# Request for Proposal

**For:** Climate KIC Community Digital platform design, building & maintenance

**Date:** 06 May 2025

## 1 Overview

### 1.1 Executive Summary

This is a Request for Proposal (RFP) that details Climate KIC's requirements for services. Please treat this document in accordance with the confidentiality obligations detailed further in this document.

| | |
|---|---|
| Services and/or goods requested | Website building, design, maintenance |
| The legal entity requesting these goods and/or services, referred to as "Climate-KIC". | Stichting Climate-KIC International Foundation |
| Services and/or goods will be delivered to the following locations | Services will be delivered remotely |
| Climate KIC Contract Manager for submitting proposals and inquiries | Magnus Harrison<br>Community Host<br>magnus.harrison@climate-kic.org |
| Proposed contract term for successful candidates | 2 years plus option to renew for 12 additional months per Climate KIC's discretion |

### 1.2 Timelines

Climate KIC has set the following indicative timelines for this RFP:

| Planned Date* | Milestones |
|---|---|
| 06 May 2025 | RFP issued to bidders |
| 20 May 2025 | Bidders submit proposals / Submission Deadline |
| 21 May 2025 | Notification of contract award |

\* Climate KIC reserves the right to amend this timetable during the RFP.

### 1.3 How you can participate

1. Review the RFP documents provided by Climate KIC.
2. Email the Contract Manager letting us know you will submit a proposal (within 2 business days if possible).
3. If you have questions on the RFP, email the Contract Manager at least 3 business days before the submission deadline. We aim to respond in a timely manner wherever possible.
4. Submit a proposal following the requirements at Section 6 by the Submission Deadline stated at Section 1.2.
5. Climate KIC will assess bids and notify bidders following the timeline at Section 1.2.

### 1.4 About Climate KIC

Climate KIC is the EU's climate innovation initiative, working to accelerate the transition to a zero-carbon and resilient world by enabling systems transformation. Headquartered in Amsterdam, it operates from 13 hubs across Europe and is active in 39 countries. Climate KIC was established in 2010 and is predominately funded by the European Institute of Innovation and Technology (EIT), a body of the European Union.

As a Knowledge and Innovation Community (KIC), it brings together more than 400 partners from business, academia, the public and non-profit sectors to create networks of expertise, through which innovative products, services and systems are developed, brought to market and scaled-up for impact. See https://www.climate-kic.org/ for more information.

## 2 Confidentiality

All information provided in this Request for Proposal (hereinafter "RFP") document and any information that may be subsequently disclosed during discussions, correspondence and negotiations is confidential and must not be disclosed to any other party or used for any other purpose whatsoever without the prior written permission of Climate-KIC.

The Supplier must not disclose any such information, materials, specifications or other documents to any third parties or to any other part of the Supplier's group or use them for any purpose other than for the preparation and submission of a response to this RFP. The Supplier must not make any press announcements or publicise in any way Climate KIC's name, this document, the quotation process or any subsequent agreement without the prior written consent of Climate KIC.

Climate KIC may require the execution of Non-Disclosure Agreement as part of this RFP or for future commercial engagements. As part of preparation for the submission of the response and in any subsequent negotiations, the Supplier is allowed to disclose confidential information to others within the Supplier organisation, external advisors or subcontractors, provided that the confidentiality conditions are adhered to. ⍰

Employees of either party who have access to confidential information must be notified of their obligations with regard to confidentiality and of the disciplinary proceedings which will result if confidentiality conditions are breached.

# 3  Introduction and Background

Climate KIC Community is a network of organisations and individuals that are aligned with Climate KIC's transformative mission and come together to share knowledge, tools and experiences and collaborate in new innovative projects. The Community model is built on the core principle that members want to actively work together to transform city, industry, land-use, finance, and maritime systems through innovation to speed up the rate of decarbonisation and strengthen climate resilience.

Our core members are organisation members, which regroup the corporates, start-ups, SMEs, NGOs, Universities, municipalities, and all the other kinds of public and private institutions that have decided to take part in our Community as an entity. There are 3 membership tiers that organisations are free to choose and that represent the different levels of engagement within the Community and with Climate KIC's staff: Network, Collaborate, Learn. Members can also join as individuals, representing their individual or organisation interest inside the Community.

**Climate KIC is looking for a provider to host their Community membership in a digital platform.**

Currently, Climate KIC utilises Climate-HIVE.org as a Community digital platform that reunites members and facilitates connections, communications and learning to its membership. The current platform infrastructure development and maintenance is provided by a third-party agency, Hivebrite.

From 2025, in line with Climate KIC's objective to push innovation through community even further, the Community platform plays a central role in delivering impact by enhancing exchange of information between Climate KIC and members, and enabling transformative collaboration opportunities. Thus, the Community platform needs to improve its interactive features and have a customisable and user-friendly experience and interface aligned with the new Climate KIC branding. The platform will also need to host an increasing number of users, with a baseline of +2000 users. Our goal is to arrive to 5000 users by the end of 2025.

Moreover, Climate KIC is aiming to incorporate in its Community, and thus the platform, a network of Europe-based farmers. The objective is to support those European farmers that struggle with the required transformation by providing pathways for change including innovative solutions and support in generating enabling conditions. The platform will be integrated with this pivotal network of European farmers. The desired outcome is to facilitate connections and matchmaking between farmers and the dissemination of knowledge.

At this stage, Climate KIC accepts proposals from third-party service providers or web agencies that can satisfy our requirements in terms of features, customisation and user experience.

## 3.1 Pages, Functionalities, Modules & More

Climate KIC has outlined a list of the desired modules, pages and functionalities and their objectives. Based on this list, the bidder is asked to draft which potential solutions satisfy our requirements.

**MUST-HAVE**:

- Homepage: a page users can find quick information about the next events, opportunities, available memberships, spotlighted content, and more. It doesn't require a log in to be viewed.
- Memberships: Our Community model is membership-based. Therefore, each user, to navigate the full platform functionalities, should have an assigned membership. Memberships are selected / purchased directly by users from the Membership page, while admins should be able to approve them in specific use cases. The permissions and pages visibility should be set by admins. In general, the memberships available on the platform can fit in the following categories:

o Restricted membership for subcommunity members: The membership should restrict access to all the content behind the login except for the Groups module (detailed below). This membership should always be free. Once users sign up for this membership, the access must be approved by admins.

o Basic memberships for individuals: Membership that grants full access as a 'viewer' on the platform. Users can visit all modules and interact with the posted content. This membership requires a fee, and also grants a one-month free trial after the purchase. Once the purchase is complete, access is granted without admin approval, although there might be some exceptions (see section 3.3 Farmers network integration).

o Premium membership for organisations: Membership for our premier organisation members. Full access to the global platform features and permissions to be 'content contributors'. Members can submit events, opportunities, projects to be posted on the platform corresponding modules. It should be possible to request (or sign up for) the membership from the platform; after they complete the registration form, users will be contacted by Climate KIC Community team to finalise the membership and payment details. At the end of this administrative process, access to the platform will be granted by the admins.
Once the membership has been signed, and based on the tier that has been agreed, the organisation has access to a specific number of accounts on the platform:

  ▪ Network tier: 5 accounts

  ▪ Learn tier: 10 accounts

  ▪ Collaborate tier: 20 accounts

  *Nice to have*: If a user signs up with a specific email domain, he is automatically approved and the correct membership is assigned to them.

The membership permissions are further detailed in the user roles (Annex II).

- Membership directory: a page showcasing all the members profiles with an interactive map feature. The map will showcase members' profiles based on their geolocation. It must have the possibility to conduct searches through a search bar and filters based on the user industry, organisation type, skills, interests, name of user, name of organisation, keywords, job title, and/or other fields that will be agreed with the supplier. Optional: the map could be integrated into other features such as a Projects module, or Events, to have a comprehensive view of what is happening on the ground.

- Events: A module showing upcoming (and past) events in a "calendar" view. Optional: Users with special permissions should be able to post their own events too.

- Opportunities: A module in a blog format (or other formats that might be suitable) hosting funding calls, partnerships scouting, etc. Users should also be able to filter content based on categories that will be given by Climate KIC. Optional: Users should be able to post their opportunities too.

- Content repository / library: A media center, or knowledge hub where we can store, and organise written or video resources. It needs to have the possibility for admins to create folders and customise the order of the content. Users should also be able to filter content based on categories that will be given by Climate KIC.

- Groups: Sub-communities with their own space and functionalities that are topic-based (e.g. food systems) or background-based (e.g. all the start-ups coming from our entrepreneurship programmes, Europe-based farmers). Groups can be both open and closed access (invitation-only) groups. Only admins can create groups and invite users to restricted groups. The

functionalities that are strictly required are members directory and Forum / Live Feed. Optional: an events module, content library, opportunities module integrated in the sub-group. It should also be possible for users to invite other users to join OPEN groups.

- Messaging functionality: Possibility to activate chats from one user to another to facilitate connections. For each message sent, an email notification should be sent by default to the receiver. Optional: possibility to activate group chats.

- Forum module: Module to start thematic discussions. All users should have the permissions to start discussions. Users should also be able to filter content based on categories that will be given by Climate KIC, or keywords.

- Project module: A blog or directory showcasing different projects. Users should also be able to filter content based on categories that will be given by Climate KIC, or keywords. Each project should have as featured components: Project owner, Title, Description, Timeline, Links, Categories, Call to Action, Thumbnail picture, Project owner logo. Optional: Users should have the permissions to add their own projects too.

- Membership page: A public custom page where users can find additional information about the memberships features, benefits, and details (e.g. costs, free trial period) and complete the registration process and purchase.

- Automatic emailing system: Based on the templates that Climate KIC will provide in due time, the supplier will propose an automatic email system that will cover the onboarding process (account activation confirmation email and payment confirmation), events registration (confirmation email and reminder email), new messages received. Optional: onboarding journey cycle, automatic digest, new opportunity posted, new event posted, new forum discussion, new project, new file in the library.

**NICE TO HAVE:**

- Matchmaking module: A "marketplace" to match users with mentors, advisors, peers for one-on-one guidance, or other skills / positions they might be looking for. How we imagine it: User lands on the "Match-making landing page";  User finds a quick form with questions like : What are you looking for (mentorship, partner with other peers, … TBD), In which industry (list of industries); Based on the answer, the user is matched them with another user. This could happen automatically (ideal), or manually (not ideal). Criteria and categories for matching will be defined by Climate KIC.
Please scout for possible plugins or integrations that can do this functionality. We are open to different options. If it takes more time to implement, it can be launched at a later stage.

The bidders are requested to provide the technical solutions that satisfy the requirements above.

It is also important that Climate KIC and the supplier agree on what can be publicly accessible and what is not. With public, we mean pages, content, modules, functionalities, etc. that do not require having an account / being logged into your own account to access them. Climate KIC wants to provide users with teasers on the content and then restrict access to incentivise registrations. For instance, non-logged in user should be able to view the event in its entirety, but registrations should be restricted as available to only logged-in users.

Finally, the bidders should prioritise a solution that is easily scalable for potential new modules, functionalities, pages or more that might be requested in the future.

### 3.2 User stories, roles & data

Climate KIC has created user stories and roles that should allow the bidders to better understand the nature of the platform, its functionalities and expected outcome. They detail the requirements from an end user and admin point of view. They can be found in Annex I (User Stories) and Annex II (User Roles).

Moreover, Climate KIC has identified the user fields and data that is required to be migrated to the new environment in case it has been decided to change the current platform provider. They can be found in Annex III (User Data)

User stories, role and sitemap can be subject of discussion during the technical discovery phase. Climate KIC reserves the right to adjust and prioritise them based on the timeline and most convenient technical solution. The supplier should evaluate the impact of these adjustments to the timeline and available budget, and communicate their acceptance.

### 3.3 Farmers network integration

Particular attention should be reserved to the integration of the network of the European farmers (now referred as 'Farmers'). In the proposal, bidders are asked to ensure the following requirements are met:

- Membership: The Farmers should be assigned to an individual membership that grants them a one-year free access to the whole platform, without requiring any credit card information. Permissions should be the same as the individual members. At the end of the free trial, the Farmer will be asked to maintain full access to the global platform features by purchasing one of the available paid memberships, or to downgrade to a restricted membership for subcommunity individuals.
- Landing page: Farmers are identified and can sign up through a specific landing page hosted in the platform. Bidders are requested to design the page.
- Group: The Farmers will have their own dedicated group in the platform. Only users who have selected a Farmers membership (set up by the admins) will gain access to the group.
- Farmers resources: Farmers should be able to quickly access knowledge resources, such as articles, videos, and guides on best practices, modern farming techniques, and market trends in the global platform setup. All these resources will be provided by Climate KIC, and will be added to the module of pertinence, which is the Content Library. Each content should have a label (i.e. a category) that allows Farmers to quickly identify them.

## 4 Specification

### 4.1 Scope

Climate KIC are requesting quotation for building, designing, and maintaining the Community platform. The quotation should also incorporate the integration of the farmers' network inside the platform.

The scope of this document is divided into the following items:

- Technical discovery to match business requirements with the available technology
- Website design
- Website development, configuration, and user acceptance
- Data migration
- Website maintenance
- Farmers network integration

Requirements & Deliverables for each phase is detailed in the subsections below. The supplier will ensure sufficient financial, economic, technical and professional capacity to deliver the services in an efficient and effective manner.

### 4.1.1 Technical discovery

In this initial phase, Climate KIC and the Supplier will run workshops to match the user stories with the most suitable technology. The Supplier will analyse the current platform use, the needs of the users and admins and propose technical solutions to satisfy the requirements.

### 4.1.2 Website design

This item covers the creation and feedback loop for high-fidelity mock-ups of all internal pages. These mock-ups will visualize the final look and feel of the user interface.

### 4.1.3 Website development, configuration and user acceptance

The supplier will architect, develop and oversee the platform build and configuration, including development and staging infrastructure setup, testing, deployment, launch, and training for the Climate KIC team.

Given the complexity of the platform, the supplier may propose a multi-phase launch of the platform, highlighting dependencies, which pages and functionalities will be included in each phase, and a timeline for the different launches.

### 4.1.4 Data migration

The supplier needs to include the costs and technical requirements and implications to migrate user data from the current platform to the new environment.

### 4.1.5 Website maintenance

Ongoing support after the platform launch until 2027. Maintenance should include continuous technical support for system administration, as long as support for content updates, troubleshooting and minor configurations.

### 4.1.6 Farmers network integration

Building the technical infrastructure to host the network of European farmers in the Community platform.

### Out of scope

Additional services related to this Scope may be requested on a day rate basis. Please ensure a rate card is included with your submission and any other applicable costs associated with supplementary services.

## 4.2 Objectives

As detailed above in Sections 3 and 4.1, the digital platform should fulfil the following objectives:

- Build a space for members to facilitate connections, matchmaking between each other, and eventually project scaling and funding.
- Create a customised digital experience for all members – from onboarding to advocacy.
- Manage membership payments in a simple and automatised way.
- Host a centralised hub to share learning resources, events, and more, and where users can find quickly information related to opportunities of engagement, projects, and more

## 4.3   Deliverables

**Technical discovery**

- Platform prototype
- Technical requirements document

**Website design**

- High-fidelity mock ups of all internal pages

**Website development, configuration and user acceptance**

- Platform fully functional in a test environment, with roles and functionalities.
- After Climate KIC's acceptance, deploy to production

### 4.1.4 Data migration

- Data migrated to the new platform in a test environment

- After Climate KIC's acceptance of the migrated data in the test environment, deployment to the production environment

### 4.1.5 Website maintenance

- Monthly reports on actions taken and spending
- Support with incidents and bugs

### 4.1.6 Farmers network integration

- Integration in the test environment
- After Climate KIC's acceptance, deployment to production.

## 4.4   Service Level Requirements

In providing goods and/or services to Climate KIC, the following service levels are requested:

- Services are requested during business hours 9am to 6pm CET excluding public holidays.
- The provider is to propose a suitable service level agreement to ensure key elements of goods and/or services delivery are defined, aligned and tracked over time. This should include escalation channels, performance indicators / targets and mechanisms for remediation of ongoing missed performance targets (e.g. credits, rebates or reimbursement).

- The service provider should be generally contactable and responsive during business hours by phone or email.
- Services should be delivered by professionally competent and appropriately experienced individuals.

## 4.5  Sustainability

In order to uphold our commitment to sustainability, Climate KIC aims to minimise any negative impact we may have on the natural and built environment by effectively managing our resources.

In the efforts to procure in a sustainable manner with minimal impact, the following requests are made of the bidder:

- The services are to be delivered digitally following a paperless policy
- We ask our service providers to consider the greenhouse gas emissions from transport to our offices and events. Cycling, walking, public transport and rail are preferable over air travel wherever possible.
- We love to hear what suppliers are doing to minimise impact. Feel encouraged to share your approach and policies if applicable.

## 4.6  Eligibility

Climate KIC reserve the right to reject proposals where the proposed supplier:

- Has insufficient technical, professional or financial capacity to deliver the services.
- Has been bankrupt or insolvent (last 7 years)
- Is sanctioned by a relevant authority
- Does not comply or has previously not complied with our Ethical Standards for Contractual Counterparties
- Has been convicted of crime, links to terrorism, breach of tax or social security obligations
- Is an individual prior employee of a Climate KIC or group entity (discretionary basis)
- Will continue to be a full time employee of an EIT grant recipient or Climate KIC partner during the contract term (discretionary basis)

If any of these scenarios apply, please make Climate KIC aware in your submission.

## 4.7  Required Experience and Capabilities

The team or individuals delivering the services should be able to demonstrate the following experience and capabilities:

- Experience in web development, website maintenance, UX/UI Design
- Working knowledge of community management
- Previous experience building similar projects
- Previous experience in data migration
- Adherence to evaluation professional ethics and quality standards
- Project and financial management showcasing on time and on budget delivery

## 4.8  Payment & Invoicing

4.9 Payments will be made following provision of a correctly rendered undisputed digital (via email) invoice to Climate KIC. The Climate KIC contract manager will inform the successful bidder where to submit invoices.

4.10 Payment terms associated with delivery of the goods and/or services must be not less than net 30 days.

4.11 Climate KIC can provide a purchase order number to be referenced on invoices.

4.12 Where Climate KIC is requesting services over longer periods of time, we ask that bidders invoice in a pay as we go model (e.g. billed on a monthly consolidated invoice based on work completed or completion of deliverables).

4.13 Requests for deposit payments are generally not accepted.

4.14 If the bidder is requesting any form of payment prior to delivery of goods and/or services, this must be raised with Climate KIC.

4.15 If submitting invoices for subscription services, please ensure these fees are itemised and priced at line level.

### 4.16 Contract Management

A framework agreement is proposed for award of work.

Climate KIC can share their standard terms and conditions but will consider the bidder's own terms and conditions on the basis that the bidder can incorporate the following:

- Climate KIC requires that that service providers provide an indemnity to Climate KIC for breach of third party intellectual property rights;
- Climate KIC's primary source of funds is the European Institute of Innovation and Technology (EIT) eit.europa.eu/.  Consequently, Climate KIC is obliged to pass through certain FPA/SGA terms to all service provider and service providers are required to agree and comply with such terms. See http://www.climate-kic.org/policies/;
- In addition, Climate KIC will ask that service providers comply with the Ethical Standards for Climate-KIC Contractual Counterparties available at https://www.climate-kic.org/policies
- Service providers are required to comply with Climate KIC's standard data protection clauses (can be provided in advance on request) and provide an indemnity for any breach;
- The liability of the service provider to Climate KIC (and affiliates) to be uncapped in respect of breach of data protection clauses.  For all other heads, liability of the service provider to Climate KIC (and affiliates) may be capped at a reasonable multiple of fees not less than 2X.  If applicable, ClimateKIC liability to service provider also be similarly capped;
- No indemnities extended by Climate KIC to service providers.

## 5 Award Criteria

Climate KIC will assess bids based on the following factors:

| Component | Weighting |
|---|---|
| Cost – the total cost for providing the scope. | 50% |
| Quality – suitability and capability of the proposed services to deliver the scope and requirements in the Specification as evidenced by its proposal. | 40% |

| Component | Weighting |
|---|---|
| Ability of bidder to fulfil the scope of services, in a manner consistent with Climate KIC's objectives and those of this project, as evidenced by its proposal | 10% |
| **Total** | 100% |

# 6 Instruction to Bidders

## 6.1 Responding with your proposal

Climate KIC are requesting the following are submitted to bid on this contract:

1. **A Proposal** that sufficiently details the bidder's solution and responds to the requests contained in this document.
   - o The bidder is kindly asked to include their trading name, VAT or tax identification number (if applicable) and registered trading address (p*lease note, address is not required for an individual)*.
2. **A Quotation** that meets the requirements described at Section 6.2

Any alternative solutions or services that the bidder may wish to bring to the attention of Climate KIC should be included at the end of your response. Climate KIC reserves the right to reject RFP responses that do not confirm with these guidelines.

**All responses shall be made to the Contract Manager (refer Section 1.1) via electronic copy**

## 6.2 Quotation requirements

Climate KIC request that bidders quote in the following manner as appropriate to delivery of the services:

6.3 Please provide itemised quotations in Euros and specify if the quote includes / excludes VAT or any other taxes;

6.4 Provide a rate card for relevant grades of employment that will be conducting services for Climate KIC (e.g. day rate) instead of averaged rates. These may be used for additional services.

6.5 Include all applicable costs or charges associated with providing the goods and/or services in your quotation.

6.6 Please quote on a company letterhead or similar company form where possible with the resolution described in **Table 1** at a minimum. Where a resource plan can be provided or explicitly requested, please refer the example in **Error! Reference source not found.**.

**Table 1:** Provided quotations to include the following details

| Item and unit cost (in Euros excluding VAT) |
|---|
| • Technical requirements gathering<br>• UX/UI Design<br>• Website development<br>• Website maintenance<br>• Farmers network integration<br>• License fees (per user per month/annum, and in aggregate) if applicable |

| Item and unit cost (in Euros excluding VAT) | |
|---|---|
| | TOTAL (if applicable) |
| Rate card for services (per day/hour, in Euros excluding VAT): | |
| • Assistant – XX / day<br>• Officer – XX / day<br>• Specialist - XX / day<br>• Project coordinator – XX / day | |

## 6.7 Subcontracting guidance

It is acceptable for bidders to sub-contract parts of the service but Climate KIC is keen to understand which elements of the service this would apply to. In your response, state which sections are proposed to be subcontracted and advise Climate KIC of the sub-contractor name and address (address is not required for an individual).

## 6.8 Terms of this RFP

1. Your proposal should be submitted according to the instructions as detailed in this section and should be valid for a period of at least six (6) months from the bid due date. Any proposal submitted outside the scope defined may be rejected without provision for re-submission.

2. Any further information pertaining to this RFP, of whatever nature, must be directed to the Contract Manager detailed in Section 1.1. If a point of clarification materially affects the RFP, our response will be circulated to all bidders, otherwise the response will only be sent to the bidder seeking clarification.

3. If any doubt exists concerning any element of this RFP, a clear statement should be made on the assumptions taken to arrive at your quoted costs, or alternatively contact us prior to submitting your proposal to seek clarification.

4. Entering into contractual arrangements with Climate KIC in connection with this RFP does not guarantee work will be awarded.

5. Climate KIC reserves the right to reject any proposal(s) received after the submission date/time.

6. Climate KIC reserves the right to undertake post-bid negotiations with none, all or a shortlist of bidders.

7. Climate KIC, at its sole discretion, reserves the right to accept or reject any or all of the proposals received and not to award any business and shall not be bound to give reasons for any decision. Only the execution of a written agreement between an Climate KIC entity and a supplier(s) will obligate an Climate KIC entity in accordance with the terms and conditions contained in such agreement.

8. Climate KIC reserves the right to procure services from alternative suppliers(s) where the successful bidder is, or becomes, uncompetitive within the market. However, issues over pricing and specification will be resolved through discussion and mutual agreement between Climate KIC and the supplier.

9. Bidders are required to email soft copies of their proposal to the Contract Manager detailed in Section 1.1 based on the timeline at Section 1.2.

10. As per above and where applicable, bidders must acknowledge receipt of this RFP by return email to the Contract Manager detailed in Section 1.1 confirming whether they intend to submit a proposal by the Submission Deadline.

11. This RFP does not commit or obligate any Climate KIC company to pay any expenses incurred by you in the preparation of your Proposal. All such expenses are solely at the risk of the bidder and by submitting a proposal you automatically agree that proposal becomes the property of Climate KIC.

12. Proposals are to be kept as clear and concise as possible and should be sequenced and numbered in accordance with the format of this RFP.

13. The formatting of this document and the attached response document should not be altered.

14. Whilst this RFP confers no legal rights on its addressees, it is not intended that any other persons acquire rights or obligations in respect of or arising under it.

15. Unsuccessful bidders agree, by the submission of their proposals, to return to Climate KIC this RFP and any and all papers, records, data and materials supplied to them in connection with it, including all copies made by them.

16. This RFP is for consideration in whole and not in part or parts unless otherwise indicated.

17. All efforts have been made to ensure the accuracy and validity of information contained in this RFP. However, Climate KIC does not warrant the information accurate or comprehensive.

# Annex I: User stories

## Generic user stories

| As a [USER] | I want to [GOAL] | So that I can [REASON] | MOSCOW | Notes from CKIC |
|---|---|---|---|---|
| New user | Register to the platform with social media (Google, LinkedIn) | Save time from adding my personal details | Could have | |
| New user | Have my profile details pre-filled with the LinkedIn information - headline, description, skills | Save time from adding my personal details | Could have | |
| New user | Have a free trial period - free of charge | Test if the Community experience is something that can benefit my personal and/or professional growth | Must have | |
| New user | Insert my payment details from the registration process | Have my payment details saved on the platform and the automatic payment scheduled | Must have | It means that the user should insert their credit card information when they are signing up for the platform - even if they are granted a one month free trial. I think this is standard for most of the platforms. |
| New user | Have different payment options | Pay quickly with PayPal, Apple Pay, Google Pay | Should have | If there are more/other payment methods we can add, please go ahead |
| New user | Add promo code when adding my payment details | Save money at my first payment | Must have | Should only be valid for the first purchase |
| New user | Add promo code when adding my payment details that is valid for the whole duration of my membership | Afford a cheaper membership | Should have | This is because we aim to onboard individuals from regions where the subscription could be expansive in their local currency. Therefore, we should be able to develop subscription plans that are cheaper for them. I don't know if coupons / promo codes are the best way to proceed, or if you have other suggestions. |
| User | Be able to cancel my membership from my personal area on the platform | Cancel my membership quickly without having to ask for support from the admins | Must have | |
| User on free trial | Receive an alert when my free trial is about to expire | Be aware that a payment will be processed soon | Must have | |
| User | Receive an email communication with the | Keep track of my membership payments | Must have | |

| | | | | |
|---|---|---|---|---|
| | receipt after each payment is processed | | | |
| User | Have my login credentials saved on the platform | Log in quickly without adding my credentials at every access | Must have | |
| User | Have a mobile-friendly platform | Access it from the phone and view everything in the right format | Must have | This is important because Climate-HIVE has many issues on mobile. |
| User | Receive website / in-app notifications each time a new content is posted | Make sure I don't miss any new content | Must have | |
| User | Have a homepage with quick access to latest or highlighted content | Access quickly the latest and most important content | Must have | |
| User | Add details to my personal profile | Other users can read information about myself and connect with me if interested | Must have | |
| User | Add a social media (LinkedIn, Twitter, Website) handle in my profile | Get people to read even more about my activity, organisation, and more | Must have | |
| User | Read more details of other members in a dedicated user page | Understand if they are interesting for my organisation | Must have | User page |
| User | Have a map to find other members | Find members in a specific geographic area of interest | Must have | Members directory |
| User | Find people that work on specific industries, fields, or based on keywords, topics | Find members of a specific area of interest | Must have | |
| User | Send messages to other users on the platform | Start conversations easily without changing platform | Must have | |
| User | Have a page with all the events in chronological order | See all the upcoming events | Must have | Event module |
| User | Have a page with Community events | Keep track of the most relevant events for Community members | Should have | Community events page. The rationale is: the general Events page will be crowded, because there will be events from Community team, other teams, events that are relevant to our users but not organised by CKIC, drive members can add their own events, etc. There are times where we have 60+ events showing. So I would like us to have a page where we have ONLY events organised by the Community team, such as: |

| | | | | |
|---|---|---|---|---|
| | | | | Community CONNECT, learning sessions etc. These events should also appear in the general event feed, but will be "filtered" to only Communnity events in the dedicated page. An alternative to this, could be to pin events on top of the event feed. Please advise |
| User | Click on the event and read more details on a dedicated page | Understand where the event takes place, what the topic is in detail, how I can participate | Must have | Event page |
| User | See other related events on the event page (based on category, or location) | Register to more events that I am interested in | Could have | |
| User | Have a native registration form for events | Confirm my interest, receive the information to participate (e.g. online link) and related communications / updates | Must have | |
| User | Receive an email confirmation after completing the event registration form | Ensure my registration has been saved | Must have | |
| User | Receive a calendar item in the event confirmation email | Add it to my calendar | Should have | |
| User | Have a page with all the opportunities (open calls, funding opportunities, etc.) | Stay updated with the latest opportunities from Climate-KIC and partners | Must have | Opportunities module |
| User | Have a link to apply to the opportunity | Submit my interest in case I want to participate in a specific opportunity | Must have | This needs to be there for every opportunity, BUT mind that it doesn't mean that there will be a native registration form for each opportunity. Most of opportunities are managed by other teams / partners / institutions that have their own application process, so we can't substitute it with a registration form. Also a Call to action might even be "Contact us" (redirecting to email) in certain cases. |
| User | Access knowledge resources provided by Climate-KIC in one space and in all formats - | Cultivate my learning development thanks to Climate-KIC, and find everything quickly in one place | Must have | Knowledge library module |

| | | | | |
|---|---|---|---|---|
| | written and video - with option to download | | | |
| User | Order the knowledge resources from the latest published | Check quickly what is the latest published content | Should have | |
| User | Have the resources ordered in folders | Find quickly what I need in the library | Must have | |
| User | Filter the knowledge resources based on categories | Find quickly what I need in the library | Must have | |
| User | Have a space to ask questions and/or start discussions on specific topics | Ask for peer advice | Must have | Forum module |
| User | See previous discussions filtering by topics, and engage with them | See if other members had the same issues I am experiencing and how they addressed it | Must have | |
| User | Have a share button option to every content - events, opportunities, forum discussions, projects, content in the knowledge hub, etc. | Save the link and share it to others if needed | Should have | |
| User | Tag other users and comment under content - events, opportunities, … | Point some users to content they might be interested in | Should have | it's not strictly necessary for the Projects module |
| User | Comment under content - events, opportunities, … | Post my reflections, questions or other | Should have | it's not strictly necessary for the Projects module |
| User | Have a page with CKIC and other partners' programmes, projects and initiatives | Understand what Climate-KIC and its partners do in concrete and if and how my organisation can partner | Must have | Project module |
| User | Read more details of the project I am interested in in a dedicated page | Understand what Climate-KIC and its partners do in concrete and if and how my organisation can partner | Must have | Project page |
| User | Have a call to action button to contact project managers / main responsibles | Ask for a collaboration / partnership / ... | Must have | |
| User | See a list of all the Drive members and filter them based on geography and organisation type | I know which are CKIC Drive members and what they do related to climate change | Must have | Organisation page - managed externally |

| | | | | |
|---|---|---|---|---|
| User | Have a page with available memberships | Description, benefits, features, payment details, etc. | Must have | Membership page |
| User | Have a call to action button for each membership type | Upgrade to the new membership tier | Must have | |
| User | Receive an activity digest with latest content from the platform at a customised frequency | Stay up to date with the latest news without having to log in | Should have | |
| User | Edit my privacy settings | Adjust the notifications (particularly emails) I receive | Must have | |
| Organisation member | Sign up without going through the paywall | Avoid paying again | Must have | Organisation memberships are paid by the member organisation after the reception of an invoice. This processed is NOT managed through the platform of course, but through Salesforce. We need to understand how to make it work. It could be (my ideas but open to brainstorm more solutions):<br>- Organisation users can sign up through a specific registration form (different from the generic user form) that will be sent to them and that triggers the creation of an account and a free membership (IDEAL)<br> - Organisation users can sign up through the form, where we add at the end a list of pre-approved email domains, and those domains, once the account is created, receive automatically a free membership (IDEAL - that was what we did on Climate-HIVE for a while)<br>- Organisation users can only be added to the platform manually by admins (NOT IDEAL)<br> - Organisation users sign up in the normal registration form, where we add the field - Are you a Organisation member?, and then admins need to approve the registration before the account is created. (NOT IDEAL) |
| Organisation member | Have the possibility to register for multiple tickets, adding the other registrees email | Give "extra" tickets to my coworkers, and they receive updates and | Should have | The possibility to add multiple emails is not necessarily a requirement |

| | | | | |
|---|---|---|---|---|
| | | information about the event | | |
| Organisation member | Add my organisation events on the event calendar feed | Spotlight initiatives driven by my organisation | Should have | They should be able to add categories as well |
| Organisation member | Add a call to action button in each event page with "Register here" (or similar) redirecting to external webpage | Redirect users to the page where they can register | Should have | |
| Organisation member | Create a standard registration form for the events created by my organisation | Track registrations coming from the Community | Wish | Not sure how they can track people who registered. Perhaps they have a "My events" in their personal area and can see it there? Or maybe they just receive an email with those who register. |
| Organisation member | Add my opportunities on the opportunities feed | Spotlight initiatives driven by my organisation | Should have | They should be able to add the categories as well |
| Organisation member | Add a call to action button for users to contact my email or redirecting to an external website in the opportunity page | Gather leads from the opportunity | Could have | |
| Organisation member | Add my projects on the projects feed | Spotlight initiatives driven by my organisation | Should have | They should be able to add the categories as well |
| Organisation member | Have my organisation spotlighted on the platform | Other members can read about us | Must have | Organisations page - it's managed externally on the CKIC corp website |
| User | Have a page where I can see CKIC subcommunities | Request to join if I believe I fit in that subcommunity | Must have | Subcommunities page |
| Subcommunity member | Have a page with all the subcommunities I am member of | Have a quick access to my groups | Should have | My Subcommunties page |
| Subcommunity member | Access resources dedicated to my specific sub-community - such as events, opportunities, knowledge resources | Continue my personal and professional development and build further professional opportunities | Must have | Group page |
| Subcommunity member | Add my events, and post on a feed in the subcommunity group | Interact and foster my subcommunity network | Must have | |
| User | Have a page with a view of all the Climathons | Register to the Climathon close to my city | Should have | Climathon page |

| | | | | | |
|---|---|---|---|---|---|
| Climathon organiser | Submit my Climathon details - banner image, description, date, time, location, link to register | Promote my Climathon to the network | Should have | Climathon page |
| User / Climathon organiser | Have a page with all the information to become a Climathon organiser and link to the open call / resources to download | Get all the information and updates on the open call | Should have | Become an organiser page |

## Admin stories

| Column1 | As a [USER] | I want to [GOAL] | So that I can [REASON] | MOSCOW | Notes from CKIC |
|---|---|---|---|---|---|
| 1 | Full admin | Add manually users (individually and in large bulks) on the platform from the backoffice | Add users coming from other databases | Should have | It means that we, as admins, should be able to import users in large bulks (through csv files or similar), creating user accounts for them. To define the journey once the account is created in the backoffice. |
| 2 | Full admin | Give users specific permissions based on their memberships (e.g. which modules they can view, actions they can perform, etc.) | Ensure users have limited actions based on their membership | Must have | |
| 3 | Full admin | Be able to fully control membership settings on users - i.e. add or cancel memberships to users (even in bulk), block access | Take quick action when necessary | Must have | |
| 4 | Full admin | Edit in bulk user information | Apply modifications to settings, membership etc in bulk, without having to manually open each profile | Must have | Perhaps doable adding modifications in a csv file? |
| 5 | Full admin | Access relevant analytics related to my platform - e.g. visits, accounts activation, main events performed by users | Track platform performance and user behaviour | Must have | The actual metrics can be agreed based on what's "available" without a further scope |
| 6 | Full admin | Create website pop ups for users | Make sure my campaign messages reach every user when they log in | Should have | |
| 7 | Full admin | Post, edit and remove content autonomously | Populate my platform with content for users | Must have | |

| | | | | | |
|---|---|---|---|---|---|
| 8 | Full admin | Receive an email alert each time a user has posted something | Be aware of and moderate what is being posted on the platform | Should have | Alternatively, just notification on the backoffice? |
| 9 | Full admin | Set up a confirmation email right after the membership purchase and free trial activation | To give clear directions to user on what they have to do now that their free trial has started | Must have | Email should be customised based on the membership |
| 10 | Full admin | Edit the confirmation email | Add content related to seasonal campaigns on it | Must have | |
| 11 | Full admin | Set up an automatic onboarding email flow, showcasing different features, benefits,etc. | Ensure users are receiving personalised messages based on their journey and membership | Could have | |
| 12 | Full admin | Set automatic emails related to events - i.e. confirmation after registration, reminder emails | Ensure users are reminded the events they registered for | Must have | |
| 13 | Full admin | Have all the emails of the new users added to our Mailchimp mail list and removed when their membership is cancelled | Have the list updated automatically | Could have | |
| 14 | Full admin | Have the option to set paid tickets for events | Generate revenues from selling event tickets | Should have | This could be required only to very few events |
| 15 | Full admin | Customise registration forms for events and opportunities | Add specific fields and gather more data | Must have | |
| 16 | Full admin | See the list of people who registered to events and opportunities | Understand how many participants I can expect and create specific campaigns for them | Must have | |
| 17 | Full admin | Set specific content as public (not requiring a login) | Generate interest in users who land on our platform to purchase our Community membership | Must have | Please check the sitemap, and we will also provide another document to ensure the division between gated and non-gated content is clear |
| 18 | Full admin | Be able to add details on each event: date, time, location, address, description, category, event banner, registration form | Provide the full details to participants | Must have | |
| 19 | Full admin | Add and edit categories for events | Ensure users filter quickly events they are interested in | Must have | |

| | | | | | |
|---|---|---|---|---|---|
| 20 | Full admin | Pin events to the top in the Events page | Showcase the most important events on top | Should have | This could be an alternative to the Community events page (see story 22 in user-focused tab) |
| 21 | Full admin | Add and edit categories for opportunities | Ensure users filter quickly opportunities they are interested in | Must have | |
| 22 | Full admin | Add and edit categories for content posted in the library | Ensure users filter quickly content they are interested in | Must have | |
| 23 | Full admin | Add and edit categories for projects posted in the projects module | Ensure users filter quickly projects they are interested in | Must have | |
| 24 | Full admin | Have opportunities, events, and library files linked to projects and showing on the projects module | Have an overview of the linked content in the projects page | Could have | |
| 25 | Full admin | Edit content on the homepage | Spotlight content based on the ongoing campaigns | Must have | |
| 26 | Full admin | Export user data | Create customised reports | Must have | |
| 27 | Full admin | Give badges to my users | Reward users behaviours | Could have | |
| 28 | Full admin | Create groups | Organise users in subcommunities | Must have | |
| 29 | Full admin | Make other users group admins | Delegate the responsibility of group moderators and engagement managers to other users - even if they are not full admins | Must have | |
| 30 | Full admin | Edit description, name, banner of the group | Customise the group experience | Must have | |
| 31 | Full admin / Group admin | Give platform-wide free trial to subcommunity users, and limit their access to the group when it's expired | Tease them about the full platform content, and then limit their access to their subcommunity unless they upgrade | Must have | |
| 32 | Group admin | Set my group as open (to everyone) or private (invitation only / admin approval) | Ensure access is unlimited or limited to only specific users depending on the case | Must have | |
| 33 | Group admin | Be able to see group entry requests | Approve or reject them | Must have | |
| 34 | Group admin | Access my group analytics - i.e. members, engagement stats | Track my group engagement and users behaviours | Must have | |

| | | | | | |
|---|---|---|---|---|---|
| 35 | Group admin | Export group members data | Create customised reports | Must have | |
| 36 | Group admin | Manually add members to my group from the existing platform users | Add members to my group if they belong to my subcommunity | Must have | This means adding existing registered users that are not part of the group yet to the group |
| 37 | Group admin | Import external users to my group | Add contacts from my database | Should have | This means adding non-registered users to the group through a database (csv file or similar). These users get added simultaneously to the whole platform, and the group. User story 37 and 38 can be alternatives. |
| 38 | Group admin | Share a link for non-members to join the platform and group at the same time | Fasten the onboarding process | Should have | This means non-registered users can sign up autonomously to the platform and the group simultaneously. User story 37 and 38 can be alternatives. |
| 39 | Group admin | Post content, such as events, calls, knowledge resources etc. to my group members | Promote opportunities and share resources that my subcommunity can be interested in | Must have | |
| 40 | Group admin | Delete content posted by users | Moderate the group content so that it follows the community guidelines | Must have | |
| 41 | Group admin | Customise which modules appear on my grous | Add only relevant modules | Must have | Some groups might want different "combinations" of modules. For instance: - Feed, Events, library, forum - or events, library, opportunities etc. |

# Annex II: User roles

| User role / activity | Subcommunity member | Individual member | Organisation member |
|---|---|---|---|
| **Create an event** | FALSE | FALSE | TRUE |
| **Comment under event** | FALSE | TRUE | TRUE |
| **Create a forum** | FALSE | FALSE | TRUE |
| **Comment under forum posts** | FALSE | TRUE | TRUE |
| **Create an opportunity** | FALSE | FALSE | TRUE |
| **Comment under opportunity** | FALSE | TRUE | TRUE |
| **Create a project** | FALSE | FALSE | TRUE |
| **Comment under project** | FALSE | TRUE | TRUE |
| **See Members on the directory (map)** | FALSE | TRUE | TRUE |
| **View files on content library** | FALSE | TRUE | TRUE |
| **Send private messages to users** | TRUE ONLY TO OTHER SUBCOMMUNITY USERS | TRUE | TRUE |
| **See profile details (e.g. description, organisation etc.)** | TRUE ONLY TO OTHER SUBCOMMUNITY USERS | TRUE | TRUE |

# Annex III: User data

Last name
First name
Primary email
Honorary title
Gender
Headline
Summary
Twitter profile URL
LinkedIn profile url
Website
Admin comment
Creation date
SubNetworks:Title
Live Location:Address
Live Location:ZIP/Postal code

Live Location:City
Live Location:State/Region/Province
Live Location:Country
Live Location:Country code

Industries:Industries

Last Job:Position
Last Education:School

Longest active membership subscription:Id

Longest active membership subscription:Type name

Longest active membership subscription:Membership status

Longest active membership subscription:Purchase method

Longest active membership subscription:Amount

Longest active membership subscription:Type periodicity

Longest active membership subscription:Expires at

Longest active membership subscription:Created at

Longest active membership subscription:Recurring

Longest active membership subscription:Notes

Groups Member:Group Member

_6228529a_What_are_you_looking_for_as_a_member_of_the_EIT_Climate_KIC_Community_

_ff54701d_How_did_you_hear_about_the_Community_

_25928a35_If_you_heard_about_this_Community_from_a_Climate_KIC_staff_member__please_specify_their_name_

_7f374dd2_Name
_244cfa5d_Description
_117862b6_Website

_45ca8c7d_I_have_read_and_adhere_to_the_Community_Manifesto__climate_hive_org_page_community_manifesto