



CHESAPEAKE BAY FOUNDATION

Saving a National Treasure

Responsible AI Advisory and Tool Evaluation Services
Request for Proposal
September 9th, 2026

Due Date and Time

September 30th, 2026, at 5:00 pm ET

Administrative Information

Issuing organization: Chesapeake Bay Foundation, Inc.

Address: 6 Herndon Ave., Annapolis, MD 21403

RFP title: AI Advisory and Tool Evaluation Services

Point of contact: Rosie McNeely, rmcneely@cbf.org

Issue date: September 9th, 2026

Intent to bid: Please provide an email to CBF's point of contact if you intend to bid on this proposal. Providing this information will allow you to be copied with all updates to the RFP process including vendor submitted questions and responses.

Vendor questions due: September 21st, 2026 by 12:00 pm ET

Proposals due: September 30th, 2026 by 5:00 pm ET

Anticipated award: no later than October 31st, 2026

Submission method: [Submit your responses here](#)

Confidentiality: All information included in this RFP is considered confidential and intended only for use by responders. No information included in this document, or in discussions related to CBF's AI usage may be disclosed to another party or used for any other purpose without the express written consent of CBF.

Introduction, Background, and Context

About CBF

Founded in 1967, the Chesapeake Bay Foundation (CBF) is the largest independent conservation organization dedicated solely to saving the Bay. Serving as a watchdog, we fight for effective, science-based solutions to the pollution degrading the Chesapeake Bay and its rivers and streams. With offices in Maryland, Virginia, Pennsylvania and the District of Columbia and 15 field centers, CBF leads the way in restoring the Bay and its rivers and streams.

Background and Context

The Chesapeake Bay Foundation (CBF) is requesting proposals to help guide and inform the organizations' use of Artificial Intelligence (AI) over the next 2-3 years. CBF has to date done the following related to its AI journey.

1. Adopted an internal CBF IT Artificial Intelligence Policy intended to guide safe, responsible, ethical, thoughtful, and human-centered AI use by staff, interns, and contractors.

2. Conducted basic organization wide AI training and a pilot program using Microsoft Copilot. The pilot found useful applications for summarizing, drafting, analyzing documents and spreadsheets, searching across Outlook, Teams, Box, and OneDrive, meeting preparation, schedule organization, simple coding, and agent experimentation. The pilot also identified barriers, including staff skill gaps, hesitation, privacy concerns, environmental impact, emotional resistance, and the need to move beyond research and writing toward higher value uses.
3. Formed an AI committee comprised of a cross section of departments to help guide organizational use and adoption of AI.
4. Created a list of where and how AI is being used in it's current tech stack.

The AI Committee was formed to ensure AI decisions are not made by IT alone, but by a cross-organizational group that considers responsible use, ethics, workforce implications, efficiency, environmental impact, and organizational guidance. Committee is currently engaged in gathering broader staff input, evaluating current AI tools, and additional staff training.

CBF's leadership believes that AI should not be adopted for its own sake. AI should be used thoughtfully, in service of CBF's mission, with attention to credibility, fact checking, disclosure, resource use, and staff training.

This RFP seeks a consultant to help CBF move from experimentation and policy awareness into a practical, mission-aligned evaluation of where AI can create value, which tools or capabilities fit those needs, and what guardrails are required.

Purpose and Engagement Objectives

CBF seeks a consulting partner to conduct a focused evaluation of high-value AI opportunities, existing and alternative tools, organizational readiness, risks, and sustainability considerations.

This is **not** a comprehensive inventory of every potential AI use case or AI feature embedded in CBF's software environment. It is also **not** an implementation, procurement, custom model development, or full multi-year AI transformation engagement. The work will result in prioritized recommendations, a phased path forward, and a decision framework that CBF can use to guide future decisions.

The engagement objectives are:

1. **Mission-first needs and opportunity discovery:** Identify a manageable set of significant, recurring, or cross-functional processes where AI or another approach

could advance CBF's mission, improve operations, reduce organizational burden, support staff, or create value for stakeholders.

2. **Problem and workflow assessment:** Define the underlying needs, workflow challenges, data conditions, and organizational barriers before determining whether AI is appropriate. Identify where process improvement, data cleanup, conventional automation, training, policy changes, or better use of existing software may be more effective.
3. **Focused use-case prioritization:** Screen broad opportunity areas and prioritize a manageable shortlist of use cases based on mission value, anticipated benefits, readiness, feasibility, risk, sustainability, cost, and organizational capacity.
4. **Existing AI tool alignment:** Recommend how CBF's current AI tools and relevant capabilities should fit into its overall AI strategy and phased plan, without conducting a comprehensive inventory of AI features embedded in enterprise applications.
5. **External tools and alternatives where justified:** Evaluate external AI tools, alternative AI approaches, or non-AI solutions only when existing capabilities do not adequately meet a prioritized need or when another option offers a meaningful advantage in value, governance, sustainability, accessibility, cost, or risk.
6. **Integrated sustainability and responsible AI review:** Incorporate environmental impact, vendor transparency, privacy, security, copyright, bias, accuracy, reliability, accessibility, appropriate human oversight, policy alignment throughout the evaluation and recommendations.
7. **Actionable recommendations and decision framework:** Provide a phased path forward and repeatable framework that CBF can use to make future decisions about AI use cases, tools, pilots, embedded features, renewals, and staff requests without committing immediately to implementation or procurement.

Guiding Principles

The vendor's work must reflect the following principles:

- **Mission before technology:** CBF adopts AI only where it advances mission, improves staff effectiveness, or solves a real organizational problem.
- **Needs before tools:** The engagement must begin with outcomes, workflows, staff needs and use cases before recommending tools or model approaches.

- **Existing investments first, but not automatically:** The vendor must evaluate tools CBF already owns or licenses but must not assume those tools are the best fit.
 - **External tools where appropriate:** The vendor must assess external tools when existing tools lack functionality, create unacceptable risk, lack transparency, have poor sustainability performance, duplicate capabilities, or impose higher long-term cost.
 - **Environmental stewardship throughout:** Energy, water, carbon, vendor transparency, and sustainability tradeoffs must be evaluated within every relevant workstream, deliverable, and recommendation.
 - **Human-centered responsible AI:** AI must augment human judgment, not replace it. CBF's policy requires AI output to be treated as a first draft, manually reviewed, checked for accuracy, reviewed for bias, and approved through Communications for external AI-generated content.
 - **Inclusive and not IT-driven alone:** Staff perspectives, leadership input, AI Committee input, and department-specific needs must inform the evaluation.
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Scope of Work and Workstreams

Workstream 1: Mission, Needs, and Workflow Discovery

The vendor will identify and clearly define organizational needs, workflow challenges, and mission opportunities where AI or another approach could create meaningful value for CBF.

Discovery should focus on a manageable set of significant, recurring, or cross-functional processes with the greatest potential to advance CBF's mission, reduce organizational burden, or improve operations. **The vendor is not expected to inventory every workflow, task, or possible AI use case across CBF.**

The vendor must:

- Review CBF-provided materials, including its AI policy, pilot findings, AI Committee notes, relevant leadership materials, and other planning documents.
- Conduct structured interviews and working sessions with CBF leadership, the AI Committee, IT, and representative staff.

- Work with CBF staff to conduct inclusive discovery activities such as listening sessions that incorporate perspectives from AI users, non-users, skeptics, and staff with different roles, experiences, accessibility needs, and levels of readiness.
- Identify administrative burdens, repetitive or inefficient workflows, data challenges, mission-facing opportunities, and opportunities to improve service to CBF's stakeholders and partners.
- Clearly define the underlying problem or need before identifying AI as a potential solution.
- Distinguish between needs that may benefit from AI and those better addressed through process improvement, data cleanup, conventional automation, training, policy changes, or more effective use of existing software.

Workstream 2: Use-Case Prioritization and Value Assessment

The vendor will translate discovery findings into an initial set of broad opportunity areas and, in consultation with CBF, select a manageable number of the most promising use cases for further evaluation. **The vendor is not expected to evaluate every potential application of AI identified during discovery.**

Only the shortlisted use cases must be evaluated using consistent criteria that address:

- Alignment with CBF's mission and organizational priorities
- Anticipated value for staff, operations, stakeholders, or partners
- Availability of an effective non-AI or process-based alternative
- Data readiness and technical feasibility
- Fit with CBF's existing AI tools and capabilities
- Staff readiness, usability, accessibility, and training or change management needs
- Privacy, security, copyright, bias, accuracy, reliability, and human oversight considerations
- Environmental impact and the availability of lower-impact approaches
- Cost, level of effort, dependencies, and overall value

The vendor must document the rationale for each prioritization and identify any significant limitations, assumptions, or information gaps that affect the assessment.

The final prioritization must categorize use cases as:

- Near-term opportunities using existing capabilities
- Candidates for targeted pilots or further evaluation
- Medium-term opportunities
- Opportunities requiring foundational work before proceeding
- Use cases CBF should not pursue at this time, with rationale

Vendors should propose the number of broad opportunity areas and shortlisted use cases they can meaningfully assess within the proposed scope, timeline, and budget. The engagement is not intended to produce a comprehensive inventory or evaluation of every possible AI use case, staff task, or departmental workflow.

Workstream 3: Existing AI Tool Assessment

CBF IT has an established understanding of AI capabilities embedded within its core enterprise applications. Therefore, this workstream should focus primarily on tools already licensed, approved, or in use by CBF whose principal function is AI, rather than conducting a comprehensive inventory of every AI feature embedded within CBF's software ecosystem.

The vendor must assess, as applicable:

- Microsoft 365 Copilot and Copilot Chat
- AI meeting, transcription, and note-taking tools
- AI assistants, chatbots, and content-generation tools
- AI-powered research, knowledge management, and internal search tools
- AI-specific analytics, reporting, or workflow automation tools
- Other tools currently used or under consideration by CBF that are primarily AI products or have full scale AI functionality such as Box AI.

The vendor is not expected to perform a comprehensive assessment of AI functionality embedded within core enterprise applications such as Salesforce, Asana, ArcGIS, finance, HR, fundraising, communications, or project management platforms. However, the vendor should identify and assess an embedded capability when it:

- Directly supports a prioritized CBF use case
- Creates a material security, privacy, compliance, accessibility, or governance concern

- Could reduce the need for a separate AI tool
- Presents a meaningful opportunity to consolidate tools, reduce costs, or lower environmental impact
- For the AI tools and material embedded capabilities reviewed, the vendor must provide an overall recommendation for how each should fit into CBF's broader AI strategy and implementation plan, including whether it should be used, expanded, restricted, replaced, or avoided.

Workstream 4: External AI Tool and Alternative Assessment

CBF does not assume that its current AI tools are the only or best options for responsible AI adoption. The vendor must evaluate external AI tools, alternative AI approaches, or non-AI solutions when CBF's existing capabilities do not adequately meet a prioritized need.

CBF is not seeking to replace core enterprise platforms such as Microsoft 365, Salesforce, Box, ArcGIS, Asana, or other established business systems through this workstream. Recommendations should focus on filling validated gaps, improving outcomes, or providing a clear superior alternative to an existing AI-specific tool or capability.

External AI tools should be assessed when they may offer:

- Better functionality for a prioritized use case
- Lower environmental impact
- Stronger governance, security, privacy, or data controls
- Greater vendor transparency
- Stronger alignment with CBF's mission and values
- Lower total cost of ownership
- Better usability or accessibility
- Less duplication or tool sprawl
- Lower risk than an existing AI tool or embedded capability
- A practical capability not available through CBF's current tools

Where justified, the vendor may consider:

- Purpose-built AI tools

- AI-powered analytics or reporting tools
- Knowledge management and internal search tools
- Workflow automation tools
- AI meeting, transcription, or note-taking tools
- Private, smaller, retrieval-based, locally operated, hosted, or cloud-based AI approaches
- Tools or models designed to reduce energy use or environmental impact
- Non-AI approaches when AI does not provide sufficient additional value

Recommendations must include a clear comparison with relevant existing CBF capabilities and explain why the proposed option is preferable to expanding, configuring, or more effectively using a tool CBF already has.

Workstream 5: Sustainability, Governance, and Responsible AI Review

This workstream must be integrated throughout the preceding workstreams rather than treated as a separate or final-stage review.

For each recommended use case and tool option, the vendor must assess, to the extent reliable information is available:

- Environmental impacts, including energy and water use
- The availability, quality, and credibility of vendor environmental disclosures
- Transparency regarding data center locations, hosting arrangements, and resource use
- The relative resource intensity of the model, tool, or workload
- Whether increased use could offset the tool's environmental efficiency benefits
- Whether a lower-impact AI or non-AI alternative could adequately meet the need
- Privacy, security, copyright, bias, accuracy, reliability, and appropriate human oversight
- Alignment with CBF's IT Artificial Intelligence Policy
- Alignment with CBF's technology purchasing and vendor security review requirements

The vendor should identify where reliable information is unavailable and should not assume that the absence of disclosed environmental or risk information indicates a low level of impact or risk.

Workstream 6: Final Recommendations and Decision Framework

The vendor will synthesize findings from all workstreams into a practical, prioritized AI strategy and roadmap that CBF can use to guide future decisions without committing immediately to implementation or procurement.

The final recommendations must include:

- Prioritized AI use cases and recommended next steps
- Recommendations for how CBF's existing AI tools and capabilities should fit into the plan
- External tools, approaches, or pilots recommended for further evaluation, where justified
- Use cases, tools, or capabilities CBF should not pursue at this time, with rationale
- Policy, governance, security, sustainability, training, change management, and communication implications
- A phased roadmap for near-term, medium-term, and longer-term priorities
- A repeatable decision framework for evaluating future AI use cases, features, renewals, pilots, and tool requests

Recommendations should identify anticipated value, key risks and dependencies, relative level of effort, and the recommended next decision or action.

Engagement Parameters, CBF-Provided Resources and Expected Deliverables

CBF anticipates a focused engagement centered on a manageable number of broad opportunity areas and shortlisted use cases. Vendors must state the number of interviews, working sessions, opportunity areas, use cases, and presentations included in their proposed fee.

CBF will provide relevant policies, pilot findings, AI Committee materials, technology context, planning documents, and access to designated staff and decision-makers. The

selected vendor will be expected to build upon this information rather than duplicate work already completed by CBF.

Final deliverables must be provided in an accessible format such as PDF and editable Microsoft Office products. Registers, matrices, roadmaps, and decision tools must be provided in formats CBF can maintain and reuse. Vendors must disclose any proprietary methods, templates, licensing restrictions, or subcontractors associated with the work.

Vendors must describe how they will protect CBF information, including any proposed use of AI tools in performing the engagement. CBF information may not be entered into public or unapproved AI services.

Expected Deliverables

Deliverable	Description
Discovery and Needs Assessment	Summary of the significant organizational needs, workflow challenges, staff perspectives, and mission opportunities identified through discovery. The assessment should focus on broad, high-value processes rather than inventorying every task or potential AI use case.
AI Opportunity Register and Prioritization	A concise summary of the broad opportunity areas identified during discovery, followed by a more detailed assessment of the shortlisted use cases. For each shortlisted use case, include the underlying need, desired outcomes, affected users, anticipated value, readiness, risks, dependencies, and prioritization rationale. Briefly summarize the opportunity areas not advanced for detailed evaluation and the basis for that decision
Existing AI Tool Recommendations	Recommendations for how CBF's existing AI tools and relevant capabilities should fit into the overall AI strategy. This deliverable is not intended to be a comprehensive inventory of AI features embedded in CBF's applications.
External Tools and Alternatives Assessment	Comparison of external AI tools, alternative AI approaches, or non-AI solutions only where existing capabilities do not adequately meet a prioritized need. The assessment should consider value, governance, sustainability, accessibility, cost, risk, and potential tool duplication.

AI Strategy and Phased Roadmap	Practical, prioritized recommendations for near-term actions, targeted pilots or evaluations, medium-term opportunities, foundational work, policy and training needs, and use cases or tools CBF should not pursue at this time. Recommendations should distinguish between actions using existing resources and those requiring additional investment or procurement.
AI Decision Framework	A repeatable framework for evaluating future AI use cases, tools, embedded features, pilots, renewals, and staff requests. The framework should incorporate mission value, organizational readiness, cost, sustainability, governance, security, responsible AI, and the availability of lower-impact or non-AI alternatives.
Executive Readout and Working Session	Presentation of findings and recommendations, followed by a facilitated working session with CBF leadership, the AI Committee, and other designated participants to review priorities, tradeoffs, and next decisions

Sustainability, governance, security, privacy, accessibility, and responsible AI considerations must be clearly documented within each applicable deliverable rather than addressed only in a separate final-stage review. Where information is limited or unavailable, the vendor must identify the resulting uncertainty or disclosure gap.

Vendor Qualifications

Minimum qualifications:

- Demonstrated experience in AI strategy, use-case evaluation, responsible AI, tool assessment, data governance, and organizational change.
- A proposed team with the collective expertise needed to address AI strategy, data governance, security, change management, and sustainability.
- Ability to assess how existing AI tools, external tools, and non-AI alternatives align with prioritized organizational needs.
- Ability to translate technical findings into clear, practical recommendations for nonprofit staff and decision-makers.

- Independence from vendors whose products may be evaluated or recommended, or full disclosure of any relationships or financial interests that could influence the assessment.

Preferred qualifications:

- Experience working with nonprofit, mission-driven, environmental, advocacy, science, education, or conservation organizations.
- Familiarity with Microsoft 365, Box, Salesforce, ArcGIS, and similar nonprofit technology environments.
- Experience integrating environmental considerations, including energy, water, carbon, and vendor transparency, into AI assessments.
- Experience with inclusive staff engagement, training, adoption, and change management.
- A track record of providing independent recommendations without promoting unnecessary tools or implementation services.

Proposal Submission Requirements

Vendors must submit one PDF containing:

1. **Executive summary, one page maximum, demonstrating the vendor's understanding of CBF's mission, values, AI context, and environmental priorities.**
2. **Discovery and staff engagement approach**, including how the vendor will identify broad, high-value organizational processes without inventorying every workflow or potential AI use case.
3. **Use-case screening and prioritization approach**, including the proposed number of broad opportunity areas and shortlisted use cases, depth of evaluation, CBF's role in shortlisting, evaluation criteria, and treatment of uncertainty.
4. **Existing AI tool assessment approach**, focused on how current AI tools fit into CBF's overall strategy rather than a comprehensive inventory of embedded AI features.
5. **External tool and alternative assessment approach**, limited to options that address a prioritized need not adequately met by existing capabilities.

6. **Approach to integrating sustainability, governance, and responsible AI throughout the workstreams**, including environmental impact, transparency, privacy, security, copyright, bias, reliability, accessibility, and human oversight.
 7. **Approach to developing the final roadmap and repeatable decision framework**.
 8. **One or two relevant case studies or sample deliverables** redacted if needed, and two client references.
 9. **Project team, roles, availability, and relevant experience**.
 10. **Proposed schedule**, including anticipated start date, overall duration, milestones, decision points, deliverable dates, and expected CBF staff participation.
 11. **Pricing by phase or workstream**, including the total fixed fee for the base scope, payment schedule, assumptions, dependencies, exclusions, optional services, anticipated expenses, and rates or costs for additional work.
 12. **Significant project risks and proposed mitigation strategies**.
 13. **Disclosure of any relationships or financial interests that could influence the vendor's assessment or recommendations**.
 14. **Disclosure if the use of AI** in crafting the response and if used, which model and version?
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Proposal Evaluation and Finalist Presentations

Stage 1: Written Proposal Evaluation

Written proposals will be evaluated based on:

- Quality, practicality, and scope discipline of the proposed approach: 30%
- Relevant experience and qualifications of the proposed team: 20%
- Strength of sustainability, governance, and responsible AI approach: 20%
- Cost and overall value: 15%
- Quality and usability of relevant prior work: 10%
- Schedule and expected level of CBF staff participation: 5%

Based on the written proposal evaluation, CBF may invite a limited number of finalists to participate in a presentation and discussion.

Stage 2: Finalist Presentation and Discussion

Finalists may be evaluated on:

- The team's understanding of CBF's needs and objectives
- The clarity, practicality, and focus of the proposed approach
- The qualifications and expected involvement of the individuals assigned to the engagement
- The team's ability to respond thoughtfully to questions and adapt its approach to CBF's context
- The feasibility of the proposed scope, schedule, staff participation, and cost
- Any clarifications or refinements to the written proposal

For finalists, the written proposal evaluation will represent 70% of the final score, and the finalist presentation and discussion will represent 30%.

Finalist presentations are expected to be conducted virtually. CBF may request an in-person presentation by mutual agreement. Vendors will be responsible for their own costs associated with proposal preparation and finalist participation unless otherwise agreed in writing.

CBF will consider both the written proposal and finalist presentation in making its final selection. CBF reserves the right to request clarification, contact references, negotiate scope and pricing, select a vendor without conducting finalist presentations, or reject any or all proposals