

Pitch Long Beach!

Documentation for v1.2

Program Enhancements

Dec. 4, 2024

Highlights for City Staff

The latest iteration of the Pitch Long Beach! program brings several enhancements for City Staff. After administering the program for over a year we learned that there were some critical flaws in the evaluation process for Subject Matter Experts (SMEs). To improve the evaluation process, the program has adopted evaluation criteria (see Section 1), a streamlined submission document (see Section 2), and a streamlined evaluation process leveraging Microsoft Outlook (see Section 3). Please note that information included here supersedes any conflicting information in the original program overview attached after this document.

Highlights for Vendors

To complement the improvements for internal staff, the Pitch Submission form has been updated to better reflect the evaluation criteria and increase alignment with City needs (see section 2). To better understand the quality and individual strengths of submissions, Pitch Long Beach has implemented a qualitative scoring system, like those used in traditional purchasing (see Section 4). Please note that information included here supersedes any conflicting information in the original program overview attached after this document.

Introduction

This document outlines the implemented program enhancements stemming from the Pitch Long Beach! program evaluation that was conducted over the summer of 2023. The Program Team was given 12 recommendations to increase the quality and relevance of submissions and improve the experience and outcomes of the unsolicited proposal pilot model. After reviewing the recommendations, the team opted to implement recommendations that improve the internal experience. These improvements prioritized the internal Subject Matter Expert (SME) experience by elevating more relevant information and streamlining the evaluation process. The improvements for version 1.1 of the Pitch Long Beach! program include: 1) inclusion of pilot program evaluation criteria 2) redesigned submission form, 3) streamlined SME and Committee evaluation procedures, , and 4) quantitative scoring. More details about each improvement can be found below.

1. Inclusion of pilot program evaluation criteria

To better align Pitch Long Beach! with the other City pilot programs (Smart City Challenge and Long Beach Collaboratory) and to provide more guidance to all stages of the pitch evaluation process, the team has elected to implement four evaluation criteria: qualifications, feasibility, impact, and originality. See further definitions below.

- *Qualifications*: the organization's professional and academic experience; ability to implement and sustain the pilot and a potential contract; related case studies; and lastly, bandwidth and staff to dedicate to the pilot.
- *Feasibility*: the actions and resources required by the City for pilot success and the reasonableness of the anticipated costs to scale the pilot if successful.
- *Impact*: the product or service's ability to generate short-term and/or long-term outcomes that will benefit residents, community stakeholders, and the City.
- *Originality*: the submission is novel, and if the City's normal purchasing process may have omitted or overlooked the solution.

2. Redesigned submission form and document

The program's original submission form and the corresponding PDF were criticized by the SMEs who were interviewed during the evaluation process. The critiques ranged from the low quality of information provided to being visually hard to read. To remedy these flaws and aim to increase relevant submissions, the submission form has been redesigned and split up into six sections: Organizational and Contact Information, Alignment, Qualifications, Feasibility, Impact, and Originality. .

- *Organization and Contact Information* includes basic information such as organization name, contact, title of proposal, etc.
- *Alignment* includes seven questions to better understand the organization and their submission's fit for the Pitch Long Beach Program. Additionally, this section gives more information to City staff about the potential pilot's alignment with the Smart City Initiative guiding principles and strategic directions for potential partner Departments. There are several questions in this section that will end the pitch submission form if the submission does not align with the program and the City's strategic initiatives. This is by design to off ramp potential pitches that have no chance of moving forward.
 - We will not be accepting any submissions related to property development, please contact the Economic Development Department
 - We will only be accepting submissions that are considered technology or "tech enabled." "Tech-enabled" refers to any solution that has a technological component but doesn't necessarily hinge on any specific technology.

- We will only consider products or services that are “deployment” ready, this means we cannot pilot or co-build “ideas.”
- Submissions must align with at least one of the City’s priority areas as identified in the [2030 Strategic Vision](#).
- Submitters must conduct an adequate amount of research and identify potential partner [departments](#).
- Submitters pitching an artificial intelligence (AI) solution to the City must in addition to the pitch form complete an AI Fact Sheet that divulges key aspects of the AI’s composition.
- We will continue to evaluate submission alignment with the Smart City Initiative Guiding Principles
- *Qualifications* include three questions that allow evaluators to understand the organization's experience; the ability to implement and sustain the pilot and a potential contract.
- *Feasibility* includes nine questions that allow the evaluators to understand the actions and resources required by the City for pilot success and the reasonableness of the anticipated costs to scale the pilot if successful.
- *Impact* includes three questions to understand the product or service’s ability to generate short-term and/or long-term outcomes that will benefit residents, community stakeholders, and the City.
- *Originality* includes two questions to assess whether the pitch is novel, and if the City’s normal purchasing process may have omitted or overlooked the solution.

Four of the six sections align with the newly implemented pilot program evaluation criteria to aid in the evaluation of the submissions. By categorizing the questions to align directly with the criteria, we are following an evaluation pattern that has been established in other pilot programs and Financial Management’s procurement process. This gives staff who are conducting the SME or committee evaluations a familiar framework to utilize as they proceed through the program.

The updated submission document has been simplified to include only the essential organization information and the questions that align with the evaluation criteria. Additionally, there have been improvements to the visual design of the document, including enhanced typographic hierarchy to increase legibility.

3. Streamlined Evaluation Procedures

The evaluation process will be utilizing ACTA email templates to resume communication via email and manage the unsolicited pitches effectively until a suitable automation solution is designed or made available. Emails will be sent according to the calendar of the SME. This flexibility will provide

priority operations and allow SMEs to make an estimation on how to proceed with the unsolicited pitch. These SME notifications are for each evaluation process step:

- Pitch - Initial screen
- Pitch - SME evaluation
- Pitch - Committee evaluation

For the initial screen, Pitch Long Beach Program staff are prompted with an email notification with the submission attached and asked if the submission does or does not meet criteria. If the staff member selects “meets qualifications” they are prompted with a second email notification to select an SME (or SMEs) to evaluate the submission further.

At the SME evaluation stage, the user is prompted with an email notification that has the submission attached and asks them to evaluate the proposal on the four criteria outlined above. The evaluation includes a Scoring Rubric for the pitch and the unsolicited pitch form in four sections, one for each criterion and asks them to score each from *poor* to *excellent* following Financial Management’s procurement standards. There are two additional fields for the SME to complete: a final recommendation and comments. In the decision field, they can select to proceed to a committee review, not proceed to a committee review, or defer until a later date. If the user elects to proceed, they are prompted to select up to five committee evaluators to review the submission before coming together to discuss the opportunity.

Once the SME selects who they would like to include in the committee evaluation, those users are then prompted with a similar email notification to the SME evaluation. This email notification includes a link to the submission document and the four fields for each criterion. Similarly, they are required to rate the submission from poor to excellent for each criterion but are not prompted to make a final decision as this will be discussed at the committee evaluation meeting.

4. Quantitative scoring

Continuing to standardize the Pitch Long Beach! evaluation process and making the quality of submissions easier to analyze, a quantitative scoring system has been implemented. Just like with the evaluation criteria listed above, the scoring is borrowed from Financial Management’s evaluation tool. Each individual criterion can be scored from zero (0) to four (4).

- 0 = incomplete
- 1= poor
- 2 = fair
- 3 = good
- 4 = excellent

Total scores range from 0 to 100 and are based off the evaluator's selection in the four evaluation criteria. The criteria are all weighted equally at 25%.

The scoring system adds transparency into the evaluation process and allows program managers to understand how submissions compare against each other and with submissions in other solicitations (for example measuring the difference in quality between unsolicited submissions versus submissions to challenge-based RFPs). Over time, program managers will be able to identify trends in the quality of submissions that are selected for pilots versus those that are not.