



**CRDF GLOBAL REQUEST FOR PROPOSAL**  
**Seeking Research Security Subject Matter Expert (SME) for Development and Delivery of Research Security Workshops for University Leadership in Italy**

**Deadline: March 27, 2026, at 11:59PM Eastern Daylight Time**

**Background:**

On behalf of the United States Department of State, Bureau of Arms Control and Nonproliferation, Office of Cooperative Threat Reduction (ACN/CTR), CRDF Global is seeking a Research Security Subject Matter Expert (SME) with demonstrated expertise in protecting sensitive and dual-use research, mitigating risks associated with international collaboration, and delivering training for academic leadership and research administration audiences.

**Scope of Work:**

The selected SME will contribute to the development and delivery of three research security workshops to be held in Turin and additional cities such as Rome, Milan, or Naples (to be conducted during a single trip in late May or June 2026). Through practical and action-oriented case studies, the workshops will explore dual-use risks in advanced and emerging technologies, identify strategies to mitigate them, and support action planning.

Each workshop will follow a one-and-a-half-day format. The first day will focus on practical content delivery and dialogue facilitation, including case-based learning and interactive exercises designed to explore realistic research situations involving dual-use technologies and international collaboration. The second half day will convene university rectors and senior institutional leadership for a strategic, informal discussion focused on research governance, institutional responsibilities, and potential next steps for strengthening research security practices within Italian universities.

The SME will provide strategic and technical expertise to ensure that all materials reflect internationally recognized research security standards and best practices, including relevant European Union and Italian research governance frameworks, as well as relevant U.S. benchmarks (e.g., National Institute of Standards and Technology - NIST) for comparative insight where appropriate. All content must be tailored to Italy's research, legal, and policy landscape, as well as to the specific institutional contexts of participating universities.

**The workshops are intended to:**

- Secure engagement from university leadership on the importance of research security and the need for institutional approaches to managing related risks.
- Support university leaders and research administrators in identifying practical steps their institutions can take to strengthen oversight of international research collaborations, data protection, and dual-use research risks.
- Build practical skills in research governance, screening, due diligence, and the application of national and international research security frameworks.
- Encourage coordination among participating universities, regulatory authorities, and relevant government stakeholders.



- Establish a foundation for continued coordination among participating universities, including potential working groups or institutional action plans to advance research security practices.

Across both workshops, the SME will ensure that preparatory analysis, instructional content, and implementation resources are clearly aligned to the thematic focus of each engagement and tailored to the institutional roles of participants. The SME will produce background materials, training content, and leave-behind resources, including templates, checklists, and guidance documents, and deliver at least three in-person trainings incorporating lectures, facilitated discussion, and applied exercises. The SME will coordinate regularly with CRDF Global to ensure alignment with program objectives and Italy's national research security context.

### **TASKS AND DELIVERABLES**

The SME shall complete the following tasks in support of three one-and-a-half-day research security workshops to be held in Turin and additional Italian cities (Rome, Milan, or Naples) in late May or June 2026.

#### **Task One: Workshop Design and Agenda Development**

The SME will design detailed agendas for three one-and-a-half-day workshops tailored to university leadership, research administrators, and faculty involved in advanced research fields with dual-use applications. The SME will structure the workshop to include one full day of practical content delivery, including case-based discussion and interactive exercises focused on research collaboration and institutional risk management. The additional half day will convene university rectors and senior leadership for a strategic, informal discussion focused on institutional research security governance, including institutional responsibilities, potential policy approaches, and discussion of next steps for participating universities. CRDF Global and ACN/CTR will provide feedback on the agenda, which should be addressed in full in the final agenda.

##### ***Task One Deliverables:***

- Draft workshop agenda (April 10, assuming contract issue date of April 3)
- Final workshop agenda (within 3 business days of feedback being provided)

#### **Task Two: Development of Workshop Materials**

The SME will develop all training materials, including presentation slides, tabletop exercise scenarios, case studies, participant handouts, and pre-/post-workshop survey drafts. Scenarios included in the materials should be grounded in academic research settings, including cross-border collaboration review, data-sharing decisions, publication and preprint considerations, funding and investment screening, and technology transfer risk. The material should be tailored specifically for university leadership and research administration audiences and should support both case-based learning and discussion of institutional approaches to research security risk management. The structure of the content should be highly interactive, designed to facilitate interaction and dialogue. CRDF Global and ACN/CTR will then provide feedback on the materials, which should be addressed in full in the final version of the materials.

##### ***Task Two Deliverables:***

- Draft workshop materials (slides, exercises, surveys, and supporting documents). (May 7)
- Final workshop materials. (Within 5 business days of feedback being provided)

#### **Task Three: Delivery of Three Workshops**

The SME will travel to Italy to deliver three one-and-a-half-day workshops over a single trip, dependent on scheduling. The SME will facilitate the workshops according to the final approved agenda and materials and



work to ensure consistent participant engagement throughout the workshops. Following the delivery of each workshop, the SME should send a brief readout detailing their workshop observations (high-level bullet point observations).

***Task Three Deliverables:***

- Brief readout (bullet points) following each workshop (within 3 hours of workshop end) (May 25- June 19, exact dates to be confirmed)

**Task Four: Project Management, Reporting, and Close-Out**

The SME will participate in every other week planning calls with CRDF Global and the funder, and other ad-hoc meetings as required by the scope. The SME shall submit an After-Action Report (AAR) for all workshops detailing key themes and technical findings, participant feedback, observed institutional gaps (as appropriate), and recommendations for future programming.

***Task Four Deliverables:***

- Consolidated After-Action Reports (within 10 business days of final workshop).

**CONTRACTOR REQUIREMENTS:**

- Demonstrated ability and willingness to incorporate cost-sharing, leverage existing resources, and provide in-kind contributions (e.g., staff time, materials, tools, or institutional support) to maximize project impact and efficiency.
- Ability/willingness to participate as part of a team of experts contributing to the development and delivery of project activities and materials.
- Willingness to accommodate reasonable changes or adjustments to content or delivery as directed by CRDF Global or the Funder.
- Ability to travel to Italy in late May or June 2026 to deliver three workshops (in Turin and two other Italian cities, possibly Rome and Naples).
- Demonstrated commitment to interactive, participant-centered training design, with the ability to develop and deliver materials that prioritize active engagement over passive instruction, including through facilitated discussions, tabletop exercises, case-based learning, small-group deliberation, and hands-on scenario work.
- Demonstrated experience developing and delivering academic, industry, or government-facing training, analysis, or reporting in one or more of the following areas:
  - Research security and protection of sensitive or dual-use research and technologies, with particular relevance to emerging technology fields including quantum information sciences, artificial intelligence and machine learning, aerospace engineering, and space technologies.
  - Risk identification and mitigation in international research collaboration, including foreign influence risks, insider threat awareness, and oversight of cross-border research partnerships.
  - Development of practical training curricula, interactive scenario-based exercises, case studies, and implementation tools tailored to university leadership and research administration audiences.
  - Knowledge of applicable European Union and Italian research governance frameworks, as well as relevant U.S. benchmarks such as the National Institute of Standards and Technology (NIST), and the ability to contextualize these within Italy's legal and institutional landscape.



- Experience with research security governance, including screening and due diligence frameworks, data protection practices, funding and investment screening, technology transfer risk, and publication review considerations applicable to academic research environments.

## PROPOSAL REQUIREMENTS:

Each proposal must include:

- **Proposed Technical Approach and Project Team**

- Detailed description of services offered in correlation with the RFP scope and tasks. Your vision for the completed scope and individual deliverables,
- Technical approach, including CVs and/or bios for the proposed team who can travel to Italy in late May or June for implementation of workshops in a single trip.
- ***The technical approach must clearly outline: the methodology that will be used to ensure the workshops remain interactive, case-based, and outcome-oriented;*** the approach that will be used to tailor the materials for university leadership, research administrators, and faculty engaged in advanced research fields.
- List of recent experience: in developing and delivering customized research security training; working with universities in Italy (or in Europe more broadly); working with university leadership and rectors; applicable references/past performance should be clearly included.
- 10-page limit excluding CVs and cost proposals

- **Cost Proposal in USD**

- NOTE: Applicants are required to submit their cost proposal using the budget template provided or a template following the same structure. Applicants may add additional rows or sub-categories as needed to include travel costs, cost-sharing, leveraged resources, in-kind contributions, or any other items required to fully represent their technical and cost approach. All additions should be clearly labeled.
- **Travel Cost Proposal:** If travel is required under the proposed Scope of Work, the Applicant must include a detailed travel budget that reflects the nature of the proposed technical approach and implementation plan. Travel costs must be reasonable, necessary, and directly allocable to the performance of the project. The travel budget must, at a minimum, include: number of travelers, origin and destination, estimated airfare (economy/coach class only unless otherwise justified), lodging costs, meals & incidental expenses (M&IE), ground transportation, any visa or required travel documentation costs.
  - All proposed travel costs must be prepared in accordance with applicable Federal Travel Regulations (FTR) and U.S. General Services Administration (GSA) per diem rates, as applicable to the travel location. Lodging and M&IE rates shall not exceed the allowable federal per diem rates unless specifically justified and approved in writing.
  - In addition, all air travel funded under this award must comply with the Fly America Act (49 U.S.C. § 40118). Applicants must budget for U.S. flag air carriers unless a documented exception applies under the Fly America Act or applicable Open Skies Agreement.
  - Failure to provide a detailed and compliant travel budget may result in the cost proposal being deemed non-responsive.
- Cost proposal as formatted below:



Task / Deliverable	Number of People	Level of Effort (LOE)	Hourly Rate (USD)	Total (USD)
Task One: Development of Workshop Agenda				
Task Two: Development of Workshop Materials				
Task Three: Delivery of Three Workshops				
Task Four: Reporting and Close-Out				
Travel Expenses (include detailed travel budget in separate table; assume workshops in Rome, Turin, and Naples in that order)				
<b>Total (USD)</b>				

**CONTRACTOR SELECTION CRITERIA:**

Scoring will be based on CRDF Global’s evaluation of the Contractor’s ability to meet CRDF Global’s key requirements. That includes competitive pricing, quality of proposal, past performance, and credentials/ experience of key personnel. 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. CRDF will select the contractor who provides the best value in terms of overall price and experience.

**Best Value Trade-Off:**

Successful proposals will be selected based on both technical and price factors, weighing them to determine which offer represents the best value. Technical factors, such as experience, innovation, and past performance, may be more heavily weighted than price. CRDF Global reserves the right to select a higher-priced proposal if it offers superior technical benefits or overall value. CRDF Global retains full discretion to contract for all, some, or none of the activities included in any proposal submitted under this RFP. CRDF Global also reserves the right to select multiple proposals and/or SMEs and combine or assign complementary roles among selected offerors to achieve the best overall technical approach and value in support of the activity.

**Evaluation Scoring Methodology:**

Proposals will be evaluated on a 100-point scale. Scoring will be based on alignment with the stated objectives, creativity and soundness of the proposed approach, and the realism of the scope, weighted according to the criteria identified above.

Evaluation Criteria	Weight (%)	Subfactors
1. Technical Approach	60%	<ul style="list-style-type: none"> <li>- Understanding of the requirements</li> <li>- Feasibility of the approach</li> <li>- Alignment with project goals</li> </ul>
2. Price/Cost	20%	<ul style="list-style-type: none"> <li>- Overall cost compared to market rates</li> <li>- Cost realism</li> <li>- Price structure</li> <li>-Cost share</li> </ul>
3. Key Personnel and Qualifications	10%	<ul style="list-style-type: none"> <li>- Relevant experience of personnel</li> <li>- Availability and commitment to the project</li> </ul>



4. Past Performance	10%	- Relevance of past projects - Performance ratings or assessments
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**Procurement Timetable:**

This procurement process is intended to follow the timeline below:

Activity	Date
1. Request for Proposal (RFP) Issued	March 13, 2026
2. Deadline for Questions & Inquiries	March 20, 2026
3. RFP Questions & Answers Released	March 23, 2026
<b>4. Proposal Submission Deadline</b>	<b>March 27, 2026, 11:59 PM Eastern Daylight Time</b>
5. Anticipated Contract Issuance	April 3, 2026

**Submission:**

Proposals should be submitted to Kelly Russell, [krussell@crdfglobal.org](mailto:krussell@crdfglobal.org) & Salman Al-Darbisi, [saldarbisi@crdfglobal.org](mailto:saldarbisi@crdfglobal.org), no later than Friday, March 27, 2026 at 11:59PM Eastern Daylight Time. Proposals should be submitted as electronic documents in **PDF, Word or Excel format** and **please add “RFP Response – Italy Research Security Workshops” to the subject line.**

**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 30 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; Amman, Jordan; Kyiv, Ukraine; Manila, Philippines; Almaty, Kazakhstan; and Warsaw, Poland; CRDF Global’s global staff and networks of local community and government stakeholders deliver programs tailored to specific regions that advance U.S. security interests in over 120 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 status, or disability. We are committed to fostering a respectful, collaborative, and supportive work environment where all individuals can contribute and thrive. We recognize and uphold the inherent value and dignity of every person, and we strive to maintain a workplace that honors a wide range of backgrounds, perspectives, and experiences.

More information is available at [www.crdfglobal.org](http://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 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, 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, 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, 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, should be made in writing and included in the form of an addendum to the applicable Section in the RFP.

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