

AI Adoption and Integration Program

Overview

St. David's Foundation is seeking a consultant for an organization-wide project to adopt and integrate the use of artificial intelligence tools into the Foundation's work and operations. This includes transforming the Foundation's current AI guidelines into a robust policy, creating a process for vetting AI tools for security and utility, educating and training staff on AI product use and privacy and security issues, and developing a framework to analyze work functions for optimization through the use of AI tools.

A successful partner must have knowledge of the AI industry and common tools, and the ability to guide the Foundation's AI team through successful launch of its AI adoption and integration efforts. Beyond the obvious criteria of proven skills and experience, we're looking for a partner who embraces mission-driven work and shares the same commitment to advancing equity and brings expertise and awareness in cultural competency related to AI technology. Experience with medical/dental organizations or grantmaking organizations is ideal.

A successful partner must demonstrate the ability to assist the Foundation in developing a plan that provides clarity and guidance in adopting and integrating AI technology with efficiency and impact. One that articulates objectives, goals, action steps, and metrics to measure ongoing progress. An effective plan is one that:

- Provide a roadmap for managing the project complexities
- Provides focus, clarity, and direction for both our internal and external work
- Enables teams to create clear and realistic AI adoption workplans that are in service of our Foundation strategic vision and direction

About St. David's Foundation

St. David's Foundation is a community-focused and equity-driven organization with more than 100 employees supporting health and wellness in Central Texas. As one of the largest health foundations in the United States, the Foundation funds over \$100 million annually in a five-county area surrounding Austin, Texas (Bastrop, Caldwell, Hays, Travis, and Williamson counties). Through a unique partnership with St. David's HealthCare, we strategically reinvest proceeds from the hospital system back into the community, with the goal of advancing health equity and improving the health and well-being of our most underserved Central Texas neighbors. The Foundation also operates one of the largest mobile dental programs in the country and offers the largest healthcare scholarship program in Texas, the St. David's Neal Kocurek Program.

Through investments and action, St. David's Foundation is committed to centering health equity in all that we do so that all Central Texans have a fair chance to achieve optimal health with no avoidable, unjust, or systematically caused differences in health status due to ethnicity, race, age, ability, or geography.

Each team within the Foundation plays a key role in advancing our mission and has a role to play in the strategic planning process. Teams include Community Investments, Community Programs, Learning and Evaluation, Communications, Human Resources, Legal, IT, and Finance.

Scope of Services and Project Goals

The selected consultant will be expected to perform services that may include, but are not limited to, the following areas. Proposers are encouraged to recommend refinements or additions to the scope based on their expertise.

1. AI Readiness and Maturity Assessment

- Evaluate the Foundation's current state of AI readiness, including:
 - Data quality, availability, and governance practices
 - Existing technology infrastructure and systems
 - Current use (formal or informal) of AI tools across teams
 - Workforce skills, awareness, and comfort with AI technologies
- Identify strengths, gaps, risks, and dependencies that may affect successful AI adoption.
- Provide a high-level maturity assessment and readiness summary to inform prioritization and sequencing of AI initiatives.

2. AI Strategy and Use Case Identification

- Collaborate with stakeholders across functions to identify high-value, mission-aligned AI use cases, including opportunities for:
 - Workflow optimization and efficiency gains
 - Knowledge management and research support
 - Data analysis and insights generation
 - Communications, customer or community engagement, and internal operations
- Assess proposed use cases based on feasibility, impact, risk, cost, and alignment with organizational values.
- Develop a prioritized portfolio of AI initiatives with clear rationale and success criteria.

3. Implementation Roadmap

- Develop a phased, actionable AI implementation roadmap, including:
 - Short, medium, and long-term initiatives
 - Key milestones, dependencies, and decision points
 - Roles and responsibilities across communications, IT, legal, and leadership functions
- Provide guidance on integration with existing systems, tools, and workflows.

4. Governance, Risk, and Responsible AI Framework

- Support the development or refinement of AI governance policies and guidelines, including:
 - Responsible and ethical use principles
 - Data privacy, security, and compliance considerations
 - Transparency, accountability, and human oversight expectations
- Design a process for vetting, approving, and monitoring AI tools and vendors for security, legal, and operational risk.
- Advise on ongoing governance structures to ensure compliance with applicable laws, regulations, and internal standards.

5. Training, Change Management, and Capacity Building

- Recommend a training and enablement approach tailored to different roles and levels within the Foundation.
- Develop or advise on educational materials addressing:
 - Practical use of AI tools
 - Data privacy and security responsibilities
 - Ethical considerations and risk awareness
- Support change management efforts to promote adoption, trust, and effective use of AI technologies across teams.

6. Measurement, Evaluation, and Continuous Improvement

- Define metrics and success indicators to measure the impact and effectiveness of AI initiatives.
- Recommend processes for ongoing evaluation, iteration, and improvement of AI tools and practices.
- Provide guidance on sustaining AI capabilities beyond the initial engagement.

Project Goals

The overarching goals of this engagement are to:

- Establish a clear and shared vision for AI adoption that aligns with organizational strategy and values.
- Enable responsible, secure, and compliant use of AI technologies across the enterprise.
- Identify and prioritize AI opportunities that deliver measurable value and operational impact.
- Build internal understanding, skills, and confidence to support long-term AI use.
- Create a practical roadmap and governance framework that supports ongoing innovation while managing risk.

Budget

The cost of services will be determined by the final accepted work plan.

Submission and Timeline

This project is a priority, and the Foundation wants to begin the engagement no later than April 2026. While the Foundation has initial thoughts on the project workflow, we expect the selected partner to guide the overall process, timeline, and best practices. These should be clearly articulated in the RFP submission.

Please include in your proposal:

- Cover letter
- Approach to the work
- Recommended timeline
- Proposed budget
- Relevant work and case studies that are most representative of the thinking and approach you would use on our project.
- Detailed outline of team structure, including bios (account team outlines in submission must be present during agency presentation)

Submissions & Questions : AI@stdavidsfoundation.org

Proposals Received:	March 27, 2026
Meetings and Presentations:	As scheduled – Week of April 13th
Notice of Award:	Week of April 20th
Start Date:	Kickoff project Week of April 27 th

Note: all dates subject to change