

ECHO RFP Q&A Responses

What is the anticipated or not-to-exceed budget for the initial term (Phases 0–3), and separately for ongoing annual operating costs?

ECHO will be funded and delivered incrementally, and the engagement is structured to proceed phase by phase. For phase 1, TechTown has allocated approximately \$100,000 for the initial build, inclusive of platform/licensing and professional services. Rather than a single not-to-exceed amount spanning Phases 0–3, we ask respondents to propose modular, phase-gated pricing (a firm fixed-fee or not-to-exceed amount for each phase) so the coalition can authorize work one phase at a time as additional funding is secured from participating organizations, funders, and partners. Phases 2–3 are expected to be funded separately and are not governed by a single pre-set ceiling at this time.

We will budget ongoing annual operating costs based on the selected platform which will include licensing, consulting fee associated with support and maintenance and ongoing data stewardship. Please provide estimated ongoing annual operating costs separately and itemized where possible.

During discovery, requirements gathering, and implementation, will the selected vendor have direct access to participating partner organizations/ESOs and their relevant business and technical stakeholders? If so, what level of participation should the vendor assume from partner organizations for activities such as requirements gathering, data and system discovery, integration planning, testing, and validation?

The selected vendor will have direct and facilitated access to the participating organizations and their relevant business and technical stakeholders throughout discovery and implementation. TechTown's CIO will be the project sponsor with oversight from the CRM architect and may include a development team to assist with data and system discovery, field/schema mapping, and integration planning. TechTown will coordinate scheduling and serve as the central point of contact and escalation:

- A designated business lead and a technical/CRM administrator as named points of contact.
- Participation in requirements and process-mapping sessions during discovery (assume several working sessions per organization).
- Availability for integration testing, user-acceptance testing, and change management activities.

- Participation in governance decisions (data-sharing terms, consent, and access tiers) through a coalition governance group.

What is the funding source for this contract? Does it impose spending deadlines, reimbursement-based payment, compliance flow-downs beyond Section 24, or make any phase contingent on grant renewals or the go/no-go reviews?

TechTown Detroit is a nonprofit organization supported by multiple funding sources, including private foundations, government agencies, and other public and philanthropic partners. Certain funding sources may carry specific procurement, documentation, or compliance requirements. The RFP and related procurement process have been structured to meet TechTown's applicable procurement guidelines and organizational requirements.

The project timeline has been established based on TechTown's organizational goals and anticipated project needs and is not intended to represent a specific spending deadline associated with any single funding source. Similarly, the project phases and go/no-go reviews are intended to support effective project management and decision-making and are not, unless expressly stated in the contract, contingent upon renewal of a particular grant or funding source.

TechTown's standard contracting practice is to reimburse vendors for work performed and accepted in accordance with the contract, approved scope of work, and applicable invoicing requirements. Any specific compliance requirements or contractual flow-down obligations applicable to the selected vendor will be identified in the final agreement, including those set forth in Section 24.

The initial cohort includes up to four participating organizations, including TechTown. Approximately how many organizations does TechTown anticipate participating in ECHO at full scale, and how does TechTown envision phasing the onboarding of additional organizations beyond the initial cohort?

The initial cohort currently includes three organizations, including TechTown. At full scale, the coalition envisions 20+ ESOs across Southeast Michigan with expansion to be prioritized by CRM readiness and data quality, sector and geographic coverage, and each organization's readiness and consent. Respondents should design the platform and the onboarding process to scale to at least 20 organizations and the record volumes noted in the RFP assumptions – recognizing that a percentage of the records will be duplicates across ESOs.

Note: each new participant should follow a repeatable onboarding playbook, starting with a governance agreement, connector configuration, identity resolution, and validation – and not a bespoke integration. How efficiently and repeatably your approach supports adding organizations over time is an explicit evaluation consideration.

Is there any incumbent vendor, prior discovery or architecture work, or existing data-sharing agreement among the partners that this engagement builds upon?

There is no incumbent vendor and no prior third-party discovery or architecture engagement that this work builds upon; the selected partner will begin fresh. TechTown has completed internal conceptual and planning work - including the project vision/framework and an illustrative proof-of-concept demonstration - which will be shared with the selected partner as background, but this does not constitute prior implementation or architecture deliverables. Establishing the coalition's data-governance framework and the associated data-sharing agreements is part of the scope of this engagement. Any existing agreements among participating organizations will be shared with the selected partner at kickoff.

Please confirm whether there are any additional data platforms other than Hubspot, Zoho, and Salesforce in the initial implementation, including the CRM platform and edition used by each organization.

The initial implementation involves the three named CRMs - Zoho, Monday and Salesforce - across the initial cohort of three organizations, including TechTown. The specific instance and edition for each organization will be confirmed during discovery. Respondents should also plan for at least one flat-file/CSV source, as not every participating organization maintains a mature CRM, and should not assume uniform edition capabilities across organizations.

For each initial source system, will the participating organization provide the necessary API access, service accounts, documentation, and technical contacts?

Yes. Each participating organization will provide the necessary API access, service accounts, documentation, and a named technical/CRM-administrator contact, coordinated centrally by TechTown. Where an organization relies on its own external CRM implementation partner, that partner may be made available for discovery and integration planning. Respondents should note that provisioning may require lead time and that API limits and available scopes are edition-dependent; please flag any assumptions your approach depends on.

Is the anticipated data flow from partner systems to the shared environment read-only, or are any corrections, stewardship decisions, identifiers, or enriched values expected to be written back to partner CRM systems?

Phase 1 is anticipated to be read-only ingestion from partner CRMs into the shared environment; participating organizations' CRMs remain their systems of record. Stewardship decisions, resolved identifiers, and enriched values are maintained in the shared environment and are not written back to partner CRMs in the initial term. Optional

write-back may be considered in a later phase but should be treated as out of scope for Phase 1.

What synchronization cadence is anticipated for the initial integrations—for example, real-time, daily, weekly, or another schedule? Can different data sources operate on different cadences?

A weekly batch cadence is anticipated for the initial integrations; real-time synchronization is not required for Phase 1. Different sources may operate on different cadences (for example, daily for CRM sources and weekly for a flat-file source). Respondents may recommend a cadence per source with supporting rationale.

In addition to the estimated 10,000 organization records and 15,000 contacts, is there significant additional data related to funding events, outcomes, audit records that should be considered?

Respondents should plan for additional volume across engagements/services provided, funding events, and client outcomes (revenue and job related metrics), in addition to provenance/audit records, which are append-only and grow continuously. As a planning assumption, assume engagements on the order of 2x client contact count, funding events and client outcomes at lower volumes (approximately 10% volume), and audit/lineage records as the highest-volume, fastest-growing domain. Solutions should be sized for growth as additional organizations onboard.

How much historical data should be included during initial onboarding, and will historical loading expectations vary by partner or data domain?

Initial onboarding should include a defined historical window and we suggest planning for approximately 3 to 5 years of active records with the expectation that loading will vary by partner and by domain. Core company, contact, and engagement history takes priority; older or low-quality records may be excluded. Final per-partner scope will be set during discovery based on each organization's data maturity and quality.

Does TechTown have a preferred approach regarding centralized storage of approved partner data versus federated, virtualized, or view-based access, or should we recommend the approach? For solutions that store copies of partner data, are there defined requirements for how quickly data must be removed from the shared environment following source-record deletion, consent withdrawal, or partner offboarding?

TechTown is open to the respondent's recommendation but anticipates a centralized, governed store of approved partner data (harmonized into a common data model to

support identity resolution and BI), with federated or view-based elements proposed where they add value. For solutions that store copies of partner data, defined removal requirements do apply - data associated with a source-record deletion or consent withdrawal should be removed or suppressed by the next synchronization cycle and no later than 30 days. Upon partner offboarding, that organization's contributed data should be fully removed and/or returned within 30 days. Please describe how your architecture enforces these controls.

Are there required or preferred Cloud providers, hosting regions, data-residency requirements, or existing cloud environments that the proposed solution should use?

TechTown has a partnership with Wayne State University, which is standardized on the Microsoft stack, so Microsoft Azure is one option we're exploring, with U.S.-based hosting and data residency. That said, TechTown is not limited to Wayne State's platforms and operates several non-Microsoft environments, including AWS. We are open to the cloud provider and architecture that best serve a well-designed solution for all participating ESOs, and we welcome respondents' recommendations.

How detailed must source attribution and lineage be - for example, must the source be traceable for each field value, each record, or only for each dataset or file?

Field-level source attribution is required for values that are shared or reported. Each attribute on a resolved/golden record must be traceable to its contributing source system, source record, and timestamp, consistent with the provenance/audit entity in the common data model. Record-level lineage is the minimum; field-level is expected wherever values are merged or survivorship rules are applied.

Who is expected to review uncertain matches and perform match, merge, split, correction, and override actions after implementation: TechTown, individual partners, or a centralized data steward?

A centralized data-steward function initially staffed by TechTown is expected to perform match, merge, split, correction, and override actions, with an escalation path to individual partners for questions specific to their own records. Respondents should assume they will configure the stewardship workflow and tooling regardless of who ultimately staffs it.

Are there anticipated match confidence thresholds, review volumes, turnaround expectations, or service levels for the stewardship queue?

Respondents should propose confidence thresholds and service levels; as a planning baseline, assume auto-merge above a high-confidence threshold (~90%), auto-reject below a low threshold, and manual review for the ambiguous band in between. At the initial

cohort's scale, plan for an initial steward queue in the low hundreds of records with a turnaround target of 5 business days. Final thresholds and SLAs will be ratified through the governance process.

How do participating organizations currently manage consent, and what levels of control are required to ensure information is used only for approved purposes and by authorized audiences? For example, do organizations use a signed form? A checkbox? A database record? Some other method?

Consent is currently managed inconsistently across organizations using a mix of signed intake forms, CRM checkbox/field values, and program records with standardization as part of ECHO's governance scope. The solution must capture/propagate consent status from source systems where it exists, track it at the record level, and enforce limitation and audience restriction so information is used only for approved purposes and seen only by authorized audiences. Current per-organization methods will be documented during discovery.

What user categories and estimated user counts should be assumed for initial implementation and ongoing support?

Assume the following categories for the initial implementation: partner-organization users (CRM/technical admins, program/business users, and read-only viewers); a central data steward administrator group; and external report consumers limited to aggregate views. As a planning estimate for the initial cohort, assume 5 to 7 users per organization, a small central admin team, and 20 external viewers. Please state the assumptions your pricing uses.

Is integration with an existing identity provider or single sign-on environment required? If so, which identity provider and authentication standards are required?

Single sign-on is preferred for users, using standards-based authentication (SAML 2.0 and/or OpenID Connect) with multi-factor authentication supported. TechTown will confirm the specific identity provider to integrate with during discovery; respondents should assume a standards-based IdP rather than design to a single proprietary product.

Who is expected to have direct access to reports and dashboards? Will access be limited to participating organizations that contribute data, or should access also be provided to non-contributing organizations or others, such as funders, government agencies, or other approved users?

Access is tiered. Contributing organizations receive shared, coalition-level views plus partner-level detail for their own data. Aggregate dashboards may be extended to non-

contributing stakeholders including funders, government agencies, and other approved users since demonstrating collective impact to those audiences is a core objective of ECHO. Non-contributing parties receive aggregate/approved views only.

Does TechTown have a preferred business intelligence or dashboard platform, or should we recommend one and include one as part of the proposed solution?

Wayne State University is standardized on the Microsoft platform, and we are currently exploring whether there is a cost benefit to using Power BI on that infrastructure. That said, we are not committed to it as operating within WSU's environment may carry policy constraints we'd want to avoid, so respondents are welcome to recommend an alternative. Please include your proposed BI/dashboard platform, the rationale for it, and any associated licensing in your response.

What process or technical capability is intended by “KPI certification support,” and who will be responsible for approving a KPI as certified?

"KPI certification support" refers to a governed process in which each KPI's definition, source-to-metric mapping, calculation logic, and data-quality thresholds are documented and formally approved as the coalition's official metric, so figures are audit-ready for funders and government partners. Approval authority rests with the coalition data-governance body (convened by TechTown); the vendor is responsible for the documentation and validation capabilities that make certification possible.

Will testing environments or sample data be available for the initial CRM systems, or should we plan to create test data for development and testing purposes?

TechTown will provide a set of historical production data from its own CRM to serve as the primary dataset for development, testing, and validation. Respondents should plan to work with this data de-identified or masked where appropriate under the project's governance and consent rules, rather than relying solely on synthetic test data.

How many proposals does TechTown anticipate receiving in response to the RFP?

Our minimum requirement for this RFP is three.

Aside from Zoho, Salesforce, and HubSpot are there any other platforms that your participating organizations currently use or plan to integrate together (e.g. data warehouses, CRMs, financial tools, AI tools, data visualization tools, etc.)?

The current landscape of participating ESOs use Zoho, Monday.com, and Salesforce. We expect to support additional systems over time, including flat-file/CSV sources for organizations that do not maintain a full CRM.

Beyond the source CRMs, we are planning a business-intelligence/data-visualization layer for reporting and dashboards. In future phases, we intend to augment the harmonized coalition data with external data sources, such as deal tracking, funding and investment activity, and public economic-development datasets, so the coalition can develop insight into which client journey patterns drive economic-development outcomes. Additional tool categories (for example, a data warehouse or AI/analytics tooling) may be integrated as the platform matures.

Accordingly, respondents should design for extensibility - a repeatable process for onboarding new source systems, file-based inputs, and external data domains - rather than a fixed set of integrations. We welcome recommendations on architecture that supports this.

Do participating organizations currently use any common identifiers across their systems (e.g., EIN, DUNS, shared program/grant IDs), or should Proposers assume no existing cross-reference exists between partner records?

At TechTown, the identifiers currently used include email address, EIN (Employer Identification Number), and State of Michigan LARA entity numbers. These offer a useful starting point for matching, but their availability, completeness, and consistency across the other participating organizations are not yet known and will be confirmed during discovery. Accordingly, the solution should support multi-attribute identity resolution, combining deterministic matching on strong identifiers (such as EIN or LARA number) where present with probabilistic matching on attributes like name, address, and email, rather than relying on a pre-existing cross-reference between systems. Establishing and maintaining shared identifiers going forward is an anticipated benefit of ECHO.

Since no formal governance body exists yet, will TechTown Detroit have authority to approve data-sharing rules, taxonomy, and KPI definitions on behalf of the coalition during Phase 0, or does that require individual sign-off from each partner organization?

TechTown Detroit will lead coalition governance for ECHO. TechTown has made significant investments in establishing a robust CRM and data foundation and will serve as the convening and decision-making lead for the initiative, including during Phase 0, when the data-sharing framework, taxonomy, and KPI definitions are first established. Proposers should plan to work with TechTown as the primary approving authority and single point of coordination for governance decisions.

At the same time, ECHO is a coalition effort, and we look forward to incorporating the best practices and perspectives of the other participating organizations. Our intent is a collaborative model where TechTown leads and holds decision authority, drawing on input from participating organizations. Proposers should therefore assume that foundational, coalition-wide decisions can be approved through TechTown without unanimous individual sign-off, but that each organization's participation is anchored in a data-sharing agreement that establishes its consent to the agreed rules.

As the formal governance body matures beyond Phase 0, decision-making is expected to transition toward a standing coalition governance structure. Proposers may recommend a governance and decision-rights model based on comparable data-collaborative implementations.

Has a budget range or budget ceiling been established for this initiative, for the initial 12-month term and annually thereafter?

For the initial term, TechTown has committed approximately \$100,000 to launch the project. It's important to frame what this figure is and is not: it represents TechTown's initial contribution to stand up Phase 1 and get the coalition moving. It is not the budget to build ECHO in full, it does not include the resources other participating ESOs will bring, and it is not intended to fund the complete implementation. Later phases will be funded separately, and Phase 1 is the demonstration we will use to unlock that funding from participating organizations, funders, and public partners.

A single not-to-exceed ceiling has not been established for the initiative as a whole. Because ECHO is funded incrementally, we ask Proposers to propose modular, phase-gated pricing - a firm fixed-fee or not-to-exceed amount for Phase 0 and Phase 1 within the initial term - so the coalition can authorize work one phase at a time as additional funding is secured. Phases beyond the initial term are expected to be funded separately and are not governed by a pre-set ceiling at this stage.

We are deliberately starting small. Phase 1 has two goals: 1) stand up the data-governance framework (the foundational, and perhaps hardest, part) and 2) deliver a working minimal

viable product that connects a limited set of ESOs, making visible the value that only emerges when the data is combined. ECHO is a governance-first data-collaboration layer across multiple ESO CRMs, not a full single-platform CRM implementation, so Phase 1 can be scoped considerably leaner than a typical organization-wide rollout.

An ongoing annual operating budget has not been fixed. Please provide estimated annual operating costs separately and itemized where possible, including hosting/infrastructure, platform and connector licensing, support and maintenance, and ongoing data stewardship, recognizing that recurring costs will scale as additional organizations onboard in later phases. We welcome Proposers' recommendations on right-sizing both the Phase 1 scope and the ongoing operating model to the resources available.

What is the makeup of the team (a project lead, data steward, and/or working group) dedicated to oversee ECHO through implementation?

TechTown will dedicate an internal team to oversee ECHO through implementation and will contribute the time of its CIO, a solution architect, and two developers to support the engagement. TechTown's CIO will serve as the executive lead for the initiative.

As the coalition lead, TechTown will also coordinate governance and act as the central point of contact across participating organizations. We expect the other participating ESOs to contribute comparable resources appropriate to their size and role; at minimum, a business/program lead and a technical/CRM-administrator contact from each organization to support requirements gathering, data and system discovery, testing, and validation of their own data (consistent with the partner-participation expectations described elsewhere in this RFP).

We anticipate the oversight structure will include a project lead, a data-steward function, and a cross-organization working group that convenes the participating ESOs on governance, taxonomy, and KPI decisions. Proposers should describe the counterpart roles they expect from TechTown and the coalition and may recommend a team and governance structure.