



## **Request for Proposals Artificial Intelligence Solutioning & Implementation Partner**

### **Background**

The Food Export Association of the Midwest USA (Food Export – Midwest) and Food Export USA Northeast (Food Export – Northeast) are not-for-profit export associations whose primary function is to develop export markets for midwestern producers and processors of value-added food and agricultural products. Our members include state agricultural promotion agencies from thirteen midwestern states and ten northeastern states.

Both groups are participants in the Market Access Program (MAP), America First Trade Promotion Program (AFTPP), and the Regional Agricultural Promotion Program (RAPP), a federal program handled by the Foreign Agricultural Service (FAS) of the U.S. Department of Agriculture. The MAP/ATP/RAPP is intended to boost the export of value-added food and agricultural products from the U.S. through a partnership between FAS and approximately 75 other industry-based trade organizations. This includes primarily commodity-specific groups, as well as two other unaffiliated regional groups similar to Food Export - Midwest and Food Export - Northeast that handle the southern and western regions of the U.S.

The products covered for export promotion by Food Export – Midwest and Food Export – Northeast include a wide variety of processed and semi-processed products found throughout the retail, foodservice, and food processing sectors. These include products or derivations of meat, dairy, poultry, seafood, grains, fruits and vegetables, salty and savory snack foods, confections, beans, sauces and condiments, pet foods, beverages, canned foods, animal feeds, bakery products, pasta and many others. Marketing channels include mass market retail, specialty foods, convenience foods, private label, healthy/organic, food ingredients, frozen foods, and others.

Food Export - Midwest and Food Export – Northeast are independent organizations that have been engaged in a strategic alliance since April of 2000. Through this alliance, the strategy and tactics of the organizations have been aligned so that the activities and services of each group are very similar with differences based primarily on geographic focus. Food Export - Midwest focuses on midwestern exporters and a series of nine overseas target markets, including China, Hong Kong, Taiwan, Japan, Korea, Southeast Asia, Mexico, Oceania, and Sub-Saharan Africa. Food Export - Northeast targets northeastern exporters and nine overseas markets, including France, Germany, the United Kingdom, Central America, Canada, South America the Middle East, Sub-Sharan Africa, and the Caribbean. By collaborating, the activities and services of each organization are open to participation by companies from the other region. The net effect is that exporters in the Midwest and Northeast have access to a larger range of export promotion opportunities, while the limited staff at Food Export - Midwest and Food Export - Northeast can focus on specific market development opportunities.

The states that are members of Food Export- Midwest include: Illinois, Wisconsin, Kansas, Minnesota, Michigan, Nebraska, North Dakota, South Dakota, Iowa, Indiana, Ohio, Oklahoma, and Missouri. Food Export – Northeast encompasses: New York, New Jersey, Vermont, Delaware, Connecticut, Massachusetts, Maine, New Hampshire, Pennsylvania, and Rhode Island.

More information about Food Export – Midwest and Food Export – Northeast is available at: [www.foodexport.org](http://www.foodexport.org).

## **Scope of Work**

### **1. Introduction & Background**

Food Export–Midwest and Food Export–Northeast (“Food Export”) seek a qualified vendor to design, develop, and fully implement an introductory Artificial Intelligence (AI) capability within our existing systems. This project will be Food Export’s first use of AI and will focus on practical, low-risk integration that supports our Customer Service and Sales (Liaison) teams.

The vendor will plan, build, configure, and deploy an AI tool that works within Microsoft Dynamics 365 and Microsoft Power BI, and will provide best practices and guidance to support responsible and effective AI use across the organization.

The project will take place during the 2026 calendar year.

#### **Objectives:**

- Implement a secure, reliable AI feature set that simplifies staff access to internal data and external intelligence.
- Provide rapid, automated summaries of participant activity, interests, touchpoints, and evaluation data stored in Dynamics.
- Use publicly available data sources to provide high-level market insights tied to participant HS codes.
- Introduce Food Export to AI through a controlled, manageable pilot approach.
- Establish foundational best practices and governance recommendations for ongoing AI use.

### **2. Scope of Work Requirements**

#### **A. Discovery & Planning**

The vendor will:

1. Conduct discovery sessions with Food Export stakeholders.
2. Review Dynamics and Power BI data structures, workflows, and current integration points and other relevant tools in place.
3. Evaluate technical readiness and system constraints.
4. Produce a documented AI Implementation Plan, including architecture, data access, security considerations, and phased rollout strategy.
5. Recommend initial AI governance and best-practice policies tailored to Food Export’s needs.

#### **B. AI Tool Design & Development**

The vendor will design and build an AI tool that includes:

##### **1. Internal Data Summarization (Microsoft Dynamics)**

AI functionality must:

- Pull participant-level information (program history, evaluations, interests, touchpoints, success stories, documents).
- Generate concise summaries and insights for staff use.
- Present information in an embedded or integrated interface within Dynamics.

## **2. External Market Intelligence (Publicly Available Data Only)**

Using HS codes and other unique data tied to a participant, and stored in Dynamics, the AI tool must:

- Identify free, authoritative sources for export statistics and market data.
- Provide high-level insights such as potential target markets, basic trade barriers, and tariff considerations.
- Cite data sources within its output.

## **3. Integration With Power BI**

The vendor will:

- Enable AI-driven commentary or contextual insights within existing or newly developed Power BI dashboards.
- Ensure seamless and secure data access between the AI layer and Power BI reports.

## **C. System Integration & Implementation**

The vendor will:

1. Fully configure and deploy the AI tool into Food Export's Microsoft Dynamics environment.
2. Implement necessary connectors, APIs, or plugins to support communication with Power BI.
3. Ensure compliance with Food Export's security, privacy, and data access requirements.
4. Perform thorough testing within staging and production environments.
5. Oversee go-live deployment in 2026, including staff onboarding and transition support.

## **D. Training, Documentation & AI Best Practices**

The vendor will create and deliver:

### **1. Staff Training**

- Training sessions tailored for Customer Service, Sales/Liaison, and basic Admin users.
- Training materials including user guides, quick-start sheets, and FAQs.

### **2. AI Best Practices & Governance Guidance**

A written package of best practices covering:

- Responsible and safe use of AI within Food Export's context.
- Data handling and privacy considerations.
- Transparency and accuracy expectations.
- Recommended future governance structures (usage policies, review processes, request/change procedures).

## **E. Pilot Testing & Optimization**

The vendor will:

- Conduct a controlled pilot with a selected user group.

- Gather feedback, monitor performance, and identify improvement areas.
- Refine the AI tool to enhance clarity, usability, and accuracy.
- Document pilot outcomes and recommendations.

## **F. Post-Implementation Support**

The vendor will:

- Provide stabilization support 90 days after launch.
- Offer optional ongoing support and maintenance packages.
- Provide a roadmap for future enhancements and scalability beyond 2026.

## **4. Deliverables**

- Discovery Report and AI Implementation Plan (2026)
- Fully Developed and Deployed AI Tool within Microsoft Dynamics
- Integrated AI Insights within Power BI
- User Interface for AI Summaries and Market Insights
- Training Sessions and User Documentation
- Written AI Best Practices and Governance Recommendations
- Pilot Test Summary and System Refinements
- Final Deployment and Stabilization Support

## **5. Timeline**

The project will take place during January–December 2026, with key milestones proposed by the vendor, including:

- Q1-Q2: Discovery & Planning
- Q2-Q3: Development, Testing, & Pilot
- Q3: Full Deployment & Stabilization

## **Requirements**

Vendors must demonstrate the following minimum qualifications:

- 1. Experience with AI integration in Microsoft Dynamics 365 and Microsoft Power BI**
  - Proven track record implementing AI or machine learning features within Microsoft environments.
  - Ability to configure, customize, and deploy AI tools that work with structured CRM and analytics data.
- 2. Experience working with nonprofit or mission-driven organizations**
  - Preference will be given to vendors who have worked with associations, cooperatives, nonprofits, or public-sector clients.
  - Experience adapting solutions to organizations with multi-program structures or grant-related reporting is beneficial.
- 3. Understanding of responsible AI use**
  - Demonstrated knowledge of secure, ethical, and privacy-conscious AI development and deployment.
  - Ability to provide guidance on AI best practices, governance, and organizational readiness.

4. **Project management capacity**
  - Ability to manage a multi-month project with clear communication, timelines, deliverables, and regular check-ins.
5. **Location Preference (Not Required)**
  - Vendors located in the **Chicago metropolitan area** are preferred but not required.
  - Remote or hybrid vendors are eligible but should outline how they will ensure consistent communication, coordination, and support.

### **Company Information**

- Legal name, headquarters, year founded, and ownership.
- Complete mailing address, type of ownership structure.
- EIN/TIN/SS number (or equivalent tax ID number if an overseas entity).
- Number of employees; number of dedicated AI staff.
- Subcontractors (if any) and their roles.
- Technologies used (especially Dynamics, Power BI, or AI models)

### **Experience**

- Experience integrating with **Microsoft Dynamics 365 CRM**.
- 3 customer references similar in size/industry, with preferences to non-profits.

**Pricing Assumptions:** Vendors must submit a **detailed and transparent cost proposal** that includes:

#### **A. Cost Breakdown**

A line-item breakdown covering, at minimum:

- Discovery and planning
- System design/architecture
- AI model development and configuration
- Dynamics integration
- Power BI integration
- Testing and pilot phase support
- Training and documentation
- Implementation/go-live support
- Post-deployment stabilization support
- Optional ongoing maintenance or support packages

Each line item should include:

- Estimated hours
- Hourly/role rates
- Total cost for that phase

## **B. Total Lump Sum Cost**

Vendors must also provide:

- A total lump sum, not-to-exceed cost for the entire project.
- A summary of what is included.
- Identification of any optional or additional features with separate pricing.

## **C. Additional Cost Requirements**

The proposal should also outline:

- Any required licenses, subscriptions, or third-party tools (if applicable).
- Any anticipated travel costs (if proposing on-site visits).

Food Export – Midwest and Food Export – Northeast is not liable for any costs associated with any company's response to this RFP. Food Export – Midwest reserve the right to not award this contract if, in the opinion of the evaluators, no suitable proposal is received. The awarded contract may be renewed for up to three years.

The selected contractor must agree to abide by Food Export –Midwest and Food Export – Northeast Terms and Conditions:

Food Export - Midwest and Food Export – Northeast does not discriminate on race, color, national origin, religion, sex, gender identity (including gender expression), sexual orientation, disability, age, marital status, family/parental status, income derived from a public assistance program, political beliefs, or reprisal or retaliation for prior civil rights activity, in any program or activity. Persons with disabilities who require alternate means of communication of program information should contact us. Food Export - Midwest do not tolerate fraud in their programs or services, and expect all participants to comply with our code of ethics ([www.foodexport.org/termsandconditions](http://www.foodexport.org/termsandconditions)).

If you suspect any instance of fraud, please contact our Ethics Reporting Line at: [www.foodexport.ethicspoint.com](http://www.foodexport.ethicspoint.com) or 1-855-727-6715 (domestic toll-free.)

We reserve the right to deny services to any firm or individual which, in the sole opinion of Food Export – Midwest and Food Export – Northeast does not comply with MAP/ATP/RAPP; FAS; Food Export – Midwest and Food Export – Northeast regulations or policies, or otherwise reflect positively on them; their members states; FAS; or USDA, in pursuit of their mission of increasing food and agricultural exports, or for continued public support for their programs. For more information, please see our Terms and Conditions located at [www.foodexport.org/termsandconditions](http://www.foodexport.org/termsandconditions).

The selected contractor must agree to abide by the provisions contained in Section 202 of Executive Order 11246 (30 Federal Register 12319) with regard to employment and contracting practices. In addition, Food Export – Midwest require that its contractors may not discriminate on the basis of race, color, national origin, religion, sex, gender identity (including gender expression), sexual orientation, disability, age, marital status, familial/parental status, income derived from a public assistance program, political beliefs, reprisal or retaliation for prior civil rights activity. Food Export – Midwest and Food Export – Northeast acceptance of proposal is conditional upon contractor disclosing all existing relationship with another party that has the potential of impacting and/or influencing the contractor's ability to carry out the scope of work.

By responding to this request for proposal, you are certifying that your company nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any Federal department or agency. If you are unable to certify to the preceding statement but wish to proceed with a proposal to this request, you will need to include an explanation as to why you cannot certify this statement as an attachment to your proposal.

The contents of this Request for Proposal and Scopes of Work are confidential and business proprietary. They may not be re-used for any purpose, in whole or part, including any text, or related concepts, strategies or tactics described, without written permission from Food Export – Midwest and Food Export – Northeast.

**The deadline for proposals is March 30<sup>th</sup>, 2026. E-Mailed proposals will be accepted by Mike Weiand at [mweiand@foodexport.org](mailto:mweiand@foodexport.org).**