CareSource®
FOUNDATION

REQUEST FOR PROPOSALS (RFP)

Advancing AI-Enabled Models for Care and Community Transformation

Phase 1 Concept RFP Release Date: November 10, 2026, 8:00 a.m. EST

Phase 1 Concept Proposal Due Date: January 6, 2027, 11:59 p.m. EST

Phase 2 Full Proposal Due Date: February 12, 2027, 11:59 p.m. EST

Funding: Up to $500,000 annually for two years for a total of $1,000,000

Project Duration: Up to 24 months

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TABLE OF CONTENTS

Table of Contents 1
1. Purpose and Opportunity 2
2. Strategic Priority Areas 3
3. Funding and Award Structure 4
4. Eligible Applicants 4
5. Proposal Submission Requirements 4
5.1 Proposal Package – Required Components 5
5.2 Submission Instructions 6
5.3 Minimum Requirements (Screening) 7
6. Reporting and Performance Management 7
7. Evaluation Criteria 7
8. Selection Process 9
9. Timeline 9
9.1 Information Session 9
9.2 Clarification Questions 10
10. Compliance and Legal Requirements 10
11. Governance and Partnership Model 10

1. PURPOSE AND OPPORTUNITY

At the CareSource Foundation, we turn purpose into action by investing in organizations, partnerships, and innovative ideas that strengthen communities and help people live healthier lives. Our work is rooted in the same nonprofit mission that has guided CareSource from the start: the belief that health is shaped by far more than clinical care alone. The conditions in which people live, learn, work, and grow play an essential role in their ability to achieve lasting well-being. That is why we focus on expanding access to stable housing, nutritious food, economic opportunity, workforce development, quality behavioral and preventive care, and strong community support.

Through strategic grantmaking and community collaboration, we help address these needs at their source by supporting solutions that are far-reaching and built for lasting impact. What sets the CareSource Foundation apart is not only what we fund, but how we show up. We listen first, build trust through collaboration, and convene partners around shared goals and community priorities to drive collective impact and create meaningful pathways to better health and brighter futures.

In this way, the Foundation complements the work of CareSource—while CareSource acts on the belief that every person deserves high-quality, accessible care that addresses the whole person, we help strengthen the community infrastructure that makes this care possible. We are more than philanthropy. We are mission in motion—turning commitment into action, partnership into progress, and possibility into a future where every person can thrive.

We invite proposals submitted through designated 501(c)(3) nonprofit organizations (in good standing for at least three years) serving as the lead applicant or fiscal sponsor, including affiliated nonprofit entities of academic institutions and other organizations, leading cross-sector collaborations with technology partners, academic organizations, research institutions, healthcare organizations, community-based organizations, and other strategic collaborators.

The purpose of this initiative is to explore how AI can move beyond traditional analytics and reporting to play a more active role in improving care delivery, supporting vulnerable populations, strengthening community engagement, augmenting workforce capacity, and enabling more proactive, personalized, and coordinated interventions.

The CareSource Foundation is particularly interested in innovative, implementation-ready solutions that leverage AI to:

- Curate, integrate, and analyze health plan, clinical, community, and population-level data
- Generate actionable insights and real-time decision support
- Improve care coordination, navigation, outreach, and engagement
- Identify emerging risks and intervention opportunities earlier
- Reduce barriers to access and improve health equity
- Support caregivers, providers, care teams, and community organizations

- Enhance operational effectiveness while improving member[1] outcomes
- Demonstrate measurable impact, scalability, sustainability, and return on investment

This initiative seeks to:
- Accelerate scalable, high-impact solutions
- Advance AI innovation in healthcare and community settings
- Foster cross-sector collaboration and partnership
- Explore new models for AI-enabled care delivery and intervention
- Inform future policy and care delivery models
- Drive measurable, system-level transformation

The selected partner will collaborate with the CareSource Foundation to explore the art of the possible through responsible AI innovation, community engagement, and data-driven transformation focused on improving outcomes for vulnerable populations. As part of this initiative, the CareSource Foundation may provide the following:
- Strategic collaboration
- Connections to community partners
- Access to data (where appropriate)

Two-Phase Solicitation Process: To encourage broad participation and identify the most promising solutions, this RFP will be conducted through a two-phase process. In **Phase 1**, applicants will submit a concise **Concept Proposal** describing their proposed AI-enabled solution, existing capabilities, partnership approach, anticipated impact, and potential for implementation and scale. Following review of Phase 1 Concept Proposals, the CareSource Foundation will invite selected applicants to participate in **Phase 2** and submit a **Full Proposal** providing greater detail regarding the solution, implementation approach, outcomes and measurement, responsible AI practices, budget, scalability, and sustainability. Only applicants invited by the CareSource Foundation may submit a Phase 2 Full Proposal.

2. STRATEGIC PRIORITY AREAS

The CareSource Foundation is particularly interested in solutions that demonstrate how AI can support more proactive, connected, personalized, community-centered approaches to care and intervention delivery.

Potential AI-enabled capabilities may include, but are not limited to:
- Predictive analytics and early intervention models
- AI-enabled care coordination and navigation platforms
- Intelligent workflow and decision-support tools
- Community resource matching and referral optimization
- Workforce augmentation and administrative burden reduction
- Real-time operational intelligence and actionable reporting
- Member engagement and communication platforms

[1] Member means an individual served by or eligible for health care coverage, services, or supports.

- Behavioral health identification and intervention support
- Cross-system data integration and interoperability solutions
- Rural access and service optimization strategies
- AI-enabled tools that directly support or augment care delivery and intervention models (e.g., AI-enabled virtual care and digital therapeutics)

Proposed solutions should demonstrate relevance to Medicaid, underserved, and high-need populations and should be designed with responsible AI practices, measurable outcomes, scalability, and long-term sustainability in mind.

3. FUNDING AND AWARD STRUCTURE

- **Total Funding Available**: Up to $500,000 annually for two years for a total of $1,000,000
- **Award Structure**: Anticipated one award
- **Project Term**: Up to 24 months
- **Payment Structure**: Milestone-based disbursements tied to deliverables

Funding decisions will prioritize proposals with strong potential for sustainability, scalability, and measurable impact.

4. ELIGIBLE APPLICANTS

Applicants must meet the following criteria:

- Designated 501(c)(3) nonprofit organizations (in good standing for at least three years) serving as the lead applicant or fiscal sponsor, including affiliated nonprofit entities of academic institutions and other organizations,
- Demonstrated experience serving Medicaid, Dual Eligibles (those eligible for Medicaid and Medicare), and/or underserved populations
- Proven organizational capacity and financial stability
- Ability to manage data responsibly and comply with privacy standards

Applicants must demonstrate a cross-sector collaborative partnership that brings together complementary expertise necessary to successfully implement, evaluate, and scale the proposed solution. Phase 1 Concept Proposals must identify the proposed cross-sector partners, their anticipated roles, and the expertise each brings to the initiative. Applicants that do not demonstrate the required collaborative partnership may be deemed ineligible for advancement to Phase 2.

5. PROPOSAL SUBMISSION REQUIREMENTS

The CareSource Foundation is particularly interested in innovative AI-enabled solutions with existing capabilities or demonstrated models that can be operationalized, scaled,

and evaluated in real-world healthcare and community settings to drive measurable impact and long-term transformation.

To be considered, applicants must submit a complete proposal package that includes the required components listed below within the stated page limitations. Content exceeding character limits or including unrequested supplemental materials will not be reviewed or scored.

5.1 Proposal Package – Required Components

Phase 1 – Concept Proposal:

Applicants must submit a **Concept Proposal** providing sufficient information for the CareSource Foundation to assess the proposed solution, its alignment with this RFP, and its potential to advance to Phase 2. The Concept Proposal includes the following:

1. **Eligibility & Lead Organization Information**: 501(c)(3) status and program support questionnaire; lead organization name, EIN, address, and main contact information.
2. **Applicant and Partnership Overview**: Lead organization, 501(c)(3)/fiscal sponsor structure, collaborators and relevant experience.
3. **Problem and Target Population**: Problem/opportunity and populations served. **1,000-character limit including spaces*
4. **Proposed AI-Enabled Solution**: What it does, how AI is used and how it could transform care, intervention, engagement, or community outcomes. **2,550-character limit including spaces*
5. **Existing Capability and Readiness**: What exists today, evidence of previous implementation or demonstrated capability, and what would be implemented, adapted, validated or scaled. **2,550-character limit including spaces*
6. **Anticipated Impact**: Expected outcomes and potential measurable impact. **1,700-character limit including spaces*
7. **Scalability and Sustainability:** Potential for broader application and long-term impact. **1,700-character limit including spaces*
8. **Partnership Opportunity:** Why working with the CareSource Foundation would help implement, validate, or scale the solution. **850-character limit including spaces*

Phase 2 – Full Proposal:

A. **Lead Organization Information**: Organization name, address, EIN, primary contact, authorized signatory, project title, funding request, and proposed project period.
B. **Executive Summary** (*4,000-character limit including spaces*): Problem, target population, proposed solution and how it will be used in practice, and expected outcomes.
C. **Organizational Overview and Experience** (*8,000-character limit including spaces*): Mission, demonstrated experience (i.e., previous implementations or pilots, if applicable; demonstrated results and lessons learned), partners, and implementation capacity.

D. **Statement of Need** (*4,000-character limit including spaces*): Evidence of need and impact on the target population(s) and why this problem matters now.
E. **Solution Description and Technical Approach** (*20,000-character limit including spaces*): Solution design; AI approach; workflow integration (including integration into care delivery, engagement, intervention, and operational workflows); deployment approach (including implementation timeline and operational readiness); project governance; staffing; expected CareSource Foundation participation; and risks, limitations, and mitigation strategies. A high-level implementation plan/work plan is required as an attachment. Applicants must distinguish between existing solution capabilities and components that would require adaptation, customization, or further development. Applicants should describe previous implementations or pilots, demonstrated results, lessons learned, and comparable engagements, and provide references that may be contacted by the CareSource Foundation.
F. **Project Team and Resource Requirements** (*6,000-character limit including spaces*): Describe the proposed project governance and staffing model, roles of collaborating organizations, and anticipated resources, expertise, and/or other support required from the CareSource Foundation and/or CareSource. Bios/resumes for key staff are required as an attachment and will not count towards the character limit for this section.
G. **Outcomes, Measurement, and Learning** (*6,000-character limit including spaces*): Specific outcome measures and key performance indicators (e.g., enhanced care coordination, member engagement, behavioral health outcomes, health equity, workforce effectiveness, reductions in avoidable utilization), methods and data sources to measure success, equity considerations (who benefits and how disparities will be reduced), and plan to use findings to improve and share learnings.
H. **Data, Privacy, Security, and Responsible AI** (*8,000-character limit including spaces*): Data needs and assumptions for access/sharing, interoperability approach, privacy/security safeguards, and responsible AI practices (bias mitigation, human oversight, transparency, explainability, model validation, and ongoing performance monitoring).
I. **Budget and Budget Narrative** (*6,000-character limit including spaces*): Itemized budget, budget narrative, implementation costs, and ongoing operating assumptions. Also include a high-level total cost of ownership, including people, process, and technology considerations as well as implementation, ongoing operating, licensing, maintenance, and other anticipated costs.
J. **Scalability and Sustainability** (*4,000-character limit including spaces*): Describe the long-term operating and funding model, including how the solution will continue beyond the CareSource Foundation funding.

5.2 Submission Instructions

- Phase 1 Concept Proposal Due Date: January 6, 11:59 p.m. EST Proposals must be submitted to the CareSource Foundation grant application portal via Blackbaud Grantmaking.
- All proposals must comply with the character limits outlined within each section of the grant application.

5.3 Minimum Requirements (Screening)

Proposals may be deemed non-responsive and removed from further consideration if they:

- Do not submit a proposal by the required deadline
- Do not submit the proposal in the required format or through the required submission method
- Do not meet eligibility requirements
- Omit required proposal components or required attachments
- Do not include a complete budget and budget narrative
- Exceed the stated character limits
- Do not follow the formatting requirements
- Include supplemental materials, appendices, or other additional materials not expressly requested in this RFP
- Violate the RFP's public disclosure or communications restrictions
- Fail to comply with applicable legal, compliance, data privacy, security, ethical AI, conflict of interest, or non-discrimination requirements

Please note: Applicants are solely responsible for all costs incurred in preparing and submitting a response to this RFP.

6. REPORTING AND PERFORMANCE MANAGEMENT

The awardee will be required to:

- Provide regular performance and progress reports
- Submit data in accordance with defined reporting standards
- Share qualitative insights, including case studies and impact stories

7. EVALUATION CRITERIA

The CareSource Foundation will use a two-phase competitive selection process.

Phase 1 – Concept Proposal Review: Concept Proposals will be reviewed to identify applicants and solutions demonstrating the strongest alignment with the Foundation's objectives, potential for impact, existing capabilities, collaborative approach, and potential for implementation and scale. Selected applicants will be invited to advance to Phase 2.

Phase 2 – Full Proposal Review: Invited applicants will submit Full Proposals that will undergo detailed evaluation using the criteria and scoring methodology outlined below. The Foundation may request clarifications, presentations, demonstrations, interviews, references, or other information as part of its evaluation and due diligence. Following Phase 2 evaluation, the CareSource Foundation will determine the applicant selected for funding.

Phase 2 Proposals will be evaluated using a structured scoring framework, including:

- Strategic alignment with the CareSource Foundation's RFP priorities
- Strength of demonstrated need
- Potential for measurable impact
- Responsible use of AI in Human Services
- Organizational capacity and demonstrated experience
- Innovation, operational readiness, and feasibility
- Budget justification and cost efficiency

Proposals submitted in response to this RFP will be reviewed and evaluated in accordance with the criteria set forth herein. However, issuance of this RFP does not obligate the CareSource Foundation to select the highest-scoring proposal. The CareSource Foundation reserves the right, in its sole discretion, to select the applicant deemed to be in the best overall interest of the Foundation and most closely aligned with its strategic priorities.

Submission Component (Section 5)	What reviewers look for:	Weight
A. Lead Organization Information	Required company information	N/A
B. Executive Summary	Clarity of problem statement, target population, proposed solution, and expected outcomes	N/A
C. Organizational Overview and Experience	Relevant experience, partner strength, and capacity to execute	10%
D. Statement of Need	Evidence of need, population impact, and urgency/importance	10%
E. Solution Description/ Technical Approach	Soundness of design, appropriateness of AI use, workflow integration, operational feasibility, implementation approach/workplan, and potential to improve intervention delivery and outcomes	30%
F. Project Team and Resource Requirements	Project governance, staffing model, and anticipated resources	5%
G. Outcomes, Measurement, and Learning	Quality of KPIs, evaluation design, feasibility, and learning approach	15%
H. Data, Privacy, Security, and Responsible AI	Data needs, transparency, human oversight, reporting capabilities, privacy/security safeguards, interoperability approach, responsible AI governance	15%
I. Budget and Budget Narrative	Reasonableness, completeness, alignment to work plan, and cost effectiveness	10%
J. Sustainability and Scalability	Credible plan to sustain and scale impact beyond the grant term	5%

Each criterion will be scored on a standardized scale:

Score	Definition
5 – Excellent	Complete, highly compelling response that exceeds expectations and demonstrates strong feasibility, impact, and low risk
4 – Strong	Complete response that meets expectations; may require minor clarification but does not omit required information or present material concerns
3 – Adequate	Complete response that meets minimum expectations, though some areas are underdeveloped or present moderate concerns
2 – Limited	Response is incomplete, underdeveloped, or contains notable weaknesses that materially limit confidence
1 – Poor	Response is inadequate, nonresponsive to the criterion, or does not meet requirements

8. SELECTION PROCESS

The selection process includes:

- Two-stage review process consisting of independent scoring followed by a consensus committee review meeting based on evaluation criteria outlined in Section 7
- The CareSource Foundation Board will have full participation in the evaluation and selection process, with 100% of Board members engaged in proposal review, discussion, and/or final selection deliberations
- Request for clarifications and/or presentations (as needed)
- Final evaluation and award determination

9. TIMELINE

Milestone	Date
Phase 1 Concept RFP Release	November 10, 2026
Phase 1 Information Session	December 10, 2026
Phase 1 Concept Proposals Due	January 6, 2027
Phase 1 Concept Proposal Review Period	January 6-18
Phase 2 Invitations Issued	January 18
Phase 2 Full Proposals Due	February 12
Phase 2 Presentations/Demonstrations, if requested	February 15-22
Final Award Notification	March 18
Project Launch	Q2 2027

9.1 Information Session

- The CareSource Foundation may hold an information session. Details will be provided if scheduled.

9.2 Clarification Questions

- Proposal Clarification Questions: Submit questions to Nicole Krider: Nicole.krider@caresource.com.

10. COMPLIANCE AND LEGAL REQUIREMENTS

All applicants must comply with applicable:

- Data privacy and security standards
- Ethical AI principles
- Conflict of interest policies
- Non-discrimination requirements

Intellectual property, licensing, commercialization, and data ownership provisions will be negotiated with the selected awardee. Additional legal terms and conditions will be provided for the selected awardee.

Applicants and their employees, agents, subcontractors, consultants, and representatives shall not make any public statement, press release, social media post, marketing communication, or other disclosure regarding this RFP, their proposal, the evaluation process, contract negotiations, or any resulting award without the prior written consent of the CareSource Foundation. Any violation of this provision may result in disqualification from this process or other action deemed appropriate by the CareSource Foundation.

11. GOVERNANCE AND PARTNERSHIP MODEL

The selected partner will engage with the CareSource Foundation leadership in an advisory structure that may include:

- Strategic guidance and checkpoints
- Performance and risk monitoring
- Shared evaluation insights
- Periodic learning collaborative
- Alignment with broader organizational priorities
- Responsible AI oversight discussions