


Date: January 24, 2024

To: Board of Directors

From: Sam Desue, Jr. 

Subject: **RESOLUTION NO. 24-01-02 OF THE TRI-COUNTY METROPOLITAN TRANSPORTATION DISTRICT OF OREGON (TRIMET) AUTHORIZING A CONTRACT MODIFICATION WITH GIRO, INC. FOR HASTUS EMPLOYEE SCHEDULING SOFTWARE, UPGRADES, AND ANNUAL MAINTENANCE FEES**

1. Purpose of Item

This Resolution requests that the TriMet Board of Directors (Board) authorize the General Manager or his designee to execute a contract modification with GIRO, Inc. (GIRO) for HASTUS employee work scheduling software, software components, upgrades, and annual maintenance fees (Modification).

Type of Agenda Item

- Initial Contract
- Contract Modification
- Other _____

2. Type of Contract Procurement

- Low Bid / Invitation to Bid (ITB)
- Request for Proposals (RFP) (inc. CM/GC)
- Request for Qualifications (RFQ) (Personal Services)
- Other (inc. sole source): Sole Source

3. Reason for Board Action

Board authorization is required for all contract Modifications over \$1,000,000.

4. Type of Action

- Resolution
- Ordinance 1st Reading
- Ordinance 2nd Reading
- Other _____

5. Background

TriMet’s scheduling of bus and MAX Operators is a complex process and one that is poorly supported by our current technology. Every three months, using a cumbersome and outdated manual process, TriMet bus and MAX Operators sign up for work assignments that are scheduled for the following quarter. In addition, Operators participate in signups for nine specific holidays and special service assignments, such as bus bridging in response to special events, construction work, and temporary MAX service outages.

The current signup process relies on the use of paper, phone calls, emails, and legacy software, and creates a significant burden on Operators, station agents, schedule writers, schedule data technicians, and other staff. Signing up for a shift, requesting vacation, and taking sick time are all manual processes and can be slow, onerous, and error-prone. In addition, our sub-optimal scheduling system negatively impacts our less senior Operators who may be assigned unpredictable schedules, such as having to work an early morning start (sometimes at 4 a.m. or earlier) followed by a late night run (sometimes until well after midnight).

Our research with Operators shows that these scheduling challenges are a major factor driving Operator attrition, particularly in the first year of employment. This is especially true for those who are assigned to work the “Extraboard” -- Operators who must be available to accept work assignments of other Operators who report in sick, on vacation or otherwise unavailable for duty -- and have unpredictable work on any given day.

HASTUS software is used by many public transportation systems and is what TriMet currently relies on for creating transit timetables and preparing driver rosters. HASTUS software is produced by GIRO, the best and most experienced vendor of Operator scheduling software systems for agencies of TriMet’s size and complexity. TriMet currently makes limited use of some capabilities of HASTUS, but we must expand our HASTUS system and thoroughly rework our processes in order to deliver a modern, state-of-the-art, self-service, scheduling experience for our Operators.

TriMet’s Workforce Management Upgrade Project (Project) intends to modernize and streamline the Operator signup, Operator assignment, and Extraboard processes, and Modification of the existing GIRO contract is necessary to do so. The Project proposes to fully adopt the capabilities of the HASTUS system and to retire a complex mix of manual processes and legacy software. The Modification proposed by this Resolution will address these challenges and is a critically important component of the Agency’s multi-faceted efforts to improve Operator experience and retention.

Under the Modification, TriMet would receive new and upgraded HASTUS employee work scheduling software modules, including “Roster,” “Bid/Bidweb,” “DailyCrew/DailyVehicle” and “SelfService” software. The Modification would also include three years of software maintenance fees. The benefits of these upgrades include improved functionality and increased access to the software for Operators, resulting in an improved Operator work signup experience and control over work schedules.

The Modification will improve operator signups and the day-to-day management of operator shifts and assignments, including online signups when Operators bid for their bus or MAX assignments with each schedule change. New scheduling software and upgrades will utilize multiple connections to other functions, including detailed information on schedules and run availability, HR information, and Operator seniority lists, and is pre-integrated with our current HASTUS scheduling modules. The Modification will provide TriMet’s Operators, Station Agents, Scheduler Writers, Schedule Data Technicians, and other staff with a better, more efficient, and consistent user experience, reduce training time and maximize accuracy and understanding of the various HASTUS functions.

Implementation of the Modification is expected to increase retention and recruitment of Operators. This is essential to maintaining reliable bus and MAX service and enabling TriMet to deliver planned service expansions.

6. Description of Procurement Process

HASTUS is a leading software in the public transit market, and a broad selection of TriMet's peer transit agencies, large and small, use the HASTUS system. Many already use the enhanced modules that TriMet seeks to implement. TriMet has used HASTUS software from GIRO for its core work scheduling processes for many years, and the Agency has been through several upgrades of its core functions. The software has been effective for our past uses and GIRO has been responsive to our needs over time.

TriMet has evaluated the field and determined that continuing to invest in the HASTUS platform, rather than replacing it, would be the most cost-effective method of improving the scheduling processes for our Operators and the Agency. It is in TriMet's best interests to pursue the Modification with GIRO, Inc. for installation and operation of new modules and functionality for the HASTUS software system.

If the Modification described in this Resolution is approved, TriMet will modify its existing sole source contract with GIRO, upgrading the goods and services provided and increasing the current contract amount of \$654,569 by \$4,500,000, for a new contract amount of \$5,154,569. The Modification also would extend the current contract termination date for five years, from June of 2026 to June of 2031.

7. Diversity

GIRO has 661 employees, 13.5% of whom are minorities and 30.7% of whom are female.

8. Financial/Budget Impact

This Project currently is identified as part of TriMet's Capital Improvement Program, with FY2024-FY2025 funding anticipated from the State Transportation Improvement Fund (STIF).

9. Impact if Not Approved

If the Modification is not approved, TriMet will be unable to upgrade its workforce scheduling software, and bus and MAX Operators will continue to sign up for their work using a cumbersome, time-consuming and outdated process that contributes to significant Operator frustration and dissatisfaction. Without these upgrades, TriMet will forgo the opportunity to enhance the work scheduling experiences of our Operators and managers, undermining our Operator retention goals. Increased Operator retention is necessary for TriMet to meet its Vision 2030 service targets.

RESOLUTION NO. 24-01-02

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WHEREAS, TriMet has authority under ORS 267.200 to enter into a contract Modification with GIRO, Inc. (GIRO) for the HASTUS Roster, Bid/Bidweb, DailyCrew/DailyVehicle, and SelfService software modules, other software components and upgrades, and maintenance fees necessary to operate the HASTUS employee work scheduling system (Modification); and

WHEREAS, by Resolution No. 22-05-35, dated May 25, 2022, the TriMet Board of Directors (Board) adopted a Statement of Policies requiring the Board to approve contract Modifications obligating TriMet to pay in excess of \$1,000,000; and

WHEREAS, the total amount of this Modification will exceed \$1,000,000;

NOW, THEREFORE, BE IT RESOLVED:

1. That the Modification shall conform with applicable law.
2. That the General Manager or his designee is authorized to execute a contract Modification with GIRO, increasing the current \$654,569 amount by \$4,500,000, for a total not to exceed amount of \$5,154,569, through its June 2031 termination date.

Dated: January 24, 2024



Presiding Officer

Attest:



Recording Secretary

Approved as to Legal Sufficiency:



Legal Department