



REQUEST FOR PROPOSAL (RfP)

**Custom Developer Support for the C40 Knowledge Hub
and Salesforce CRM**

**C40 Climate Leadership Group, Inc.
120 Park Avenue, 23rd Floor
New York, NY 10017
United States of America**

1 May 2022

1. C40 Cities Climate Leadership Group



The C40 Cities Climate Leadership Group connects more than 90 of the world's greatest cities, representing 650+ million people and one quarter of the global economy. Created and led by cities, C40 is focused on tackling climate change and driving urban action that reduces greenhouse gas emissions and climate risks, while increasing the health, wellbeing, and economic opportunities of urban citizens.

The current chair of C40 is Mayor of Los Angeles Eric Garcetti; three-term Mayor of New York City Michael R.

Bloomberg serves as President of the Board. C40 is governed by a Steering Committee made up of C40 member city mayors, elected by their peers to represent the geographic diversity of the network. Currently, the C40 Steering Committee includes the mayors of Abidjan, Barcelona, Bogotá, Buenos Aires, Dhaka, Dubai, Freetown, Hong Kong, Jakarta, Johannesburg, London, Los Angeles, Milan, Montréal, Phoenix, Stockholm and Tokyo.

C40's work is made possible by three strategic funders: Bloomberg Philanthropies, Children's Investment Fund Foundation (CIFF), and Realdania.

C40 positions cities as a leading force for climate action around the world. We define and amplify their call to national governments for greater support and autonomy in creating a sustainable future. Working across multiple sectors and initiative areas, C40 convenes networks of cities providing a suite of services in support of their efforts, including: direct technical assistance; facilitating of peer-to-peer exchange; and research, knowledge management and communications.

As a climate organisation of the world's greatest cities, C40 supports its members to move on to a low carbon development pathway, adapt to climate change, curb GHG emissions, and engage in partnerships among themselves and with global organisations, national governments, the private sector and civil society.

C40 Cities Climate Leadership Group, Inc. is a U.S. not-for-profit 501(c)(3) registered organisation, working with the world's megacities to tackle climate change. With offices in London and New York, and people working across the globe, C40 has about 220 staff members. Around a half are UK based, around a tenth are US based, the remainder cover roughly another 15 countries. C40 is continuing to expand with plans to register entities in other countries this year. C40 Inc. in the U.S. would remain as the party entering into contracts and handling most financial transactions for all its global affiliates.

2. Summary and Background of the Project

C40 Cities Climate Leadership Group (C40) is seeking a Salesforce development partner to support ongoing customization, configuration, maintenance, and optimization of its Salesforce suite, currently

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C40.org
[@c40cities](https://www.instagram.com/c40cities)

Sales Cloud (CRM) and Experience Cloud platforms. C40 anticipates working with a development partner to improve its existing systems (i.e., build custom components to meet new needs, leverage new functionality added by product upgrade cycles, create or improve integrations with C40's tools/systems including Google Drive, Gmail, Slack, Form Assembly, WeGlot, Smartsheets, Zoom, Qlik, etc.) and to suggest/implement performance improvements and cost-saving optimizations.

C40 currently utilises two Salesforce platforms:

- Sales Cloud (CRM), which serves as the organisation's primary contact database and relationship management tool for member cities, nonmember cities, partners, contractors, and funders. The system also includes Opportunities tracking (fundraising), relevant data sets on cities and integrations/APIs with Gmail, Form Assembly, Qlik, and Google Drive.
- Experience Cloud, which powers both C40's public knowledge repository ([Knowledge Hub](#)) and internal Knowledge Management System, and includes integrations/APIs with Coveo, Google Analytics, Google Drive, Qlik

Both systems are designed to support C40's mission, and to make workflow and information access more efficient and productive in pursuit of the organisational mission. More specifically:

C40 launched [The C40 Knowledge Hub](#) in October 2019 as a Salesforce Community with a custom look-and-feel, to provide resources to cities wanting to act on climate change. It is designed for every city, regardless of C40 membership. We use 'cities' as shorthand for urban municipal governments of any size and in any country.

The primary goal of the Knowledge Hub is to equip city practitioners and policymakers with the practical information and tools they need to drive climate action at home. To accomplish this goal, we identify practical experiences, tried-and-tested approaches, and insights from cities already working on climate issues, and share them in formats designed to be accessible and digestible for cities everywhere.

To date, more than 400,000 individuals across more than 16,000 municipalities have accessed the Hub. More than 85% of city users surveyed have reported that the information they found here helped them advance a project in their city.

C40 launched its CRM in 2017 to further professionalise and more effectively manage C40 communications and data. This platform serves as a CRM and city/partner/funder data repository for C40.

3. Proposal Guidelines

This Request for Proposal represents the requirements for an open and competitive process. Proposals will be accepted until 5pm EST, May 27, 2022. Any proposals received after this date and time will not be accepted and will be returned to the sender.

All proposals should include how you would work with C40, clear costs and detail on experience in this area. Specifically, the proposal should explain and identify:

- Core capacities, including any specialisation in Sales Cloud or Experience sites, administration, design, UX/UI or custom Salesforce development.
- Experience working with nonprofits and government agencies.
- How engagements are typically scoped and costed (e.g., timeline, elaboration, bid structure, T&M vs Fixed). And on average how long this process takes.
- Average availability or maximum lead time (e.g., when a team can begin work after an individual project is scoped and agreed).
- Staffing model requirements (e.g., all projects must include a PM, etc.)
- Minimum project size.
- Description of preferred development approach (e.g., Agile, Sprint, Scrum, etc.)
- Description of Project Management tools/process.
- Communication methods/requirements (e.g., Slack, weekly standup/wrap calls, status reports, self-service ticketing system, etc.)
- Any designations or awards from Salesforce (e.g., Premium Nonprofit, Registered Nonprofit Partner, etc.)
- Certifications of current team members and time zone.
- Any Non-Profit discounts or other client support mechanisms (i.e., Grants) that you provide.

Since the capacities and approaches above are relatively high-level, we also invite each respondent to estimate three initial projects that would fall under the master agreement.

These projects, which reflect real needs at C40, are also meant to be representative of the kind of work we would seek to accomplish under this proposal. While C40 may elect to pursue these particular projects, they are not meant to create an obligation for either party at this time. Instead, they are meant to illustrate how projects are scoped, costs are estimated, teams are staffed to meet needs, etc. Each project is documented in the appendix. Please note: two of the projects have not yet been delivered. One has already been scoped and delivered and is included to better understand the accuracy of the team's cost estimates, which is an important criteria for selection.

The proposal should clearly indicate the required input from C40 staff, timeline of implementation, and any required background work or set up. Furthermore, the submission should show how the respondent intends that the project governance and management should work. This should, as a minimum, cover proposed working partnership with C40, key roles and responsibilities, reporting, change requests, escalation of issues, sign-off of work stages, and acceptance criteria.

Respondents are also required to set out any risks and assumptions. Where risks are identified appropriate management and mitigation strategies should also be outlined.

The proposal should include details on how a risk assessment would be completed and what that would include.

If the organisation submitting a proposal intends to outsource or contract any work to meet the requirements contained herein, this must be clearly stated in the proposal. Additionally, all costs included in proposals must be all-inclusive to include any outsourced or contracted work. Any proposals which call for outsourcing or contracting work must include a name and description of the organisations being contracted.

All costs must be itemised to include an explanation of all fees and costs, particularly varying rates for different roles (e.g., solutions architect, custom developer, declarative developer, designer, project manager, etc.) and any regional variance in rates across such roles. Please indicate any non-profit discounts that are applied or other programs that may be utilised to reduce costs.

Contract terms and conditions will be negotiated upon selection of the winning bidder for this RfP. All contractual terms and conditions will be subject to review by the C40 legal department and will include scope, budget, schedule, and other necessary items pertaining to the project.

4. Project Purpose and Description

The primary purpose of this RFP is to identify multiple development partners to enter into a longer-term support arrangement with C40, under which subsequent phases of work can be scoped and bid efficiently, and work scheduled into an appropriate development window with a short to medium time horizon. While C40 has core competency to operate its Salesforce instance and over seven years of experience with Salesforce as a Knowledge Management tool for the organisation, it does not have certified Salesforce administrators or developers in-house. It works with contractors to meet these development and administrative needs.

By entering into a long-term, open-ended support arrangement, C40 can have greater confidence that a developer who has familiarity with C40's Salesforce structure and code base can scope work and estimate costs with a higher degree of accuracy, established communication patterns, and predictable ways of working. In exchange, the Developer gains a client with a higher likelihood of renewable business, greater confidence that scoping is likely to translate into contracted work, and a responsive, respectful client with depth of experience working in similar arrangements.

We pride ourselves on thorough documentation of needs, clear guidance, timely answers to developer questions, and comprehensive user acceptance testing. We are happy to provide references to our current development partner to this effect.

C40 will look to appoint a panel of development partners in order to:

- Limit disruption to its development work streams in the future.
- Increase the chances of a development partner having staff available at any given moment in time should urgent (<4 weeks) or semi-urgent (4-8 week) needs arise.
- Better match developer time zones to C40 staff who need to inform the process.
- More effectively match developer bids to available budgets for any given project.

Example past projects and future needs are included in Appendix 4 to better explain the kinds of work we tend to do across these platforms.

5. Project Scope

The successful development partner(s) will enter into a 1-3 year Master Service Agreement (MSA), which enables individual Scopes of Work (SOWs) to be executed under the master agreement.

Historically, C40 has allocated \$50,000 to \$125,000 per annum to development projects under such agreements, however potential bidders should note that being appointed represents the opportunity to win work under the Master Service Agreement only and does not represent any guarantee of particular levels of remuneration or volumes of work.

Example projects are included as Appendices 1-3. C40 is interested in engaging a developer on projects 1-2. Project 3 was previously implemented and is simply being included as a barometer for accuracy of scoping efforts and bid ranges. Responses received on all three projects will be included alongside the core capacities and approaches listed above, alongside availability, rate, evidence of efficiency, and other selection criteria.

6. RfP and Project Timeline

RfP Timeline:

All proposals in response for this RfP are due no later than 5pm EST, May 27, 2022.

Evaluation of proposals will be conducted from May 31, 2022, to Jun 10, 2022. If additional information or discussions are needed during this week-long window, the bidder(s) will be notified.

Second stage elaboration exercises may be required from a select number of bidders, if so the presentations will be held on or before Jun 17, 2022.

The selection decision for the winning bidder will be made no later than Jun 24, 2022.

Notifications to bidders who were not selected will be completed by Jun 27, 2022.

Activity	Date
Request for Proposals sent out	1 May 2022
Written responses submitted to C40	1 May 2022 - 27 May 2022
Close of RfP submission period	27 May 2022
Evaluation of written response	31 May - 10 Jun 2022
Discussion/Elaboration of SOW 1-2	before 17 Jun 2022
Selection decision made	24 Jun 2022
All bidders notified of outcome	27 Jun 2022

Project Timeline:

A MSA will be drafted to govern the initial period through 31 Jul 2025.

Permitting successful bids from Projects 1-2, we hope to schedule such work as soon as possible, to commence no later than 1 Sept.

Additional projects will be scoped and scheduled as needed under the MSA.

7. Project Budget

For Projects 1-2, please state estimated Time & Materials or fixed bid, and include a breakdown of rate, time estimates, and costs per role. If the bid is Time & Materials, it is understood that the final change may be less than estimated, or pending a change order, more than estimated, or that less may be accomplished than previously assumed within the original estimate. That said, a successful bidder will demonstrate a good track record of projects that are completed on time and on budget, within a reasonable range.

8. Bidder Qualifications

Bidders should also provide the following items as part of their proposal for consideration:

- Description of experience working with similarly sized, global nonprofits to customise their Salesforce Instance.
- Evidence of interest in C40's mission and supporting our overall objectives.
- Track record of success specific to complex Salesforce Experience Sites implementations and custom development, including a front-end designer/CSS specialist who can ensure that all future functionality on our site meet or exceed current design standards; examples of past projects if publicly available, and/or references who can speak to your work.
- Evidence of success working on integrations/APIs especially to those platforms listed in this RfP.
- Description of coding best-practices that developers will adhere to.
- Any maintenance or warranty windows should additional bugs become known to the project team, or which rise from further engagement with your development teams (but excluding issues that arise from subsequent development with another delivery partner or changes by C40).
- Team member bios who would be assigned as an account representative, project manager(s), and lead developers.
- Timeframe for your tasks and completion of the project.
- Project management methodology and systems (we are familiar with Jira, Trello, Asana, Smartsheets, and several proprietary systems).
- Communications methodology and systems for how you will work with C40 (we prefer Slack for continuous contact during a development window with weekly status/planning meetings and ad-hoc discussions where required).
- Data Protection (if it is a system, software or a supplier utilising personal data like passport number, birthday, address, etc.): C40 is subject to the European Union and United Kingdom data protection regulations and the winning proposal must ensure its continued compliance. If a successful proposal will require that you process or control personally identifiable information

(PII), please describe your familiarity, and ability to comply with Directive 95/46/EC and the forthcoming General Data Protection Legislation.

- Organisational commitment to climate goals (such as reducing or minimising carbon footprint), equity, inclusion, and diversity statements (which can be evidenced through corporate policies).

9. Proposal Evaluation Criteria

C40 will evaluate all proposals based on the following criteria:

- Compatibility with 'how you work with C40' and proposal guidelines: ability to meet the scope and needs included in this document.
- Scoping of the three initial projects.
- Organisational experience and qualifications.
- Overall cost and value provided to C40.

Proposals will be evaluated against the following criteria:

<i>Evidence of capacity and success, particularly in Sales Cloud and Experience site projects, and in working with non-profit or government entities.</i>	30%
<i>Approach: Flexibility of staffing models, availability of project teams, robustness, and professionalism of PM tools.</i>	15%
<i>Capability and cultural fit quality, experience, and availability of the team references from other clients including not-for-profit clients Ability to meet requirements listed, supplier alignment with C40's goals on greenhouse gas emission reduction and equity and diversity.</i>	15%
<i>Value for money as understood through bids on Projects 1-2 and test case Project 3, as well as rates per role and evidence of delivering projects on-budget in a T&M model.</i>	40%

Each bidder must submit 1 copy of their proposal to the email address below by May 27, 2022 at 5pm EST:

Daniel Samuels, Senior Knowledge Platform Manager, dsamuels@c40.org

Statement of Work *(to include with RfP)*

Scope of Work

In addition to describing overall capacity and approach, please submit bids for the following three projects, further described in Appendix 1, 2, and 3. Elaboration sessions are available as needed to refine scope.

- *Project 1: Automated notification system for registered users.*
- *Project 2: Data retention tools for administrators and automation processes.*
- *Project 3: Fix Topic Stripping Bug/unintended behaviour.*

Term

Please estimate when teams could be available to begin work on Projects 1-2, either simultaneously or independently (and note any difference in price depending on whether they are done together or separately); please provide project delivery timelines through UAT and deployment.

Fees

Please indicate the expected T&M/Fixed target or range, including a breakdown per role and the corresponding rate for each role involved in the project team. Please include all technology fees, taxes/VAT, PM/overhead costs.

Payment Schedule

Please indicate your preferred payment method and timeline. Examples include: monthly or quarterly payments, one-time payments at the completion of each project, milestone payments agreed to during each scope, etc. Please note: C40 must be invoiced and issue payment via check or wire transfer. C40 does not pay more than once per month.

C40 Staff Point of Contact

Daniel Samuels
Senior Knowledge Platform Manager
dsamuels@c40.org

The appendix project notes are written to help prospective developers understand how new functionality will work alongside old functionality and custom elements within the C40 platforms. C40 is always open to alternative approaches that will still achieve the purpose of the project and welcome guidance on feasibility, cost-effectiveness, development best practices, future-proofing and any privacy concerns that may result from the proposed development.

APPENDIX 1: Project 1: Automated notification system for registered users based on user data

Purpose

Enable users of our Experience site to 'Follow' any Level 1 Theme or Level 2 SubTheme Topic, so that they are notified via email when a new article is posted on the same topic.

Background

Our Salesforce Experience site ([C40 Knowledge Hub](#)) utilises a custom Topic setup: we use the 'Hierarchical Topic Details' (HTD) custom object to manage Topics and the 'Hierarchical Topic Assignments' (HTA) as a joint object to connect our HTD's to our Knowledge Articles.

- Examples at the top (and right-hand column) of this article: [Why Clean Air is Vital for your City's Health and Prosperity](#).
- Example of a HTD on our experience site: [Clean Energy Topic](#).

Within the HTD, we have three levels of hierarchical topics: Theme (level 1), SubTheme (level 2) and Topic (level 3), differentiated via a field on the HTD record (TopicType). Each level rolls into the level above, so the Level 1 Theme includes all level 2 SubThemes under it, and all the level 3 Topics that are under each SubTheme. **This project will be focused on the Level 1 Themes and Level 2 SubThemes.**

N.B., We use the term 'Topics' as an umbrella term to denote both Level 1 Themes and Level 2 SubThemes. If I am talking about a specific level topic, I will note the level of the topic.

Components for Scoping

There are eight (known) parts to this project:

1. Topic Follow as part of Self-Registration
2. Follow Topics from Topic Catalog Page
3. Make the 'My Followed Items' into the 'My Followed Topics' page
4. Edit Topic (HTD) Page
5. Enhance Topics on the Article Page
6. Automated Topic Following Suggestions
7. Admin Tracking
8. Email notifications sent to users on publishing of new articles with Topics.

1. Topic Follow as part of Self-Registration

The C40 Knowledge Hub has a custom [Self-Registration Process](#) for users to become members of the site. As part of the process, users will complete a short form, and then accept our site terms and conditions, before being sent to the [Knowledge Hub Home Page](#).

We would like to introduce another step in this process, to have prospective registered users select the level 1 Themes (HTDs) they would like to 'Follow' after completing the form, and before accepting the site terms and conditions.

During this 'Follow Topics' step users should be presented with a clean visually appealing option to 'Follow' Featured Topics (it should look similar to our [Topic Catalog](#) page/ possibly reuse this design and code with added selecting design and functionality).

The user can select to follow any number of the Featured Topics from this step. When a Topic is selected to Follow, it will change in design to show it is now selected (maybe a big green tick icon in the middle of the box).

Salesforce Admins will select HTDs to show during this step by checking the 'IsPrimary' and 'IsFeaturedPrimary' checkboxes on the HTD (this functionality already exists and is how we select what to show on the [Topic Catalog](#) page).

After the User has selected the Topics they want to Follow, they will move to the last stage of accepting the site terms and conditions.

2. Follow Topics from Topic Catalog Page

The [Topic Catalog](#) page shows Featured Topics (as selected by Admins) - in the top section, and Featured Spotlights and Portfolio Topics - in the bottom section.

As a logged in user, in the Top section where it shows the Featured Topics, we would like to add functionality that allows a user to Follow any of the Level 1 Featured Topics on that page.

This part could reuse the functionality built for the Self-Registration step above.

If a user is not logged in, this functionality will still be visible, but if clicked it will redirect you to the login page, and once logged in will take you back to the Topic Catalog page to Follow Topics.

3. Make the 'My Followed Items' into the 'My Followed Topics' page

Each HTD has an associated Topic page in the C40 Knowledge Hub with a 'Follow' button. Example: [Air Quality Topic Page](#). Currently, when a logged in user selects to 'Follow' a Topic, selected articles from the Topic will be shown as a list on the My Followed Items page.

We would like to remove this functionality from the My Followed Items page, and make it into the place where users will manage which Topics they Follow.

Changes to the My Followed Items page:

- Rename page as 'My Followed Topics' Page (also in navigation menu)
- Remove article list (previously showing articles from Followed Topics) from the page and disable functionality that links Follow button to showing selected articles on this page.
- Design a clean, easy to use, expandable UX that allows users to select Topics to Follow and remove Topics they do not want to Follow anymore (would prefer to do this in one tool, but could be two tools - one to add/ one to remove if needed).

The design of this interface will be key to the success of this project. We have a lot of Level 1 and Level 2 Topics (around 50) so the interface needs to be clean, intuitive and easy to use.

The design should resemble the [Topic Catalog](#) page, with all the Featured Topics (Featured Topics are selected by System Admins with existing functionality - only Level 1 Themes can be Featured) shown as Topic boxes on the page.

The Topic box will have three functions:

- Users can open the Topic box (accordion style) to show all the Level 2 SubThemes under it that a user can Follow.
- Within or alongside each Topic Box will be the option to Follow that specific Topic. When a Topic is Followed, this option will change to a UnFollow option to stop Following that Topic.
- A link to the site search page with that Topic pre-selected as a filter, so they can quickly and easily see all articles from that Topic.

When a Topic is Followed, it will look different to non Followed Topics to easily show the User which Topics they are already Following (the option to Follow will also change to UnFollow).

If a user is not logged in, they should not be able to access the My Followed Topic Page (link is in user menu).

Note - if C40 deletes a Topic that users are following, that Topic will be removed as a Followed Topic for that user.

4. Edit Topic (HTD) Page

Each HTD has an associated Topic page in the C40 Knowledge Hub with a 'Follow' button. Example: [Air Quality Topic Page](#).

We would like to remove the 'Follow' button from the level 3 Topics and from our Portfolio Topics (the Follow system will only be for the Level 1 Themes and Level 2 SubThemes)

Level 3 Topics are denoted on the HTD record via the TopicType field. Portfolios are denoted on the HTD record via the 'Is Portfolio' Checkbox.

If a user is not logged in, the functionality to 'Follow' will still be visible, but if clicked it will redirect you to the login page, and once logged in will take you back to the Topic Page (this functionality already exists).

5. Enhance Topics on the Article Page

On an article page, Topics are shown on the banner at the top (level 1s only) and in the right-hand sidebar (all Topics). Example: [Why Clean Air is Vital for your City's Health and Prosperity](#).

We would like to add functionality to the right-hand sidebar list of Topics, that presents users with a visual option to Follow or UnFollow any Level 1 Theme from that sidebar on that article page.

This could be a small "+" icon next to the Level 1 Themes in the list. When selected, it would change to a "Checkmark" (Tick, ✓) icon. These icons may benefit from helper text on hover.

If a user is already Following a Level 1 Theme, it would show the Tick icon, and the user would be able to select it again to UnFollow that Level 1 Theme (icon changes back to + icon when topics is not Followed).

Secondly, we want to resolve a sorting bug in that Topic list on the article page. We would like to have this list of Topics arranged alphabetically sorted by any Level 1 Theme, with any Level 2 Subthemes nested under their respective Theme, and those Subthemes sorted alphabetically, with any Level 3 Topics nested under their respective Subtheme and those topics sorted alphabetically. If an article has any Topics that are Portfolios ('Is Portfolio' checkbox is checked on record), those should be listed at the end of the other Topics and alphabetically sorted if more than one.

And resolve a display bug in the Topic list on the article page. When we add a Level 1 Theme, without drilling down to a Level 2 or 3 under that Level 1. Or add a Level 2 SubTheme, without drilling down to the Level 3 under that Level 2 Subtheme - in the Topic list on the article page a blank space will appear

under the Theme or SubTheme in the list of Topics (as if it is leaving space for the Level 2 or Level 3 that we did not connect). We would like to remove that blank space for these two scenarios.

Lastly, at the bottom of the Topic list on the article, for logged in users, we would like to have a link to 'Manage My Followed Topics' that would take the user to their My Followed Topic page.

If a user is not logged in, this functionality will still be visible, but if clicked it will redirect you to the login page, and once logged in will take you back to the article page they were on.

6. Automated Topic Following Suggestions

Based on a logged in User's readership, we would like to create automated suggestions to Follow Level 1 Themes we think they would be interested in.

As a logged in User, we would like to track if:

- A User opens (reads) 2 articles from a Level 1 Theme they are not following already.
- A User saves 2 articles to their 'My Saved Items' list/page that include a Level 1 Theme they are not following already.

When they hit the number 2 for that specific Level 1 Theme, we would like a popup to show in the browser window for the User, with a short message and a button to Follow that Topic (something like: "We noticed you have been reading articles on <TopicName>. Would you like to follow the <TopicName> so that you can receive one monthly email with a summary of all articles published on that topic. [CLICK HERE TO FOLLOW <TOPICNAME>](#)). Second button to NOT FOLLOW TOPIC or close the popup.

If they select to NOT FOLLOW THE TOPIC, we block sending them any more suggestions to Follow that Level 1 Theme for 6 months. Also, if the User has UnFollowed this Level 1 Theme from the My Followed Items page, they should not receive suggestions for that Level 1 Theme for 6 months. After the 6 months have passed, it will start tracking that user and Level 1 Theme again, and once they reach 2 it will resend the suggestion.

If a popup won't be possible, an alternative might be an email that is sent to the user (change to 3 articles read/saved to trigger - we don't want as many emails being sent out, so change 2 to 3 for email path). We'd prefer to have it as a popup so that we grab the user's attention while they are still on the site and thinking of KH and Knowledge.

Note - if opening/reading an article would result in multiple popups/emails being sent to the user. Instead, one combined popup/email will be sent that includes information on all the Level 1 Theme suggestions all together.

We are particularly open to guidance on the cost effectiveness of this proposed aspect of the project, as well as any privacy concerns. Please be creative, but also honest when assessing the costs/benefits, and/or suggesting a path forward here.

7. Admin Tracking

Salesforce System Admins need the ability to see which users are Following which Topics, when they started to follow that Topic and how they started to Follow the Topic (From: Registration, Topic Page, My Followed Topics Page or Suggestion) via a Dashboard or Report.

8. Email notifications sent to users when articles are published with a Topic they Follow

The last part of the project will be the email part of the tool. When a user is Following a Topic, and a new Article is published with the 'Primary Theme' field set to that same Topic in the last month then that user would receive an email notification summarising all the articles published to Topics they are following in the previous month (max, 1 summary email per month).

We will design one custom email template that can be used to email all users. The email template will have headers - one for each Level 1 Theme (excluding Portfolios). Articles published to those Level 1 Themes in the previous month will be shown under those headers as a list.

Each article shows up under the Theme listed in that Articles' 'Primary Theme' field.

If a User is NOT following the Theme listed in the 'Primary Theme' field, that article would not be included in the email for them.

Under the Topic Header (Topic Title) it would have: the Article Title (as a link to the article in the C40 Knowledge Hub), the article published date, and the Teaser field for each article published in that month for that Topic. At the bottom of the email is an unsubscribe link back to the My Followed Topics page to UnFollow any Topics they don't want to receive any more notifications on or add more topics to their list for next month (if user is not logged in when clicked it will take them to login first, and then take them to the My Followed Topics page).

If no articles are posted to a Level 1 Theme for that month that the user follows, then that topic header won't appear in the email for them. **If no articles are posted to any Level 1 Theme for that month that the user follows, then they won't receive the email at all for that month.**

To determine which articles are newly published: Check if Date of Production is within the last Month AND article is published into the 'Public Knowledge Base' Channel. If TRUE, include the article in the email. If this is FALSE check the second function below.

Check if the Published Date is within the last Month AND it was published into the 'Public Knowledge Base' Channel within the last Month AND that the 'Public Knowledge Base' Channel is still checked. If TRUE, include the article in the email. If FALSE, the article is not included.

The Email templates should be styled to look like they are a part of the C40 Knowledge Hub, and come from this system with our look and feel, and colours and designs. Example of [current Knowledge Hub Newsletter Design](#).

We would like System Admins to be able to control when (during the month) the email should be sent out (so that we can set an appropriate amount of time between it and our other Newsletter, which does not go out on a fixed schedule). By default, the Topic email will be sent out 30 days after the last Topic email, but System Admins should be able to override that default number, and change it to any other number of days after the last outreach in order to send out the email earlier or later.

Purpose

To be compliant with various procedures, including GDPR, C40 is introducing custom Data Retention tools that will allow us to review when a record was last used* and design automated tools to remove / anonymize old data.

Project

Part 1 - Track when records are last used*.

For the purposes of this project, we need to build a system to track when a record was “last used” by a C40 Staff member. We will define used* to mean when a record was last viewed or edited; viewed as a related record or viewed as part of a list or report.

This tracking only needs to be setup on the Salesforce Objects (custom and native) that store personal information (and that C40 uses): Contacts, Contact Protocols, Engagement - Host/Presenter/Speaker, Engagement - City Contact/Other Attendee, Case, Deleted Information, C40 Surveys, Declaration Commitment, Tasks and Campaign Members.

We will also need a way to add this tracking to new Objects we create that might store personal information. And a way to turn off tracking for Objects that we stop tracking personal information on.

Part 2 – Automate the removal/anonymization of old record data that passes the data retention period.

When data is not used* for a set period, such data would be automatically deleted or anonymized (based on what sort of data it is, and how it relates to other data in Salesforce).

The default data retention period should be set to 36 months. Salesforce System Admins should be able to change the data retention period to any number of months for the Contact Object, and then separately be able to set a separate data retention period for all other Objects under this policy (see list of Objects above). So Contacts will have its own data retention period, and then all other Objects under this Policy will share a second separate data retention period.

Design a Dashboard that will show Admins what is close to being removed (within 3 months), what has previously been removed (over the last 6 months) and provide a way to bring this data back if needed. After the 6-month grace period has passed, the data can be fully deleted/anonymized.

Each week, we would like specific System Admins (not all) to receive an email summarising all the records that are about to reach the end of their Data Retention Period and will be deleted/anonymized in the coming month.

Note – data that are interconnected with other related data in Salesforce will have to be anonymized instead of deleted. For instance in the City Engagement Tracking Object we track interactions of C40 with external Contacts. For our reporting purposes, even after the data retention period has passed for that Contact, we would still need to know that a person from that city interacted with us, but we could anonymize the data so we don't know exactly who it was from the city.

Part 3 - Anonymize Old Sales Cloud and Knowledge Hub User Data

When a User is deactivated in Salesforce, the User data is kept and can only be cleared manually. User records can not be deleted. As such, we will need an automated process that will further hide old User data, after they have been deactivated for more than 1 year.

We would also like a manual option that System Admins can use to to anonymize any single User's data at any time.

When used it would clear these fields from the User Object: First Name, Title, Company, Department, Division, Call Center, Phone, Extension, Fax, Mobile, Employee Number, Individual, Mailing Street, Mailing City, Mailing State/Province, Mailing Zip/Postal Code, Mailing Country, Federation ID, Organisation, City, Country, Accepted Terms and Conditions, Delegated Approver and Manager.

For these required user fields, we would enter a system-generated text sequence in a format we define: Last Name, Alias, Email, Username and Nickname

The text sequence will be automatically incremented for each new User anonymized with this tool. So the first time it is used, Last Name, Alias and Nickname becomes "person1", Email and Username becomes "[person1@person1.com](#)". The next time it's used, that user becomes: Last Name, Alias and Nickname becomes "person2", Email and Username becomes "[person2@person2.com](#)", etc.

Lastly, for these required dropdown fields we would set a default value:

- Time Zone = (GMT +00:00) Greenwich Mean Time (GMT)
- Locale = English (United Kingdom)

- Language = English
- My Regional Focus = None

We would like this to work for both Sales Cloud CRM and Community Users.
Salesforce Admins need to be able to control which fields are included in this process.

This may be one way we can anonymize User data: [Make Users' Personal Data Unusable by Salesforce at Their Request](#)

Part 4 – Track Large Report Exports

We would like to be able to track when large reports of personal information are taken out of Salesforce via a report being exported.

Large reports are reports with over 100 records.

Our preference would be to automate this, so when a large report of specific Object data (see list above of Objects with personal information) is exported, specific System Admins (not all Admins) would be notified – who, when and what data was exported. The System Admin will review and follow up with the user as needed.

Or alternatively, if it cannot be automatic, could we build a report showing all recent large downloads?

For discussion - would it be possible to put timers on data exports from Salesforce? So they can only be used for a certain period of time after download, and then after that it locks the document so it can't be opened/used anymore?

Part 5 – Enable Community Users to disable their Knowledge Hub account

Provide a way for Community Users to deactivate their Knowledge Hub accounts by themselves.

Reminder - this project has already been delivered, the scoping language for the project is included here for your reference to help us understand how you approach time estimation and resource allocation for a project with fewer variables.

Purpose

Fix a bug in the Knowledge article editing/publishing process, that is clearing the article from a related lookup field on the HTD Topic record.

Background

Each HTD can showcase 3 Featured Knowledge Articles for that Topic. C40 chooses which articles are Featured by inputting the relevant Knowledge record into 3 lookup fields on the HTD (FeaturedArticle1, FeaturedArticle2 and FeaturedArticle3). Example: [Air Quality Topic Page](#).

Project

Every time a Knowledge Article record is updated (for instance: changes to the text/content, featuring it on the home page, or changing an associated partner or Author), then that article is being cleared from the 3 lookup fields on the HTD - thus being removed as a Featured Article for that Topic.

This creates a huge headache for the team, as we are forced to then manually track down where the article might have been featured and reenter the article into the lookup field for that specific Topic (we have over 300 Topics, so this can take a long time to fix each time).

I believe the record ID for the Knowledge Article is changing each time the article is updated, and thus the connections we had made to the old Knowledge Article record ID in those three lookup fields on the HTD break.

We would like to design an automated process that will update/keep track of the right Knowledge Article ID for the FeaturedArticle lookup fields on the HTD, so that when an article is edited and it is a Featured Article, it will stay as a Featured Article for that Topic.

Note - as part of our Knowledge Article Publishing Process we need to keep Articles on the same version. So for each update to an Article, we choose to NOT publish it as a new version of the article.

APPENDIX 4

C40 has needed both declarative and custom imperative development on both platforms (and may consider additional platforms in the future), and so we are looking for a partner to fully support our work across the Salesforce Suite.

To give bidders a better sense of the kinds of projects that are likely to come up in the future, illustrative examples are included below in brief:

- Build a new data collection and custom subdomain section on the C40 Knowledge Hub for the [Cities Race to Zero Campaign](#).
 - Develop 5 new template pages with custom HTML and CSS.
 - [Integrate a data collection form](#) (third party tool – [FormAssembly](#)) to collect data.
 - Design and build the [FormAssembly](#) form with custom CSS, and API connections to Salesforce.
 - Designing data cleaning process with team running campaign.
 - Create new objects, fields, page layouts, permissions in Salesforce to store data collected from form.
 - Create 3 custom Aura components for more advanced functionality on the pages.
 - Build and [Integrate a Google Map](#) (map hosted by Google Maps).
 - [Integrate Twitter Tweet functionality](#) (run by Twitter).
 - Develop two custom theme layouts to give the subdomain space its own look and feel (especially around the header and footer of the pages).
 - Manage permissions for the new pages and data shared on them from Salesforce.
 - Manage SEO for the 5 new pages in the Knowledge Hub.
 - Build Reports and Dashboards in Salesforce to showcase data being collected.
- Build a new City Engagement Reporting Process in Salesforce, to track and analyze City participating in C40 Networks, programmes and campaigns.
 - Setup 4 new objects, including new fields, layouts, permissions and validations to collect data from C40 Staff (and ensure we get the right data each time with field validation).
 - Create 3 Joint objects to create many-to-many connections between objects.
 - Develop 9 new record types, page layouts and field sets for each team to report on their specific engagements (each team reports different types of engagement).
 - Setup history tracking for objects and fields.
- Build new custom tools/features.
- Helping reorganise data models.
- Respond to new policies (like MFA) and work with C40's IT team to identify the right solution.
- Build custom Visualforce pages/components.
- Writing new CSS.
- Configure Google Analytics - GA4, segmentation, data studio, and reports.