

## **Request For Proposal (RFP)**

**Issued by  
FIRST.Org, Inc.**

### **SECRETARIAT SERVICES**

**Submittal Deadline: November 6, 2015**

## **INTRODUCTION**

FIRST.Org, Inc. (FIRST) is a recognized global leader in computer network incident response and security. Membership in FIRST enables incident response teams to more effectively respond to security incidents by providing access to best practices, tools, and trusted communication with member teams. FIRST is a nonprofit membership association of over 300 member teams from over 60 nations. FIRST.Org Inc. is a U.S. nonprofit corporation and is recognized by the U.S. Internal Revenue Service as a 501(c)(3)tax-exempt organization.

### **FIRST's Mission Statement**

- FIRST is an international association of trusted computer incident response teams who cooperatively handle computer security incidents and promote incident prevention programs.
- FIRST members develop and share technical information, tools, methodologies, processes and best practices
- FIRST encourages and promotes the development of quality security products, policies & services
- FIRST develops and promulgates best computer security practices
- FIRST promotes the creation and expansion of Incident Response teams and membership from organizations from around the world
- FIRST members use their combined knowledge, skills and experience to promote a safer and more secure global electronic environment.

## **SECTION 1 RFP PURPOSE**

The FSS (First Secretariat Services) is the administrative infrastructure behind the workings of FIRST. The FSS provides support in a number of areas:

- Membership communication and support
- Dues management support to the CFO of FIRST.ORG, Inc.
- General management and meeting support
- Overall/general communications throughout FIRST

This RFP calls for applicants to manage the full lifecycle of FSS services for FIRST,Org, Inc.

## **Section 2 Contractor's Responsibilities and Requirements**

The FSS is responsible for the smooth running of communications and communications related services to the FIRST membership, potential membership and FIRST.ORG, Inc's Board of Directors. The FSS often represents the "first face of FIRST" for new members and their role within the maintenance and administration of many of our resources represents a vital link to FIRST. The duties outlined in this RFP highlight the most critical aspects of this communication. All parties interested in providing Secretariat Services to FIRST are expected to fulfill these primary duties, but are also encouraged to bring to FIRST their own ideas and systems to assist with the day-to-day running of a world-renowned Incident Response organization.

FSS serves as management front office and project managers. Their deliverable is the service, and that may mean volunteers it may mean contracted others, but FSS has to make it happen, chase things up, and be ready with contingency plans if specific plans and objectives do not pan out.

The Contractor's responsibilities in performance of this requirement include:

### **Membership support**

The FSS shall provide direct and indirect support to the membership in a variety of areas. The following category the critical areas of responsibility:

Support for the application process (in co-operation with the Membership Committee and the FIRST.ORG CFO and CPA): The FSS should work closely with the FIRST Membership Committee

(MC) to provide any required logistical and/or communications related assistance as needed for all new FIRST applicants. This includes, but is not limited to: general questions and answers regarding the membership process, review of membership applications for completeness, keeping potential members informed of their status within the process and working closely with both the Steering Committee and the Membership Committee during the application process.

The FSS should also maintain whatever electronic resources necessary to expedite the application process, such as a Wiki/FAQ to provide clear instructions and guidelines for those interested in becoming FIRST members.

### **Membership maintenance support**

The FSS shall act as a primary point of contact for all FIRST members needing assistance with their membership status. Some expected types of assistance include, but are not limited to: resolving errors/inconsistencies with membership team data, working with Team Reps to assure changes to team memberships are reflected in a timely manner and forwarding any relevant requests (such as major team changes) to the Membership Committee and Steering Committee as appropriate.

The FSS should also maintain an “exit procedure” for Teams who wish to end their FIRST membership; this procedure should provide feedback to the Steering Committee and Membership Committee for future reference.

### **Membership database**

The FSS is responsible for the accuracy of the FIRST Membership Database. This Database should also contain accurate information as to individual team members within a given FIRST Team’s membership. FIRST members often rely upon PGP for secure communications. It is the responsibility of the FSS to update information in relevant databases based on membership updates.

### **Dues and financial obligations**

The FSS shall work closely with the FIRST.ORG, Inc. Chief Financial Officer and appointed accountant to facilitate communications with the Membership regarding their financial standing within FIRST.

Whilst the FSS will not be directly responsible for financial matters and invoicing FIRST members, they should provide an effective conduit for communication and information between interested parties. As requests are forwarded to the CFO and/or accountant, the FSS will ensure a timely reply and eventual issue resolution.

The FSS shall also collect general feedback on this process (insofar as it involves them) to assist the FIRST.ORG, Inc. CFO, accountant and Steering Committee with ensuring it is running in as smooth and professional manner as possible.

### **General management**

The FSS shall be responsible for a variety of tasks regarding the scheduling and management of meetings of FIRST bodies. This includes, but is not limited to: The FIRST Board of Directors, the Annual General Meeting, Special Meetings, Technical Colloquia and Conferences calls.

It is expected that FSS will adopt a “Front Office” role with respect to the management of all FIRST services delegated to the FSS.

It is essential that the FSS maintains the style, professionalism and security of all world and membership facing systems. FIRST is a leader in the incident response community, and the FSS is expected to assist in maintaining that leadership in the services it manages and provides.

Any and all services maintained by FSS for FIRST are expected to meet the same standard and quality of service, and all appropriate support will be provided to the FSS by the FIRST Board of Directors in order to help them meet these standards.

### **Meeting support**

This support shall consist of a variety of logistical, planning and preparatory responsibilities, such as the management of all dates and locations (in co-operation with the Chair and other appointed representatives of FIRST to arrange scheduling), management of meeting logistics for non-AGM face-to-face meetings (in co-operation with Chair on agenda management), tracking of all voting, proxies and ballots.

Further, the FSS shall maintain the list of action items as decided at meetings and work closely with tasked members/teams to assure completion of obligations.

Meeting minutes are the responsibility of the FSS. The FSS shall ensure that minutes are taken in a consistent fashion and distributed for approval and general communication in a timely and efficient manner. The FSS shall also ensure that all vote results and minutes are distributed to the FIRST.ORG, Inc. corporate lawyer in addition to the FIRST Membership as a whole.

### **Technical Colloquia**

With respect to technical colloquia, Host Organisations maintain primary responsibility for all TC logistics, however, the FSS shall work closely with the Host Organisation to provide support and assistance as appropriate.

The FSS may also act as program co-ordinator, in conjunction with a team of volunteers from FIRST membership and/or the Board of Directors to manage the publication of the TC program, assist in preparation of the TC Chair, and processing of any TC related surveys conducted during the event. The FSS shall also report regularly to the Board of Directors (or appointed liaison) on the status of these items.

The FSS also plays a vital role in other aspects of the running of a successful TC, including, but not limited to: maintenance of a TC Checklist for the Host Organisation and class co-ordinator, information distribution about the TC communications channels (website, email, etc.), providing registration services for FIRST membership to attend a TC, and distribution of any shareable material to the FIRST membership after the completion of a Technical Colloquia.

During the TC event itself, the FSS shall provide on-site assistance in areas such as providing the TC-Chair with requisite material and information, interacting with the Host Organisation and their appointed staff, assisting in the preparation and distribution of Certificates of Completion, and other services as requested by the Host Organisation or Board of Directors.

### **Annual conferences**

During the Annual General Meeting / Annual Conference, the FSS shall provide assistance to the program and logistics co-ordinators in such a way that facilitates a smooth-running event. This support may include items such as providing process consultancy from a senior FSS member to improve quality and continuity and providing conference webpages.

The FSS shall also assist the program committee process in areas such as receiving and managing abstracts & biographies, distribution of abstracts to reviewers, receiving and managing papers for publication and eventual distribution of all shareable material to FIRST members and non-members.

Upon completion of the annual conference, the FSS shall facilitate the posting of conference presentations and other material via the FIRST website in a timely fashion and with due permission from all contributing sources.

Availability of the FSS to answer questions from members and non-members regarding the conference via e-mail is also an essential FSS support service; the FSS is expected to ensure clear communications with all interested parties regarding the annual conference and provide feedback to the program committee and steering committee as appropriate.

### **Project Management and Notetaking**

In support of FIRST initiatives and Special Interest Groups, the FSS shall provide notetaking services, as well as coordinating meeting invites, logistics and overall support to enable the initiative. Report back regularly on project status to the FIRST Board of Directors.

## **SECTION 3.0 PROPOSAL PREPARATION AND SUBMISSION**

- The response must include costs to provide all services outlined in this RFP.
- Describe how your proposal meets each requirement of Section 2 of this RFP.
- Identify the individuals who would contribute to the project. Describe the qualifications of each individual.
- Provide references from jobs of similar size and scope with the proposal submittal.
- Provide examples of work from jobs of similar size and scope with proposal submittal.
- Any agreements (e.g. licenses, etc.) that vendor or any third party proposes to be entered into as part of a contract resulting from this RFP must be included with the proposal response.
- A representative authorized to bind the company must sign the proposal.
- The proposal must be submitted in PDF form via email to [rfp-response@first.org](mailto:rfp-response@first.org).
- Proposal Receipt Deadline: November 6, 2015

If you have questions concerning this RFP please contact the FIRST Chair:

Ms. Margrete Raam  
[rfp-response@first.org](mailto:rfp-response@first.org)  
FIRST.Org, Inc.  
P.O. Box 1187  
Morrisville, North Carolina 27560-1187

### **Additional Terms**

A response to this proposal does not create any agreement between vendor and FIRST.Org, Inc. and does not create any commitment on the part of FIRST.

If a contract is awarded, FIRST reserves all options regarding the terms of the contract and will establish the terms at the point of issuing a contract.

FIRST reserves the right to amend or cancel this RFP at any time prior to the submittal deadline.

All material submitted regarding this RFP becomes the property FIRST.

If a prospective vendor includes any information in a proposal that it wishes to keep confidential, it shall clearly identify such information in the proposal.