Utility Training By MONTICELLO

LIVE ONLINE COURSE

Mastering RFPs for Utility Collections

A Practical Workshop for Designing, Evaluating, and Managing Collection Agency RFPs



December 2 and 8, 2026

10:30 AM–3:30 PM ET Each Day

Two Live Online Sessions

Course Overview

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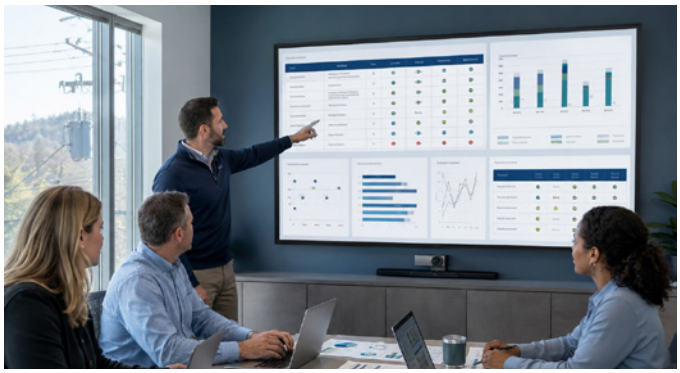
Two Live Online Sessions

Mastering RFPs for Utility Collections is a two-session, instructor-led live online course for utility credit, collections, procurement, legal, customer operations, and vendor management professionals responsible for selecting and managing outside collection agencies.

Participants use a practical, utility-specific agency scorecard framework connecting current-state assessment, collection strategy, scope of work design, vendor evaluation, pricing analysis, and post-award performance management.

Rather than focusing only on drafting RFP questions, this workshop helps utilities build a more defensible agency selection process by evaluating recovery performance, compliance risk, customer treatment, cybersecurity, reporting, pricing, implementation readiness, and operational fit.

Through guided exercises, sample RFP and SOW review, and vendor evaluation scenarios, participants leave with adaptable tools for stronger RFP planning, agency selection, vendor accountability, and long-term recovery performance.



Class size is limited to support discussion, applied exercises, and instructor feedback.

Learning Outcomes

After completing this course, participants will be able to:

01 Assess the current collection agency environment using liquidation rates, commission costs, customer arrears, write-offs, placement volumes, and account segmentation.

02 Define RFP objectives by collection tier, including early-out, primary, secondary, warehouse, final bill, residential, and commercial placements.

03 Build scope of work requirements addressing placement timing, account recalls, dispute handling, reporting, audits, and compliance obligations.

04 Develop RFP questions that generate comparable, scoreable vendor responses.

05 Use weighted scorecards to evaluate agencies across recovery performance, compliance, reporting, cybersecurity, pricing, and implementation readiness.

06 Apply knockout criteria to identify unacceptable vendor risk before final scoring and award decisions.

07 Compare rate-versus-recovery outcomes and cost-to-collect measures when evaluating agency proposals.

08 Develop final award recommendations using scorecard results, reference checks, pricing analysis, and operational fit.

09 Connect agency selection decisions to onboarding, post-award scorecards, audits, business reviews, and ongoing performance management.

Course Sessions

SESSION 1

Designing the RFP Around the Utility's Collection Strategy

- Course overview and scorecard framework
- Strategic planning and current-state assessment
- Historical data, account segmentation, and placement strategy
- Scope of work design by collection tier
- Procurement preparation and sourcing alignment
- RFP question development and proposal instructions
- Evaluation criteria and scorecard linkage
- Day 1 applied assignment

SESSION 2

Using the Scorecard to Select, Negotiate and Manage Agencies

- Day 1 assignment review
- Scorecard structure and knockout criteria
- Scoring sample vendor responses
- Rate vs. recovery analysis
- Due diligence and reference validation
- Contract and onboarding requirements
- Post-award performance management
- Champion-Challenger strategy

PARTICIPANT DELIVERABLE

Current State Assessment and RFP Scope Worksheet

PARTICIPANT DELIVERABLE

Final Award Recommendation Exercise

Who Should Attend

This course is designed for utility professionals involved in selecting, evaluating, contracting with, or managing outside collection agencies. Whether developing a new RFP, strengthening an existing agency strategy, or improving post-award performance oversight, participants will gain practical tools for building a more defensible and results-focused agency selection and oversight process.

Ideal attendees include:

Credit & Collections Leaders

Professionals responsible for collection strategy, agency performance, customer arrears, final bill recovery, liquidation, and write-off reduction.

IT, Data & Integration Stakeholders

Teams supporting secure data transfer, middleware integration, cybersecurity requirements, reporting capabilities, and implementation readiness.

Procurement & Sourcing Professionals

Staff responsible for vendor sourcing, proposal administration, evaluation methodology, contract negotiations, and award recommendations.

Vendor & Performance Management Teams

Professionals responsible for agency scorecards, business reviews, corrective action plans, vendor accountability, and ongoing performance management.

Customer Operations & Revenue Recovery Teams

Leaders aligning outsourced collection programs with payment compliance, customer treatment standards, and operational performance goals.

Utility Executives & Finance Leaders

Decision-makers responsible for recovery performance, cost-to-collect, write-off exposure, vendor risk, and outsourced collection strategy.

Legal & Compliance Professionals

Professionals responsible for regulatory requirements, licensing standards, privacy obligations, audit provisions, and vendor compliance oversight.

This workshop is appropriate for both experienced practitioners and professionals contributing to a utility collection agency RFP, vendor evaluation, or post-award oversight process for the first time.

Tools & Materials Included

Participants receive practical tools and working materials that can be adapted to support utility collection agency RFP planning, vendor evaluation, award decisions, and post-award performance management.

CORE WORKSHOP TOOL

Utility Collection Agency Scorecard Workbook

Evaluate agency responses across recovery performance, compliance, reporting, cybersecurity, pricing, and operational fit.

Student Workbook

Guided workshop exercises and applied activities.

Rate vs. Recovery Analysis Tool

Compare commission rates, recoveries, cost-to-collect, and expected net outcomes.

Current State Assessment Worksheet

Assess placement volumes, liquidation rates, commission costs, arrears, write-offs, and segmentation.

Final Award Recommendation Template

Document scorecard results, reference checks, pricing, due diligence, and operational fit.

SOW Requirement Mapping Worksheet

Connect collection strategy to vendor responsibilities, controls, reporting, and compliance requirements.

Post-Award Performance Planning Worksheet

Plan onboarding, reporting, audits, business reviews, and performance scorecards.

Knockout Criteria Checklist

Identify licensing, regulatory history, cybersecurity, financial stability, or operational disqualifiers.

Sample RFP and SOW Reference Materials

Review examples supporting utility agency procurement and oversight discussions.

Participants leave with adaptable tools for strengthening agency selection, vendor accountability, and long-term recovery performance.

Instructor

Joe Duggan

Manager, Credit & Collections at Consolidated Edison



Joe Duggan brings more than 25 years of utility credit and collections experience at Consolidated Edison, serving in roles across customer operations, field operations, collections, and central credit and collections. His broad operating background provides a practical understanding of the full utility meter-to-cash lifecycle and the factors that influence recovery performance, customer treatment, and regulatory compliance.

In his current role as Manager of Credit & Collections, Joe oversees credit and collections strategy, third-party collection agency performance, process improvement initiatives, and compliance with New York State Public Service Commission and federal requirements. His responsibilities include working with external vendors and supporting collection programs designed to improve recovery performance and control write-offs while maintaining operational and regulatory standards.

Joe's experience managing collection agency relationships gives participants direct insight into the operational considerations that should drive a utility collection agency RFP. His perspective connects RFP requirements, vendor evaluation, agency accountability, compliance controls, and post-award performance oversight to measurable recovery outcomes.

Throughout this workshop, Joe applies his utility experience to help participants evaluate agency capabilities, strengthen scope of work requirements, use scorecards effectively, and build vendor management strategies that support long-term collection performance.

Instructional Methods

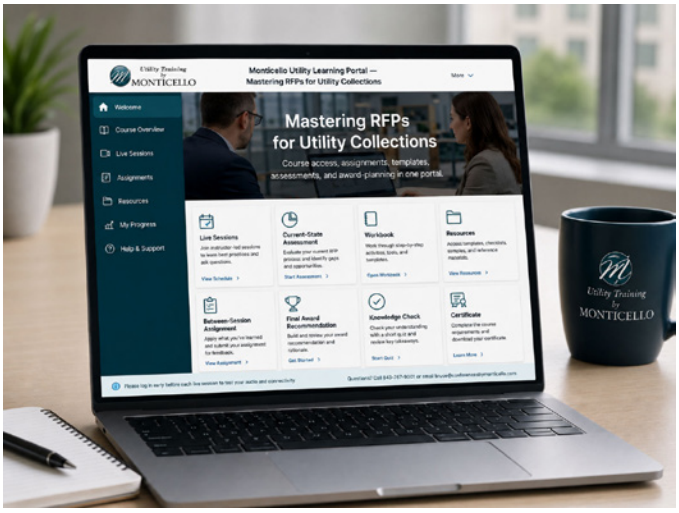
This live online workshop combines instructor-led discussion, practical exercises, sample RFP and SOW review, vendor evaluation scenarios, and guided use of the Utility Collection Agency Scorecard Workbook.

Participants will apply course concepts through structured activities focused on current-state assessment, scope development, scoreable RFP requirements, agency evaluation, rate-versus-recovery analysis, final award recommendations, and post-award performance planning.

Online Delivery

This course will be delivered live through Microsoft Teams. Participants do not need an existing Teams account and may join directly through a supported web browser. During each session, attendees may interact with the instructor and fellow participants by microphone or through the chat window.

For the best experience, participants should use the Microsoft Teams application, Microsoft Edge, or Google Chrome. Prior to the course, each registrant will receive an email with access instructions and the link needed to join both sessions.



> The online meeting room will open approximately 30 minutes before the scheduled start time. Participants are encouraged to log in early to confirm connectivity and resolve any technical issues before instruction begins.

Registration Instructions and Fees

Single Registration: $1,395 per attendee.

Registration includes both live online sessions, the Student Workbook, the Utility Collection Agency Scorecard Workbook, and the practical tools, templates, and reference materials described in this brochure.

1. Register now using the ONLINE REGISTRATION FORM here or on the website.
2. Call 843-767-9001 for registration assistance.
3. A PDF version of the REGISTRATION FORM is available for download. Please email the form to bruce@conferencesbymonticello.com

- Payments accepted include VISA, MasterCard, American Express, Discover, PayPal

Team Discounts

Organizations registering three or four participants for the same course receive a 10% discount on each registration, including the primary registrant. For groups of five or more, contact Monticello for private team training or group pricing.

Substitutions and Cancellations

Cancellation Policy: Cancellation requests must be submitted in writing at least five business days before the course start date to qualify for a refund. A $95 administrative fee will be deducted from the refund.

Registrations may be transferred to another participant within the same organization. Monticello's liability is limited to refunding the registration fee.

For registration assistance, contact us at 843-767-9001.

Utility-Focused Training Built for Operational Results

Utility-Focused Training for Credit, Collections, and Meter-to-Cash Professionals

Utility Training by Monticello develops practical online courses for utility professionals responsible for credit, collections, revenue recovery, customer operations, billing, payments, and meter-to-cash performance.

Our programs combine utility-specific instruction, applied exercises, analytical tools, and implementation planning to help participants strengthen strategy, improve operational performance, and reduce write-off exposure.

Why Choose Monticello?

Utility-Specific Focus: Courses built around the operating realities, regulatory oversight, and performance challenges of utilities.

Practical Application: Workbooks, analytical tools, case exercises, and action plans designed for immediate use.

Experienced Instruction: Programs developed and delivered by professionals with direct utility credit, collections, and revenue-recovery experience.

Explore upcoming live online courses and professional training programs.

Contact: Bruce A. Gay
Office: 843.767.9001
bruce@conferencesbymonticello.com
www.conferencesbymonticello.com