

PROCUREMENT SUMMARY

**STRATEGIC FINANCIAL MANAGEMENT ON-CALL SERVICES
PS132584000 THROUGH PS132584002**

1.	Contract Number: PS132584000 (Custom Application Development and Maintenance in Oracle, Salesforce, and Microsoft SharePoint) PS132584001 (Business Improvement Process Studies) PS132584002 (Organizational and Resource Planning and Management)	
2.	Recommended Vendor: KPMG LLP (PS132584000) Crowe LLP (PS132584001) KPMG LLP (PS132584002)	
3.	Type of Procurement (check one): ☐ IFB ☒ RFP ☐ RFP-A&E ☐ Non-Competitive ☐ Modification ☐ Task Order	
4.	Procurement Dates:	
	A. Issued: September 5, 2025	
	B. Advertised/Publicized: September 5, 2025	
	C. Pre-Proposal Conference: September 15, 2025	
	D. Proposals Due: October 15, 2025	
	E. Pre-Qualification Completed: February 27, 2026	
	F. Ethics Declaration Forms submitted to Ethics: October 16, 2025	
	G. Protest Period End Date: July 21, 2026	
5.	Solicitations Downloaded: 86	Bids/Proposals Received: 5 (Custom Application Development and Maintenance in Oracle, Salesforce, and Microsoft SharePoint) 4 (Business Improvement Process Studies) 3 (Organizational and Resource Planning and Management)
6.	Contract Administrator: Bryan Truong	Telephone Number: (213) 922-4241
7.	Project Manager: Thu Nguyen	Telephone Number: (213) 922-4490

A. Procurement Background

This Board Action is to approve Contract Nos. PS132584000 (Oracle Application Development and Maintenance), PS132584001 (Business Improvement Process Studies), and PS132584002 (Organizational and Resource Planning and Management) to provide on-call consulting services to augment staff resource needs and support Oracle, Salesforce, and Microsoft applications. Board approval of contract awards is subject to the resolution of any properly submitted protest(s), if any.

On September 5, 2025, Request for Proposals (RFP) No. PS132584 was issued as a competitive procurement in accordance with Metro's Acquisition Policy and the contract type is a firm fixed unit rate. The Diversity & Economic Opportunity Department established an overall 10% Small Business Enterprise (SBE) goal, which can be achieved through commitments to SBEs and/or Disabled Veteran

Business Enterprises (DVBE) in any combination. It was also subject to the Local Small Business Enterprise Preference Program, which awards a bonus of 5 preference points for utilization of local small business firms.

Proposers were allowed to propose on one or more disciplines. The RFP stated that only one contract per discipline would be awarded, with no limit on the number of contracts that may be awarded to a single firm.

Work under each contract will be authorized through the issuance of task orders. Each future task order will contain a specific scope of services and will be issued based on on-call needs.

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

- Amendment No. 1, issued on September 29, 2025, extended the RFP proposal due date from October 6, 2025, to October 15, 2025.

A total of 86 downloads of the RFP were included in the planholders' list. A virtual pre-proposal conference was held on September 15, 2025, and was attended by 12 participants representing 12 firms. There were 54 questions received and responses were issued prior to the proposal due date.

A total of 12 proposals were received by the proposal due date of October 15, 2025, and are listed below in alphabetical order. No proposals were received for the Fare Restructuring discipline.

Custom Application Development and Maintenance in Oracle, Salesforce, and Microsoft SharePoint

1. Deloitte Consulting LLP (Deloitte)
2. Financial Management Consulting (FMC)
3. KPMG LLP (KPMG)
4. Numentica LLC (Numentica)
5. Speridian Technologies LLC (Speridian)

Business Improvement Process Studies

1. Alvarez & Marsal Public Sector Services LLC (Alvarez)
2. Crowe LLP (Crowe)
3. KPMG LLP (KPMG)
4. The Boston Consulting Group, Inc. (BCG)

Organizational and Resource Planning and Management

1. Crowe LLP (Crowe)
2. KPMG LLP (KPMG)

3. The Boston Consulting Group, Inc. (BCG)

B. Evaluation of Proposals

A Proposal Evaluation Team (PET) consisting of staff from Metro's Countywide Planning and Development, Vendor/Contract Management (V/CM), and Office of Management and Budget was convened and conducted a comprehensive technical evaluation of the proposals received.

From November 5, 2025, through December 15, 2025, the PET independently evaluated the proposals based on the following criteria for all categories:

Phase I: Minimum Qualifications Requirements: Proposers must meet the following minimum qualifications requirements at the time of proposal submittal:

Custom Application Development and Maintenance in Oracle, Salesforce, and Microsoft SharePoint

1. Five years of development experience in Oracle Application Express (APEX) v21 or higher.
2. Five years of development experience in Asynchronous JavaScript and XML (AJAX) and JavaScript.
3. Five years of development experience in Procedural Language extensions to the Structured Query Language (PL/SQL).
4. Five years of development experience in Oracle E-Business Suite (EBS) version 12.2 or higher.
5. Five years of development experience with Oracle workflow within EBS.
6. Five years of development experience in webADI.
7. Experience configuring EBS user authentication.
8. Three years of Microsoft SharePoint platform development experience.
9. Three years of experience in developing and updating Microsoft PBI.
10. Five years of experience developing Salesforce applications.

Business Improvement Studies

1. Three years of experience in developing KPIs and evaluating efficiency of organizational structure.
2. Three years of experience in financial modeling.
3. Three years of experience in developing templates and tools for streamlining business processes.
4. Three years of experience preparing and submitting Federal NTD reports for transit operations.

Organizational and Resource Planning and Management

1. Three years of experience in succession planning.
2. Three years of experience in resource planning.

Of the 12 proposals received, the PET determined the proposals submitted by FMC and Speridian were non-responsive as they did not meet the Phase I Minimum Qualifications Requirements and were excluded from further evaluation. The remaining 10 proposals were evaluated based on the following Phase II evaluation criteria and weights:

- Prime Contractor/Team's Skill and Experience 25%
- Qualifications and Experience of Proposed Key Personnel 30%
- Resource Allocation Plan/Approach 30%
- Price 15%
- Local Small Business Enterprise (LSBE) Preference Program 5%

Several factors were considered when developing these weights, giving the greatest importance to qualifications and experience of proposed key personnel and resource allocation plan/approach.

The PET determined that 10 proposals submitted by six firms were within the competitive range and are listed below by discipline in alphabetical order:

Custom Application Development and Maintenance in Oracle, Salesforce, and Microsoft SharePoint

1. Deloitte
2. KPMG
3. Numentica

Business Improvement Process Studies

1. Alvarez
2. BCG
3. Crowe
4. KPMG

Organizational and Resource Planning and Management

1. BCG
2. Crowe
3. KPMG

At the conclusion of the evaluation, the PET determined Deloitte to be the top-ranked firm for Custom Application Development and Maintenance in Oracle, Salesforce, and Microsoft SharePoint; Crowe for Business Improvement Process Studies; and KPMG for Organizational and Resource Planning and Management.

However, following fact-finding and negotiations, Deloitte was eliminated from further consideration due to the extensive exceptions taken to Metro's Terms and Conditions.

Qualifications Summary of Firms within the Competitive Range:

KPMG LLP (KPMG)

KPMG was founded in 1987, and its U.S. headquarters is located in New York, New York. KPMG's main expertise lies in audit, tax, and consulting services. KPMG has experience in providing clients with skilled, adaptable, and qualified resources to meet a wide spectrum of technological needs. KPMG's experience spans both the public and private sectors, including long-standing relationships with federal, state, and local entities across the country, including the State of California.

KPMG possesses hands-on experience in leveraging Oracle Apex to build sophisticated, custom applications tailored to complex public sector workflows. KPMG has experience advising executive levels, state and local organizations within Los Angeles such as the City of Los Angeles, Los Angeles County Department of Justice Compliance Office, Los Angeles Sheriff's Department, Los Angeles World Airports, Port of Los Angeles, Los Angeles Police Department, Los Angeles Department of Water and Power, Los Angeles Community College District, and Los Angeles County Office of Education.

Numentica LLC (Numentica)

Numentica was founded in 2008 and is headquartered in Los Angeles, California. Numentica is an IT consulting and solutions partner specializing in enterprise application development, system integration, and data management.

Numentica has delivered on-call IT services to government, financial, and enterprise clients, including urgent fixes, ad hoc reporting, and critical patching within the defined service level agreement. Numentica has experience in Oracle ERP/APEX, Salesforce, and SharePoint.

Alvarez & Marsal Public Sector Services LLC (A&M)

A&M was founded in 1983 and is headquartered in New York, New York. A&M is a management consulting firm specializing in providing consulting services to companies, investors, and government agencies.

A&M has experience in delivering strategic financial and operational management services to transportation and government agencies. A&M has provided consulting services to the Massachusetts Bay Transportation Authority, Gateway Development Commission, and the Houston-Galveston Area Council.

Crowe LLP (Crowe)

Crowe was founded in 1942 and is headquartered in Chicago, Illinois. Crowe is a public accounting and consulting firm and has been serving government organizations for more than 50 years, including those within the State of California for more than 30 years.

Crowe has current experience with transportation agencies across the country, providing global insights into financial reporting and operational issues faced by transit and transportation providers, planners, and other funders. Crowe has provided a variety of services for transportation entities such as the Arkansas State Highway Commission, Foothill Transit, Miami-Dade County Transit, Indianapolis Public Transit, and Massachusetts Bay Transportation Authority. Crowe's team also provides a blend of consulting, planning, financial, manufacturing, and operations experience, together with in-depth transit industry knowledge.

Crowe proposes a structured yet flexible delivery framework to efficiently manage quality, accountability, and responsiveness. Crowe's approach is to adapt while maintaining consistent standards of project governance, communication, and quality assurance across each engagement.

The Boston Consulting Group, Inc. (BCG)

BCG was founded in 1963 and is headquartered in Boston, Massachusetts. BCG specializes in management consulting services to help organizations innovate and create succession strategies.

BCG has completed more than 3,000 public sector engagements, including transit-focused work for over 75 federal, state, and local agencies. Government agencies that BCG has supported include the City of Los Angeles, Employment Development Department, California Public Utilities Commission, California Department of Transportation, Washington Metropolitan Area Transit Authority, and New York Metropolitan Transit Authority.

The following is a summary of the PET scores:

Custom Application Development and Maintenance in Oracle, Salesforce, and Microsoft SharePoint

1	Firm	Average Score	Factor Weight	Weighted Average Score	Rank
2	Deloitte Consulting LLP				
3	Prime Contractor/Team's Skill and Experience	78.89	25.00%	19.72	

4	Qualifications and Experience of Proposed Key Personnel	77.78	30.00%	23.33	
5	Resource Allocation Plan/Approach	78.33	30.00%	23.50	
6	Price	100.00	15.00%	15.00	
7	Local Small Business Enterprise (LSBE) Preference Program Bonus	0.00	5.00%	0.00	
8	Total		105.00%	81.55	1
9	KPMG LLP				
10	Prime Contractor/Team's Skill and Experience	83.32	25.00%	20.83	
11	Qualifications and Experience of Proposed Key Personnel	83.33	30.00%	25.00	
12	Resource Allocation Plan/Approach	82.50	30.00%	24.75	
13	Price	55.27	15.00%	8.29	
14	Local Small Business Enterprise (LSBE) Preference Program Bonus	0.00	5.00%	0.00	
15	Total		105.00%	78.87	2
16	Numentica LLC				
17	Prime Contractor/Team's Skill and Experience	63.32	25.00%	15.83	
18	Qualifications and Experience of Proposed Key Personnel	64.44	30.00%	19.33	
19	Resource Allocation Plan/Approach	59.17	30.00%	17.75	
20	Price	99.40	15.00%	14.91	
21	Local Small Business Enterprise (LSBE) Preference Program Bonus	100.00	5.00%	5.00	
22	Total		105.00%	72.82	3

Business Improvement Studies

1	Firm	Average Score	Factor Weight	Weighted Average Score	Rank
2	Crowe LLP				
3	Prime Contractor/Team's Skill and Experience	77.76	25.00%	19.44	
4	Qualifications and Experience of Proposed Key Personnel	77.77	30.00%	23.33	
5	Resource Allocation Plan/Approach	79.17	30.00%	23.75	
6	Price	100.00	15.00%	15.00	
7	Local Small Business Enterprise (LSBE) Preference Program Bonus	0.00	5.00%	0.00	
8	Total		105.00%	81.52	1

9	KPMG LLP				
10	Prime Contractor/Team's Skill and Experience	82.24	25.00%	20.56	
11	Qualifications and Experience of Proposed Key Personnel	83.33	30.00%	25.00	
12	Resource Allocation Plan/Approach	81.67	30.00%	24.50	
13	Price	60.47	15.00%	9.07	
14	Local Small Business Enterprise (LSBE) Preference Program Bonus	0.00	5.00%	0.00	
15	Total		105.00%	79.13	2
16	The Boston Consulting Group, Inc.				
17	Prime Contractor/Team's Skill and Experience	75.56	25.00%	18.89	
18	Qualifications and Experience of Proposed Key Personnel	80.00	30.00%	24.00	
19	Resource Allocation Plan/Approach	75.83	30.00%	22.75	
20	Price	81.33	15.00%	12.20	
21	Local Small Business Enterprise (LSBE) Preference Program Bonus	0.00	5.00%	0.00	
22	Total		105.00%	77.84	3
23	Alvarez & Marsal Public Sector Services LLC				
24	Prime Contractor/Team's Skill and Experience	76.68	25.00%	19.17	
25	Qualifications and Experience of Proposed Key Personnel	74.43	30.00%	22.33	
26	Resource Allocation Plan/Approach	75.83	30.00%	22.75	
27	Price	44.93	15.00%	6.74	
28	Local Small Business Enterprise (LSBE) Preference Program Bonus	0.00	5.00%	0.00	
29	Total		105.00%	70.99	4

Organizational and Resource Planning and Management

1	Firm	Average Score	Factor Weight	Weighted Average Score	Rank
2	KPMG LLP				
3	Prime Contractor/Team's Skill and Experience	80.00	25.00%	20.00	
4	Qualifications and Experience of Proposed Key Personnel	82.23	30.00%	24.67	
5	Resource Allocation Plan/Approach	81.67	30.00%	24.50	
6	Price	86.67	15.00%	13.00	

7	Local Small Business Enterprise (LSBE) Preference Program Bonus	0.00	5.00%	0.00	
8	Total		105.00%	82.17	1
9	Crowe LLP				
10	Prime Contractor/Team's Skill and Experience	77.76	25.00%	19.44	
11	Qualifications and Experience of Proposed Key Personnel	77.77	30.00%	23.33	
12	Resource Allocation Plan/Approach	78.33	30.00%	23.50	
13	Price	100.00	15.00%	15.00	
14	Local Small Business Enterprise (LSBE) Preference Program Bonus	0.00	5.00%	0.00	
15	Total		105.00%	81.27	2
16	The Boston Consulting Group, Inc.				
17	Prime Contractor/Team's Skill and Experience	71.12	25.00%	17.78	
18	Qualifications and Experience of Proposed Key Personnel	74.43	30.00%	22.33	
19	Resource Allocation Plan/Approach	70.83	30.00%	21.25	
20	Price	63.13	15.00%	9.47	
21	Local Small Business Enterprise (LSBE) Preference Program Bonus	0.00	5.00%	0.00	
22	Total		105.00%	70.83	3

C. Price Analysis

The proposed firm fixed fully burdened rates have been determined to be fair and reasonable based upon price analysis, technical evaluation, and fact-finding.

D. Background on Recommended Contractor(s)

Crowe LLP

Crowe LLP (Crowe) is headquartered in Chicago, Illinois. It is a multinational professional services network consisting of more than 220 offices in 13 countries.

Crowe's proposed lead manager has over 25 years of professional work experience in the public sector.

Crowe has provided financial and compliance audit services to Metro, and performance has been satisfactory.

KPMG LLP

KPMG LLP's (KPMG) U.S. headquarters is located in New York. KPMG operates worldwide, offering audit, tax, and advisory services to both the private and public sectors.

KPMG's proposed lead account partner has more than 20 years of experience in providing consulting services.

KPMG LLP has provided services for Metro, and performance has been satisfactory.