

CRDF Global
Request for Proposal Questions & Answers
Released May 12, 2026

The following questions and answers are provided in response to inquiries submitted regarding the Request for Proposals, [“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”](#)

These questions and answers are provided for informational purposes only and do not modify, amend, or supersede the terms of the Request for Proposals. In the event of any inconsistency between this Q&A and the RFP, the RFP shall govern. Responses reflect CRDF Global’s interpretation of the RFP requirements as of the date of release.

Respondents are responsible for monitoring the official procurement platform for updates or additional clarifications.

Questions and Answers:

Q: I wanted to briefly inquire whether CRDF Global is open to proposals involving regional partners or consortia. We are currently exploring potential avenues to engage, either independently or in collaboration with more established institutions, and would welcome any guidance you may be able to share.

A: CRDF Global is open to all types of respondents to this RFP; individuals, organizations, consortia, groups which contain a variety of experts, etc. A response which contains a wide variety of expertise, including regional specialization, research security policy expertise, government experience, representation from U.S. and Latin American experts would be desirable. As described in the RFP one of the key tasks for any successful respondent will be to develop the agenda for the conference, including recommending speakers and experts for sessions- who do not necessarily need to be a part of your submission- however, if a respondent were to have done the leg work to secure these speakers in advance and include them as a member of the team included in the response, this would certainly make the proposal more competitive.

Q: I am a CRDF Global Affiliated Expert. To respond to this RFP, do I need to submit a full proposal package, or can I just submit my CV for consideration?

A: Thank you for your interest. This is a publicly open and competitive solicitation, and all respondents are held to the same evaluation standards regardless of any existing affiliation with CRDF Global. To be considered, you must submit a complete proposal package that meets the requirements outlined in the "Proposal Requirements" section of

the RFP. A CV alone would not constitute a responsive submission. We encourage you to review that section carefully and welcome a full proposal from you.

Q: Could you clarify whether CRDF Global anticipates selecting a single SME to cover the full scope of work, or whether multiple SMEs may be selected with responsibilities divided across tasks?

A: For this solicitation, CRDF Global intends to select a single expert/institution. This expert will be responsible for designing the conference as outlined in the RFP, including agenda design, recommending additional speakers for the conference for CRDF Global to procure, and conducting the consultative activities as outlined. The selected respondent will serve as the conference's lead expert, and a successful response will cover the full scope of the RFP as outlined.

Q: Does CRDF Global have internal expectations or historical benchmarks regarding the anticipated LOE for each task, particularly for agenda design, material development, and follow-on consultations?

A: CRDF Global does not provide anticipated LOE benchmarks for individual tasks. Respondents should propose the level of effort they believe is necessary to achieve the stated deliverables. CRDF Global will analyze each response for cost-reasonableness using both historical performance of similar tasks and market rate analysis to determine how well proposed pricing aligns with expectations.

Q: Should applicants assume that all four countries will require in-person consultations, or will this be determined based on country interest and budget availability?

A: Respondents are encouraged to assume the full scope will be implemented and should plan to travel to all four countries for consultations. The full scope of consultative services is not expected to take place exclusively in-person; respondents should assume that some work will be conducted virtually, with in-person travel available to support intended outcomes.

Q: Are consultation formats expected to follow a standardized structure, or should they be tailored individually based on needs identified during the forum?

A: Consultations are not expected to follow a standardized structure. As outlined in the RFP, the design of consultative mechanisms in coordination with CRDF Global is part of the scope. Consultations should respond to the needs, gaps, and commitments of delegations attending the conference.

Q: Does CRDF Global have preferred templates or examples for interactive exercises, scenario-based activities, or tabletop components?

A: CRDF Global does not maintain a standard template library for expert materials. Materials should be developed in whatever format the expert determines will maximize intended outcomes, participant engagement, and knowledge retention.

Q: Are digital engagement tools (e.g., polling platforms, collaborative whiteboards) permitted during the forum?

A: There are no restrictions on digital engagement tools, provided they conform to all other applicable standards and regulations. Should digital engagement tools be required for expert-led sessions, the expert is expected to provide licenses or other resources necessary for participants to utilize these tools.

Q: Is there a target number of recommended speakers or panelists that CRDF Global expects in the proposal?

A: There is no required number of recommended speakers or panelists. Respondents should outline their technical approach and explain how their proposed speaker composition will achieve the forum's objectives. The final agenda and speaker roster will be determined in coordination with CRDF Global and the funder.

Q: Should the roster include regional (Latin American) experts, or is CRDF primarily seeking international subject matter expertise?

A: A response that demonstrates a diverse range of expertise would be desirable, including regional specialization, research security policy expertise, government experience, and representation from both U.S. and Latin American experts. As described in the RFP, a key task is to recommend speakers and experts for sessions; these individuals do not necessarily need to be included as part of the respondent's team. However, a respondent who has secured commitments from recommended speakers in advance and includes them as team members in their proposal would likely strengthen the competitiveness of their submission.

Q: Will CRDF Global provide background materials on the research security landscape of Argentina, Chile, Peru, and Mexico, or should applicants plan to develop all contextual analysis independently?

A: CRDF Global will provide what resources it has access to including summaries of previous engagements. However, successful respondents are expected to research and develop tailored event materials as part of the scope outlined in the RFP.

Q: Does CRDF Global have expectations regarding the type or proportion of cost-sharing or in-kind contributions that would be considered competitive?

A: There is no baseline metric for cost-sharing or in-kind contributions to be considered competitive. However, proposals which include greater proportions of cost-sharing or in-kind contributions will score higher on Price/Cost category given its inclusion as a sub-factor within the Evaluation scoring methodology.

Q: If multiple SMEs are selected, will CRDF Global coordinate the division of responsibilities, or should applicants propose potential collaboration structures?

A: CRDF Global intends to select one respondent from this solicitation. However, respondents who include coordination mechanisms within their technical approach as a means of ensuring thematic consistency and facilitating conference design will likely strengthen their submission, given that agenda design and speaker recommendations are key components of the scope.

Q: Will CRDF Global provide interpretation services during the forum and consultations, or should the SME budget for language support?

A: CRDF Global will arrange and handle conference logistics to include interpretation and translation if necessary.

Q: First, the RFP states that "CRDF Global will manage recruitment, contracting, and coordination of recommended speakers". We want to confirm whether travel and logistics costs for the expert team attending the forum in Santiago, as well as for the in-person follow-on consultations described in Task 4, should be included in our cost proposal, or whether these fall under CRDF Global's direct management.

A: Travel and logistics costs for the expert team, including flights, lodging, and M&IE for both the forum in Santiago and in-person follow-on consultations, may be handled in one of two ways: (1) included as separate line items in the respondent's cost proposal, or (2) arranged and managed directly by CRDF Global. Respondents should indicate their preferred approach in their cost proposal. If electing option 1, all travel costs must be itemized. Travel and logistics costs for recommended speakers and panelists who are not part of the respondent's team will be managed by CRDF Global and should not be included in the cost proposal.

Q: Second, Task 5 notes that the contractor will coordinate with CRDF Global on logistical matters related to the forum, including venue requirements, audiovisual needs,

translation/interpretation services, etc. Could you clarify whether the financial responsibility for these items rests with CRDF Global, or whether they should be reflected in our cost proposal?

A: Financial responsibility for venue logistics, audiovisual equipment, and translation/interpretation services rests with CRDF Global and should not be included in the respondent's cost proposal. This task is included in the scope to ensure that the selected expert provides input on venue requirements, special arrangements, materials, or audiovisual needs necessary to support speakers and expert-led sessions.

Q: Third, regarding personnel costs, we wanted to ask whether you prefer that salaries be identified by individual name and hourly rate, or whether it is acceptable to present them as a team effort under broader categories such as "lead experts" and "support staff" without specifying individual names.

A: Respondents should identify individual team members by name and include corresponding hourly rates in their cost proposals. Individual hourly rates are required to support CRDF Global's evaluation of cost reasonableness and market rate analysis.

Q: Will this conference be the partner governments' first engagement on research security?

A: No. CRDF Global, the U.S. Department of State, and other relevant entities have previously engaged with these governments on research security topics. This forum is designed to build on and deepen those prior engagements.

Q: Will speakers from U.S. Inter-Agency be considered?

A: Yes, CRDF Global anticipates including U.S. government speakers within the agenda. Identification and coordination of USG speakers will be managed directly by CRDF Global and is not the responsibility of the respondent.

Q: Should additional expert names and rates be provided in the proposal?

A: The proposal should include only experts who are directly part of the respondent's team. Experts recommended to speak at the event do not need to be included in the proposal. CRDF Global will facilitate recruitment and contracting of recommended speakers.

Q: Is there a desire to have local speakers or speakers from the audience?

A: Yes. A response that demonstrates a diverse range of expertise would be desirable, including regional specialization, research security policy expertise, government experience, and representation from both U.S. and Latin American experts. As described in

the RFP, a key task is recommending speakers and experts for sessions; these individuals do not necessarily need to be included as part of the respondent's team. However, a respondent who has secured commitments from recommended speakers in advance and includes them as team members would likely strengthen the competitiveness of their submission.

Q: How many speakers are expected or desired?

A: There is no set target for the number of speakers at the conference. This is intentionally left open to give respondents flexibility and room for creativity in proposing a conference design. Respondents may propose as many or as few speakers as their technical approach requires to achieve the forum's intended outcomes.

Q: Should any cultural considerations be made around workshop timing and workshop hours?

A: Respondents should assume standard business hours (approximately 8:30 AM to 5:30 PM local time) for the design of the conference. Specific adjustments to scheduling, including culturally appropriate mealtimes and break structures, will be coordinated with the selected expert once identified.

Q: Does CRDF intend to manage the external experts or is this an assumed responsibility of the lead expert?

A: CRDF Global will manage all external experts. Recommendations made by the selected expert for additional speakers will guide the selection process, but logistical and financial responsibility for all additional speakers remains with CRDF Global.

Q: Does the lead expert have to be the person to conduct the five-day follow-on assessments or is there flexibility to have some of the other experts support this?

A: The consultation design should reflect the technical approach of the responding party. The selected expert may delegate consultation activities to other qualified members of their team as appropriate. The RFP intentionally provides flexibility in how consultations are structured to allow respondents to design a mechanism that best achieves sustained outcomes. Consultations are not expected to be conducted entirely in-person; respondents should anticipate a hybrid approach with the option for up to one site visit per country.

Q: What is the major theme of the conference, and what are the consultations intended to produce?

A: The overarching theme of the conference and consultations is to strengthen national-level research security oversight, policy, and procedures within Latin American partner governments. The conference provides an opportunity to introduce best practices and emerging frameworks, identify specific challenges facing partner governments, and secure commitments for improving research security. The follow-on consultations provide an opportunity to work bilaterally with individual governments to address their specific challenges and deliver tailored expert guidance.

Q: Should the technical proposal name individual team members explicitly, or is it acceptable to describe team composition by number of personnel, role, and required qualifications with CVs attached separately?

A: It is acceptable to describe team members by role, number of personnel, and required qualifications, provided each member is accounted for within the cost proposal and corresponding CVs are included with the submission package. Each team member described in the technical proposal should be clearly attributable to their respective CV.

Q: Could CRDF Global clarify the required font type and size, line spacing, margins, and paper size (Letter or A4) for the 10-page technical proposal?

A: There are no specific formatting requirements for the technical proposal beyond the 10-page limit, which excludes cost proposals and CVs. Proposals should be legible, professionally presented, and in a reasonable font size.

Q: Are the following sections included or excluded from the 10-page limit: cover page, table of contents, references, past performance summaries, appendices, and executive summary?

A: The only sections excluded from the 10-page limit are the cost proposal, CVs, and any supporting appendices (such as references or letters of support) that do not constitute part of the technical approach. The technical approach, proposed methodology, past performance narratives, and team descriptions must fall within the 10-page limit.

Q: Could CRDF Global indicate the anticipated budget range or ceiling for this contract? Comparable Latin America workshops, such as the 2023 Santiago workshops with Formation Consultancy, provide partial reference, but the current scope is substantially larger.

A: CRDF Global does not disclose anticipated budget ranges or ceilings for open solicitations. Respondents should propose costs that are reasonable and reflective of their anticipated level of effort and expert rates. Proposals will be evaluated for cost reasonableness as described in the evaluation criteria.

Q: Should travel costs for the contractor team be included in the cost proposal, or handled separately under CRDF Global's Option 1 / Option 2 travel arrangements?

A: Travel and logistics costs for the expert team, including flights, lodging, and M&IE for both the forum in Santiago and in-person follow-on consultations, may be handled in one of two ways: (1) included as separate line items in the respondent's cost proposal, or (2) arranged and managed directly by CRDF Global. Respondents should indicate their preferred approach in their cost proposal. If electing option 1, all travel costs must be itemized. Travel and logistics costs for recommended speakers and panelists who are not part of the respondent's team will be managed by CRDF Global and should not be included in the cost proposal.

Q: Based on our network and prior engagements with stakeholders across the region, we already have a working framework for speaker selection that prioritizes a balanced and merit-based roster representative of the diverse institutional landscape in each participating country, including government agencies, academia, and research funding bodies. To refine our session design, could CRDF Global indicate approximately how many hours per day are allocated to contractor-led content, the average duration per session, and how many sessions should be led by guest speakers? We understand that breakout and Q&A facilitation count toward the contractor's session allocation, is that right?

A: For the purposes of this solicitation, respondents should assume that approximately six (6) hours per day of the conference will be available for contractor-designed content within the agenda. Average duration per session and the number of guest speakers should be determined by the respondent as part of their proposed agenda design. Breakout sessions and Q&A facilitation are considered part of the overall conference program and are not counted against any specific contractor session allocation.

Q: Given that all four participating countries are Spanish-speaking and the audience consists of regional government stakeholders, our working assumption is that the forum and participant-facing materials should be conducted and prepared in Spanish. Could CRDF Global confirm this assumption, indicate whether any English-speaking participants or observers are expected to attend who would require interpretation, and clarify whether

such interpretation and translation services would be provided by CRDF Global or expected from the contractor?

A: The conference is intended to be conducted primarily in Spanish, as all participating countries are Spanish-speaking and the forum will be hosted in Chile. However, attendees from CRDF Global, invited experts, guest speakers, and/or representatives of the United States Government may not speak Spanish. CRDF Global will be responsible for the financial and logistical requirements of translating materials from English to Spanish and will provide interpretation at the conference based on participant needs. Materials created and submitted to CRDF Global by the respondent should be developed in English.

Q: We understand the contexts of Argentina, Chile, Peru, and Mexico, including key institutional actors and inter-agency dynamics in science policy, research funding, higher education oversight, and national security sectors. An important consideration in this region is the constitutional autonomy of universities from national governments, which differs significantly from many other contexts. In some of the participating countries, current political circumstances have created tensions between university systems and the executive branch, with universities in active institutional disputes and limited willingness to engage in dialogue alongside government representatives. We are already considering strategies to invite stakeholders in ways that minimize such conflicts and ensure productive cross-sector dialogue. To refine these strategies, could CRDF Global provide an approximate total number of participants expected per country delegation, indicate the anticipated balance between government and agency representatives on one side and university and academic representatives on the other?

A: CRDF Global anticipates a total audience of approximately 50 to 60 participants. While participants have not yet been identified, CRDF Global expects approximately ten (10) representatives each from Argentina, Mexico, and Peru, and approximately twenty (20) representatives from Chile as the host country. The intended audience for this conference is government officials and public sector professionals with responsibility for research security policy, oversight, and coordination. Significant representation from the academic and university sector is not anticipated for this forum.

Q: If CRDF Global selects multiple contractors under the Best Value Trade-Off, how would scope, deliverables, and budgets be redistributed? Should proposals assume sole contractor responsibility or include collaborative flexibility?

A: CRDF Global intends to select a single respondent for this solicitation. The selected respondent will serve as the “lead expert” for the conference. Proposals should assume sole contractor responsibility for the full scope outlined in the RFP.

Q: What is the intellectual property arrangement for materials developed under this contract, particularly for supplemental resources such as case study libraries and self-assessment tools?

A: Specific terms for intellectual property ownership will be addressed during the contracting stage. However, respondents should be aware that any materials, tools, case study libraries, or other deliverables developed under this contract will, at a minimum, remain accessible to and usable by CRDF Global and the funding agency in perpetuity.

Q: For the past performance section, does CRDF Global require formal reference letters, contact information for verification, or written summaries, and is there a preferred number of references?

A: CRDF Global does not require formal letters of recommendation or reference contact information, though both may be included in support of a proposal. The past performance section is intended to provide evidence and examples of the respondent's (individual or team) historical success in completing work similar or related to the scope outlined in the RFP.