UNITED WAY
Southeastern
Michigan

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Request for Proposals: Interoperability Training for Social Service Partners

Introduction

United Way for Southeastern Michigan seeks a qualified trainer or training team to design and deliver an in-person session on interoperability in social services. The training will give United Way partners a practical foundation in CIE and prepare them for stronger resource sharing, referrals, information exchange, and coordinated care.

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.

The training should present interoperability as both a technical and organizational practice. It must cover low- and high-technology approaches, responsible sharing of client and resource information, security and consent, workflow change, and organizational readiness.

Training Overview

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

Format: Approximately two hours of content in person, plus an additional 30 minutes for networking or facilitated peer discussion. The session is planned for February 2027; the final date and location will be set during contracting.

The contractor will lead the content areas below. United Way will provide Michigan-specific context where appropriate.

Content Area	Expected Coverage and Learning Outcomes
Social service ecosystem and CIE context	• Describe the Southeastern Michigan social service ecosystem and common coordination challenges. • Explain common misconceptions about CIE, especially in comparison to terms like community care hubs and social care referral systems. • Explain the distinct but complementary roles of 2-1-1, resource directories, self-service tools, CIE, and coordinated-care models. • Show where interoperability fits within a broader operating model built on relationships, governance, readiness, and accountability.
Interoperability concepts and approaches	• Define interoperability in plain language and distinguish technical, organizational, semantic, and workflow interoperability.

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	• Introduce national and international data exchange initiatives, including HL7® FHIR® accelerators (e.g., The Gravity Project), baseline data sets (e.g., USCDI), clinical terminology (e.g., LOINC, SNOMED CT, ICD-10, etc.) and community human service classification systems (e.g., Inform USA / 211HSIS taxonomy) to ensure staff understand the basics of standardizing, crosswalking, and exchanging clinical and social care data across healthcare and community-based platforms. • Compare low-technology and high-technology options for sharing client and resource information. • Use practical examples relevant to community-based organizations with different technology stacks and capacities.
Value and challenges	• Explain how interoperability can improve access, referral quality, follow-through, coordination, service visibility, and system learning. • Address implementation challenges such as capacity, cost, data quality, workflow change, vendor dependence, governance, sustainability, and uneven partner readiness. • Help participants identify where interoperability may or may not create sufficient value for their organization and clients.
Responsible information sharing	• Introduce key considerations related to privacy, security, consent, data-sharing agreements, minimum necessary information, and client trust. • Differentiate sharing information about resources, referrals, service status, and identifiable client data. • Clarify that technology alone does not establish permission, good governance, or effective practice.
Organizational readiness and next steps	• Help participants assess leadership support, staff capacity, workflows, data quality, technology, partner relationships, and change readiness. • Connect learning to practical next steps, including stronger resource directory records, referral readiness, governance participation, workflow design, and future CIE engagement. • Provide a usable reflection or readiness tool participants can apply after the session.

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, partner-readiness pathway, and operating model.
- Prepare the agenda, learning objectives, facilitation plan, participant experience, presentation, facilitator guide, exercises, and supporting resources.

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- Use United Way-specific examples and practical scenarios relevant to nonprofit and community-based organizations.

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 February 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 room setup, materials, technology, and engagement strategies.
- Complete a final readiness review with United Way staff.

Training Delivery

- Deliver the February 2027 in-person session.
- Facilitate discussion, exercises, networking, and group activities.
- 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 and readiness will vary. The selected trainer should use plain language, participatory adult-learning methods, realistic nonprofit scenarios, and facilitated discussion that supports meaningful exchange without assuming advanced technical knowledge.

Minimum Qualifications

- Demonstrated expertise in interoperability, CIE, social-care technology, or health and human services information exchange.
- Experience explaining technical, governance, privacy, and workflow concepts to nonprofit or community-based audiences.
- Experience designing and facilitating interactive adult learning.
- Knowledge of data sharing, privacy, security, consent, cross-organizational governance, and state or national CIE efforts.
- Ability to provide technology-neutral guidance for organizations with different systems and levels of readiness.

- Preferred: direct work with CIE implementation, 2-1-1 or resource-and-referral networks, social service interoperability, or coordinated-care models, both locally and nationally

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 interoperability, CIE, social services, data sharing, and adult learning.
- Proposed approach, draft agenda, engagement methods, staffing plan, assumptions, and United Way inputs needed.
- Work plan covering curriculum design, review, revisions, readiness, delivery, and debrief.
- Budget by payment milestone, including fees, materials, travel, lodging, and other expenses. Travel is allowable.
- 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 adult learning for nonprofit, social service, or cross-sector audiences	20%
Understanding of CIE, 2-1-1/resource infrastructure, governance, privacy, consent, and organizational 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, and facilitator guides for leadership review.

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Milestone 3	Delivery of revised final training materials in editable formats and completion of participant communications, logistics recommendations, facilitator preparation, and final readiness activities.
Milestone 4	Delivery of the February 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 February 2027
- Post-session debrief and final materials: Within two weeks after training