

CRDF GLOBAL

Seeking Subject Matter Expert (SME) for Design, Development, and Delivery of a Three-Day Public Sector Forum on Research Security for Government Stakeholders in Latin America REQ26-0268 REQUEST FOR PROPOSAL

Deadline: *May 19th, 2026 at 23:59 Eastern Standard Time*

Summary:

CRDF Global, in support of the United States Department of State Bureau of Arms Control and Nonproliferation (ACN) Office of Cooperative Threat Reduction (CTR), seeks qualified subject matter experts to design and deliver a three-day, in-person public sector forum in Santiago, Chile, focused on research security policy, regulation, oversight, and coordination. The forum will convene government stakeholders from Argentina, Chile, Peru, and Mexico responsible for science policy, research funding, higher education oversight, and national security. The selected expert(s) will be responsible for designing a comprehensive conference agenda; recommending qualified experts, speakers, and panelists to fill session slots; developing materials for delivery of expert-led sessions; serving as a moderator, facilitator, or session lead for panel discussions, Q&A sessions, or other non-seminar sessions during the conference; and designing and providing follow-on consultations with participating governments. The forum aims to strengthen threat awareness, improve national research security frameworks, enhance intra- and inter-governmental coordination, and identify country-specific gaps and challenges in protecting academic research systems from foreign state interference.

Scope:

Selected contractor(s) will support the design and delivery of a three-day, in-person public sector forum in Santiago, Chile, focused on research security across the academic and scientific sectors of Argentina, Chile, Peru, and Mexico. The forum is structured around an inverted pyramid framework, moving from broad global threat awareness on Day 1, through policy, regulation, and coordination on Day 2, to country-specific gap analysis, action planning, and commitment-building on Day 3.

The contractor(s) will design a comprehensive conference agenda, emphasizing engaging and participant centric sessions, such as panels, interactive Q&A and small group sessions, while thoughtfully integrating informative seminar sessions. The contractor(s) will recommend qualified experts, speakers, and panelists to fill session slots across the agenda, drawing on practitioners, government officials, academics, and subject matter experts with relevant regional or thematic expertise. CRDF Global will manage recruitment, contracting, and coordination of recommended speakers. The contractor(s) will directly develop materials for and deliver expert-led content, and will serve as a moderator, facilitator, or session lead for panel discussions, Q&A sessions, or other non-seminar-based sessions as determined in coordination with CRDF Global.

Following the conference, the contractor(s) will design a consultation mechanism and provide targeted follow-on consultations, either virtual or in-person, with participating government delegations to support the translation of conference commitments into concrete policy actions, framework improvements, and intra-governmental initiatives. In-person consultations may be supported for up to one trip per country of approximately five business days each. Throughout the engagement, the contractor(s) will coordinate

closely with CRDF Global staff to ensure alignment with project objectives, logistical requirements, and funder expectations.

Period of Performance: Agreement Execution Date – December 31, 2026

Task One: Agenda Design and Speaker Identification

Objective: Design a comprehensive three-day conference agenda and recommend qualified experts, speakers, and panelists to fill session slots, ensuring a cohesive, high-impact forum that advances research security awareness, policy development, and coordination among government stakeholders from Argentina, Chile, Peru, and Mexico. The agenda should be intentionally designed to center participant engagement and interactivity as a primary focus of expert led sessions incorporating structured group-working sessions, action planning, and/or domestic and multilateral working groups. Recommendations for speakers should account for the ability of speakers to furnish supplemental resources for improving session outcomes. Supplemental resources include items such as case study libraries, threat indicator checklists, policy framework comparison guides, coordination model summaries, or self-assessment tools which could facilitate sustained outcomes following the conference.

Example Activities include:

- Coordinate with CRDF Global to define conference objectives, thematic priorities, and target audience profiles for each day of the forum.
- Design a detailed three-day agenda following an inverted pyramid structure. Possible structure for the conference agenda: Day 1 focused on global threat landscape and threat recognition; Day 2 on policy frameworks, regulatory tools, oversight, and intra/inter-governmental coordination; Day 3 on country-specific gap analysis, action planning, and post-conference support pathways.
- Allocate sessions across seminars, panels, Q&A/small-groups, and networking formats in accordance with the program’s structural requirements.
- Recommend qualified experts, speakers, panelists, and facilitators to fill agenda session slots, drawing on individuals with demonstrated expertise in research security, science policy, academic integrity, technology transfer, counterintelligence, or related fields, with preference for individuals possessing regional knowledge of Latin American academic and research systems. CRDF Global will manage recruitment, contracting, and coordination of recommended individuals.
- Provide guidance on content sequencing and thematic coherence across sessions to ensure alignment between individual presentations and the overall conference arc, including avoidance of redundancy and consistency of key messaging.

Task 1 Deliverables:

- Draft conference agenda within 15 days of contract execution.
- Recommended speakers and panelists roster with qualifications and rationale, delivered alongside the draft agenda.
- Finalized conference agenda, incorporating confirmed speakers, at least 60 days prior to the forum.

Task Two: Conference Material Development

Objective: Develop practical, substantive materials for the contractor’s assigned session(s) to be delivered directly by the contractor(s) during the forum. Materials should strengthen participants’ ability to recognize research security threats, understand policy and regulatory frameworks, and design effective national responses, tailored to the specific contexts and challenges of Argentina, Chile, Peru, and Mexico.

The contractor will only be required to provide materials for the sessions they lead within the agenda; however, the contractor shall be expected to facilitate coordination among speakers to strengthen the narrative arc of the conference and improve outcomes for participants.

Example Activities include:

- Coordinate with other confirmed speakers or panelists as needed to ensure complementarity between the contractor's materials and adjacent sessions, avoiding redundancy and reinforcing the narrative arc of the conference.
- Develop presentations, case studies, and facilitation guides for the contractor's assigned sessions.
- Design interactive exercises, scenario-based activities, or tabletop components as appropriate within the contractor's assigned sessions to reinforce applied learning and promote participant engagement.
- Develop discussion frameworks, facilitation prompts, or guiding questions for any panel discussions or Q&A sessions the contractor will moderate or lead.
- Ensure materials for the contractor's assigned sessions are tailored to the Latin American research and academic context, with specific relevance to the institutional, legal, and political environments of the four participating countries.

Task 2 Deliverables:

- Draft presentations, exercises, and participant-facing materials for the contractor's sessions shared with CRDF Global at least 60 days prior to the forum.
- Finalized and edited materials delivered at least 45 days prior to the forum.

Task Three: Conference Delivery

Objective: Deliver expert-led content and serve as a moderator, facilitator, or session lead for panel discussions, Q&A sessions, or other non-seminar-based sessions during the three-day forum, ensuring a dynamic, participant-centered environment that achieves conference objectives.

Example Activities include:

- Deliver the contractor's seminar content, including any associated exercises, case-study discussions, or interactive activities, during the forum in Santiago, Chile.
- As needed serve as moderator for one or more panel discussions, guiding panelist contributions, managing audience questions, and ensuring sessions remain focused and productive.
- As needed serve as facilitator or session lead for Q&A sessions, small-group working sessions, or other non-seminar-based sessions as determined in coordination with CRDF Global.
- Facilitate participant interactions during sessions, breaks, and networking periods to encourage cross-delegation dialogue and relationship building.
- Support the facilitation of Day 2 country-grouped breakout sessions and Day 3 action planning activities, including circulating among groups and providing expert guidance.
- Provide daily high-level summaries to CRDF Global staff highlighting key discussions, notable participant engagement, emerging themes, and any recommended adjustments.

Task 3 Deliverables:

- Daily high-level summaries of highlights, key discussions, and notable participant engagement for each day of the forum.

Task Four: Follow-On Consultations with Partner Governments

Objective: Design a structured consultation mechanism and provide targeted follow-on consultations—either virtual or in-person—with government delegations from Argentina, Chile, Peru, and Mexico to support the translation of conference commitments into actionable policy steps, framework improvements, resource allocation decisions, and institutional capacity-building initiatives.

Example Activities include:

- Design the post-conference consultation mechanism in coordination with CRDF Global, including defining the consultation format, sequencing, thematic focus areas, and expected outcomes for each participating country based on gaps and priorities identified during the forum.
- Conduct follow-on consultations with each participating country's delegation through a combination of virtual sessions and, where appropriate, in-person engagements. In-person consultations may be supported for up to one trip per country of up to five business days each, subject to CRDF Global approval and logistical coordination.
- Provide expert guidance on designing or strengthening national research security policies, oversight mechanisms, coordination structures, and institutional frameworks.
- Offer tailored recommendations based on each country's identified gaps, challenges, and institutional context as surfaced during the forum.
- Support delegations in developing implementation roadmaps, including recommended timelines, responsible entities, resource requirements, and benchmarks for progress.
- Prepare brief written summaries of each consultation session or in-person engagement, including key recommendations and agreed next steps.

Task 4 Deliverables:

- Consultation roadmap, including proposed format, focus areas, sequencing, and success criteria, delivered within 10 business days of the conclusion of the forum.
- Brief written summaries for each consultation session or in-person engagement, including recommendations and next steps, delivered within 5 business days of each session.

Task Five: Communication and Coordination with CRDF Global

Objective: The contractor(s) will be expected to participate in regular coordination calls with CRDF Global, other experts contributing to this effort, and provide post-activity reporting.

Example Activities include:

- Participating in coordination calls and collaborating with other experts and/or a team of experts contributing to the overall effort.
- Providing regular progress updates to the CRDF Global project management team on agenda development, speaker recommendations, material preparation, and consultation scheduling.
- Coordinating with CRDF Global on all logistical matters related to the forum, including venue requirements, audiovisual needs, translation/interpretation services, and participant communications.
- Provision of an after-action report highlighting lessons learned, recommendations for improvement, and ideas for future CRDF Global research security programming.

Task 5 Deliverables:

- Up to 15 one-hour virtual calls with CRDF Global, the funder, and/or other members of the expert team to coordinate tasks, provide updates, and deliver a final briefing on outcomes.
- Conference after-action report (within 7 business days of the conclusion of the conference).
- Consolidated after-action report (within 10 business days of the final follow-on consultation).

Anticipated Performance Schedule:

Task	Deliverables	Expected Delivery Date
1	Agenda Design and Speaker Identification	May- June 2026
2	Conference Material Development	June 2026
3	Conference Delivery	25-27 August 2026
4	Follow-On Consultations with Partner Governments	September-November 2026
5	Communication and Coordination with CRDF Global	Throughout Period of Performance

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 and 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 Santiago, Chile in August 2026 to deliver a three-day conference, and willingness to travel to up to four partner countries (Argentina, Chile, Peru, and Mexico) for in-person follow-on consultations of approximately five business days each, subject to CRDF Global approval.
- Demonstrated commitment to interactive, participant-centered training and conference design, with the ability to develop and deliver materials that prioritize active engagement over passive instruction, including through facilitated discussions, case-based learning, scenario exercises, small-group deliberation, and working sessions.
- Demonstrated experience developing and delivering government-facing training, analysis, or policy advisory services in one or more of the following areas:
 - Research security and protection of sensitive or dual-use research and technologies within academic and public research institutions.
 - Risk identification and mitigation in international research collaboration, including foreign state influence risks, insider threat awareness, and oversight of cross-border research partnerships.
 - Science and technology policy, including governance frameworks for research integrity, export controls, foreign investment screening, and disclosure requirements applicable to the academic sector.
 - Intra-governmental and inter-governmental coordination on science security, technology protection, or related national security matters.
- Development of practical training curricula, interactive scenario-based exercises, case studies, and policy tools tailored to government officials and public sector decision-makers.
- Knowledge of relevant U.S. and international research security benchmarks and frameworks (e.g., NSPM-33, NIST, the Australian University Foreign Interference Taskforce, the UK Trusted Research guidelines), and the ability to contextualize these within Latin American institutional and legal landscapes.
- 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.

- Proficiency in or strong familiarity with Spanish is preferred but not required; ability to work effectively with interpretation and translated materials is essential.

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. Specificity is encouraged.
 - Technical approach, including CVs and/or bios for the proposed expert or expert team who can travel to Santiago, Chile in August 2026 for implementation of the forum and to partner countries for follow-on consultations.
 - *The technical approach must clearly outline: the methodology that will be used to ensure the forum remains interactive, case-based, and outcome-oriented; the approach for identifying and recommending qualified speakers and panelists to fill agenda session slots; the proposed consultation mechanism design for follow-on engagements with partner governments; and the strategy for tailoring content to the specific research security contexts of Argentina, Chile, Peru, and Mexico, including government officials responsible for science policy, research funding, higher education oversight, national security, export controls, and related regulatory functions.*
 - List of recent experience in: developing and delivering customized research security or science policy training; consulting or advising government officials on research integrity and security frameworks; conducting or supporting capacity-building programs in Latin America or comparable regions; applicable references and 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 provided budget template or a template following the same structure. Applicants may add additional rows or subcategories as needed to include 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.

Cost proposal as formatted below:

Task / Deliverable	Number of People	Level of Effort (LOE)	Hourly Rate (USD)	Total (USD)
Task One: Agenda Design and Speaker Identification				
Task Two: Conference Material Development				
Task Three: Conference Delivery				
Task Four: Follow-On Consultations				
Task Five: Communication and Coordination with CRDF Global				
Total (USD)				

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 technical 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 below.

Evaluation Criteria	Weight (%)	Subfactors
1. Technical Approach	55%	<ul style="list-style-type: none"> - Understanding of the requirements - Feasibility of the approach - Alignment with project goals
2. Past Performance/Qualifications	30%	<ul style="list-style-type: none"> - Relevance of past projects - Performance ratings or assessments - Relevant experience of personnel - Demonstration of expertise - Availability and commitment to the project
3. Price/Cost	15%	<ul style="list-style-type: none"> - Overall cost compared to market rates - Cost realism - Price structure - Cost share

Timetable:

The procurement process is intended to follow the timeline below.

Activity	Date
Request for Proposal (RFP) Issued	May 1, 2026
Deadline for Questions and Answers	May 11, 2026
RFP Questions and Answers Released	May 12, 2026
Proposal Submission Deadline	May 19, 2026
Anticipated Contract Issuance	May 27, 2026

Questions and Answers:

Interested parties may submit questions regarding this RFP to jcarpenter@crdfglobal. Questions will be accepted through 11:59 PM Eastern Standard Time and will be addressed as received. Following the close of the Q&A period, a consolidated Q&A document containing questions received and the corresponding responses will be posted alongside the RFP on the CRDF Global website.

Submission:

Proposals should be submitted to procurement@crdfglobal.org & jcarpenter@crdfglobal.org, no later than **23:59 Eastern Standard Time May 19,2026**. Proposals should be submitted as electronic documents in PDF, Word, PowerPoint, 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 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.

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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.