROJECT**

**A. Background on Contractor**

Founded 25 years ago, Giro, Inc., is located in Montreal Canada. Giro is considered a world leader in transit software. They provide computer software, maintenance, and related consulting for transportation applications in 21 countries. In the United States, Hastus is used by 34 transportation properties, including applications for New York City and Chicago Transit.

Since 1997, Metro's Scheduling Department has used the Hastus System to create all bus and operator schedules. Giro has consistently provided Metro with a cost effective vehicle & crew scheduling solutions that adheres to UTU Labor Agreement, State Law, and accepted practices. As part of this project, Giro will provide the Schedule Operator Activity Scheduling and Tracking System client/server hardware, to track daily transit Operator activities, and integrate the Scheduling, Human Resources, and Payroll, Training, and ATMS software systems. Giro will also provide comprehensive testing and training. In other HASTUS projects, Giro's past performance has been rated excellent.

**B. Procurement Background**

Metro procured the Giro Inc., Hastus client/server based scheduling software package in 1997/1998. This was a Board approved competitive procurement in the amount of \$775,000. Annual Maintenance agreements for the software began at the end of this procurement cycle with Metro entering into a Program Product License Agreement with Giro. Under the terms of the Agreement, Metro acquired a perpetual license for the use of the Hastus complement of software products from Giro. The Hastus programs are very sophisticated proprietary products. Adopting Hastus-Daily Crew and Hastus-Self Service Modules will eliminate the need to integrate Giro proprietary software with third party software. Implementing another software platform would introduce extra cost, avoidable risk, and time consuming tasks to the project. As such, no other sources were solicited for this requirement.

A Determination & Finding was prepared and approved to execute a non-competitive procurement for this requirement. This non-competitive action complies with PUC 130237, "Single Source Exceptions," which permits use of a single source of supply for the sole purpose of duplicating or replacing supplies equipment, or material already in use, without observance of competitive bidding requirements.

The Small Business Unit did not recommend a Small Business Enterprise participation goal for this procurement. The Contractor is expected to continue completing the entire scope with its own workforce.

**C. Evaluation of Proposals**

Metro has been using the Hastus System exclusively and no other proposals were solicited. The evaluation of Giro's proposal complied with the requirements of the MTA Procurement Policies and Procedures Manual.

**D. Cost/Price Analysis Explanation of Variances**

The recommended price has been determined to be fair and reasonable based upon the Independent Cost Estimate and Price Analysis performed.

**BOARD REPORT ATTACHMENT A-2  
LIST OF SUBCONTRACTORS**

**TRANSIT OPERATOR ACTIVITY SCHEDULING AND TRACKING PROJECT**

**PRIME CONTRACTOR – Giro, Inc.**

Small Business Commitment

0%

Total Commitment      0%.

Other Subcontractors

Not Applicable

