

**CRDF GLOBAL
REQUEST FOR QUOTE**

Deadline: June 07, 2024

Summary:

CRDF Global is seeking subject matter experts to support academic and research stakeholders from Brazil, Chile, and Peru in the fields of artificial intelligence (AI) and convergent technologies to enhance institutional research security and IP protection practices via a virtual study tour in August/September 2024 (exact dates to be determined) and remote mentorship.

Scope:

CRDF Global is seeking experts who can authoritatively speak to the importance of mitigating the risk of acquisition of dual-use and sensitive research, intellectual property (IP), and data and provide practical recommendations for adopting best practices in research security and IP protection. Selected experts will engage participants in a virtual study tour and remote mentorship program. The anticipated structure of the virtual sessions includes a series of four, two-hour sessions weekly for a duration of four weeks (eight hours total). The anticipated structure of the remote mentorship is one session per month for a duration of three months following the virtual sessions. A total of nine participants from Brazil, Chile, and Peru will be selected to participate by CRDF Global. Selected participants will receive a grant from CRDF Global to conduct their own local institutional workshop after the virtual sessions.

The topics addressed by the selected experts at the virtual sessions should include two facets of responsible conduct: 1) Exercises and discussions focused on assessing and mitigating the various risks associated with undesired foreign acquisition of relevant dual-use AI research and technologies; and 2) Enhancing the compliance/administrative capabilities of the institutions to include ethics in research, protection of intellectual property from licit and illicit foreign transfer, and internal compliance mechanisms. During the virtual sessions, experts will share case studies of research and talent diversion and best practice frameworks with participants and will examine the utility and opportunities for development and use of these frameworks and practices at the participants' institutions. Participants will receive preliminary material focusing on dual-use technology risk and diversion pathways, to include hands-on exercises with institutional systems to combat acquisition of their research, IP, and data. The experts will engage one-on-one with the participants to promote their ability to inform, raise awareness, and build capacity at their home institutions.

By the end of the virtual study tour and mentorship, the selected experts should have assisted participants with the following:

- Identifying steps they should take to adopt, develop, or enhance processes, policies, and protocols within their institutions for:
 - Student/faculty/researcher, collaborator, donor/investor review/vetting/surety
 - Compliance measures to mitigate risks of institutional and individual participation in foreign talent acquisition initiatives
 - Due diligence on partnerships/collaboration

- Effective processes, policies, procedures to recognize and prevent licit and illicit attempts to transfer dual-use information
- Communication and coordination with relevant public/security authorities
- Assisting participants to lead effective informational sessions and serve as a resource for counterparts within their institution on foreign research/technology acquisition threats and relevant processes, policies, and protocols to mitigate them

Tasks and Deliverables:

CRDF Global will review all deliverables and may request changes and edits as needed.

1. Material for the virtual sessions that includes:
 - a. Agenda: The agenda will encompass the virtual study tour schedule (four two-hour topical sessions) and will be completed in coordination and communication with CRDF Global. The agenda should include the proposed presenter, the session's title, the session's length, and an addendum that provides a brief abstract of each session's purpose and subject matter.
 - b. Presentations on the aforementioned topics in the scope section.
 - c. Outlines and relevant documents/components including case studies and hands-on activities
2. Communication in planning calls with CRDF Global on a bi-monthly or ad hoc basis will cover the following:
 - a. Programmatic updates
 - b. Shifts in project implementation
 - c. Recent conversations with the funder
3. Present session material and facilitate the virtual sessions
4. Conduct remote mentorship sessions for the nine participants
5. Completion of a Final Report for which CRDF Global would provide a template

Contractor Requirements:

- Experience developing, implementing, or managing a research security/integrity office at a research institution or equivalent
- Demonstrated experience designing and delivering training curriculum to international university and/or research staff
- Experience with technology transfer restrictions, export controls, and due diligence in a university/research setting.
- Desired: Familiarity and past performance with the research sector in Latin America including Brazil, Chile, and Peru
- Desired: Publication or demonstrations of technical understanding in areas of advanced or emerging technologies, in particular artificial intelligence (AI)
- Desired: Publications or demonstrations of understanding the threat landscape, including illicit acquisition of research and technology from academia and research sectors
- Creativity and public speaking skills
- Microsoft PowerPoint proficiency

Proposal Requirements:

- Statement of Interest and Technical Capabilities
- Cost proposal
- CV(s)
- 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:

{**May 31, 2024**}: RFP Questions due
{**June 03, 2024**}: RFP Questions & Answers released
{**June 7, 2024**}: RFP submissions due
{**July 08, 2024**}: Contract start date

Contractor Selection Criteria:

CRDF Global will select the contractor that provides the best value in terms of overall price and experience. The contractor should have proven experience working with academic and research sector stakeholders in the fields of artificial intelligence (AI) and convergent technologies.

Contractor proposals must demonstrate the following:

- Contractor's proven experience in the subject matter expertise
- Contractor qualification is based on the Mandatory and/or Preferred requirements listed in the Contractor Requirements Section.
- The capability to fulfill the assignment described in the Scope, Tasks, and Deliverables section.

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, eporter@crdfglobal.org & akelkar@crdfglobal.org, no later than **June 07, 2024 at 5pm EST**. Proposals should be submitted as electronic documents in PDF, Word or Excel format.

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 RFQ 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 RFQ. 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 RFQ shall be binding upon the supplier for the duration of the contract.

Hold Harmless. By submitting a response to the RFQ, 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 RFQ, 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 RFQ, 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 RFQ, should be made in writing and included in the form of an addendum to the applicable Section in RFQ.

CRDF Global Proprietary Information. Supplier agrees that all non-public information contained in this document and communicated verbally in reference to this RFQ by CRDF Global shall be received for the sole discretion and purpose of enabling the supplier to submit an accurate response to this RFQ. The information contained in this RFQ 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 RFQ 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.