

A large, stylized, light blue Phoenix logo is centered in the background of the slide. The logo is composed of several curved, overlapping shapes that form the bird's head and tail. The background is a solid, medium blue color.

# RFQu-24-0279 Collection Services

July 30, 2024 – 10:00 a.m.  
Via WebEx

**City of Phoenix**  
Finance Department



# Housekeeping

- Please mute your microphones, unless you are speaking, to mitigate background noise and potential electronic feedback for the other participants.
- We will be touching on each major section of the solicitation, please try and limit your questions to the section being discussed.
- Please email your company name, first and last name, telephone number, and email address to the procurement officer: [benjamin.arballo@phoenix.gov](mailto:benjamin.arballo@phoenix.gov)



# Legal Notice

The purpose of the Pre-Offer Conference is to provide a casual atmosphere to discuss the City's intent and to determine whether the City's requirements are clearly stated.

Although an exchange of information may take place, the official position of the City is that which is delivered in the solicitation document and in the form of a written Solicitation Addendum. Therefore, nothing said here today should be construed as a change to the written requirements in the solicitation document.

Any changes will be in the form of a solicitation addendum. Vendors must acknowledge receipt of any/all addenda by signing and returning the document with their submittal, or the response may be considered non-responsive.

Please note that it is the responsibility of the Offeror to read the entire solicitation document. Offerors must contact the Procurement Officer if they have any questions – no other City employees per the Transparency Policy.



# Key Dates

Pre-Offer Conference

July 30, 2024  
at 2:00 p.m.

Written Inquiries Due

August 2, 2024  
at 2:00 p.m.

Offer Due Date

August 16, 2024  
at 2:00 p.m.



# Agenda

## RFP 24-0279 Collection Services

1. Review Solicitation Instructions
2. Review Special Terms and Conditions
3. Review Insurance and Indemnification Requirements
4. Review the Scope of Work
5. Review Submittal Requirements
6. Review Attachments
7. Closing



# Solicitation Instructions

- Transparency Policy starts at solicitation opening and ends at Council Award
- All offerors must register at:  
<https://www.phoenix.gov/procure>
- All written inquiries will be answered after the inquiry period ends.
- The City will not be responsible for oral instructions made by employees or officers, any changes will be in the form of solicitation addenda
- Businesses **must** be registered with the Arizona Corporation Commission (this is checked)
- Offeror must read the entire solicitation and accept all terms and conditions without exception



# Special Terms & Conditions

- Term of the contracts will be 5 years and will begin around January 1, 2025.
- Method of Ordering is through a City issued purchase order.
- Please pay special attention to the Confidentiality and Data Security provisions within the solicitation
  - PII shall not be processed for Contractor's own purposes, for commercial mining, product research etc.
  - Contractor shall maintain measures to protect PII against unlawful processing and against accidental loss.



# Insurance & Indemnification

- Please note the indemnification provisions within the solicitation
- Insurance requirements cover:
  - General liability
  - Worker's compensation
  - Network and privacy liability
  - Crime Insurance
- Upon award, certificates of insurance (ACORD form or equivalent) must be provided to the City within 10-days
- Send to the Procurement Division at [procurement@phoenix.gov](mailto:procurement@phoenix.gov)





# Scope of Work

- The QVL will be utilized by the City to select Contractors to receive initial and future account assignments.
  
- The major types of debt are
  - General Accounts Receivable
  - Fire Department- Emergency Transportation Services (ETS)
  - Municipal Services (Water, Wastewater, and Refuse)
  - Sales (Transaction Privilege Tax - TPT) tax,



# Scope of Work

## General Requirements

- Not have authority to independently negotiate a settlement of a debt.
- All work performed shall be conducted according to applicable provisions of any and all Federal or State laws pertaining to the collection industry.
- Assign and maintain highly trained and qualified collection staff.
- Perform skip-tracing activities to locate debtors regardless of the balance of the account.
- Ensure that all payments received by the Contractor are forwarded to the City. The Contractor shall submit designated City account numbers, as required by the City, for all payment transactions (excel preferred).
- Social security numbers may not be provided and will be at the discretion of each purchasing department.



# Submittals

- Responses may be received by email or mail.
- Be sure to include references, as these are also checked
- Be sure to complete and include all 5 submittal forms;
  - Costs and Payments
  - References
  - Conflict of Interest
  - Debarment
  - Offer Page
- Statement of Qualifications (SOQ) responding to Section 4 Eval Criteria
- Pricing Proposal



# Key Dates

**IMPORTANT  
INFORMATION**

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**August 2, 2024  
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