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Commissioner/CEO

**ADDENDA**  
**Request for Proposals (“RFP”) for ImageSilo Enterprise  
Content Management System**

Addendum No. 5 - Issued on July 30, 2025

**Amendment 24:**

The Tab 3, Cost Proposal template is hereby amended as indicated below.

**TAB 3, COST PROPOSAL**

**COST PROPOSAL FORM**

**A. Annual Base Costs**

Itemized Costs for ECM System	Total Estimated Costs for (2025-2026)	Total Estimated Costs for (2026-2027)	Total Estimated Costs for (2027-2028)	Total Estimated Costs for (2028-2029)	Total Estimated Costs for (2029-2030)
<b>Base Charges</b>					
<b>1. Annual ECM Cloud Services Hosting Costs:</b>  <i>Proposers must insert their annual hosting costs based on current usage of 4,100 GB over the course of each year.</i>					
<b>2. Unit Rate Costs:</b>  <i>Proposers must insert the unit rate that was used to compute the Annual Costs in Item 1 above.</i>  Unit Rate: \$ _____ x 4,100 GB x 12 Months					
<b>TOTAL ANNUAL COSTS</b>					

**FIVE YEAR TOTAL CONTRACT AMOUNT: \$ \_\_\_\_\_**



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## Optional Total Costs

<u>Optional Itemized Costs for ECM System</u>	<u>Total Costs for (2030-2031)</u>	<u>Total Costs for (2031-2032)</u>	<u>Total Costs for (2032-2033)</u>	<u>Total Costs for (2033-2034)</u>	<u>Total Costs (2034-2035)</u>
<b><u>Optional Charges</u></b>					
<b><u>1. Annual ECM Cloud Services Hosting Costs:</u></b>  <i>Proposers must insert their annual hosting costs based on current usage of 4,100 GB over the course of each year.</i>					
<b><u>2. Unit Rate Costs:</u></b>  <i>Proposers must insert the unit rate that was used to compute the Annual Costs in Item 1 above.</i>  Unit Rate: \$ _____ x 4,100 GB x 12 Months					
<b><u>TOTAL ANNUAL COSTS</u></b>					

**OPTIONAL FIVE YEAR TOTAL CONTRACT AMOUNT: \$ \_\_\_\_\_**

**GRAND TOTAL (5 Year Base + 5 Year Optional): \$ \_\_\_\_\_**

Addendum No. 4 - Issued on July 21, 2025

### **Amendment 21:**

The second paragraph in Section 8 of this RFP titled "Contract" is hereby amended as indicated below.

The successful Proposer(s) will be required to execute a contract with the Agencies that incorporates the Agencies' [Standard Clauses for Contracts](#), hyperlinked herein as Appendix I. The successful Proposer(s) may also be required to execute a contract with the Agency(ies) that incorporate(s) the Agencies' /Agency's [MWBE Participation Requirements and Procedures for Contracts](#), and [the Agencies' Information Security Policy](#), [and the MSA](#), hyperlinked herein as Appendix II, ~~and~~ Appendix III, ~~and~~ IV, respectively.



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## **Amendment 22:**

Subsection 12.2.4.a) of this RFP titled “Master Services Agreement (MSA), Artificial Intelligence Policies, Security Policies, and access to Licensed Software/Post-Contract Rights” is hereby amended as indicated below

### **12.2.4 Master Services Agreement (MSA), Artificial Intelligence Policies, Security Policies and access to Licensed Software/Post-Contract Rights**

**a) Proposer to indicate deviations from the MSA. Any proposed deviations in the form of the MSA will be factored into the selection process, hyperlinked hereto as Appendix IV.**

## **Amendment 23:**

Appendix IV was added to the “Policies, Standard Clauses and Requirements” in Attachment A titled “Proposal Checklist” as indicated below.

### **Policies, Standard Clauses and Requirements**

- [Standard Clauses and Requirements for Solicitations](#), hyperlinked as Exhibit A
- [Standard Clauses for Contracts](#), hyperlinked as Appendix I
- [MWBE Participation Requirements and Procedures for Contracts](#), hyperlinked herein as Appendix II
- [Agencies’ Information Security Policy](#), hyperlinked as Appendix III
- [Agencies’ Master Services Agreement](#), hyperlinked hereto as Appendix IV

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Addendum No. 3 - Issued on July 15, 2025

## **Amendment 12:**

The Cover Page of the RFP is hereby amended by revising the Submission Deadline date to August 11, 2025, 12pm, EDT as indicated below.

# Request for Proposals for *ImageSilo Enterprise Content Management System*

RFP Issuance Date: June 23, 2025  
Proposal Submission Deadline: August **11**, 2025, 12pm, Eastern Daylight  
Time

RFP Number: HCR-RFP-250623

## **Amendment 13:**

The second paragraph in Section 2 of the RFP titled “Purpose” is hereby amended by adding the hyperlink to “New York State Archives’ regulations” as indicated below.

The Agencies currently manage a vast repository of records in their current ImageSilo ECM system, including approximately 4.1 terabytes (TB) of digital documents. The need for a new competitive solicitation is required under the Agencies’ Procurement and Contract Guidelines to ensure continued operation of the ImageSilo ECM system and compliance with New York State Archives’ regulations, improve operational efficiency and support the Agencies’ mission of promoting affordable housing and homeownership opportunities within the State.

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## **Amendment 14:**

The table in Section 5 of the RFP titled “Calendar of Events and Milestones” is hereby amended as indicated below

<b>Event</b>	<b>Date</b>
Issuance of Request for Proposals	June 23, 2025
Deadline for RFP Questions	July <del>30</del> <sup>15</sup> , 2025, 12:00pm, Eastern Daylight Time (“EDT”)
Deadline for Agency Responses to RFP Questions	<del>August 6, July 21</del> , 2025, 5:00pm, EDT
<a href="#"><u>Intent to Submit Proposal</u></a>	<a href="#"><u>July 31</u></a> <del>21</del> , 2025, 5:00 pm, EDT
Deadline for Submission of Proposals	August <del>11</del> <sup>4</sup> , 2025, 12:00pm, EDT
Interviews/Demonstrations (if necessary)	To Be Determined
Anticipated Selection Date*	October 10, 2025

\*Subject to the approval of each Agency’s Board of Directors (“Board”).

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## **Amendment 15:**

Section 6 of the RFP titled “Proposer Mandatory Minimum Qualifications” is hereby amended as indicated below.

Proposers must meet all the mandatory minimum qualifications outlined in this section. Failure to do so will result in the rejection of the proposal.

The Proposer must be able to meet the below criteria and provide a statement in the Proposal Cover Letter certifying that Proposer meets the criteria in 1) through 3) below:

1. Proposer must be certified as an authorized Reseller of ImageSilo ECM systems and shall provide evidence of its Reseller certification from ImageSilo/Digitech Systems LLC.
2. Proposer must ensure (and certify within its Proposal Submission) that all Agency data must be segregated from other customer data. Agency data must not be made available outside the borders of the contiguous United States (“CONUS”), either physically, electronically, verbally, or in any other form or manner; and

**23.** Proposer must ensure (and certify within its Proposal Submission) that all resources of the successful Proposer will be physically located within the borders of the CONUS.

A Proposer must meet the qualifications outlined in this section. Failure to do so will result in the rejection of the proposal.

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## **Amendment 16:**

The first paragraph in Section 7 of the RFP titled “Scope of Services” is hereby amended as indicated below.

### **7. Scope of Services (“Scope of Work”)**

The New York State Housing Finance Agency (“HFA”), State of New York Mortgage Agency (“SONYMA”) and Housing Trust Fund Corporation (“HTFC”) (collectively, the “Agencies”) seek Value Added Resellers (“VAR(s)”) of the ImageSilo Enterprise Content Management (“ECM”) system for the successful continuity of the Agencies’ current records system. ImageSilo (powered by PaperVision) is the current ECM platform under licensure by the Agencies. The Agencies currently manage a vast repository of records in the ImageSilo system, including 4.1 terabytes (TB) of digital documents. ~~The need for a new provider of ImageSilo for a 5-year term to ensure compliance with, improve operational efficiency, and support the Agencies’ mission of promoting affordable housing and homeownership opportunities.~~



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## **Amendment 17:**

Subsection 7.3 of this RFP titled “Specific Requirements” is hereby amended by adding the hyperlink to “New York State Archives’ regulations” as indicated below.

7.3.2 Regulatory Compliance: The solution must comply with standards such as NIST, ISO 27001, FISMA and [New York State Archives guidelines](#);

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## **Amendment 18:**

Subsection 7.3 of the RFP titled “Specific Requirements” is hereby amended as indicated below.

The selected Reseller must ensure the following functionalities and services are included:

- 7.3.1 Storage based fee structure, based on GB of storage used;
- 7.3.2 Regulatory Compliance: The solution must comply with standards such as NIST, ISO 27001, FISMA and [New York State Archives guidelines](#);
- 7.3.3 Data Security: Provide robust security measures, including data encryption, identity management, and disaster recovery plans;
- 7.3.4 Retention and Disposal: Support automated retention scheduling and secure disposal of records in compliance with regulatory requirements; and
- 7.3.5 Search and Retrieval: Enable advanced search capabilities, including full-text search and metadata filtering.
- ~~7.31.64~~ Disaster Recovery: A disaster recovery plan must be in place and must be tested upon the Agencies’ request.;
- ~~7.31.75~~ A recovery time Service Level Agreement (SLA) is required by the Agencies to protect against any unforeseen outages; -----
- ~~7.31.86~~ Ensure that all data will be made available outside the borders of the contiguous United States (“CONUS”), either physically, electronically, verbally, or in any other form or manner; AND

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- ~~7.31.97~~ All resources of the successful Proposer will be physically located within the borders of the CONUS.



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## **Amendment 19:**

Section 12.2 of the RFP titled “TAB 2: Technical Proposal” is hereby amended by adding a new subsection titled “12.2.4 “Master Services Agreement (MSA), Artificial Intelligence Policies, Security Policies and access to Licensed Software/Post-Contract Rights” as indicated below.

### **12.2.4 Master Services Agreement (MSA), Artificial Intelligence Policies, Security Policies and access to Licensed Software/Post-Contract Rights**

a) Proposer to indicate deviations from the MSA. Any proposed deviations in the form of the MSA will be factored into the selection process.

b) Proposer to confirm that they will adhere to the Agency’s AI policies, hyperlinked here. Proposer to also briefly outline all AI components to the EMC system services to be provided, if any.

c) Proposer to confirm that Proposer will adhere to the Agency’s Security policies, hyperlinked here and attached hereto as Appendix III.

d) Disclose any licenses required for the provision of ECM system support. Provide a statement confirming that if selected as the successful Proposer of this RFP process, that upon termination of the contract resulting from this RFP, the successful Proposer will ensure continuity or a plan for the transition of these services.

## **Amendment 20:**

Section 14.3 of the RFP titled “Selection and Notification” is hereby amended as indicated below.

### **14.3 Selection and Notification**

The selected Proposer(s) will be notified via **U.S. mail or** email. Proposers who are not selected will be notified of the Agencies’ determination via **U.S. mail or** email.

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Addendum No. 2 - Issued on July 10, 2025

## **Amendment 10:**

Section 14.1.3 titled “Evaluation and Criteria for Selection” is hereby amended by adding the revisions to this section as indicated below.

### **14.1.3 Evaluation and Criteria for Selection**

Proposals will undergo an evaluation process conducted by a committee of the Agencies (“**Committee**”). The Agencies will evaluate proposals based on the qualifications of both the Firm and its current personnel, which will include an individual’s experience at other firms during the relevant time period. The Committee will evaluate the proposals based upon the following criteria, not necessarily listed in the order of importance:

1. Demonstrated ability and capacity to perform the types of services which have been described herein;
2. Expertise, experience and availability of the Proposer to provide the Agency(ies) with the services described in the Scope of Services section of this RFP;
3. The price for the firm’s services;
4. Maintenance of an office in the State of New York;
5. Diversity and commitment to equal employment opportunity and MWBE and SDVOB participation/programs;
6. Avoidance of any potential conflict of interests or appearance of impropriety and policies designed to ensure the avoidance of such conflicts in the future;
7. Financial stability;
8. Overall completeness of all information provided in the proposal; and
9. Interviews to clarify or expand on the responses (*to be conducted at the Agencies’ discretion*).

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## **Amendment 11:**

Section 14.1.5 titled “Technical Proposal Evaluation” is hereby amended by adding the revisions to this section as indicated below.

### **14.1.5 Technical Proposal Evaluation – ~~50~~ 60 Points**

The Agency(ies)’ Committee will independently score each Technical Proposal to identify Proposers with the highest probability of satisfactorily providing the services described in the Scope of Services of this RFP. Evaluations will be based on the Proposer’s demonstration of its ability to provide the services required through its Technical Proposal, ~~which may include but not be limited to:~~

- ~~— Demonstrated experience, competence, expertise and ability to provide the AMS services in the Scope of Work described “Scope of Services” section of this RFP;~~
- ~~— Project Plan, Project Approach and response to the cited deliverables in the RFP;~~
- ~~— Proposed fees and costs (including discount to governmental agency);~~
- ~~— Diversity and commitment to equal employment opportunity, including MWBE and SDVOB programs;~~
- ~~— Overall organization, completeness and quality of response, including cohesiveness and clarity of response;~~
- ~~— Interviews to clarify or expand on the RFP response (to be conducted at the discretion of the Agencies);~~
- ~~— The proposed SOW to be incorporated into the resultant agreement, the “Master Services Agreement” (MSA);~~
- ~~— The proposed deviations from the MSA; and~~
- ~~— The Agencies reserve the right to create a shortlist of proposals.~~

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Addendum No. 1 - Issued on July 9, 2025

## **Amendment 1:**

The header on page 1 of the Request for Proposals (“RFP”) AND the first and second paragraphs on page 1 of the RFP under the section titled “IMPORTANT NOTICE,” including footnote 1, are hereby revised to read as follows:

**NEW YORK STATE HOUSING FINANCE AGENCY  
STATE OF NEW YORK MORTGAGE AGENCY  
~~NEW YORK STATE HOUSING TRUST FUND CORPORATION~~**

**REQUEST FOR PROPOSALS  
FOR  
IMAGESILO ENTERPRISE CONTENT MANAGEMENT SYSTEM**

IMPORTANT NOTICE: A Restricted Period under the Lobbying Procurement Law is currently in effect for this procurement process and will remain in effect until approval of the Contract(s). Proposers are prohibited from Contacts related to this procurement process with any employee of the New York State Housing Finance Agency, State of New York Mortgage Agency, and Housing Trust Fund Corporation~~New York State Affordable Housing Corporation, State of New York Municipal Bond Bank Agency and Tobacco Settlement Financing Corporation~~ (collectively, “Agencies”) or their Affiliate(s)<sup>1</sup>, other than the Designated Contact Officer listed below.

Lobbying Law Designated Contact Officer:

~~Melina Stratos, Deputy Counsel, Compliance~~ Kathryn Mazzeo, Associate Counsel  
New York State Homes & Community Renewal  
641 Lexington Avenue, 5<sup>th</sup> Floor 38-40 State Street  
New York, New York 10022 Albany, NY 12207  
Melina.Stratos@hcr.ny.gov Kathryn.Mazzeo@hcr.ny.gov

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<sup>1</sup>Affiliate(s) shall mean the other agencies comprising New York State Homes and Community Renewal being the New York State Affordable Housing Corporation, State of New York Municipal Bond Bank Agency and Tobacco Settlement Financing Corporation~~Housing Trust Fund Corporation~~.



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## **Amendment 2:**

Section 1 of the RFP titled “Introduction” is hereby amended by adding the following revisions to this section:

### **1. Introduction**

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[New York State Homes and Community Renewal](#) (“HCR”) consists of all the major housing and community renewal agencies of the State of New York (“State”), including the New York State Housing

Finance Agency, State of New York Mortgage Agency, [and the Housing Trust Fund Corporation](#) ~~New York State Affordable Housing Corporation, State of New York Municipal Bond Bank Agency and Tobacco Settlement Financing Corporation~~. HCR includes other agencies (“Affiliates”) not involved in this request for proposals (“RFP”) process.

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### **Amendment 3:**

The table in Section 5 of the RFP titled “Calendar of Events and Milestones” is hereby amended to read as follows:

<b>Event</b>	<b>Date</b>
Issuance of Request for Proposals	June 23, 2025
Deadline for RFP Questions	July 15, 2025, 12:00pm, Eastern Daylight Time (“EDT”)
Deadline for Agency Responses to RFP Questions	July 21, 2025, 5:00pm, EDT
<u>Intent to Submit Proposal</u>	<u>July 21, 2025, 5:00 pm, EDT</u>
Deadline for Submission of Proposals	August 4, 2025, 12:00pm, EDT
Interviews/Demonstrations (if necessary)	To Be Determined
Anticipated Selection Date*	October 10, 2025

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## **Amendment 4:**

The first paragraph in Section 8 of the RFP titled “Contract” is hereby amended to read as follows:

The contract(s) resulting from this RFP process will be to provide services under the resultant Master Services Agreement (“MSA”) for a five (5) year period with two optional two-year renewals and one optional one-year renewal, subject to approval by the Agencies’ respective Boards. The Agencies/Agency’s at their/its discretion, may exercise their/its option to modify any provision in the contract including, but not limited to, the scope of services and compensation, on an as needed basis, with the mutual written consent of the contracting parties. Any contract that exceeds a five-year period will require the affirmative concurrence of the Agencies’ respective Boards to extend the term of the contract beyond a five-year period without undergoing a new solicitation process.

## **Amendment 5:**

Section 9 of the RFP titled “Questions & Answers” is hereby amended to read as follows:

Any questions or requests for clarification regarding this RFP must be submitted via email to [contractunitinfo@hcr.ny.gov](mailto:contractunitinfo@hcr.ny.gov) citing the RFP page and section, no later than the date identified in the “Calendar of Events and Milestones” section of this RFP. The “Subject” line of the email should indicate “Questions: Insurance Brokerage RFP, ImageSilo ECM RFP”

## **Amendment 6:**

Section 12.4.2 titled “Financial Capacity is hereby amended by revising this section as indicated below:

### **12.4.2 Financial Capacity**

The Proposer must provide the last two years of their firm’s most recent tax ~~returns or, if available,~~ audited financial statements, including balance sheets.

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## **Amendment 7:**

The title in subsection 14.1.5 of the RFP titled “Technical Proposal Evaluation – 50 Points” is hereby retitled to read as follows:

**14.1.5      Technical Proposal Evaluation – ~~50~~ 60 Points**

## **Amendment 8:**

The title in subsection 14.1.6 of the RFP titled “Cost Proposal Evaluation – 40 Points” is hereby retitled to read as follows:

**14.1.6      Cost Proposal Evaluation – ~~40~~ 30 Points**

## **Amendment 9:**

The header in “Form A: Intent to Submit Proposal Form” is hereby amended to read as follows:

## **FORM A: Intent to Submit Proposal Form**

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### **Intent to Submit Proposal Form**

**New York State Housing Finance Agency  
State of New York Mortgage Agency  
Housing Trust Fund Corporation  
~~New York State Affordable Housing Corporation,  
State of New York Municipal Bond Bank Agency  
Tobacco Settlement Financing Corporation~~**

**Request for Proposals for  
2025 ~~ImageSilo~~ Enterprise Content Management  
System**