

Request for Proposals: Change Management Training in Support of Care Coordination

Introduction

United Way for Southeastern Michigan seeks a qualified trainer or training team to design and deliver a virtual session on change management in support of care coordination. This training will provide a practical foundation in care coordination, with specific attention to coordination that occurs across organizations. Participants will examine the organizational changes needed to strengthen referrals, handoffs, shared workflows, and collaboration among service providers.

Connect4Care CIE connects partners, data, workflows, and accountability so people can reach services with fewer dead ends. Michigan 2-1-1 and its resource directory provide the information and referral (I&R) foundation. CIE adds shared standards, partner readiness, governance, privacy, consent, and selective interoperability across systems. Care coordination builds on that foundation within organizations and across organizational boundaries through clear roles, effective handoffs, shared workflows, partner readiness, and sustained collaboration.

The training should explain care coordination broadly, including its purpose, core activities, and value for organizations, clients, and communities. It should then place specific emphasis on care coordination across organizations, where differences in roles, workflows, communication, technology, accountability, and organizational culture can complicate implementation. The session must address factors organizations should consider when providing care coordination, partnering in a coordinated pathway, or referring clients to another organization, along with practical change management strategies and resources.

Training Overview

The selected contractor will work with United Way to develop and facilitate one virtual training for nonprofit and community-based service providers in Southeastern Michigan.

Format: Approximately two hours, delivered virtually. The session is planned for May 2027; the final date and platform will be set during contracting.

The contractor will lead the content areas below. United Way will provide Michigan-specific context and may invite local partners to share examples or experiences.

Content Area	Expected Coverage and Learning Outcomes
Care coordination definitions and practices	- Establish a shared definition of care coordination and the activities it may include. - Distinguish care coordination from information and referral, navigation, case management, and other related practices.

	• Use practical examples of care coordination within a single organization and across multiple organizations, with greater emphasis on cross-organizational practice.
Value of care coordination	• Explain how care coordination can improve continuity, reduce fragmented service experiences, and support more seamless pathways for clients. • Address the value of care coordination for organizations, clients, and the broader community. • Use examples or stories that show how coordinated approaches work within organizations and across organizational boundaries.
Challenges and organizational considerations	• Examine common challenges, including capacity, role clarity, staff workload, workflow design, communication, partner alignment, documentation, technology, sustainability, and accountability across organizations. • Help participants assess what their organization needs to provide care coordination directly and to participate effectively in care coordination led jointly with other organizations. • Help participants identify what is needed to refer clients into a care coordination pathway, define responsibilities between organizations, maintain effective handoffs, and follow through when more than one provider is involved.
Change management foundations	• Establish a shared definition of change management. • Explain why changes to workflows, roles, communication, culture, decision-making, and partner agreements are often necessary when organizations adopt care coordination, especially when work crosses organizational boundaries. • Address the effects of change on staff, leaders, partners, and clients.
Change management strategies and resources	• Provide practical strategies for preparing, communicating, implementing, and sustaining change. • Address leadership sponsorship, staff engagement, partner communication, shared expectations, training, feedback, resistance, and reinforcement within and across organizations. • Provide tools or resources participants can use to assess readiness and plan next steps.

Contractor Responsibilities

Training Design and Development

- Meet with United Way staff to confirm objectives, audience needs, project schedule, and desired outcomes.
- Develop a customized curriculum aligned with United Way's CIE approach, care coordination goals, partner-readiness pathway, and operating model.
- Prepare the agenda, learning objectives, facilitation plan, participant experience, presentation, facilitator guide, exercises, and supporting resources.

- Use United Way-specific examples and practical scenarios relevant to nonprofit and community-based organizations.
- Plan for the possible inclusion of local partner examples, stories, or a moderated discussion.

Training Content Review and Refinement

- Lead review sessions with United Way leadership and revise the materials based on feedback.
- Deliver final materials by the date set in the contract and before the May 2027 session.
- Provide final materials in editable electronic formats for future United Way use, subject to agreed licensing terms.

Implementation and Readiness Activities

- Develop participant communications, pre-work, and preparation guidance as needed.
- Recommend virtual platform setup, facilitation roles, technology needs, and engagement strategies.
- Coordinate the format and preparation needed for any participating partner speakers.
- Complete a final readiness review with United Way staff.

Training Delivery

- Deliver the May 2027 virtual session.
- Facilitate participant discussion, exercises, and group activities.
- Moderate any partner examples or discussion included in the session.
- Adjust the facilitation approach as needed to meet the learning objectives.

Post-Training Deliverables

- Submit a concise summary of key themes, observations, and recommendations.
- Submit final supporting files with the post-training summary.
- Participate in one post-training debrief with United Way leadership.

Audience and Facilitation Approach

Participants will include United Way partners and staff. Experience with care coordination and organizational change will vary. The selected trainer should use plain language, participatory adult-learning methods, realistic nonprofit scenarios, and facilitated discussion that supports meaningful exchange. The session should be useful to organizations that currently provide care coordination, organizations considering whether to provide it, and organizations that may refer clients into coordinated-care pathways.

Minimum Qualifications

- Demonstrated expertise in change management, care coordination, complex care, organizational development, or a closely related field.

- Experience supporting nonprofit, health, human services, or cross-sector organizations through workflow, program, or practice changes.
- Experience explaining care coordination and change management concepts to nonprofit or community-based audiences.
- Experience designing and facilitating interactive virtual adult learning.
- Knowledge of person-centered care, cross-organizational collaboration, referral and handoff practices, and implementation challenges.
- Ability to provide practical guidance for organizations with different staffing, systems, and levels of readiness.
- Preferred: direct experience with complex care programs, CIE initiatives, coordinated-care models, or statewide and national capacity-building efforts.

Proposal Submission Requirements

Proposals should be submitted by email as a Word or PDF attachment to semi.cie@unitedwaysem.org and should include the following components:

- Cover letter with primary contact information.
- Consultant or organization profile, qualifications, and resumes or brief biographies for the proposed trainer or team.
- Relevant experience in change management, care coordination, complex care, nonprofit or human services, and adult learning.
- Proposed approach, draft agenda, virtual engagement methods, staffing plan, assumptions, United Way inputs needed, and approach to incorporating local partner examples or speakers.
- Work plan covering curriculum design, review, revisions, readiness, delivery, and debrief.
- Budget by payment milestone, including fees, materials, and other expenses. Travel is not allowable for this virtual training.
- Licensing and reuse terms for training materials.
- Two relevant work samples, two professional references, and disclosure of any actual or potential conflicts of interest.

The proposal should also include a schedule for United Way review and approval.

Evaluation Criteria

Criterion	Weight
Relevant subject-matter expertise and qualifications	30%
Quality, practicality, and accessibility of the proposed training approach	25%
Experience facilitating virtual adult learning for nonprofit, social service, or cross-sector audiences	20%
Understanding of care coordination, complex care, organizational change, cross-organizational workflows, and partner readiness	15%
Cost reasonableness and overall value	10%

Payment Milestones

Milestone	Required Work Product
Milestone 1	Completion and United Way approval of the training design, curriculum framework, detailed project work plan, and participant experience approach.
Milestone 2	Delivery of complete draft training materials, participant resources, presentation materials, facilitator guides, and the proposed approach for partner examples or speakers.
Milestone 3	Delivery of revised final training materials in editable formats and completion of participant communications, virtual logistics recommendations, facilitator preparation, and final readiness activities.
Milestone 4	Delivery of the May 2027 training, submission of the post-training summary and all finalized resources, and participation in the leadership debrief.

Payment will be based on United Way's acceptance of each milestone. Respondents should assign a percentage or amount to each milestone. The contract will set the final payment schedule and acceptance criteria.

Terms and Funding

United Way will negotiate the final scope, term, milestone amounts, travel arrangements, material-use rights, acceptance criteria, and award with the selected respondent. United Way may seek clarification, interview respondents, negotiate scope or price, reject any or all proposals, or make no award.

Anticipated RFP and Training Timeline

- RFP release: August 3, 2026
- Proposal deadline: ~~August 21, 2026~~ September 4, 2026
- Selection and contracting: ~~Week of August 24, 2026~~ September 7, 2026
- Kickoff and content alignment: ~~Week of August 31, 2026~~ September 14, 2026
- Draft materials submitted for review: ~~September 8, 2026~~ September 30, 2026
- Final materials submitted for review: Friday, October 14, 2026
- Virtual training delivery: Anticipated May 2027
- Post-session debrief and final materials: Within two weeks after training