

**CRDF GLOBAL
REQUEST FOR PROPOSAL or INFORMATION**

**Emerging Security Threats for R&D in Academia and Private Sector: Slovenia, Slovakia,
North Macedonia, Romania, and Serbia**

Deadline: *August 03 23:59 (EDT), 2022*

Summary:

CRDF Global is seeking subject matter experts (SME), or subject matter expert teams, specializing in cyber security and/or research security to develop and deliver in-person presentations for two symposia for an Eastern European audience from the advanced STEM research and manufacturing sector. This project, taking place between August and December 2022, aims to raise awareness of threats to institutional research and cybersecurity measures within the private sector and academic communities from proliferator actors and to then develop institutional capacity to mitigate these threats.

Scope:

CRDF Global will promote nonproliferation efforts by hosting two iterations of a symposium that offers general lectures and then focused tracks on research security and institutional cyber security. These symposia will bring together a total of 100 stakeholders from the private and academic sectors in North Macedonia, Romania, Serbia, Slovakia, and Slovenia who are engaged in advanced research and development in STEM fields. By cooperatively discussing issues and best practices in the cyber security field for private and public institutions and in the realm of research security this program will develop institutional capacity to protect their research, data, and technology from licit and illicit transfer, especially where the transfer may involve a malign purpose.

CRDF Global will host the first three-day symposium in Bratislava, Slovakia for approximately 60 participants and the second in Ljubljana, Slovenia also for approximately 40 participants. Each symposium will include several experts who will create presentations on the identified subject matter fields, participate in expert panels, and one expert team will develop a tabletop exercise that will explore and engage on the intersection of cyber and research security. The participants at the symposia will select a cyber-focused or a research security-focused track which will divide the participant base in half for most of each day in the symposium. They will all jointly participate in the group exercises, panels, and daily opening sessions, but there will be a total of four highly focused courses that will tailor remarks to cyber security and research security, bearing in mind the academic and private sector audience. The SMEs will be in a formal agreement to either create, review, and provide feedback on content material that will assist with delivery of the content in the form of sessions at one or both symposia in one of the two subjects, participate in a panel with other experts to discuss subjects of the symposium, or will identify and communicate with organizations or individuals in respected country(ies), or a combination of objectives. All SMEs will be expected to engage in consistent communication with CRDF Global throughout their contract. CRDF Global will be hosting and facilitating all logistical aspects of this event including but not limited to: travel, venue, translation, and interpretation.

Tentative Performance Schedule:

Task	Approximate Start Date	Approximate End Date	Notes
Task 1: Analysis and mapping of partners/participants	8/12/2022	09/20/2022	
Task 2: Development of Symposium Courses	8/12/2022	9/15/2022	
Task 3: Develop one Table-Top Exercise (and implement)	8/12/2022	9/15/2022	
Task 4: Develop slide(s) and Participate in Event Opening and Closing Sessions	8/12/2022	10/26/2022	
Task 5: Participate in Panel Discussion	09/1/2022	10/1/2022	
Task 6: Communication and Reporting	8/12/2022	11/09/2022	Final report due 2 weeks after final event *This task is required and expected of all SMEs
Project Implementation	10/19/2022	10/26/2022	Two symposia to be held consecutively
Attend 3-day event in Slovakia	10/19/2022	10/21/2022	Bratislava, Slovakia
Attend 3-day event in Slovenia	10/24/2022	10/26/2022	Ljubljana, Slovenia

Tasks and Deliverables:

Please indicate in your proposal which of the following tasks and subtasks you are capable and willing to undertake as part of this project. Proposals are not required to include all of the tasks.

• Task 1: Analysis and mapping of potential partners/participants in the countries of engagement

Selected SMEs shall provide support with identifying and establishing relations with possible partners/participants in the countries of engagement such as private sector, research sector, academia, and government agencies that operate research integrity and/or cyber security and may be at risk of exploitation by actors seeking to acquire and/or weaponize this research, technology, and data, to implement CRDF Global projects. In particular, the selected vendor will:

- Conduct research and analysis for possible partners/participants in the countries of engagement
- Provide list of partners/participants (including contact persons and their contacts details) that may be involved into implementation of the CRDF Global projects in each country of engagement (at least one private sector institution, university, and research institution in each country)

- **Task 2: Development of Symposium Presentations and Action Planning**

Selected SMEs will be cooperating closely with the relevant stakeholders to ensure they develop curriculum and presentations to implement at event(s) on one of two subject tracks

- **Track 2a: Research Integrity Courses and Action Plan**

Selected SMEs will develop curriculum and presentations based on research integrity and research security for higher education institutions, research centers, and the private sector. Selected SMEs will develop one action planning workshop for all attendees to the event. The action planning workshop will focus on combining elements from the trainings on research integrity and cyber security into engaging, group-focused workshop opportunity

- **Track 2b: Cyber Security Course and Action Plan**

Selected SMEs will develop curriculum and presentations for an audience that will focus on strengthening cybersecurity standards within the private sector (military-grade technology manufacturing). Selected SMEs will develop one action planning workshop for all attendees to the event. The action planning workshop will focus on combining elements from the trainings on research integrity and cyber security into engaging, group-focused workshop opportunity

- **Task 3: Develop one table-top exercise for all course participants combined**

Selected SMEs will develop one table-top exercise for all attendees to the event. The exercise will focus on combining elements from the trainings on research integrity and cyber security into an engaging, group-focused exercise opportunity.

- **Task 4: Develop and Participate in keynote opening/closing**

Selected SMEs will develop a short presentation and participate in a keynote opening and closing discussion focusing on encompassing the full scope of the event, combining elements from research integrity and cybersecurity

- **Task 5: Participate in panel discussions**

Selected SMEs will participate in a panel to share their insight and expertise in research integrity and/or cyber security

- **Task 6: Communication and Reporting *This is expected of all SMEs**

Selected SMEs will establish regular cooperation with the CRDF Global via email or coordination calls, as well as provide regular updates on the course implementation progress. CRDF Global will share statistical data on individuals who registered/completed the course on a weekly basis to ensure the project timeline and target indicators are met. The selected SMEs will also develop a report assessing completed work, knowledge increase for participants in the short/medium term, providing recommendations and lessons learned.

Contractor/Proposal Requirements:

Each proposal must include:

- Statement of Interest and Technical Capabilities (including the list of RFP related capabilities and applicable past experience- see template attached);
- Cost proposal: description of the pricing and cost factors (e.g. hourly rates, fixed-cost pricing on standard services, etc.), that the Contractor would be willing to negotiate

- CV(s) of the SME(s) applying or offered for the assignment; if applying as part of a team, the CVs of all team members are required
- List of recent experience in the RFP Subject Matter area and applicable references/past performance
- Any Small or Disadvantaged Business Designations (Veteran Owned, HUB Zone, Women Owned, Disadvantaged Businesses)
- [NAICS Codes](#): 541620 Environmental Consulting Services- Small Business Threshold \$15 million
541690 Other Scientific and Technical Consulting Services – \$15 million

Timetable:

- July 13, 2022: RFP posting
July 21, 2022: Questions due
July 22, 2022: Questions and answers released
August 3, 2022: RFP submissions due
August 5, 2022: Contracted Experts Selected
August 12, 2022: Contract start date

Contractor Selection Criteria:

CRDF Global will select the contractor that provides the best value in terms of overall price as well as quality of proposal, past performance, and other intangible factors. CRDF Global reserves the right to accept or reject any and all proposals, and to negotiate terms of any subsequent agreements at its own discretion. The contractor should have proven experience working with either research integrity in a higher education setting or cybersecurity enhancement in both public institutions of research and private sector companies, many manufacturers of military-grade equipment.

Interested Proponents are allowed to submit their proposals as individuals (physical persons) as well as company's/organizations, offering a single expert or a team of experts to cover the tasks of the assignment.

A successful proposal will highlight the following qualifications:

Preferred requirements:

- Proven experience in research and development in cybersecurity or research security, information security fields in one or more of the following countries of engagement;
- Proven experience in developing/supervision/implementing/moderation in cybersecurity or research security-themed seminars/event/competitions/workshops;
- Advanced understanding of the local context in the fields of cybersecurity/information security or research security, in one or more of the countries of engagement (North Macedonia, Romania, Serbia, Slovakia, Slovenia);
- Working experience in donor-funded projects, especially for the U.S. government or multilateral institutions;
- Experience of working with various governmental agencies, private sector institutions, and/or higher education institutions in one or more of the countries of engagement;

- Certification or Master'/PhD Degree in Cybersecurity or Research Security or other relevant field;
- Language proficiency in one of the countries of engagement.

Mandatory requirements:

- English language full professional working proficiency.

CRDF Global prioritizes a safe and collaborative work environment in which diversity, equity, and inclusion is championed and discussed. CRDF Global provides equal employment opportunities to all qualified individuals without regard to age, race, color, religion, sex, sexual orientation, and gender identity, national origin, protected veteran, or disabled status. We are dedicated to creating and maintaining a respectful work environment that is safe, engaging, and comfortable for all.

CRDF Global pledges to prioritize sponsorship of diverse events and panels of experts whenever possible.

Submission:

Proposals should be submitted to procurement@crdfglobal.org, mabelev@crdfglobal.org, & sholcomb@crdfglobal.org, no later than 23:59 August 02, 2022. Proposals should be submitted as electronic documents in PDF, Word or Excel format. All CVs for SME team should be one file.

Background:

CRDF Global is an independent nonprofit organization founded in 1995 in response to the collapse of the Soviet Union and the threat of large-scale proliferation of weapons technology from the region. With support authorized by the Nunn-Lugar Act of 1991 and the Freedom Support Act of 1992, as well private foundation contributions, CRDF Global embarked on bolstering the global scientific community and fostering alternatives to weapons research.

In the past 25 years, our work has expanded to address ever-changing global concerns, but our commitment to ensuring the success of our partners remains the same. We are a leading provider of flexible logistical support, program design and management, and strategic capacity building programs in the areas of higher education, CBRNE security and nonproliferation, border security, cybersecurity, global health, technology entrepreneurship, and international professional exchanges.

With offices in Arlington, VA; Kyiv, Ukraine; and Amman, Jordan, CRDF Global's diverse staff and networks of local community and government stakeholders deliver tailored programs that meet specific regional needs in over 100 countries across the globe.

Vision Statement:

Our world, healthy, safe, and sustainable.

Mission Statement:

Safety, security, and sustainability through science, innovation, and collaboration.

Values:

We do the right thing.

We care about each other and the people we work with.
We work together to deliver excellence

CRDF Global provides equal opportunities to all qualified individuals without regard to age, race, color, religion, sex, sexual orientation, gender identity, national origin, protected veteran, or disabled status. We are committed to prioritizing an inclusive and collaborative space in which diversity and equity is discussed, championed, and supported. We acknowledge and honor the fundamental value and dignity of all individuals. We pledge ourselves to creating and maintaining an environment that respects diverse traditions, heritages, and experiences.

More information is available at www.crdfglobal.org.

Solicitation Terms & Conditions:

Right to Select Suppliers. CRDF Global reserves the right to negotiate with and select all qualified suppliers at its own discretion and is not obligated to inform suppliers of the methods used in the selection process. CRDF Global reserves the right to dismiss any and/or all suppliers from the bid process and reject any and/or all proposals.

Obligation. This RFP/RFI does not bind nor obligate CRDF Global in any way. CRDF Global makes no representation, either expressed or implied, that it will accept or approve in whole or in part any proposal submitted in response to this RFP. CRDF Global may reward, in whole or in part, the proposal at its sole discretion.

Notification. CRDF Global will notify bidders following completion of the evaluation process, as to whether or not bidders have been awarded the contract. The only information regarding the status of the evaluation of proposals that will be provided to any inquiring bidder shall be whether or not the inquiring bidder has been awarded the contract. CRDF Global may, at its sole discretion, inform any inquiring bidder of the reason(s) as to why it was not awarded the contract

Binding Period. Following the due date of submission of this Proposal, the pricing included in this RFP shall be binding upon the supplier for the duration of the contract.

Hold Harmless. By submitting a response to the RFP/RFI, bidder agrees that CRDF Global has sole discretion to select any and/or all suppliers. During or following the conclusion of this process, bidders waive their rights to damages whatsoever attributable to the selection process, materials provided, supplier selection, or any communication associated with the RFP process and supplier selection.

Transfer to Final Contract. The terms and conditions of the RFP/RFI, including the specifications and the completed proposal, will become at CRDF Global's sole discretion, part of the final contract (the "Agreement") between CRDF Global and the selected bidder. In the event that responses to the terms and conditions will materially impair a bidder's ability to respond to the RFP/RFI, bidder should notify CRDF Global in writing of the impairment. If bidder fails to object to any condition(s) incorporated herein, it shall mean that bidder agrees with, and will comply with the conditions set forth herein.

Exceptions. Any exceptions to the terms and conditions or any additions, which bidder may wish to include in the RFP/RFI, should be made in writing and included in the form of an addendum to the applicable Section in the RFP/RFI.

CRDF Global Proprietary Information. Supplier agrees that all non-public information contained in this document and communicated verbally in reference to this RFP/RFI by CRDF Global shall be received for the sole discretion and purpose of enabling the supplier to submit an accurate response to this RFP/RFI. The information contained in this RFP and disclosed during the course of negotiations and communications are proprietary in nature and under no circumstances to be disclosed to a third party without prior written consent from CRDF Global.

Supplier Proprietary Information. Information contained in the response to this RFP/RFI will be considered proprietary in nature if marked "confidential" or "proprietary". Such marked documents will not be disclosed to third parties outside CRDF Global with the exception of retained consultants under contractual confidentiality agreements.

RFP Process Guidance

1. Depending on the scope of the solicitation, the template can be altered to request a wide range of information. Please contact a procurement officer if you have any questions on what information you should add.
2. The procurement unit has a standard email address setup for receiving information or proposals: procurement@crdfglobal.org. If you would also like to receive proposals or information, please add your email to the RFP template.
3. Once you have completed the RFP template, please send it to the procurement unit for review. Procurement will add any information necessary to comply with our small and disadvantaged business requirements. Procurement Staff will add the [NAICS code](#) which identifies the [revenue or employee cap for small business](#). This will be added to the RFP before release if required.
4. Once the template has been finalized, we can discuss where to post or publicize the opportunity. *Procurement can post the RFP/RFI directly to the website.* Options include:
 - a. CRDF Global Website (Procurement will post)
 - b. External Industry Websites (Operations or Procurement can Post)
 - c. Small Business Administration Website (Procurement will Post)
 - d. Direct email from Staff (Operational Staff can distribute the RFP or the link to the RFP via their Network/Salesforce)
5. If there is a technical component to the solicitation, staff should fill out the technical rating criteria in the technical and financial review template. They should also add a weighting to the technical and financial components, and a justification. More detailed instructions can be found in the template. This should be done **before** the RFP is publicized, and the criteria should be added to the RFP.
6. Once the deadline for submission has passed, procurement will collate submissions. Staff should rate submissions based on the technical criteria. Procurement will enter the financial data into the review template. The review template will calculate the winning bid using the technical and financial criteria along with the weighting. If there are no technical criteria, a bid analysis form can be used to document and summarize the competition based on best value.
7. Once a vendor is chosen, procurement will contact the vendor announcing the decision and providing the vendor with initial paperwork as necessary.

RFP Creation Guidance

RFPs are used to solicit technical and cost proposals for goods and/or services. A successful RFP communicates CRDF Global's requirements and objectives to prospective contractors to solicit proposals describing the contractor's approach to accomplishing that objective. The RFP process is

ideal in nearly all situations because it allows the contractor to apply its own expertise to the project. Before developing an RFP, the technical officer should add the technical evaluation criteria on the financial and technical review template.

The procurement manager is responsible for reviewing all CRDF RFPs to ensure that the following components are present:

1. **CRDF Global's mission, background on the activity and the purpose of the contract.** This should include not only an overview of CRDF Global, but also the department requesting the service. There should be enough information for an outsider to contextualize the purpose and objective of the RFP.
2. **Technical Proposal Requirements.** Depending on the complexity of the service to be procured, this can include any or all of the following: project objective, scope of work, technical specifications, desired result, required deliverables, and anticipated timeframe. The procurement manager should keep in mind that innovations are key to RFPs, and to the extent possible a RFP should solicit a contractor's innovative approach to the project.
3. **Cost Proposal Requirements.** The procurement manager must be able to make a cost comparison that is fair and contains the same tasks, items, services or deliverables, and is therefore measurable by the same standards. Simple procurements may not need a price schedule (i.e. procuring printer paper or a night in a hotel), but more complicated procurements will require research to establish a price schedule. If a price schedule is not used, it may be very difficult later on to perform a commensurable cost comparison. An example that would require a price schedule would include a procurement with many different line items or services requested. The proposal should specify whether a cost-reimbursable or fixed-price contract is envisioned. If the competition is using sealed bids, then a firm fixed price contract should be indicated.
4. **Description of resources that will be provided to the contractor.** This is not always applicable, however if access to CRDF Global facilities, reports, records, data, etc. is necessary to complete the activity, the RFP should state what materials will be provided. Similarly, the RFP may state what resources, if any, are solely the contractor's responsibility.
5. **Evaluation Criteria.** The RFP should state the criteria for evaluating the proposal. Common criteria for evaluating a proposal include:
 - a. Understanding of technical requirements
 - b. Technical Expertise/Past experience
 - c. Strength/creativity of technical approach
 - d. Cost competitiveness
 - e. Past Performance and References

It is important to distinguish between two types of criteria: pass/fail or mandatory criteria, and standard technical criteria. Each criterion should be clearly labeled in the RFP as pass/fail or standard technical criteria. The RFP may indicate which of these criteria is more important relative to the others, or the weighting or importance of technical criteria vs cost competitiveness. For example, the RFP could state that technical merit comprises 40% of the final score, and cost competitiveness comprises 60%. A higher technical merit weighting is

generally used if there is a reasonable risk of unsuccessful performance (i.e. research intensive projects; construction), or if unsuccessful performance would create a significant issue or life threatening situation. In certain circumstances, the RFP may simply state “CRDF Global will select the contractor that provides the best value in terms of cost and performance”.

6. **Past Performance Requirements.** The RFP should include any past performance requirements and as applicable, a request for references or evaluations.
7. **General information.** The RFP should include general and basic information regarding the proposal, such as: proposal due date, Technical Representative to whom inquiries should be addressed, and anticipated date of decision and award.
8. **Diversity, Equity, Inclusion Language. This language should be included in all solicitation documents (RFP/RFQ/RFI).** CRDF Global prioritizes a safe and collaborative work environment in which diversity, equity, and inclusion is championed and discussed. CRDF Global provides equal employment opportunities to all qualified individuals without regard to age, race, color, religion, sex, sexual orientation, and gender identity, national origin, protected veteran, or disabled status. We are dedicated to creating and maintaining a respectful work environment that is safe, engaging, and comfortable for all. CRDF Global pledges to prioritize sponsorship of diverse events and panels of experts whenever possible.
9. **Internal Use Information.** The Technical Representative should indicate the method of RFP distribution if anything other than public dissemination is envisioned. Public dissemination is satisfied by making the RFP publicly available on a CRDF Global website. The procurement manager should ensure that any RFP not publically available is made reasonably available to interested parties and that at least three entities are selected for distribution.

The following information should never be included in an RFP or communicated to any prospective applicant:

1. Estimated costs and optimal project budget
2. In certain situations, it is acceptable to release information on consultant fees, particularly when contractors will receive a fixed stipend or honoraria. This assumes that the stipend/honoraria offers a rate well below market and ensures the contractor will accept that payment before submitting a proposal.
3. Demand for a specific Consultant or fee
4. Proprietary or business confidential information