

# Pitch Long Beach!

## Documentation for v1.1

### Program Enhancements

#### 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 Teams Approvals (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 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 technology 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](#).
- We will continue to evaluate submission alignment with the Smart City Initiative Guiding Principles
- *Qualifications* includes three questions that allow evaluators to understand the organization's experience; ability to implement and sustain the pilot and a potential contract.
- *Feasibility* includes nine questions that allows 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**

Previously, the staff evaluation process relied heavily on email communication which proved to be laborious for the Pitch Long Beach Program team with little engagement from SMEs and long timelines. To remedy these pain points, the program has implemented customized Approval cards in Microsoft Teams. These cards are triggered for each evaluation process step: the initial screen, SME evaluation, and committee evaluation.

For the initial screen, Pitch Long Beach Program staff are prompted with a card 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 card to select an SME (or SMEs) to evaluate the submission further.

At the SME evaluation stage, the user is prompted with a card that has the submission attached and asks them to evaluate the proposal on the four criteria outlined above. The evaluation card includes four fields, one for each criteria 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 decision 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 card to the SME evaluation. This card includes a link to the submission document and the four fields for each criteria. Similarly, they are required to rate the submission from poor to excellent for each criteria 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 make 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 criteria can be scored 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.

## **Pitch Long Beach! Program Overview**

### **1. Description / About**

**1.1 About this Document:** This document describes the Pitch Long Beach! Program, which outlines how vendors may submit an unsolicited idea for a project, how the pitch is evaluated, and the process for implementation. This program provides a framework for funneling unsolicited vendor pitches to a single City staff contact, evaluating them with transparent criteria, and implementing those that offer promising solutions to legitimate City needs, including potential pilot programs.

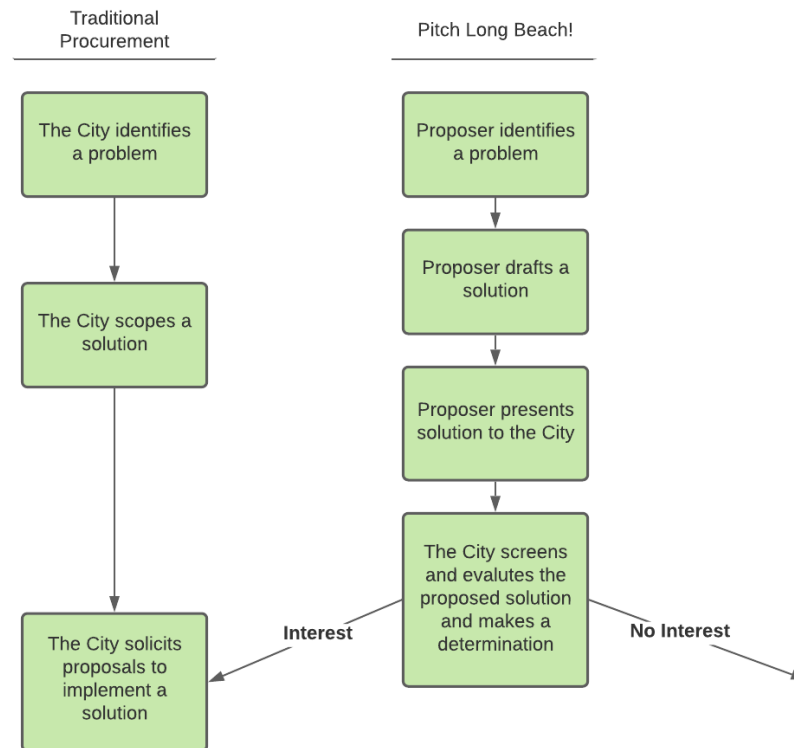
**1.2 About Long Beach:** The City of Long Beach is committed to advancing solutions to civic challenges by engaging the community, staff, and private sector to explore and implement emerging technology and innovative approaches to City service delivery. We seek to adapt to change and expand our capacity to improve the daily lives of Long Beach residents, enhance city operations and make the best possible use of resources across all City Departments. Our vision for a smarter Long Beach is not one that we can achieve alone, and we encourage collaboration and partnerships to design, test, and implement solutions.

### **2. Program Goals**

**2.1 Why do we encourage unsolicited ideas?** The City of Long Beach is no stranger to piloting new solutions. From micromobility scooters to body-worn cameras, the City has already implemented a variety of initiatives that integrate innovative approaches and public service in a short-term timeframe. Recognizing that staff capacity is limited, the City aims to develop a clear process for prioritizing innovative ideas and technologies, identifying potential partners, and implementing exploratory projects that, if successful, can be scaled citywide.

The City of Long Beach already receives countless solicitations from vendors hoping to sell their products and services to the City. Pitch Long Beach! provides a novel framework for the vendor community to identify problems the City has not identified on its own and offer solutions that are aligned with legitimate City needs.

**2.2. How does Pitch Long Beach! differ from traditional procurements?** In traditional procurements, the City identifies a need, project, or challenge, and requests proposals from vendors to fill it. Pitch Long Beach! flips the script. It provides vendors with a way to pitch ideas that can expand the scope of potential City projects.



**2.3 Benefits for Partners:** Pitch Long Beach! offers many benefits to partners who decide to participate.

- Exposure: Showcase your innovative ideas to Long Beach government officials.
- Product Refinement: If your product passes the initial screen, we will provide targeted feedback from our subject matter experts. Pitches that are selected to pilot may also receive guidance during implementation.
- Prototyping and User Testing: If your pilot pitch is selected, as time and capacity allows, you may receive support from the City and other partners to monitor, evaluate, design, and pilot implementation. Product teams will collect data and get feedback from real government users to build their products and services out to appeal to other potential customers.
- Networking: Pitches that are selected and successfully complete pilot implementation may be featured on the City's website and be exposed to the wider Long Beach business ecosystem through the City and industry partners.
- Make a Difference: Help make Long Beach an innovative, creative City and improve the quality of life for folks who live, work, and play here.

**2.3 What is a pilot project?** A pilot project, as opposed to a software trial or proof of concept, is one way of allowing the City to test out a potentially transformative solution, measure its impact, and decide on its feasibility before investing heavy time and resources. Pilots are short-term in nature, and for the purposes of this program are open to all types of solutions, including both non-technological and tech-enabled projects. “Tech-enabled” refers to any solution that has a technology component but doesn’t necessarily hinge on any specific technology. This definition encompasses both innovative “first-of-its-kind” technology projects as well as tech solutions that are more procedural and have been deployed elsewhere.

Pilot opportunities, like all City contracts, must comply with the City’s legal purchasing requirements. They must be *open* to the entire vendor community and solicited in a *competitive* manner so the City can assess the best partner or partners for any one solution.

More broadly, pilots also provide many other benefits. They:

- Engage and test new ideas to measure community impact through robust data collection;
- Improve operational efficiency and delivery of key City services and programs;
- Allow for iterative co-creation and design of solutions with partners that have the potential to scale;
- Increase understanding before committing to a full-scale contract;
- Allow City Departments to find solutions for their needs while enforcing standards for data collection, project scoping, and evaluations;
- Allow for failure if pilot projects don’t meet stated goals; and
- Position Long Beach as a destination to launch innovative solutions and civic technology

**2.4 Smart City Guiding Principles:** The Long Beach Smart City Initiative principles provide a framework to align the City’s portfolio of pilot projects. They have been adapted to address our challenges following the COVID-19 pandemic, and echo what we heard from the Long Beach community. All unsolicited ideas should meet one or more of these guiding principles.

1. Design for Equity: Reduce historic inequities and disparities by ensuring advancements in technology and service delivery are accessible to all and improve quality of life for communities that have been underserved.
2. Earn Public Trust: Build public confidence through excellence in data privacy, data transparency, and community engagement.
3. Cultivate Local Expertise: Promote place-based growth by supporting Long Beach entrepreneurs and businesses, improving workforce job-readiness, and building partnership networks.
4. Build Civic Resilience: Improve capacity to respond efficiently and effectively to the most-pressing civic challenges using data-informed decision-making.

**2.5 City Priority Challenges:** Through community engagement, staff work, and leadership by elected officials, the City has identified several priority challenges. We strongly encourage unsolicited pitches that align with one or more of these priorities:

1. Recovering from the COVID-19 economic and public health crisis;
2. Executing the City's Climate Action and Adaptation Plan;
3. Making City Hall more accessible and increasing civic engagement;
4. Improving transportation and mobility and reducing transportation-related emissions;
5. Closing the digital divide;
6. Improving efficiency of operations and service delivery;
7. Reducing homelessness and housing insecurity; and
8. Ending systemic racism and reducing racial wealth gaps.

### **3. How to Pitch Long Beach!**

**3.1 Who can apply?** Companies and entities of all sizes may pitch an idea. Long Beach-based solution providers are especially encouraged to apply.

**3.2 When to apply?** Vendors may pitch an idea at any point in time electronically by completing the [Pitch Long Beach! Idea Form](#). The City will accept pitches on an ongoing basis. Additional information about the City's financial cycle and budget may be found [here](#).

**3.3 How to apply?** Fully complete the Idea Form, available on the City website [here](#). In addition, when submitting the form, applicants commit to the following terms:

- Submitters should avoid submitting confidential, trade secret, and/or proprietary information. The City reserves the right to use contents of your pitch to develop future solicitations.
- Participation for the full length of the pilot, if selected.
- The company must be a legally registered organization.
- If/when selected, applicant must have a working pilot-ready product ready to be tested at the City and any partner organizations.
- Your submission will go through the evaluation process described in this document and will not necessarily be directly responded to.

**3.4 How will pitches be evaluated?** The Pitch Long Beach! evaluation and selection process is aligned with the City's procurement principles and ensures that selected ideas are aligned with Citywide and Departmental priorities.

**3.4.1 Initial Screen:** Ideas submitted through the Idea Form will first be screened by the Smart Cities Program Manager for the following criteria. The Program Manager will then determine whether to move the pitch forward.

- Idea Form is completed in full
- Pitch contains sufficient detail for each response



- Demonstrates alignment with one or more of the four Guiding Principles
- Demonstrates alignment with one or more City Priority Challenges

**3.4.2 Department Review:** If the pitch passes the initial screen, the Program Manager will send the completed Idea Form to one or more appropriate Departmental subject matter experts for their review. The Department subject matter expert(s) will determine whether to move the pitch forward based on the following criteria:

1. Interest:
  - a. Whether the Department determines that the pitch meets a City need and is interested in pursuing the proposed pilot.
2. Capacity:
  - a. Whether the Department has budget to cover any anticipated pilot costs and would be able to devote resources to project administration.
  - b. Whether the Department has staffing capacity to dedicate towards the pilot project

If there is interest, but the Department does not have the ability to proceed with a pilot at the time of review, the Department may elect to defer the submission for consideration at a later date.

**3.4.3 Committee Evaluation:** If the Department has both interest and capacity to pursue the pilot project, a Steering Committee led by the Department will use the following evaluation questions to understand the general viability of the pitch and determine whether to proceed with the process or not. These criteria align with the fields captured in the Idea Form. The Steering Committee will be comprised of members of any City Department(s) with subject matter expertise in the pitch and the Technology & Innovation Department for technology pitches. The Financial Management Department will also provide guidance on the Pitch Long Beach! Evaluation process.

1. Impact:
  - a. Would the pilot-stage product or service lead to short-term or long-term outcomes that will benefit the city and its residents?
2. Innovation:
  - a. Does the pitch offer services that the City would not have intended to procure through normal purchasing processes?
3. Feasibility:
  - a. What kinds of actions or resources will the City be required to expend to make the pilot successful?
  - b. Does the City Department have budget to cover anticipated pilot costs?
4. Data Governance:
  - a. Does the proposer demonstrate an understanding of using metrics and key performance indicators (KPIs) to communicate impact of their pilot and metrics?
5. Qualifications:

- a. What are the proposer’s qualifications, capabilities, techniques, or experience?
- b. Is there other information that would be beneficial to know before proceeding with next steps?

The Steering Committee will then make one of four determinations:

- **Option 1 – No Interest:** If there is no interest, the Program Manager will notify the proposer that the City will not be moving forward and will provide feedback from the Steering Committee.
- **Option 2 – More Information Needed:** If there is interest but not enough information to make another determination, the Program Manager will follow up with the proposer for additional information such as functional, technical, and legal requirements; budget, schedule, personnel, risks, etc.
- **Option 3 - Interest:** If this is interest in moving forward, the City will issue an Expression of Interest (EOI) solicitation to the wider vendor community to assess other potential competing solutions.
- **Option 4 – Defer:** If there is interest, but the Steering Committee or Department does not have the ability to proceed with a pilot at the time of review, the Program Manager will notify the proposer that their submission has been deferred for consideration at a later date.

**3.4.4 Expression of Interest Solicitation:** If the Committee determines that a pitch aligns with an unmet need and that the necessary conditions are met to support a pilot, in line with the City’s open and competitive procurement policy, the City will issue an Expression of Interest (EOI) to the vendor community to determine whether additional organizations would be interested in the opportunity to provide a similar solution to the identified challenge on a pilot basis, and would be able to meet the needs of the City.

The City will notify the proposer prior to issuing the EOI. The initial proposer is not required to respond to the EOI. The EOI will be open for ten business days, and late responses will not be accepted.

**3.4.5 Selection and Award:** The EOI solicitation will result in one of two outcomes:

- **Option 1 – Competitive Solicitation:** If one or more qualified, feasible responses are received, the City will issue a formal or challenge-based Request for Proposals (RFP) to competitively award a contract to a pilot solution to the identified challenge. RFP proposals will be evaluated by the Steering Committee on the following criteria, and then a determination will be made about the winning proposal. The City is not obliged to award any proposals, if desired.
  - Impact
  - Innovation
  - Feasibility
  - Data Governance

- Qualifications
- **Option 2 – Sole Source Award:** If no qualified responses are received, the City may proceed with a sole source exemption contract award for the initial proposer.

If after selection of a vendor, the City cannot negotiate the proposer’s participation, the City reserve all rights to terminate the solicitation.

**3.4.6 Implementation and Scaling:** At the start of project implementation, the City, the selected vendor, and other partners will agree to an implementation plan and scope of work. The implementation plan will set clear expectations, a project timeline, progress check-ins, a user testing process, and an overall communications plan. The implementation plan will also include KPIs to measure the success of the pilot created and agreed upon by all parties.

Pilots will run for a period no longer than the duration indicated by the proposer in the Idea Form. Throughout the duration of the pilot, the City will evaluate its efficacy in meeting the stated goals and determine next steps, which may include releasing an open solicitation to deploy the solution on a larger scale.

At a milestone in advance of the pilot end date, the City will evaluate project success based on the agreed-upon KPIs and the vendor’s ability to meet the expectations in the implementation plan. The City may decide on one of the following options:

- **Option 1 - Fail:** The pilot project did not meet KPIs and expectations, and the City decides to not continue the project.
- **Option 2 - Stop:** The pilot project was successful, but the City decides not to continue for other reasons, such as shifting priorities or lack of budget or staff to support a full implementation.
- **Option 3 - Re-bid:** The pilot project was successful, and the City reserves the right to issue an RFP or EOI to understand what other solutions and approaches may exist.
- **Option 4 - Scale:** The pilot project was successful, and the City decides to scale the project and renew or extend the vendor’s contract, following any applicable City approval processes.

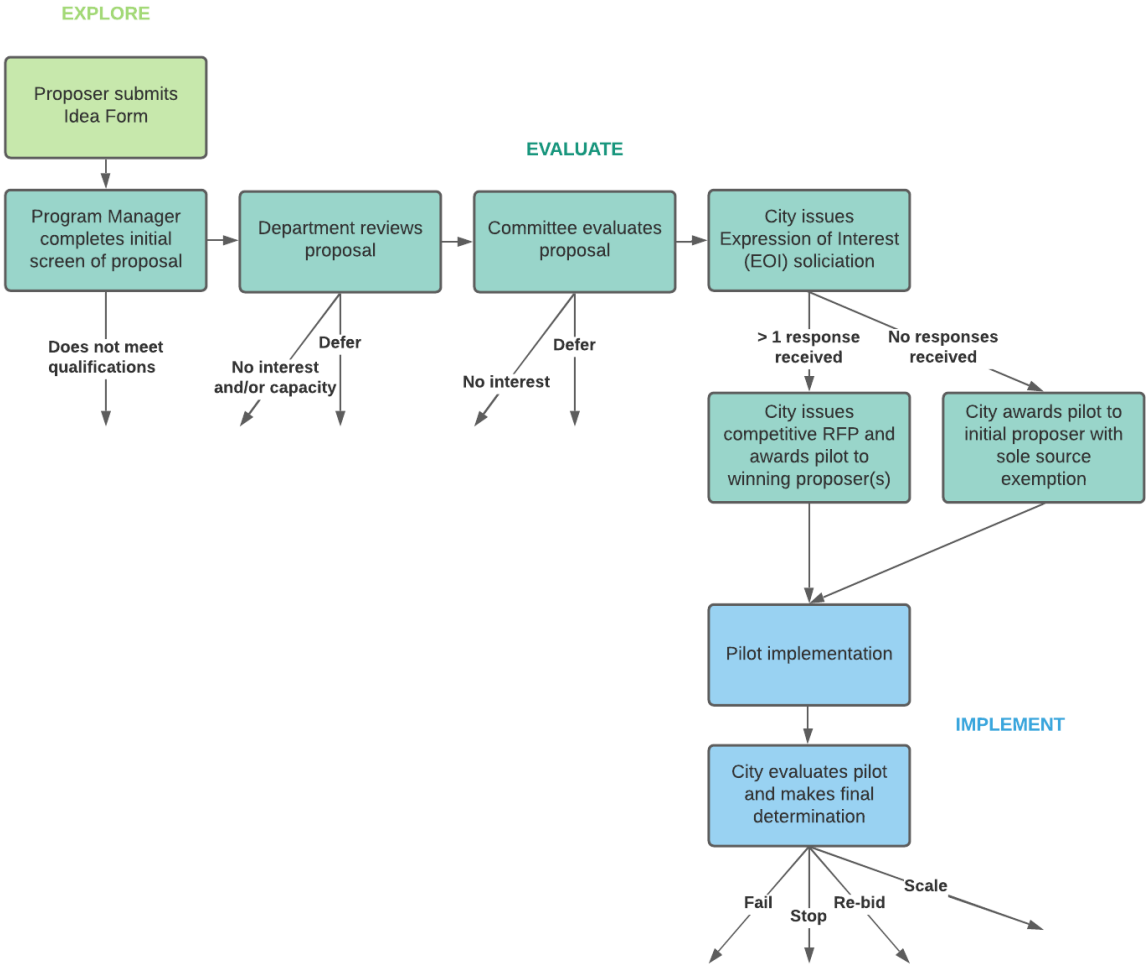
**3.5 Vendor Expectations:**

- **Data Access:** Vendors are expected to provide the City with easily-accessible data to evaluate the success of the pilot program. Project data may be utilized by the City for related services and initiatives. The City prefers that data is provided in a raw, automated manner and that an Application Programming Interface (API) is made available to City staff to easily incorporate project data into other City systems.
- **Data Privacy:** Vendors must comply with all relevant privacy and information security legislation and procedures, and must adhere to the City’s [Data Privacy Guidelines](#).
- **Demo Day:** At the end of the pilot period, vendors are expected to present at the City’s Demo Day and showcase their products and/or services, share their

experiences, and progress reports to the public and City staff. More details will be provided closer to the date of the event.

- **Timeframe:** The opportunity to provide any product or service piloted through the Pitch Long Beach! Program shall only extend through the agreed-upon pilot period and shall not continue thereafter.
- **Future Use:** The City provides no guarantee of future use, purchase or procurement of any products or services piloted through this Program. Participation in the Pitch Long Beach! Program is not in any way an advantage or benefit vis-à-vis any other vendor in subsequent solicitations or procurements held by the City or any participating entity.

**3.6 Pitch Long Beach! Program Overview**



**4. Frequently Asked Questions for Vendors**

- **Q:** Why should I put effort into a pilot pitch when it may result in a competitive solicitation process?
- **A:** The Pitch Long Beach! Program adds a layer of innovation onto the City's legal procurement requirements and expands access to new ideas by giving the City more exposure to what is available in the market. The program offers a framework that can lead to better partnerships with private sector participants, and it creates more opportunities for private sector companies to do business with the City. This is a pathway for the City to implement projects that otherwise might not have happened until well into the future, if at all. Though by submitting a pitch idea, the proposer is, in effect, creating an opportunity where one did not previously exist.
  
- **Q:** If my pitch results in an RFP, do I have any advantage in that process?
- **A:** The City is dedicated to fair and open competition in all procurement efforts. However, a successful pitch creates an opportunity that did not previously exist. Therefore, as the originator of the initial idea pitch, your ideas and approaches would give you a fair competitive advantage in a future RFP.
  
- **Q:** What if my pitch includes confidential, trade secret, or proprietary information?
- **A:** We encourage proposers to avoid including confidential, trade secret, and/or proprietary information in your Idea Form pitch. The City reserves the right to use contents of your pitch to develop future solicitations, including Expressions of Interest (EOIs) to determine whether additional organizations would be interested in the opportunity to provide a similar solution to your idea. Ideas you submit are subject to the provisions of the California Public Records Act (CPRA). Under the CPRA, the City is required to make its public records available for public disclosure, unless there is a specific reason not to do so. Proposers should mark documents of concern as "Trade Secret," "Confidential" or "Proprietary." The City will use its best efforts to inform the proposers of any request for any confidential documents pertaining to their pitches.
  
- **Q:** Can I propose a pilot that is not free for the City?
- **A:** Long Beach does not offer financial compensation for companies pitching, unless costs are stipulated by the vendor and agreed to by the City. In your idea form, please stipulate if there is an anticipated cost to the City for the pilot.
  
- **Q:** Will the City keep my product/service at the end of the pilot?
- **A:** Any equipment used will not be retained or considered property of the City or participating authorities. All products piloted as part of the Pitch Long Beach! Program will be returned at the end of the pilot.
  
- **Q:** Can the solution provider be an individual, a group/consortium of individuals, or a company?

- **A:** Yes, individuals and sole proprietorships are eligible, along with companies. Selected vendors will be required to submit a W-9 to receive payment.
  - **Q:** Are established companies and companies from outside of Long Beach eligible to participate?
  - **A:** Yes, we welcome companies of all stages to participate. While local providers will receive preference over those from outside Long Beach (where pitch quality is similar), we welcome participation from well-qualified innovators everywhere.
  - **Q:** Are you seeking solutions that already have been developed? Or, is this open to MVPs (Minimum Viable Products) that would need further development?
  - **A:** We're looking for solutions that are deployment ready. You must also be able to support your business financially throughout the process of piloting.
  - **Q:** Are you only seeking technology and/or app-enabled solutions only?
  - **A:** No. We are open to all solutions, including innovative approaches to enhance City services, technology solutions, and "tech-enabled" solutions. We understand "tech-enabled" to mean any solution that has a technology component but doesn't necessarily hinge on the tech, however we welcome well-designed initiatives that combine different strategies and mediums to ultimately address the issue at hand leveraging a technology component.
  - **Q:** Will I have access to existing City-owned infrastructure and technology systems?
  - **A:** The possibility to use existing City-owned infrastructure and technology will be assessed during the pitch evaluation stage and considered after a cybersecurity and operations review by the Steering Committee.
5. **Contact Info:** For any questions about the Pitch Long Beach! Program, you may contact Ryan Kurtzman, Smart Cities Program Manager, City of Long Beach Department of Technology & Innovation, at [ryan.kurtzman@longbeach.gov](mailto:ryan.kurtzman@longbeach.gov). All ideas MUST be submitted via the [Pitch Long Beach! Idea Form](#).