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## COLORADO HOUSING AND FINANCE AUTHORITY

### RESPONSES TO QUESTIONS AND REQUESTS FOR CLARIFICATION

COLORADO HOUSING AND FINANCE AUTHORITY

1981 BLAKE STREET  
DENVER, CO 80202

#### REQUEST FOR PROPOSAL

#### Cloud-Based Document Management System for Salesforce

To facilitate a transparent and thorough RFP process, CHFA is responding to the following questions and/or requests for clarification, which have been submitted by one or more potential responders in response to CHFA's posted RFP.

Q. Are respondents required to submit responses using the table structure format in the RFP document?

A. Respondents are not limited to responding in the table structure format.

Q. Is the US only AI/OCR processing a hard requirement or a strong preference?

A. US only AI/OCR processing is a hard requirement.

Q. Should vendors assume zero tolerance for any reuse of CHFA data for AI model training now or in the future?

A. Yes. Zero tolerance for use of CHFA data in AI model training.

Q. What types of users should vendors assume (e.g., full vs. read-only), and does CHFA have estimated user counts for pricing?

A. At this stage, CHFA requests that vendors submit general, tier-based pricing rather than pricing tied to specific user counts. Please include details of user types, levels of access, and related licensing levels in the RFP response. Numbers will be discussed in more detail during interviews with vendors selected to advance in the evaluation process.

Q. Is preference more towards Cloud or On-Premises Document Management System and Implementation Services?

A. Cloud

Q. Do you have a budget already available for this project, and has CHFA seen prior demonstrations?

A. Funding is available for this project; however, CHFA does not disclose the maximum budget. CHFA has not yet seen demonstrations of a DMS specific to this RFP.

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Q. Is this a new capability for CHFA, and is there an expected go-live timeframe?

A. This is a new technology and requirement. The implementation timeline will be determined based on requirements and integration dependencies.

Q. If middleware or an integration layer is required for the solution, should the selected vendor assume responsibility for designing, configuring, developing, and deploying such middleware as part of implementation, or will CHFA's internal IT team own that work with the vendor providing technical guidance, interface specifications, and integration support?

A. The selected vendor's product should have API integration capabilities to send documents to CHFA's on-premises DMS system (Hyland OnBase) and be able to send documents to partner organizations. Yes. The selected vendor should assume that they will design, configure, develop, and deploy middleware that meets CHFA architectural standards and requirements.

Q. What role will Salesforce play in the future-state solution?

A. Salesforce will be newly implemented and is expected to become the primary system of interaction and business context. Most user actions and data updates are expected to occur directly within Salesforce. Salesforce Experience Cloud and Government Cloud are anticipated, with a mix of standard and custom objects still being defined.

Q. It seems that integration with an existing system is under consideration. If an existing platform (e.g., OnBase) is retained, can CHFA clarify whether a new solution is expected to be implemented alongside it, or whether the intent is to integrate exclusively with existing solution(s) and functionality?

A. A new DMS solution is expected to be implemented in addition to our existing premise platform, Hyland OnBase. The intent is to integrate with Salesforce, which will be new. We will want to send documents to our on-premises Hyland OnBase system that are final records.

Q. If OnBase continues to be used for content management as part of the cloud-based objective, does CHFA prefer vendors to propose a cloud-hosted or managed OnBase deployment? Or is an on-premises OnBase environment integrated with modern cloud services acceptable?

A. CHFA prefers a cloud-hosted solution for this use case. CHFA would need to understand what is meant by "an on-premises OnBase environment integrated with a modern cloud service".

Q. If a proposed solution assumes continued use of OnBase, would data migration or data conversion still be required?

A. At this time, there has not been a decision regarding documents in the current portal that we use to collect the documents in this use case and if any would need to be migrated to a new solution or if we would choose to go forward only.

Q. If an existing platform is retained (e.g., OnBase), should vendors assume that current capabilities, such as versioning, annotations, records management, retention policies, and audit history, will remain within that platform?

A. In the new cloud based DMS, CHFA requires document versioning, annotations and audit history. Records management and retention would be ideal in a cloud based DMS but could be handled by our on-premises OnBase system after final records and pushed there.

Q. Will CHFA share relative weighting across the major evaluation categories (e.g., Salesforce-native integration, security/compliance, AI capabilities, total cost of ownership)?

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A. CHFA does not share weighting across the evaluation categories as the evaluation takes into consideration qualitative factors in addition to a purely quantitative scoring method. All of the items noted are important to CHFA in this selection.

Q. Is CHFA prioritizing a Salesforce first document management architecture versus general-purpose ECM platforms with Salesforce connectors?

A. In response to the RFP, CHFA would like to understand the perceived benefits of a Salesforce-first document management architecture vs an ECM platform that has a Salesforce connector.

Q. Is automatic checklist completion based on validated document submission considered a core requirement or a value add in scoring?

A. CHFA is interested in the functionality of an automatic checklist for completion. CHFA also requires a human review / human in the loop if there is an AI assistant/agent or other capability completing the automatic checklist. At this time, we would consider this a value add.

Q. Are explainability and auditability of AI outputs more important than advanced generative features for this project? Are AI generated summaries and extracted metadata intended to be operationally relied upon, or advisory pending human validation?

A. CHFA is interested in what advanced generative AI features are being contemplated and what those capabilities are in product solutions. At the same time, CHFA requires human-in-the-loop capabilities, and an ability to check the quality and accuracy of AI generated output. CHFA would like to understand what level of auditability and/or explainability is available.

Q. Does CHFA have an existing enterprise retention schedule vendors should align to, or is modernization of retention policy part of scope?

A. Yes. CHFA has an existing retention schedule. Tools that facilitate ease of application of retention schedules and any efficiencies / new capabilities would be interesting to be aware to determine impact on scope.

Q. Are there program specific or statutory retention triggers (e.g., bond maturity, grant closeout, audit completion) vendors should explicitly plan for?

A. Yes. CHFA's record retention on various program documents often need a trigger date. These are unique to the program / documents.

Q. Can CHFA provide high level guidance on current and projected document volumes and growth?

A. A high-level estimate is approximately 15,000 documents annually with a range of 25-40 GB of space.

Q. Are large, image heavy files (architectural plans, engineering documents, environmental studies) in scope, or primarily text-based documents?

A. Yes. Environmental studies, market studies, and architectural plans are in scope.

Q. Approximately what percentage of document intake is expected from external users via Experience Cloud or Portals? Are external users expected to classify documents themselves, or submit files for post upload validation?

A. Ideally, CHFA would like a high percentage of documents from external users to come in via the Experience Cloud. That said, we

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recognize the importance of email and the ability for email integration to easily send documents to the system. We do not want external users to classify documents. If there is an easy way to inherit document classification from a folder structure where documents are placed by an external user, that may be one possible method. It would be preferred to have technology that can identify and classify documents that a staff member can validate / correct or adjust as needed.

Q. Is CHFA envisioning a phased rollout by program/department, or a single enterprise rollout?

A. This solution is for a cross-functional group of staff from different divisions, as well as many external users (1,000 estimated) and other partner organizations in our state. This solution will not be used across the entire enterprise of CHFA. We do anticipate needing to deploy solutions in phases which are still to be determined.