



Kathy Hochul, Governor

**Homes and
Community Renewal**

RuthAnne Visnauskas, Commissioner/CEO

Request for Information for 2025 Document Automation Software Solution

Request for Information Issuance Date: September 4, 2025
Response Submission Deadline: ~~September 25, 2025, 12PM, EDT~~
~~October 2, 2025, 12PM, EDT~~
October 9, 2025, 12PM, EDT

NEW YORK STATE HOUSING FINANCE AGENCY
641 Lexington Avenue | New York, NY 10022
www.hcr.ny.gov

RFI Submission Coversheet

Attach this form to the top of your submission.

DATE: _____

GENERAL INFORMATION ON FIRM:

Legal Name of Firm:

Mailing Address:

Website:

Main Telephone Number (including area code):

Federal Tax ID Number:

SEC Registration Number (if applicable):

MBE Registration Number (if applicable):

WBE Registration Number (if applicable):

MWBE Registration Number (if applicable):

SDVOB Registration Number (if applicable):

Is your Firm a Small Business Concern? Yes No

“**Small Business Concern**” means a business which is a resident in the State of New York, independently owned and operated, not dominant in its field and employs one hundred or less persons.

MAIN CONTACT INFORMATION FOR THIS SUBMISSION:

Please list the individual that will be the main contact *regarding this RFI submission*:

Contact Name:

Contact Telephone Number (including area code):

Contact E-mail Address:

Contact Facsimile Number (including area code):

NEW YORK STATE HOUSING FINANCE AGENCY

REQUEST FOR INFORMATION FOR DOCUMENT AUTOMATION SOFTWARE SOLUTION

NOTE: THIS IS A REQUEST FOR INFORMATION AND IS NOT A SOLICITATION FOR THE PROCUREMENT OF GOODS AND/OR SERVICES.

THE NEW YORK STATE HOUSING FINANCE AGENCY RESERVES THE RIGHT TO USE INFORMATION RESULTING FROM THIS REQUEST FOR INFORMATION PROCESS TO DEVELOP A FUTURE SOLICITATION.

1 INTRODUCTION

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 (“**HFA**” or “**Agency**”). HCR includes other agencies not involved in this request for information (“**RFI**”) process.

2 OBJECTIVE AND PURPOSE

The purpose of this RFI is to gain knowledge from qualified firms or individuals (“**Respondents**”) regarding the full range of potential options and strategies currently available in the marketplace for the provision of a Document Automation Software Solution (“**Project**”).

The Agency may request to meet with Respondents following the RFI submission deadline, indicated in the Calendar of Events and Milestones section of this RFI, to request clarifications and/or to seek a demonstration of products available. Responses will be used to gauge the level of interest in the Project described herein and may be used in the development of a future solicitation, at the Agency’s discretion.

Respondents to this RFI will not be precluded from responding to any future request for proposal (“**RFP**”) process and will not be given any additional consideration from vendors who have not submitted a response to this RFI. Contact information received from parties interested in this RFI will be retained to inform said interested parties regarding any information in connection with a

potential future RFP process. All materials submitted in response to this RFI shall become the property of the Agency.

The Agency will not be liable for any costs incurred by any Respondent in connection with the preparation and submittal of any written response or for participation in a demonstration in response to this RFI. RFI Submissions are subject to disclosure under the Public Officers Law Section 87 (Freedom of Information Law Act).

Since this RFI is not a procurement, the restricted period under State Finance Law Sections 139j and 139k (the Procurement Lobbying Law) is not applicable. However, any future solicitation process resulting from this RFI process will be subject to all applicable Agency requirements. Participation in this RFI process, or any communication with State or HCR Staff involved in this RFI, will in no way constitute a commitment by the Agency to award a future contract.

3 OVERVIEW OF EACH AGENCY

HFA is a public benefit corporation of the State of New York, co-located and co-administered from its New York City (“NYC”) office.

More detailed information relating to HFA and its respective programs may be found at the Agency’s website <https://hcr.ny.gov/>, hyperlinked herein.

3.1 New York State Housing Finance Agency

The [New York State Housing Finance Agency](#) was created in 1960 to create and preserve high quality affordable multifamily rental housing to finance low- to moderate-income rental housing to communities across the State. Today, HFA is one of the nation’s most prolific issuers of multifamily housing bonds. In furtherance of its mission, HFA is committed to preserving existing affordable rental housing while continuing to be a strong presence in the financing of new affordable housing throughout the State.

-REMAINDER OF THIS PAGE LEFT BLANK INTENTIONALLY-

4 CALENDAR OF EVENTS AND MILESTONES

The RFI timeline is indicated in the below table.

Event	Date
Issuance of RFI	September 4, 2025
Question Submission Deadline	September 11, 2025, 12PM, Eastern Daylight Time (“EDT”) September 26, 2025
HCR Responses to Questions	September 18, 2025 September 25, 2025 October 2, 2025
RFI Response Submission Deadline	September 25, 2025, 12PM, EDT October 2, 2025, 12PM, EDT October 9, 2025, 12PM, EDT
Interviews/Demonstrations (To be held at the discretion of the Agency)	To be determined

Respondents submitting a response to this RFI may be invited for an interview and/or to provide a demonstration of their solution to Agency staff. As this RFI is not a solicitation, demonstrations are not scored but rather are used to gather a general understanding of capabilities and functionality of solutions in the industry.

The Agency reserves the right to modify this schedule at its discretion. Notification of changes in connection with this RFI will be made available to all interested parties via the Agency’s web site at <https://hcr.ny.gov/procurement-opportunities>. It is the responsibility of the Respondent to check the web site regularly for notifications relating to this RFI.

5 ADDITIONAL INFORMATION AND FOLLOW-UP

Any questions or requests for clarification regarding this RFI must be submitted via email to contractunitinfo@hcr.ny.gov citing the RFI page and section, no later than the Question Submission Deadline indicated in the Calendar of Events and Milestones section in this RFI. The “Subject” line of the email should indicate “Questions - 2025 RFI for Document Automation Software Solution”

The Agency also reserves the right to modify this RFI at any time, as necessary. Therefore, prospective RFI Respondents are strongly encouraged to check the Agency's web site regularly at <https://hcr.ny.gov/procurement-opportunities> for updates throughout the RFI period.

6 PROJECT CONTEXT

The Agency is seeking a full range of potential options and strategies for the provision of a Document Automation Software Solution that includes, but is not limited to, the abilities and features indicated below.

1. A user-friendly interface that auto- generates select Agency documents (*including, but not limited to, contracts, contract amendments, solicitation documents, memorandums, etc.*) by using standardized custom-built templates that generate documents based on conditional logic and user input.
2. The ability for multiple users to customize document templates and modify/customize generated documents for download and use outside of the software.
3. The ability to lock down editing of documents and templates by user as well as track the usage and edited versions for traceability.
4. An easily accessible support team for client technical assistance, on-site/virtual training orientation and onboarding.
5. Interfacing with common administrative tools such as Microsoft Products, AI, etc.
6. Optional functions to include:
 - a. Tracking contracts, expirations and prompt end-users when relevant dates are approaching;
 - b. Interfacing with DocuSign or other e-signature products;
 - c. Establishing/facilitating workflows to assist with end-to-end document preparation and finalization; and
 - d. Providing document storage and organization capabilities.
7. Other relevant abilities, capabilities, and features.
8. Cost structuring that includes how costs are structures, frequency of costs, etc. (e.g. one-time set-up, subscription model, annual maintenance, other types of cost structures and frequency of costs). HFA is not requesting nor wishes to receive actual costs and is solely seeking the types of costs and the structuring/frequency of these costs.

7 CONTENTS OF RFI SUBMISSION

A complete response includes a fully completed RFI Submission Coversheet, Cover Letter and RFI Submission Narrative that is responsive to the items listed in Section 6 and 7 of this RFI. The Respondent's response should not exceed 10 pages (excluding the RFI Submission Coversheet and Cover Letter).

To gain a more thorough understanding of options available in the marketplace for the provision of a Document Automation Software Solution, Respondents are requested to provide the Agency with the following information.

1. What types of products already exist and are currently in use in the marketplace to meet the Agency's needs as described in Section 6 of this RFI?
2. What products would best meet the Agency's needs as described in Section 6 of this RFI? Why? How were these products developed? Describe the database and platform for each product. Include ongoing related services for each product, if any. Describe benefits and downfalls of each product.
3. What information requirements and criteria are needed for the Agency to consider in its review of various software solutions? Please be as specific as possible.
4. Provide any best practices or innovative techniques in the industry that may be useful in achieving the outcomes listed in this RFI.
5. What types of fees are typical for platform and services? For example, are there any user fees or fees for maintenance? Are the fees monthly, quarterly, yearly, etc.? Please include a listing of all supplemental services associated with costs. Please note, we are **not requesting actual fees** but rather a listing of the types of services that would incur fees and how the fees are structured.
6. Provide any other potential options and strategies that would be helpful to the Agency.

8 RFI SUBMISSION

Responses must be delivered by email no later than the RFI Submission Deadline and time indicated in the "[Calendar of Events and Milestones](#)" section of this RFI via electronic email to Nyhomes.proposal@hcr.ny.gov with the subject line of the email labeled "2025 RFI for Document Automation Software." The Agency reserves the right to accept late responses at its sole discretion.

RFI Submissions must be submitted in searchable portable document format ("PDF") compatible with Adobe Reader XI. The Agency will not accept discs, flash drives, or FTP file references that require downloading information from the vendor's or a third party's website. If the file is large, it may be submitted in multiple email attachments, and labeled "1 of X", "2 of X", etc., and the last email as "X of X – Final." All submissions shall become the property of the Agency.

PLEASE NOTE: The Response to this RFI should not include costs or fees.