

COUNTY TAX COLLECTION COMMITTEE
[Sample] Tax Collector RFP
Weighted Scoring Sheet

COLLECTOR:		REVIEWER:	
Score 1-10, with 10 as high	Importance Weight (1-5)	Total Score (A x B)	Comments
1. Proposal Minimum Content Requirements			
number of years/number of employees (experience & capacity)			
site visit (tour, observation)			
qualifications of key employees			
no conflicts of interest			
quality of ethics policy			
use of subcontractors/outsourcing			
2. Financial Information			
health of financial statements			
SAS No. 70			
CPA firm background			
collector insurance coverage/provider			
quality of internal controls			
external audit process			
criminal misconduct			
adequacy of background check procedure			
3. Receipt, Deposit, & Investment of Funds			
time between receipt & deposit			
tax return processing speed			
segregation of funds			
collateralization of deposits			
lock-box capability			
willing to comply with TCC Unidentified Tax Funds Policy			
willing to comply with TCC Deposit and Investment Policy			

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	A	B	C
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	(1-10)	Weight (1-5)	(A x B)
			Comments
Score 1-10, with 10 as high			
Weight 1-5, with 5 as high			
4. Collection & Bonding Capacity			
number of other TCC RFP's being responded to			
current collection capacity/total revenue collected			
current bonding capacity limits			
collector bonding company			
procedural preparation for Act 32			
plan for future expansion & growth			
5. Technology			
current use of technology			
on-line filing/credit card acceptance			
compliance with DCED best practices			
data breach procedures & history			
6. Customer Services for Taxpayers			
office proximity to tax collection district			
telephone & in-person			
available legal staff			
training for non-lawyer staff			
quality of taxpayer forms			
7. Enforcement			
success rate in criminal, civil, & district justice cases			
reconciliation procedures for out-of-district collections			
8. Steps to Maximize Collections			
employer & tax preparer education			
procedures to verify information provided			
procedures to verify proper amounts withheld			
willing to comply with Tax Collection Agreement requirements			
for maximizing collections			

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Score 1-10, with 10 as high			
Weight 1-5, with 5 as high			
9. Distribution of Funds			
quality of sample distribution reports			
willing to distribute as required by Tax Collection Agreement			
willing to pay interest as required by Tax Collection Agreement			
10. Transition Plan			
willing to comply with relevant parts of TCC Tax Collection Transition Plan			
process for collecting prior delinquencies			
reasonableness of transition fees			
11. Price to Collect			
EIT			
LST (optional)			
Business Privilege/Mercantile (optional)			
Per Capita (optional)			
Real Estate (optional)			
other costs/service considerations (postage)			
extra delinquency collection cost			
reasonableness of proposed taxpayer delinquency fees			
12. General Compliance			
procedure for complying with PA Taxpayer Bill of Rights			
willing to sign Tax Collection Agreement without substantial revision			
willing to comply with TCC Records Policy for Tax Collector			
complete non-collusion affidavit			
13. Intangibles/Misc.			
TCC comfort/confidence ("fit")			
collector professionalism			

