



REQUEST FOR PROPOSALS ADDENDUM

Request for Proposals Title:	Customer Relationship Management System
Solicitation Number:	25-11
Addendum Number:	2
Solicitation Coordinator:	comasc@prosperportland.us
Issue Date of this Addendum:	July 15, 2026

1.0 PURPOSE OF THIS ADDENDUM

Prosper Portland is issuing this Addendum to the subject Request for Proposals to respond to select questions that were received before the Deadline for Questions.

Questions that were not selected to be answered were deemed to infringe on the project scope, be trade secrets, or proprietary information of Prosper Portland.

2.0 CHANGES TO THE RFP

In the event of any conflict between the information contained in the RFP and the responses to questions provided in this Addendum, the responses in this Addendum will take precedence.

3.0 GENERAL INSTRUCTIONS

This Addendum constitutes an integral part of the RFP and is to be read in conjunction with the RFP. Unless specifically changed by this Addendum, all other requirements and provisions of the RFP remain unchanged. Capitalized terms used in this Addendum without definition have the same meaning ascribed to those terms in the RFP. It is the responsibility of all Proposers to read this Addendum and modify their proposals accordingly.

Question:	Answer:
We would be grateful for any guidance you may be able to share regarding the anticipated budget range or funding allocation for this project. Such information would help us ensure that our proposed solution is appropriately aligned with Prosper Portland's objectives and requirements.	Prosper Portland encourages proposers to navigate to its website to understand the programs and staffing of Prosper Portland to inform the proposer's solution. A budget range of \$50,000 - \$250,000 is recommended but not required for proposals.
Section 5.3 identifies several contract compliance requirements, including authority to transact business in Oregon and obtaining a City of Portland Business License prior to contract execution. Can Prosper Portland confirm that firms based outside Oregon may submit a proposal, provided the selected firm satisfies the Oregon business registration and Portland business license requirements before contract execution?	Yes.
For the public portal, should vendors assume that users must create authenticated accounts, or should the portal also support anonymous public forms for initial intake?	Yes, both are useful.
Section 2.2 describes several existing systems, including Microsoft Dynamics ERP, Portfol, Airtable, Acuity Scheduling, Jotform, Placer, and Apptivo. Does Prosper Portland prefer to retain certain systems as systems of record and integrate with them, or does Prosper Portland intend to consolidate selected data and functionality into the new CRM?	Prosper Portland is open to consolidation as much as possible into one system. We are open to the possibility of retaining some of the described systems if integrations are shown.
Should the Microsoft Dynamics ERP integration be one-way, two-way, batch-based, near-real-time, or real-time through APIs?	One way from ERP to CRM. Near-real time is fine, but real-time is desired.
For Portfol, should vendors assume that Portfol will remain the system of record for loan and grant servicing, or should vendors propose CRM-native loan/grant tracking capabilities where feasible?	Yes at the moment. Proposers should propose CRM native grant and loan tracking capabilities where feasible.
Section 2.2.3 identifies Microsoft Office 365 and Power BI as part of the existing technology environment. Does Prosper Portland prefer CRM reporting to remain native to the CRM, be published through Power BI, or support both options?	Prosper Portland would prefer to support both options, but either are acceptable.
Section 2.2.1 identifies Outlook integration as a business need. Should vendors assume the CRM must support automatic email capture, manual email logging, calendar synchronization, contact synchronization, or all of these functions?	While Outlook integration as a business need, it is not a disqualifying factor to not have automatic email capture.
(Section 2.2.3) Q: Is Apptivo being fully retired, or will any current systems (Portfol, Airtable, Acuity Scheduling, Jotform) remain in production alongside the new CRM (aside from the ERP)? Specifically, is loan servicing expected to remain in Portfol?	Apptivo is being fully retired. Loan servicing may or may not be replaced with a CRM solution depending on functionality. We would like to move away from Portfol and have a full loan lifecycle available on CRM or be integrated with another software for parts of it (underwriting, servicing).
(Section 2.2.3) Q: Should Power BI remain the agency's primary reporting and dashboarding layer with the CRM feeding it via live connector, or is native CRM reporting expected to replace Power BI for program reporting?	Power BI and native reporting are both acceptable.
(Section 2.2.1) Growth Operations Firm Prosper Portland RFP Questions Page 2 of 7 Q: For language translation: which languages are required, and is the requirement limited to public-facing forms and documents, or does it extend to the internal staff interface?	Languages are required for many languages as needed. This requirement is needed for public facing documents, and does not extend to the internal staff interface.
(Section 3.0) Q: Of the 33 support staff, do these users need edit capabilities, or would view-only access to records and reports be sufficient for some or all?	View only access
(Section 3.1.1) Q: Do client records exist in multiple source systems simultaneously (e.g., the same business in Apptivo, Airtable, and Portfol), and is there a common identifier (such as EIN or an internal account number) shared across systems? Approximately what portion of clients appear in more than one system?	Duplicate client records exist and cleaning the data is a challenge that is a current ongoing improvement.
(Section 2.2) Q: The RFP notes that loan programs, real estate, and area planning teams "may also benefit" from the CRM. Are these teams in scope for the initial implementation or anticipated as future phases? If in scope, what entity types do they manage (e.g., properties, real estate projects, planning areas), and in what approximate volumes?	Not in scope. See optional features for features that may help these teams.
(Attachment A, Functional Requirements, response columns) Q: The response grid does not include an option for functionality delivered through a certified third-party application or pre-built integration available on the platform's marketplace. How should Proposers record such items, and how will they be scored relative to "Standard Functionality"? Relatedly, if "Standard Functionality" is marked, should the Included in Base Service and Available for an Additional Fee columns also be completed, or are the column sets mutually exclusive?	Proposers, should denote this in comment sections.
(Attachment A, Client Profile, GIS map overlays) Q: Please clarify the mandatory GIS requirement. Is the need to (a) visualize client locations on a map, (b) overlay agency-defined geographic boundaries (e.g., TIF districts, former urban renewal areas, NPI districts) onto client address data, (c) automatically assign clients to a geographic district based on their address so records can be filtered and reported by district, or (d) import and manage GIS layer files within the CRM? If boundary data exists today, in what format is it maintained (e.g., ArcGIS shapefiles, GeoJSON),	All of these are valid functionalities that may be used. Prosper GIS requirements are outlined in the specification matrix.

Question:	Answer:
(Attachment A, End User Reporting, WCAG) Q: Does the WCAG 2.1 AA compliance requirement apply to (a) exported PDF/Excel dashboard artifacts, (b) public-facing web interfaces and forms, or both? Would WCAG-compliant public web dashboards with standard (non-certified) PDF export satisfy the mandatory requirement?	Yes, please comply with WCAG if possible
(Attachment A, End User Reporting, externally shared user interfaces) Q: Please clarify whether the mandatory requirement for “user interfaces that can be externally shared with the public” means publicly viewable dashboards and reports without login, embedded data views on prosperportland.us, or something else.	It can be either a live dashboard or not-live embedded data. Publicly shared would be useful but not required.
(Attachment A, Client Tracking, employee master profile) Q: Please confirm the mandatory “employee master profile for each company” requirement means maintaining individual contact records associated with each company record, including roles and titles, rather than HR-style employee data.	Yes, individual contact records, not HR data.
(Attachment A, Integration Capability, export formats) Q: The mandatory export/import requirement lists Excel, delimited, XML, or fixed-format sequential file formats. Will support for Excel and delimited (CSV) formats satisfy this requirement, or is XML and fixed-format support independently mandatory?	Yes
(Attachment A, Technical Requirements, Usability) Q: Several questions request measured time-on-task and completion rates for Prosper Portland's top workflows before and after configuration. Since configuration has not occurred, may Proposers respond with published benchmark or analyst usability data and customer-reported productivity metrics?	Yes
(Attachment A, Technical Requirements, Artificial Intelligence) Q: Please clarify the question regarding “Retrieval Augmented Generation (RAG) and internal documentation government regulation requirements.” Is the intent to ask whether AI features can ground responses in the agency's internal documentation, whether the platform supports compliance with specific government AI regulations, or both? If specific regulations apply, please identify them.	The intent is AI features can ground responses in the agency's internal documentation
(Attachment A, Technical Requirements, Cost and Pricing Efficiency) Q: For renewal pricing protections, will Prosper Portland accept contractual caps on annual uplift proposed by the Proposer, or is historical uplift disclosure alone sufficient?	Please propose the pricing plan that you think is appropriate.
Does Prosper Portland envision maintaining a single constituent record shared across all programs and departments, or are there scenarios where separate program-specific records and relationships are preferred?	Universal records preferred across all programs, but possible access permissions between teams
On the CRM Attachment A, could you please clarify the differences between column D “not available” and column H “not supported”?	"Not available" is that it could be a future feature, but "Not supported" is that it won't be ever supported in the foreseeable future.
In Attachment A, row #19, could you please elaborate what you mean for “referrals for a company/industry cluster”?	Prosper Portland has certain priority industry clusters (e.g., Food and Beverage). If a staff member encounters a company in that industry cluster, they would refer that company profile to the staff member working as the specific industry cluster's liaison.
In Attachment A, row #26, could you please add additional context? What fields are you looking for and which apps are currently being used?	Engagement logs, dates, and times, with regards to scheduling. Currently we use Acuity scheduling and sometimes Outlook appointment scheduling.
Is the anticipated implementation timeline of August–November 2026 a firm requirement, or is there flexibility if a vendor's methodology requires additional time to ensure data quality and proper configuration across Prosper Portland's multiple program areas?	Not a firm requirement, just suggested
Given the broad range of program areas and workflows described in the RFP, are there specific functions or business processes that Prosper Portland considers highest priority for the initial implementation phase?	All the functionalities in 2.2.1 are higher priority than in 2.2.2.
Is there an identified cost/budget Prosper Portland has for this initiative?	Prosper Portland encourages proposers to navigate to its website to understand the programs and staffing of Prosper Portland to inform the proposer's solution. A budget range of \$50,000 - \$250,000 is recommended but not required for proposals.
How much of the existing technology listed does Prosper Portland plan to continue utilizing?	Prosper Portland is open to consolidation as much as possible into one system. We are open to the possibility of retaining some of the described systems if integrations are shown.
Will product demonstrations be scored separately from the written proposal or will they be used solely to clarify written responses?	They will be used to clarify written responses
Section 3.0 identifies 93 total staff. Will pricing be evaluated on a per-user basis, or will the committee consider total cost of ownership including scalability as Prosper Portland's team or partner network grows?	Pricing will be evaluated as a total package.

Question:	Answer:
Can Prosper Portland provide examples of key reports, dashboards, and outcome metrics that are considered essential for measuring program performance and economic impact?	For examples of dashboards and reports please see prosperportland.us
How should document management be handled for cases, applications, or service requests (document types, version control, and external system integration)? Document submission via portal is mentioned, but document lifecycle, versioning, and storage/integration approach are not defined.	The CRM tool is envisioned as an intake, reporting, and processing tool. Housing of official records and documents will be done in other applications.
Who are the external users of the system?	Community partners, contractors, and consultants are among the types of external users.
Approximately how many external users are expected annually?	A rough estimate of between 25-75.
Will partner organizations require multiple users under a single organization account?	All external users should have permissions set by Prosper Portland system administrators.
What types of documents will users upload? and any file size limit ?	The engagement by users varies by workflow but generally it will be documents, review interactions, and user interface with results.