



# Artificial Intelligence Expert

Request for Qualifications

**Date distributed:** July 9, 2024  
**Deadline for questions:** July 19, 2024  
**Date proposal due:** August 2, 2024  
**Submission:** [RFQ Submission Portal](#)  
**Contact:** Kelly Foster  
Senior Associate Partner, Policy and Evaluation  
[kelly.foster@bellwether.org](mailto:kelly.foster@bellwether.org)

# Contents

## RFQ Introduction

### Organization Background

Bellwether is a national nonprofit that exists to transform education to ensure systemically marginalized young people achieve outcomes that lead to fulfilling lives and flourishing communities. We work hand in hand with education leaders and organizations to accelerate their impact, inform and influence policy and program design, and share what we learn along the way.

Bellwether believes that our education system should celebrate the inherent worth of all students and afford them the ability and opportunity to lead productive and fulfilling lives. We work to create a world in which race, ethnicity, and income no longer predict long-term outcomes for students.

Our Core team ensures that Bellwether is a sustainable, inclusive organization where staff are supported to do their best and most impactful work.

Our External Relations team develops and implements strategy for Bellwether's fundraising and communications and leads Bellwether's external relations work.

Our Policy and Evaluation practice conducts analyses that inform leaders, organizations, and the broader field on ways to improve their work for America's underserved students. We produce quantitative and qualitative analyses of contemporary education issues, conduct traditional and innovative evaluations, and generate new ideas and solutions for the sector. We offer recommendations to improve outcomes for underserved youth across the P-20 landscape informed by rigorous analytical methods; our extensive understanding of the local, state, and federal policy landscape; and our experience working with a wide range of educational and early childhood systems, leaders, and practitioners.

Our Strategic Advising practice is deeply experienced in supporting educational organizations – districts, states, charters, nonprofits, and foundations – to develop ambitious but achievable plans to increase their impact on underserved students. We advise leaders and organizations on their most pressing strategic and operational issues. Our work ranges from supporting entrepreneurs through business plan development to partnering with established organizations on growth and performance improvement to assessing new opportunities for impact as the field evolves. We develop highly actionable plans that leadership teams own and run with.

### Confidentiality Statement

The information contained in this document is proprietary to Bellwether. It is distributed for the sole purpose of providing information for your response to Bellwether's Request for Qualifications. As

such, this document or any part thereof may not be reproduced or redistributed without written consent from Bellwether.

## **Description of Services**

Bellwether is actively working to embed AI throughout the organization. Over the past year we have created a variety of internal AI-related resources, including an AI Playbook that provides a set of guiding principles for how team members can use AI and an AI Use Policy that covers issues such as use, misuse, and data protection and privacy. We also convened an internal AI task force comprising a set of AI “power users” to lead training, communication, and needs identification across the team. To date, the team has received some basic training on using tools like ChatGPT, resulting in base-level knowledge of AI tools across the full Bellwether team.

Given that context, Bellwether is seeking an external contractor to help us build on and accelerate our progress. The contractor would be responsible for activities including:

- Supporting the development of a three-year roadmap for AI implementation at Bellwether.
- Identifying the specific tools and technologies that will be associated with the organization’s AI adoption and mapping them to the roadmap.
- Promoting and building understanding, awareness, and buy-in for the AI roadmap across the organization.
- Engaging with internal teams to understand needs and identify high-impact use cases and opportunities to apply AI across teams and practice areas.
- Analyzing workflows, data, and processes to identify areas for AI-driven efficiencies.
- Evaluating, selecting, and supporting the implementation of AI tools, models, and solutions that enhance team members’ capabilities.
- Designing and supporting change management efforts related to AI adoption across the organization.
- Supporting AI pilots and use-case testing across different practice areas.
- Providing training and guidance to internal teams.
- Capturing learnings from AI pilots to scale and expand adoption across the team.
- Providing program- and project-level support for select AI-related activities, ensuring alignment with the overarching vision, strategy, and roadmap.

## **Proposal Instructions**

### **Proposal Submission Due Date**

Proposals should be received via the [RFQ Submission Portal](#) by 11:59 p.m. ET on Friday, August 2, 2024. Submissions received any other way will not be considered.

## **Late Proposals**

Bellwether reserves the right to accept or reject without consideration any proposal that does not fully address the requirements of the RFQ or arrives in the designated portal after the proposal due date and time identified.

If portions of the response do not comply with any specifications, items, or scope of the RFQ, the Respondent should clearly highlight any such non-compliance for easy identification.

If the proposal response is at variance with the requirements of any item in the RFQ, then the Respondent shall describe in detail, with full support data, the reasons why the proposal response still meets the requirements and should not be considered an exception to the RFQ or be treated as a partial response. Each proposal response classified as a variance statement should be clearly identified.

## **Evaluation and Selection Criteria**

Each response received must adhere to the instructions, format/content, and specifications described in the Respondent Questionnaire section below. This will ensure that evaluation criteria can be systematically applied to all respondents. The major criteria categories for selection and evaluation are listed in priority order:

- Completeness and quality of response to questionnaire.
- Strength of skill alignment as demonstrated by responses and work products.
- Competitive costs for services provided.
- Flexibility of the respondent to meet potential project needs, including travel, working hours, and commitment to tailored excellence.
- Alignment with Bellwether's DEI (Diversity, Equity, and Inclusion) commitments.

## **Interview**

Respondents who submit qualifications that meet the request described below will be recommended to attend an interview with leaders from the Bellwether team. Kelly Foster will notify each submitting Respondent of the decision to grant an interview or not. This decision will be the final decision for qualification under the RFQ. Receiving and attending an interview should not be considered an acceptance or agreement to contract with Bellwether.

## **Final Selection and Award**

Kelly Foster will notify each participating Respondent of the selection/approval or denial of their qualifications submission. This decision will be the final decision for qualification under the RFQ. Bellwether reserves the right to reject any portions of or all proposals without giving reason for the rejection.

No qualifications will be deemed final until the contractor/vendor executes a Master Services Agreement with Bellwether. The selection and contracting process will not be separate.

## Additional Clarifications and Questions

We are committed to a transparent and equitable RFQ process. As a result, we will publicly respond to all clarification requests and follow-up questions [here](#). Please check the website before submitting additional questions to Kelly Foster at [kelly.foster@bellwether.org](mailto:kelly.foster@bellwether.org).

## Respondent Questionnaire

Complete responses must comport to the following format. For any questions that do not have an answer due to your unique context, please list N/A to ensure completeness of response.

- A. Executive Summary
  - a. Name:
  - b. Name of your company, if applicable:
  - c. Email address:
  - d. Phone number:
  - e. Mailing address:
  - f. LinkedIn profile:
  - g. URL, if applicable:
  - h. Prior existing relationships within Bellwether:
- B. Qualifications
  - a. Please detail your interest in, use of, experimentation with, and knowledge of AI tools.
  - b. Please detail your experience and interest in the education sector and, to the extent possible, your experience with AI in education specifically.
  - c. Please detail your background in or experience with professional services organizations.
  - d. Please detail your background in or experience with research or “think tank” organizations.
  - e. Please detail your experience working with organizations to define a strategy and support effective implementation.
  - f. Please list all professional degrees, certifications, and licenses.
- C. Sample Workplan
  - a. Please provide a high-level workplan designed to accomplish the set of bulleted tasks listed in the Description of Services section above. The workplan should include:
    - i. A description of your overarching approach to the work
    - ii. Detailed activities you would undertake
    - iii. Key milestones
    - iv. The outputs or outcomes of each activity/milestone
    - v. An anticipated timeline
    - vi. Required resources (e.g., Bellwether staff time)
    - vii. Proposed stakeholder engagement plan
    - viii. A description of final deliverables
    - ix. A projected budget amounting to no more than \$60,000
- D. Organization and Team Member Information

- a. Please provide a brief biography (1-2 paragraphs) for any team member or individual contributor who would complete work under this contract and describe the role that the team member would play on this engagement.
  - b. Please describe your organization's mission and the services offered. Also describe your organizational structure (if there is more than one team member), including communication process, lines of reporting, and any special tools used.
  - c. Please share a brief statement that indicates your current availability to take on new projects through August 2025. This might include how much notice you would require to begin a scope of work, your openness to travel, and how many hours a week you are looking to work.
  - d. Please explain how you/your organization considers equity in your work.
- E. Budget (*Please note that travel costs need not be included below. These incurred costs will be reimbursed to the Vendor at the point of invoicing.*)
- a. Please include a table that breaks down hourly costs, including individual team member time.
  - b. Please identify any specialized technology and tools you require to complete your work and their associated costs.
- F. Attachments
- a. Please attach annotated relevant work samples that speak to your ability to deliver on each of the key skills and experiences requested. Please indicate which skill or experience a given work sample is highlighting. One work sample may be sufficient for multiple skills and experiences, but the accompanying annotations (either inserted at relevant points throughout the document or attached as a narrative explanation) should clearly speak to evidence of excellence of each.
  - b. Please attach contact information for three (3) current or former colleagues or clients to provide references for your proposed services and a brief description of the scope of work you completed for each client.
  - c. Please attach a recent resume for any team member seeking to qualify under this RFQ.
  - d. Please attach additional materials at your discretion.