

**STATE OF NEW YORK**

**DEPARTMENT OF TAXATION AND FINANCE**

**Office of Budget & Management Analysis**

**Bureau of Fiscal Services**

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**April 21, 2015**

**Amendment #4**

**For Request for Proposals (RFP) 14-05 COLLECTION SERVICES FOR DELINQUENT TAX DEBT**

To All Potential Bidders:

The Department is also issuing Amendment #4 to:

* Amend Attachment G. Soft Collection Services Response Form;

Replacement pages are attached. All deletions are shown as shaded, strike-through text, all additions are made in blue text.

All other requirements and conditions remain as indicated in the RFP.

**Attachment G – Soft Collection Services Response Form**

This form is for the Debt Collection Services requirements as specified in **Section V.A.3, Soft Collection Services**.

1. Contacting Tax Debtors

The Bidder must have a process in place for contacting Tax Debtors by telephone and mail.

The Bidder must:

* Provide samples of all proposed collection letters (M)

It is desirable that the Bidder also:

* Provide samples of foreign language letters currently utilized (D):
* Indicate if a Spanish speaking collector will be assigned (D); and
* Indicate if a third-party language translation service is utilized (D).

1. Case Scoring, Prioritization and Skip Tracing efforts

The Bidder should have a process in place for Case scoring, prioritization and skip tracing. The process may include both automated and manual efforts.

The Bidder ~~must~~ **should** describe efforts and sources used for both automated and manual procedures.

It is desirable that the Bidder also provide:

* Flowcharts of processes (D);
* Indicate if any statistical or algorithmic scoring is used for Case scoring in terms of recovery expectations (D); and
* Indicate if specialized personnel dedicated to skip tracing will be utilized for the Contract (D).

1. Quality Assurance

The Bidder must have a process in place to provide quality assurance of accounts placed. (M) The process should include, but not be limited to, handling/review of complaints, review of collector calls and collector training.

The Bidder must provide a narrative of the Quality Assurance process and should:

* Describe the policy for handling/resolving debtor complaints including, but not limited to, if an independent Quality Assurance person or Advocate reviews debtor complaints; (D)
* Describe the policy for reviewing collector phone calls; (D) and