

1. Is a collection provider currently being used to provide the per capita and occupational assessment tax collection service? **(See Attached Spreadsheet)**
2. Please provide the name(s) of the collection service providers currently being used. **(See attached Spreadsheet)**
3. What is the current contract fee structure for any current collection service provider? **(School gets the penalty period amount)**
4. Over each of the past two years, what fee sum (in dollars) has been paid to any current collection service provider? **(We don't get a fee amount)**
5. What is the frequency of placements (i.e. daily, weekly, monthly, quarterly, etc)? **(Accounts are currently placed annually)**
6. What is the number of accounts and dollar amount of each placement or overall? **(See attached spreadsheet for all years.)**
7. What is the average age of the accounts at placement? **(Less than one year old)**
8. How many accounts are currently delinquent? **(The total for all years combined is 26453 (148,023 added all years))**
9. What is the average amount of the accounts to be turned over? **(Based on taxes provided the average is -- Per Capita -- 4500 Occupation Assessment -- 3150)**
10. What is the expected frequency of placements and the age of the accounts at delinquency? **(Annually-current year accounts at 1 year +)**
11. Does SASD expect or desire the collection service provider to pursue legal action as a part of the collection service? **(This is an option that may require a meeting between the school board and the vendor)**

PER CAPITA

2018

	<u># ADDED</u>	<u>TOTAL ADDED</u>	<u>COLLECTED</u>	<u>CANCELLED</u>	<u>BALANCE</u>	<u>%</u>
CITY OF SHAMOKIN	3157	\$ 34,716.00	\$ 876.75	\$ 319.00	\$ 33,520.25	96.56%
COAL TOWNSHIP	1428	\$ 15,708.00	\$ 1,048.70	\$ 143.00	\$ 14,516.30	92.41%
<u>EAST CAMERON TWP</u>	<u>141</u>	<u>\$ 1,551.00</u>	<u>\$ 238.53</u>	<u>\$ 77.00</u>	<u>\$ 1,235.47</u>	<u>79.66%</u>
TOTAL	4726	\$ 51,975.00	\$ 2,163.98	\$ 539.00	\$ 49,272.02	94.80%

2017

	<u># ADDED</u>	<u>TOTAL ADDED</u>	<u>COLLECTED</u>	<u>CANCELLED</u>	<u>BALANCE</u>	<u>%</u>
CITY OF SHAMOKIN	2806	\$ 30,866.00	\$ 4,942.07	\$ 781.00	\$ 25,142.93	81.46%
COAL TOWNSHIP	1443	\$ 15,763.00	\$ 5,368.46	\$ 422.00	\$ 9,972.54	63.27%
<u>EAST CAMERON TWP</u>	<u>135</u>	<u>\$ 1,485.00</u>	<u>\$ 583.00</u>	<u>\$ 99.00</u>	<u>\$ 803.00</u>	<u>54.07%</u>
TOTAL	4384	\$ 48,114.00	\$ 10,893.53	\$ 1,302.00	\$ 35,918.47	74.65%

ALL YEARS (1980-2018)

	<u># ADDED</u>	<u>TOTAL ADDED</u>	<u>COLLECTED</u>	<u>CANCELLED</u>	<u>BALANCE</u>	<u>%</u>
CITY OF SHAMOKIN	52489	\$ 577,080.35	\$ 215,640.44	\$ 241,457.99	\$ 119,981.92	20.79%
COAL TOWNSHIP	32289	\$ 354,772.15	\$ 201,712.36	\$ 104,505.14	\$ 48,554.65	13.69%
<u>EAST CAMERON TWP</u>	<u>2097</u>	<u>\$ 23,056.00</u>	<u>\$ 13,501.03</u>	<u>\$ 6,408.50</u>	<u>\$ 3,146.47</u>	<u>13.65%</u>
TOTAL	86875	\$ 954,908.50	\$ 430,853.83	\$ 352,371.63	\$ 171,683.04	17.98%

OCCUPATION ASSESSMENT

2018

	<u># ADDED</u>	<u>TOTAL ADDED</u>	<u>COLLECTED</u>	<u>CANCELLED</u>	<u>BALANCE</u>	<u>%</u>
CITY OF SHAMOKIN	2266	\$ 330,055.00	\$ 6,671.63	\$ 4,235.00	\$ 319,148.37	96.70%
COAL TOWNSHIP	978	\$ 147,785.00	\$ 8,928.38	\$ 1,375.00	\$ 137,481.62	93.03%
<u>EAST CAMERON TWP</u>	<u>100</u>	<u>\$ 15,620.00</u>	<u>\$ 1,199.25</u>	<u>\$ 165.00</u>	<u>\$ 14,255.75</u>	<u>91.27%</u>
TOTAL	3344	\$ 493,460.00	\$ 16,799.26	\$ 5,775.00	\$ 470,885.74	95.43%

2017

	<u># ADDED</u>	<u>TOTAL ADDED</u>	<u>COLLECTED</u>	<u>CANCELLED</u>	<u>BALANCE</u>	<u>%</u>
CITY OF SHAMOKIN	1884	\$ 279,565.00	\$ 45,133.72	\$ 8,085.00	\$ 226,346.28	80.96%
COAL TOWNSHIP	952	\$ 142,561.69	\$ 51,112.99	\$ 2,475.00	\$ 88,973.70	62.41%

* <u>EAST CAMERON TWP</u> *	<u>110</u>	\$ * <u>16,720.00</u>	\$ <u>6,298.11</u>	\$ <u>1,100.00</u>	\$ <u>9,321.89</u>	† <u>55.75%</u>	*
TOTAL	2946	\$ 438,846.69	\$ 102,544.82	\$ 11,660.00	\$ 324,641.87	73.98%	

ALL YEARS (1995 to 2018)

	<u># ADDED</u>	<u>TOTAL ADDED</u>	<u>COLLECTED</u>	<u>CANCELLED</u>	<u>BALANCE</u>	<u>%</u>
CITY OF SHAMOKIN	38344	\$ 5,787,491.91	\$ 2,208,343.27	\$ 2,459,299.26	\$ 1,119,849.38	19.35%
COAL TOWNSHIP	21359	\$ 3,191,213.95	\$ 1,907,985.87	\$ 844,277.26	\$ 438,950.82	13.75%
<u>EAST CAMERON TWP</u>	<u>1445</u>	\$ <u>231,830.50</u>	\$ <u>139,949.66</u>	\$ <u>55,799.20</u>	\$ <u>36,081.64</u>	<u>15.56%</u>
TOTAL	61148	\$ 9,210,536.36	\$ 4,256,278.80	\$ 3,359,375.72	\$ 1,594,881.84	17.32%
ALL YEARS - ALL TAXES	148023	\$ 10,165,444.86	\$ 4,687,132.63	\$ 3,711,747.35	\$ 1,766,564.88	17.38%

**SHAMOKIN AREA SCHOOL DISTRICT (SASD)
REQUEST FOR PROPOSALS (RFP)
TAX DEBT COLLECTION SERVICES
PER CAPITA AND OCCUPATIONAL ASSESSMENT TAX**

REQUEST FOR PROPOSALS:

Tax Debt Collection Services

The Shamokin Area School District is soliciting proposals from qualified and experienced agencies to provide delinquent tax debt recovery services for its delinquent per capita and occupational assessment tax for a period of two years beginning January 1st, 2020 and ending December 31st, 2021.

Proposal package may be obtained from SASD at 2000 W State St., Coal Township, PA 17866, by calling 570-648-5752 ext. 4114 or download from webpage www.indians.k12.pa.us.

Proposals will be received until 2:00 pm on Monday, October 14, 2019, all proposals will be opened, ranked and rated accordingly. Proposals which do not fully address the RFP requirements shall be rejected.

RFP Information

SASD Contact Person: Karen Colangelo, Business Manager
2000 W State St, Coal Township, PA 17866
kcolangelo@indians.k12.pa.us
570-648-5752

How to respond: Submit one original and 3 exact copies to SASD

Proposal Due Date: Monday, October 14, 2019 at 2:00 pm
SASD
RE: RFP TAX DEBT COLLECTION SERVICES
Attn: Business Manager
2000 W. State St, Coal Township, PA 17866

Anticipated approval
By the School Board: Tentatively, October 15, 2019
Or following School Board Meeting on November 19, 2019

Request for Proposal: Debt Collection Services

Purpose:

The Shamokin Area School District (SASD) is a public school with administrative offices located at 2000 W. State St., Coal Township, PA 17866. SASD provides a quality education to students of the municipalities of City of Shamokin, Coal Township, Shamokin Township, and East Cameron.

In accordance with all state and federal regulations SASD is currently accepting proposals for delinquent tax debt recovery services for its delinquent per capita and occupational assessment tax for a two year period beginning January 1st, 2020 and ending December 31st, 2021. SASD's desire to contract with a duly qualified and experienced agency for the term of the contract. All debt collection services must be provided in accordance with the existing rules, orders, directives and regulations promulgated by the Pa. Act 511 of 1965 or Local Tax Enabling Law.

All proposals shall be reviewed for completeness and shall be analyzed in accordance with the criteria contained herein. Therefore, SASD urges all interested firms to carefully review the requirements of the RFP. Failure to abide by the RFP's instruction in any way may lead to the rejection of the proposal.

Terms and conditions:

All proposals shall remain valid for a period of sixty (60) calendar days after the date specified for receipt of proposals in accordance with state procurement regulations. All costs of process, interviews, contract negotiation and related expenses, are solely the responsibility of the respondent.

SASD reserves the right to reject any or all proposals, to waive informalities and minor irregularities, and/or modify or cancel this solicitation. Proposals which appear unrealistic in terms of management commitments or are indicative of failure to comprehend the complexity of this RFP and subsequent contracts may be rejected.

Respondents are requested and advised to be as compete as possible in their response. SASD reserves the right to 1) contact any respondent to clarify their proposal; 2) contact any past/current clients of the respondent; 3) solicit information from any available source concerning any aspect of the proposal; 4) seek and review any other information deemed pertinent to the evaluation process.

Scope of Collection Services:

The scope of tax debt collection services being requested will pertain to all delinquent per capita and occupational assessment tax debt returned to SASD by its school district tax collectors.

The successful agency is subject to the following conditions listed below:

- Agency must provide and turnover all amounts collected monthly to the business office of SASD along with an itemized statement detailing its collections per municipalities of SASD. In your bid submission, provide a sample of the monthly turnover acknowledgement report, monthly itemized statement of collections and balance due. The amount due SASD and the agency shall be clearly delineated.
- Agency shall guarantee the confidentiality, security and safety of all files, documents and computer files, etc.
- Agency must perform all work in accordance with the application provisions of Pa. Act 511 of 1965 or Local Tax Enabling Law.
- Agency agrees to the full extent permitted by law, to defend, indemnify and hold harmless SASD, its employees, agents and officials, from any liability, claims, suits, actions, losses, expenses or accost of any kind as a consequence of or arising out of or in any way attributable in whole or in part to the performance of this agreement.
- The successful agency must maintain in force, during the full term of the contract, insurance coverage in comprehensive general liability insurance and a blanket fidelity bond to the SASD in an amount sufficient to indemnify and hold harmless from any liability whatsoever.
- Agency agrees that all fees for mailings/telephone calls, skip tracing, use of third party records for research, and similar activities are included as part of the “percentage of collections” or “flat fee” and are not billed as a separate fee.
- Agency shall regularly prepare and disseminate appropriate initial and subsequent notices or correspondences to the tax delinquent payee in full compliance of all applicable laws.
- Promptly and appropriately respond to all tax delinquent payees and maintain appropriate records of all correspondence, telephone calls and/or other communications regarding delinquent accounts.
- The ultimate scope of services may be changed, altered or amended in the course of negotiating a formal engagement with the selected Servicer, as determined necessary by Shamokin Area School District.

Qualifications

The successful agency must meet the following criteria at a minimum or the bid will be deemed non-responsive and rejected on that premise.

- 1) Agency must have been in business conducting collection services for a minimum of five (5) years.
- 2) Agency must be properly bonded and insured.
- 3) Agency must be able to comply with all aspects of the scope of work.
- 4) Agency must not be barred by any federal, state or local agency.

Proposal Requirements and RFP Submittal Sections/Documentation:

- A) Company Profile
 - a. Description of company and qualification of all staff involved in the provision of services must be included. Include history of company providing debt collection services.
- B) Reference
 - a. A minimum of four (4) school district or municipality references.
- C) Debt Collection Service Plan
 - a. Describe in detail each aspect of the tax debt collection services proposed which include the following but not limited to:
 - i. Procedures for SASD to place accounts for collection
 - ii. Recovery rates for present clients
 - iii. Commission rates
 - iv. Collection strategy/procedures
 - v. Location and methods for taxpayer to pay
 - vi. Other relevant information pertinent to this proposal
- D) Proposed Cost
 - a. Describe in detail a breakdown of the proposed costs of the required services. Include any and all rates, charges, etc. necessary to calculate the proposed final fee to SASD.
- E) Executive Summary
 - a. Respondent shall provide information reflecting on how and why their services meet the needs of SASD.
- F) Other Proposal Requirements
 - a. A Certified statement that neither the firm nor members of the firm or individuals in the provision of services are debarred, suspended, or otherwise prohibited from any professional practice by any federal, State or local oversight regulatory law enforcement authority.
 - b. Evidence of all appropriate and applicable insurance coverage carried by the firm or individual, including policy coverage periods. Successful agency shall be

requested to fully comply with SASD's service contract requirements, including but not limited to insurance indemnification.

- c. Proposal shall be submitted on the company letterhead and signed by a person or persons authorized to bind the firm to a contract.
- d. If applicable, conflict of interest of employees and school district affiliation.
- e. Other additional information in which the respondents includes to meet requirements of proposal's intent.

Evaluation Criteria:

Using the format of the proposed requirements, the proposal will be scored and evaluated as:

A. Company Profile	10 pts
B. Reference	10 pts
C. Debt Collection Service Plan for SASD	30 pts
D. Proposed Cost	25 pts
E. Executive Summary	15 pts
F. Other Proposal Requirements	<u>10 pts</u>
	100 pts

All proposals should be composed/submitted into the sections A-F above. Layout of your proposal in any other format may result in loss of points when evaluating/analyzing.

Submission of Proposals

Each proposal, consisting of one (1) original and three (3) exact copies must be received at the Shamokin Area School District's Administrative office by 2 pm on Monday, October 14, 2019 in a sealed envelope. Proposal may be mailed or hand delivered to the following address:

**Shamokin Area School District
RFP for Tax Debt Collection Services
Attn: Karen Colangelo, Business Manager
2000 W. State St.
Coal Township, PA 17866**

Faxed or emailed proposal will not be accepted.