

Open Technology Fund Request for Proposals for the Impact and Engagement Lab

Open Technology Fund (OTF) is soliciting proposals from service providers, organizations, and individuals interested in providing services to OTF's **Impact and Engagement Lab**—formerly the [Learning Lab](#).

OTF is an independent 501(c) non-profit corporation registered in the District of Columbia, and is fully funded by the U.S. government. We support the research, design, development, and deployment of technology-focused projects that counter online censorship and combat repressive surveillance, to enable global internet users to exercise their fundamental human rights online.

I. Background

Evolving Needs

Since 2018, the Lab has provided OTF-supported projects with free editorial, design, and other external support services that contribute to audience adoption of internet freedom technologies in the world's most repressive contexts.

There has been a significant erosion of internet freedom in the last six years as even the most modestly-resourced authoritarians now have access to state-of-the-art censorship and surveillance technologies. Those working to counter this trend have met the moment with privacy-enhancing, secure solutions that enable people to safely access and share information online. But, how to get these solutions to the people who need them most? This is the purpose of the Lab. However, just as there have been significant changes in the scope and scale of digital authoritarianism, audience needs and effective engagement strategies in repressive contexts have also evolved and now require enhanced approaches.

To inform our approach, OTF launched a communications-needs finding survey in 2023 to ensure the Lab was responsive to evolving demands. The responses suggested that updated services would be beneficial for OTF partners, including supported projects and fellows, to make full, strategic use of the Lab's offerings.

Moving forward, the Lab will maintain its focus on supporting audience engagement and end-use of internet freedom tools through a greater diversification of vendors and services—the success of which will be measured in terms of technology adoption and/or socialization.

The challenge the Lab is meant to address, particularly in closed information environments, is daunting and one that OTF approaches with humility. To this end, the below scope of requested services are a framework for the types of services that may prove useful to internet freedom projects, and creativity in approach is welcome.

Award Details

Service providers awarded contracts under the Impact and Engagement Lab will provide OTF-supported projects and fellows, along with other technology-focused internet freedom projects within our remit, with support services based on the scope of services below. OTF intends to award indefinite deliverable, indefinite quantity (IDIQ) contracts to **multiple vendors** with a performance period of one year, with the option to extend for an additional period of up to two years. The maximum ceiling for an awarded IDIQ agreement will be up to \$200,000 for the first year and up to \$200,000 for the optional period(s), should OTF choose to exercise the option. Please note that exercising optional periods are at the sole discretion of OTF. Awarded IDIQ agreements' final maximum value will depend on the stated availability and capacity of selected service providers and the availability of funds.

Following the award of IDIQ contracts to selected vendors, work will be ordered on a per-work-order basis as needed, and OTF does not guarantee that the full ceiling value of the IDIQ contract will be used. **Selected vendors are expected to provide at least one of the services listed below (vendors are not expected to provide every service requested or listed under a chosen category).**

Applicants should specify in their application which of the listed services they want to provide, and the price for each service category. Please only provide one rate per service category (not rates per sub-service listed under a category). **The pricing should be in the form of a fully-burdened hourly rate for each service inclusive of the support activities.** OTF will also consider the cost of any conference attendance that may be necessary as part of the services to be provided, so long as the costs follow the requirements of the U.S. Federal Travel Regulations and per diem lodging and M&IE rates as set by the U.S. General Services Administration and/or U.S. Department of State. Such travel should be relevant to the provision of the Service.

II. Scope of Requested Services

Audience and User Engagement

Services solicited under this category are necessarily variable and primarily designed to connect internet freedom technology projects with end-users and audiences. Recognizing that both audience and project needs are diverse given their overall goals and contexts, the below outlines a non-exhaustive continuum of expert consulting services that could be useful, understanding that each project engagement will require a carefully tailored, bespoke plan based on in-depth knowledge of public affairs in specific authoritarian environments.

For select internet freedom projects with dedicated staff capacity, there is a need for services that can contribute to audience adoption in information restricted environments. This may include a wide range of deliverables relating to and resulting from:

- audience identification and mapping
- brand development
- market research and message testing
- overall strategic planning and execution of digital and/or community-oriented outreach campaigns

Training in best practices in external outreach and related support can be included, but should be conceived of as an instrumental part of the implementation of audience adoption strategies rather than an inherent end.

Applicants must demonstrate a thorough understanding of information controls and their resulting limitations on successful engagement strategies, and audience behavior in specific authoritarian contexts, including but not limited to China, Cuba, Iran, Myanmar, and/or Russia.

Applicants seeking to provide audience engagement services should also have extensive experience working with democracy and human rights, humanitarian assistance, media freedom, and/or related international organizations, preferably those with localized programmatic footprints.

Applicants must be able to provide dedicated project managers to contribute to engagements which may include complex and multi-faceted deliverables. All applicants should also be able to demonstrate their ability to work with discretion and uphold best practices in data security for the safety of sensitive projects, fellows, and users.

Editorial Services

Services requested under this category contribute to user adoption by helping internet freedom projects clearly and accessibly explain their work for defined audiences. These services translate technical and/or highly quantitative information into compelling written narratives that speak to overall impact in support of establishing efficacy and security, building community trust, and sharing innovation.

Editorial services may include writing, editing, and/or copy editing public-facing materials—commonly user guides, reports, blog posts, and other related products. They may also include impact measurement storytelling, in which metrics and other data are translated into engaging narratives that help projects explain their work. At times, there may be a need for non-technical writers capable of converting data analysis, interviews, or other forms of feedback into polished, longer-form formats.

All applicants for this service category should be adept at translating highly technical concepts into broadly accessible, impact-driven content (primarily for online mediums). Technical writing experience and some background in qualitative and/or quantitative research may be helpful.

Applicants who wish to provide writing services should have a firm understanding of the internet freedom space. Applicants who wish to provide impact measurement storytelling services should have a background in research methods, research design, statistics, or a related field.

Lastly, all applicants should be able to demonstrate their ability to work with discretion and uphold best practices in data security for the safety of sensitive projects and fellows.

Graphic Design

Services requested under this category provide visual elements for external use, enhancing audience reach and adoption.

A. Branding, Illustration, and Publication Design

These services create visually appealing, accessible outputs for a range of primarily digital audiences. We are seeking partners with strong graphic design skills to create readable, professional products which may include web or PDF reports, user guides, websites, and/or branding elements (e.g., logos, campaign materials).

Applicants should have a portfolio of graphic design work. Partners with experience creating basic infographic videos is also desired.

B. Information Design

These services help internet freedom projects tell engaging stories with data to improve community adoption and understanding. OTF is seeking partners with the skills to transform complex data sets into clear, engaging, contextualized, and insightful visual narratives.

Specific services may include:

- Data visualizations (graphs, charts, infographics, metrics dashboards)
- Interactive database design
- Technical support to ensure the smooth operation and updates of visualization platforms and tools

Applicants to this category should have a portfolio of information design work for clients in the internet freedom, media freedom, human rights, or related space.

For both categories, OTF will prioritize partners with experience producing visually accessible content that meets the highest standards, and those with knowledge of best social media and

web practices. Experience working safely and securely is also important, as some of our projects and fellows have sensitive profiles.

Support Activities

In addition to one or more of these services, the vendor will be expected to carry out the following support activities:

A. Intake, scoping and liaising with OTF Lab Manager

The OTF Lab Manager will field potential engagements with vendors, who are then responsible for scoping out engagements and getting approval from the OTF Lab Manager before commencing work. Vendors may also identify suitable Lab engagements and opportunities for OTF-supported projects and fellows, as well as non-OTF-supported internet freedom projects that fall within [our remit](#).

B. Outreach

The vendor will be expected to engage in outreach to the internet freedom community, and make relevant stakeholders aware of the Impact and Engagement Lab and its services. OTF may ask the vendor to participate in specific conferences or other events to promote the lab to potential beneficiaries and related stakeholders.

C. Reporting

The vendor will be expected to submit a short monthly report on activities, as well as provide a quarterly report on completed Lab engagements to share acquired knowledge for the benefit of the community.

III. Proposal Submission

Please send your full submission by **Friday, September 13, 2024** to **impactlab-rfp@opentech.fund**.

Submission Requirements

Your Proposal **must** include the information listed below. Please double-check that your submission contains **all** of the required information before submitting.

1. An overview of your organization, company or individual expertise;
2. Specify the Primary Services which you will provide as a Service Partner, along with fully burdened hourly rates;

3. Confirm your understanding of, and ability to provide, the listed Support Services in addition to the Primary Services;
4. Describe and provide evidence of relevant qualifications for Primary and Support Services as listed above (at least two relevant projects for each Primary Support Service you would like to offer), including:
 - **Motivation for Working with OTF:** Tell us why you would like to work with OTF and why you feel you are well-suited to support individuals and organizations working to advance internet freedom.
 - **Network and Community:** Describe the organizations and individuals you aim to focus on as an Impact and Engagement Lab partner, and list relevant experience working with activists, human rights defenders, journalists, and the wider internet freedom community.
 - **Promotion and outreach strategy:** Describe your outreach strategy to the relevant network and community you've described above. How would they learn about the OTF Impact and Engagement Lab and the services you provide?
 - **Security Protocol:** Please elaborate on your experience working discreetly and in handling sensitive data and the procedures you/your organization has in place to protect the privacy and security of the applicants you work with – particularly those facing higher levels of risk, and those with sensitive profiles.
5. An overview of your predicted capacity to offer services under the Lab, including how many engagements you expect to undertake per month and/or year, if selected;
6. Language proficiencies: what, if any, languages besides English are you able to provide outputs and/or support?
7. Biographical sketches or CVs of the key employee(s) and staff who would be assigned to this project;
8. An overview of other relevant services you may provide, if any;
9. Two (2) letters of support from groups you worked with and who are part of the communities you aim to serve. Please attach their reference letters, and not just their contact details.
10. An acknowledgement that the vendor accepts the Standard Provisions in Appendix A.

Pricing

Provide a fully-burdened hourly rate for providing services to Open Technology Fund on a per-work-order basis. If you are providing a discount on your regular commercial rates, please also provide those commercial rates for comparison. OTF will not be separately covering materials or incidental costs, so please ensure your hourly rate will cover all costs associated with the services to be provided.

Any travel necessary for the implementation of Lab services will have costs covered via reimbursement, with allowable costs agreed on a per-work-order basis. As such, these costs should not be built into your fully-burdened rates.

Individuals have until August 12, 2024 to contact impactlab-rfp@opentech.fund with questions regarding this RFP. The questions will be collected and answers will be published publicly on OTF's website by August 15, 2024. If it becomes necessary to revise any part of this RFP, an Addendum will be published on OTF's website.

Restrictions on the use of data contained within a proposal must be clearly stated. Due to OTF's evaluation process for RFPs, it cannot sign non-disclosure agreements with any bidder. All material submitted regarding this RFP becomes the property of OTF and will only be returned to the bidder at OTF's option.

All costs incurred in the preparation of the proposal response to this RFP will be the responsibility of the responding vendors and will not be reimbursed by OTF.

IV. Schedule of Activities

July 16, 2024	RFP announced
August 12, 2024	Deadline for Questions
September 13, 2024	Proposal submission due
November 18, 2024	Anticipated start date

V. Selection Process

The criteria for selection of the successful proposal will include adequacy and completeness of the proposal, general experience, qualifications, and review of prior work. Although the price will be an important factor, it will not be the only factor considered.

We will primarily be evaluating price in relation to an applicant's expertise, experience, and record. We will not be considering geography as a factor when evaluating applicants' hourly rates, and so we advise all applicants globally to price themselves in relation to the expertise and skill sets they feel they will bring to the Lab, and with reference to international rather than locally adjusted practitioner rates.

OTF reserves the right to accept or reject any or all bids, to take exceptions to the RFP specifications, and to waive any requirements stated herein.

OTF reserves the right to make an award based solely on the proposals or to negotiate with one or more vendors. Issuance of this RFP, preparation, submission, and evaluation of bidder responses does not commit OTF to award a contract to any vendor. The award of the IDIQ contract does not guarantee the award of work orders under that contract, which will vary based on need and availability. OTF reserves the right to cancel or modify this solicitation at any time for any reason within its sole discretion without liability.

VI. Other Provisions

OTF, in its sole discretion, will make the final determination as to the acceptability of all work products due hereunder.

The vendor shall not issue, or permit to be issued, during the period covered by this contract or at any time thereafter, publicity in any form respecting the work hereunder or the fact of its participation herein, unless such publicity is first approved in writing by OTF.

In the event any portion of the cost of the services provided hereunder includes travel cost reimbursement, the vendor shall obtain advance approval of OTF and all travel expenditures must conform to the Standard Government Travel Regulations.

The vendor hereby agrees that all Work Product produced under the contract will be the sole property of OTF and the fees to be paid to the Vendor are full, fair and adequate compensation for Vendor's conveyance to OTF of copyrights in all Work Product.

The awarded contract will be based on OTF's standard contract terms, including a termination for convenience provision, and will also include the relevant U.S. Government provisions, which are attached here as Appendix A. Please note these terms are subject to change.

APPENDIX A STANDARD PROVISIONS FOR USG-FUNDED AGREEMENTS

As a condition to receiving federal funds from OTF under this Agreement, the Contractor agrees to comply with the following provisions:

1. Debarment, Suspension, Ineligibility, and Voluntary Exclusion. In accordance with USG Executive Orders 12549 and 12689, Contractor certifies that neither it nor any of its principals is presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this Agreement by any U. S. Government department or agency.
2. USG Funding Agency Non-liability. The USG Funding Agency does not assume liability for any third party claims for damages arising out of this Agreement.
3. Travel. The Contractor agrees to use U.S. flag carriers to the extent possible for all air travel and transportation arrangements funded by the U. S. Government under this Agreement. The Contractor must abide by the requirements set forth in the Fly America Act of 1974, which is incorporated by reference.
4. Rights to Invention. Contracts or agreements for the performance of experimental, developmental, or research work shall provide for the rights of the Federal Government and the recipient in any resulting invention in accordance with 37 CFR part 401, "Rights to Inventions Made by Nonprofit Organizations and Small Business Firms Under Government Grants, Contracts, and Cooperative Agreements," and any implementing regulations issued by the awarding agency.
5. Equal Employment Opportunity. If the Agreement is to be performed in the U. S. or to be performed with employees recruited in the U. S., the Contractor agrees to comply with Executive Order 11246, entitled "Equal Employment Opportunity," as amended, and as supplemented in Department of Labor Regulations (41 CFR Part 60).
6. Nondiscrimination. To the extent such laws apply to the Contractor; the Contractor agrees to abide by U.S. laws in regards to nondiscrimination of U.S. citizens or legal residents working under the Agreement.
7. Anti-Lobbying. For Contracts of \$100,000 or more, the Contractor certifies that no funds will be used to lobby, influence or attempt to influence any person or organization in connection with obtaining any Federal contract, grant or any other award covered by 31 USC 1352.
8. Terrorist Financing. In accordance with Executive Order 13224, the Contractor will not engage in transactions with, or provide resources or support to individuals and organizations associated with terrorism, including those organizations and individuals identified in lists promulgated by the U.S. Government, the United Nations and the European Union. It is the legal responsibility of the Contractor to ensure compliance with these laws. This provision must be included in all lower tier subcontracts issued under this Agreement.
9. Prohibition on certain telecommunications and video surveillance services or equipment. Contractor certifies that none of the funds payable under this contract will be used to procure or obtain the equipment, services, or systems that uses covered

telecommunications equipment or services as a substantial or essential component of any system, or as critical technology as part of any system in compliance with the National Defense Authorization Act. Covered telecommunications equipment and services include the following:

- Telecommunications equipment produced by Huawei Technologies Company or ZTE Corporation (or any subsidiary or affiliate of such entities).
- For the purpose of public safety, security of government facilities, physical security surveillance of critical infrastructure, and other national security purposes, video surveillance and telecommunications equipment produced by Hytera Communications Corporation, Hangzhou Hikvision Digital Technology Company, or Dahua Technology Company (or any subsidiary or affiliate of such entities).
- Telecommunications or video surveillance services provided by such entities or using such equipment.
- Telecommunications or video surveillance equipment or services produced or provided by an entity that the Secretary of Defense, in consultation with the Director of the National Intelligence or the Director of the Federal Bureau of Investigation, reasonably believes to be an entity owned or controlled by, or otherwise connected to, the government of a covered foreign country.

10. Domestic Preferences for Procurements.

a. As appropriate and to the extent consistent with law, the Contractor should, to the greatest extent practicable provide a preference for the purchase, acquisition, or use of goods, products, or materials produced in the United States (including but not limited to iron, aluminum, steel, cement, and other manufactured products).

b. For purposes of this section:

“Produced in the United States” means, for iron and steel products, that all manufacturing processes, from the initial melting stage through the application of coatings, occurred in the United States.

“Manufactured products” means items and construction materials composed in whole or in part of non-ferrous metals such as aluminum; plastics and polymer-based products such as polyvinyl chloride pipe; aggregates such as concrete; glass, including optical fiber; and lumber.