

CRDF GLOBAL

Seeking a Research Security Subject Matter Expert (Product Manager) and a Software Developer for the Full Development of the Research Security Case Management Tool

REQ26-0595 REQUEST FOR PROPOSAL-REVISION 1

Deadline: August 21st, 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 Office of Cooperative Threat Reduction (ACN/CTR), seeks a qualified research security subject matter expert and a qualified software developer or development team to fully develop the Research Security Case Management Tool, a component of the Research Security Toolkit. The Case Management Tool is a lightweight, locally deployable, and auditable application that allows a research security office to maintain a historical repository of research security cases, the decisions made, and the reasoning behind them. This solicitation is organized in two parts: Task One, a research security subject matter expert to serve as product manager and to define what research security officers and offices need in a functional and useful tool; and Task Two, a software developer or development team to design, build, package, document, and deliver the full tool together with its complete source code. CRDF Global will own all source code and materials produced, and delivery of the complete source code is a mandatory deliverable alongside the final packaged software. Offerors may propose for Task One, for Task Two, or for both.

Scope:

The selected contractor or contractors will fully develop the Research Security Case Management Tool, a lightweight, locally deployable case management application intended to serve as an auditable historical repository of research security cases. Each record captures the case number; the context, such as a screening outcome, a foreign visiting researcher, a funding or gift review, or another research security action; the risk assessment outcome; the decision reached and its justification; the decision maker; and the stakeholders involved. An append-only audit trail records who changed what and when behind every case. The tool runs entirely on the local machine with no cloud service and no network egress, stores its records in a single database file that the adopting institution owns outright, and exposes clearly marked, editable configuration for controlled vocabularies, fields, interface languages, and branding so that an institution can tailor it to local policy without a rebuild.

The two tasks are distinct but interdependent. The Task One expert serves as product manager across the development lifecycle, translating the needs of research security officers and offices into requirements, reviewing the developer's work, and validating fit to research security practice. The Task Two developer builds to those requirements and delivers a production-ready, packaged, and documented tool. Offerors may propose for either or both tasks, and teaming arrangements are permitted. CRDF Global anticipates making one or more awards and reserves the right to award each task separately, to combine or assign complementary roles among selected offerors, or to make no award.

The baseline tool is delivered as standalone, locally deployable software that installs and launches without use of a command line and presents to the user as an application rather than as a website. CRDF Global may additionally elect optional capabilities, including a central client-server deployment mode for institutionally hosted, multi-user shared records. The intended distribution model is institution-owned and source-available: adopting institutions receive the ability to run, read, audit, and modify their own instance

and own their data outright, without a right of onward redistribution and without conventional open-source release.

Period of Performance:

Agreement Execution Date through December 31, 2026.

Ownership, Source Code, and Licensing:

The following provisions are conditions of performance and award, not preferences.

- **Ownership of work product.** All software, source code, designs, documentation, and other materials produced under the resulting agreement are the exclusive property of CRDF Global and/or the funding agency. The successful offeror assigns to CRDF Global all right, title, and interest, including all intellectual property rights, in the deliverables.
- **Source code as a required deliverable.** Delivery of the complete, buildable source code is mandatory and must be delivered together with the final packaged software. Final acceptance and final payment are contingent on delivery of source code that CRDF Global can independently build into the delivered packaged software using the documentation provided.
- **Completeness and reproducibility.** The source code delivery must include all code, build scripts, configuration, and assets necessary to compile, package, and run the tool, and must not depend on any resource the offeror does not also deliver to or license to CRDF Global in perpetuity.
- **Third-party and open-source components.** Any third-party or open-source components must be disclosed in a software bill of materials and offered under permissive licenses compatible with CRDF Global ownership and the intended distribution model. Components under licenses that would impose redistribution or disclosure obligations inconsistent with that model may not be incorporated without CRDF Global's prior written approval. No component may create a runtime dependency on the offeror or on any hosted service.
- **Third-party intellectual property indemnification.** The successful offeror(s) shall indemnify and hold CRDF Global harmless against third-party claims that any delivered software, source code, or component infringes a patent, copyright, trade secret, or other intellectual property right, provided CRDF Global promptly notifies the offeror of any such claim.
- **No undisclosed functionality.** Deliverables shall contain no undisclosed data collection, telemetry, network callbacks, or other functionality inconsistent with local data ownership.
- **Warranty and defect remediation.** For a period of 90 days following final acceptance, the Task Two contractor shall remediate, at no additional cost, any defect in the delivered software or source code that prevents the tool from performing as specified in the accepted requirements and acceptance criteria.
- **Confidentiality of pilot and case data.** Any case records, institutional data, or other information the contractor accesses in the course of piloting, testing, or supporting the tool shall be treated as confidential, used solely to perform the resulting agreement, and not retained, copied, or disclosed beyond what is necessary for that purpose.

Task One: Research Security Subject Matter Expert (Product Manager)

Objective: Serve as product manager for the development of the Case Management Tool and define what research security officers and offices need in a functional and usable tool. Develop user focused training materials to include user guides, pre-recorded training modules, or other similar user training.

Example Activities include:

- Coordinate with CRDF Global and the developer to define priorities and ensure the tool reflects real research security workflows.
- Elicit and document the functional needs of research security officers and offices, grounded in workflows such as screening outcomes, foreign visiting researchers, funding and gift review, partnership and collaboration review, and other research security actions.
- Translate those needs into a prioritized functional requirements specification and feature backlog that distinguishes need-to-have from want-to-have capabilities.
- Author user stories and acceptance criteria for each capability.
- Review the developer's designs, prototypes, and releases, and provide structured written feedback on usability and fit to research security practice.
- Coordinate and synthesize feedback from pilot institutions.
- Advise on multilingual and regional tailoring needs and on the record schema.
- Provide release acceptance sign-off against the agreed acceptance criteria.

Task One Deliverables:

- Functional requirements specification and prioritized feature backlog.
- User stories and acceptance criteria.
- Written design and prototype review memoranda at each milestone.
- Pilot feedback synthesis report and release acceptance sign-offs.
- User training materials.

Task Two: Software Developer or Development Team

Objective: Design, build, package, document, and deliver the full Case Management Tool to the requirements defined with the Task One product manager, together with the complete source code.

Example Activities include:

- Design and build the full tool to the requirements defined with the product manager.
- Deliver a standalone, locally deployable, packaged application that installs and launches without use of a command line or terminal and presents to the user as an application rather than as a website in a browser.
- Implement case record creation and storage to the defined schema, repository search, an append-only audit trail, a basic reporting dashboard, and data export.
- Provide configurable controlled vocabularies and fields, multilingual readiness through externalized interface strings, and institution-level branding, all tailorable without a rebuild.
- Ensure local data ownership, with all data in the local deployment mode residing in an institution-owned store with no cloud egress and no dependency on any hosted service.
- Apply security-by-design practices and support the independent third-party security assessment that CRDF Global will arrange, including by providing the source code, build, and documentation to the reviewers and remediating findings prior to delivery.
- Define and document a practical approach to distributing updates and patches for a locally deployed tool.
- Support a limited pilot deployment and incorporate prioritized feedback within the agreed scope.
- Conduct formal user acceptance testing against the acceptance criteria defined with the Task One product manager, and obtain written acceptance sign-off prior to final delivery.

- Deliver complete technical documentation — including developer documentation and architecture diagrams sufficient for a new developer to understand, maintain, and extend the codebase — an administrator and customization guide, and an end-user guide.

Optional Capabilities (priced separately):

CRDF Global may exercise none, some, or all of the following options. Offerors should identify any optional item that cannot realistically be completed within the period of performance and that should be treated as design-forward compatibility rather than a delivered feature. Offerors should propose any additional features they believe will improve the efficacy of the tool.

- Change language settings within tool.
- Central client-server deployment mode for institutionally hosted, multi-user shared records, including authentication, role-based access control, and single sign-on integration.
- File and document attachments stored with the case.
- Exportable, formatted PDF case summaries and audit reports.
- Cost and return-on-investment reporting derived from case cost fields.
- An in-application administrative interface for configuring fields, vocabularies, and forms without editing source.
- Documented integration interfaces for a risk assessment framework and for grant and research management systems, with full connectors acknowledged as future scope beyond 2026.

Task Two Deliverables:

- Final packaged software with installers for the target operating systems.
- Complete, buildable source code delivered together with the packaged software, per the Ownership, Source Code, and Licensing section.
- Build and deployment instructions sufficient for CRDF Global to reproduce the packaged software from source.
- Technical documentation, including developer documentation and architecture diagrams; an administrator and customization guide; and an end-user guide.
- Test plan and test results and support during the pilot.
- Threat model covering the tool's data flows, trust boundaries, and attack surface.
- Architecture and data-flow diagram prepared for security review, showing how data moves through and is stored within the local deployment (and the client-server option, if exercised), distinct from the developer-facing architecture diagrams above.
- Static Application Security Testing (SAST) and dependency or software composition scan output, with any high or critical findings remediated or documented.
- Written attestation of no network egress, with supporting evidence (e.g., a network traffic capture) demonstrating that the tool makes no outbound network calls in local deployment mode

Task Three: Integration, Finalization and Coordination with CRDF Global (Product Manager, and Development Team)

Objective: Finalize the case management tool as one coherent and logical aspect of the full Research Security Toolkit, and coordinate with CRDF Global throughout the period of performance. This task depends in part on deliverables from the Research Security Risk Assessment Guide and Model Template and Workflow Library components developed under the companion Research Security Toolkit RFP (REQ26-0594); CRDF Global reserves the right to adjust the schedule and specific deliverables of this

task if those companion components are delayed, materially changed, or awarded to a different contractor on a different timeline.

Example Activities include:

- Participate in coordination calls with CRDF Global and, as relevant, the funder and other experts contributing to the toolkit.
- Provide regular progress updates across both tasks.
- Conduct at least one dedicated knowledge-transfer session with CRDF Global technical staff, distinct from the general coordination calls, covering the codebase architecture, build process, and maintenance procedures, so CRDF Global can independently operate, maintain, and extend the tool after project completion.
- Up to 10 one-hour virtual calls with CRDF Global, the funder, and/or other members of the toolkit team.
- Brief final summary or after action report within 7 business days of final delivery, including recommendations for future development.

Task Three Deliverables:

- Final use case testing and support for the independent third-party security assessment arranged by CRDF Global
- Exemplified workflows following from both the Risk Assessment tool, and the Template Library, and how they flow into the Case Management Tool.
- Up to 10 one-hour calls with CRDF Global, the funder, and/or other members of the toolkit team.
- After-Action Report delivered within 7 business days of final delivery.
- Knowledge-transfer session record or summary, delivered alongside the final materials.

Anticipated Performance Schedule:

Milestone	Deliverables	Expected Delivery Date
Requirements and design baseline	Requirements specification, backlog, acceptance criteria (Task One leads, Task Two supports)	Within 3 weeks of execution
Prototype / alpha	First working build of the full tool	End of September 2026
Iteration / beta	Revised build incorporating product manager and pilot feedback	End of October 2026
Final delivery	Final packaged software and complete source code	End of November 2026
Pilot support and closeout	Pilot support, after action report	December 2026

Contractor Requirements:

Task One (Research Security Subject Matter Expert / Product Manager):

- Demonstrated research security expertise and familiarity with the functions of a research security officer or office.
- Product management experience, ideally for software tools serving non-technical users.
- Familiarity with relevant research security benchmarks and frameworks (e.g., NSPM-33, NIST, the Australian University Foreign Interference Taskforce, and the UK Trusted Research guidelines) and the ability to contextualize them for a global audience.

- Understanding of the varying capacity of research institutions internationally and of regional and local tailoring needs.

Task Two (Software Developer or Development Team):

- Demonstrated delivery of packaged, installable software for non-technical end users.
- Secure development practices and the ability to support the independent third-party security assessment that CRDF Global will arrange.
- Experience with localization and internationalization and with database and, where relevant, client-server architecture.
- Willingness to accept the ownership and source code delivery terms in the Ownership, Source Code, and Licensing section.

Both Tasks:

- Ability and willingness to participate as part of a team of experts contributing to the Research Security Toolkit.
- Willingness to accommodate reasonable changes or adjustments to content or delivery as directed by CRDF Global or the funder.
- Demonstrated ability and willingness to incorporate cost-sharing, leverage existing resources, and provide in-kind contributions where possible to maximize project impact and efficiency.

Proposal Requirements:

Each proposal must include:

Proposed Technical Approach and Project Team

- A clear statement of which task or tasks the offeror is proposing (Task One, Task Two, or both).
- Detailed description of the services offered in correlation with the RFP scope and tasks, including the offeror's vision for the completed tool and individual deliverables. Specificity is encouraged.
- Technical approach, including CVs and/or bios for the proposed expert or team. Task Two proposals must also address architecture, packaging, security approach, and compliance with the Ownership, Source Code, and Licensing section.
- List of recent, relevant experience, including prior research security, product management, or software development work, with applicable references and past performance clearly included.
- **10-page limit per Task, excluding CVs and cost proposals**
- **Written Acceptance of Ownership Terms**
- Written acknowledgment and acceptance of the Ownership, Source Code, and Licensing section. A proposal that does not accept those terms may be found non-responsive.
- **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, optional capabilities, 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: Research Security SME (Product Manager)				

Task/ Deliverable	Number of People	Level of Effort (LOE)	Hourly Rate (USD)	Total (USD)
Task Two: Software Developer (core scope)				
Task Two: Optional Capabilities (list separately)				
Task Three (Product Manager): Integration, Finalization and Coordination with CRDF Global				
Task Three (Software Developer): Integration, Finalization 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 and 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 Global will select the contractor or contractors who provide the best value in terms of overall price and technical experience. For Task Two, acceptance of the ownership and source code delivery terms is a condition of award rather than a scored trade-off.

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 to 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. The same weighting applies to each task.

Evaluation Criteria	Weight (%)	Subfactors
1. Technical Approach	40%	Understanding of the requirements; feasibility of the approach; alignment with project goals
2. Past Performance / Qualifications	25%	Relevance of past projects; performance ratings or assessments; relevant experience of personnel; demonstration of expertise; availability and commitment to the project
3. Price / Cost	20%	Overall cost compared to market rates; cost realism; price structure; cost share

Evaluation Criteria	Weight (%)	Subfactors
4. Timeline	15%	Ability to delivery final software product by December 2026

Timetable:

The procurement process is intended to follow the timeline below.

Activity	Date
Request for Proposal (RFP) Issued	August 3, 2026
Deadline for Questions and Answers	August 12, 2026
RFP Questions and Answers Released	August 13, 2026
Proposal Submission Deadline	August 21, 2026
Anticipated Contract Issuance	By September 30, 2026

Questions and Answers:

Interested parties may submit questions regarding this RFP to Josh Carpenter (jcarpenter@crdfglobal.org) and Salman Al-Darbisi (saldarbisi@crdfglobal.org). Questions will be accepted through 11:59 PM Eastern Standard Time on August 12, 2026 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 Josh Carpenter (jcarpenter@crdfglobal.org) and Salman Al-Darbisi (saldarbisi@crdfglobal.org), no later than **23:59 Eastern Standard Time on August 21, 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.