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# Curbside Recycling Program Implementation Scope of Work for Contra Costa County

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**DRAFT**

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## I. Executive Summary

The RecycleBank Curbside Incentive Program Pilot Implementation will serve as a test case in the Cities of Moraga and Orinda to prove out the RecycleBank model in those communities. RecycleBank motivates people to recycle and rewards consumers for taking greener actions with points that can be redeemed from participating local and national business partners. At the end of the Pilot, The Central Contra Costa Waste Authority and RecycleBank strive towards the following objectives:

1. An increase in curbside recycling by 100 – 200 lbs per household per year
2. Strive to foster a culture that encourages people to take simple steps towards greener lifestyles by recycling better
3. Build a sense of community involvement through our Green Schools donation program – effectively giving back individual recycling gains to Moraga’s and Orinda’s school’s

### A. Dates

The kick-off date for the project will be August 2, 2010. First pick-up will be on or about November 1, 2010.

### B. Project Preparation

Project preparation will occur in four separate program threads over the course of three months. These are:

1. Project Management – manages the overall delivery of the program
2. Operations – truck retrofits, cart retrofits (if required), account set-up, customer service training, truck operator training
3. Rewards – establishment of local rewards program in the cities of Moraga and Orinda
4. Marketing and Communications – creation and execution of a marketing and communications plan to facilitate the deployment of RecycleBank program. The two components of the plan are:
  - a. Outreach and marketing
  - b. Public relations

## II. RecycleBank Curbside Recycling Incentive Program Implementation

### C. Project Management

#### 1. Preparation Phase

There are no project management steps during the discovery phase of the project.

## 2. Project Implementation Phase

### A. Project Management Oversight: 3 Months

After being introduced to Central Contra Costa Solid Waste Authority and Waste Management Personnel at the Kick-off Meeting, the Project Manager will be responsible for weaving the following project threads together:

- Program Initiation
- Technology / Truck Retrofits
- Rewards
- Marketing & Communications
- Customer Service Training and Integration

This ensures a seamless delivery of the RecycleBank program. Project oversight will be transparent through a coordinated bi-weekly status call with Central Contra Costa County Solid Waste Authority staff, key Waste Management Personnel, and RecycleBank team members.

A number of deliverables are a part of the Project Management thread. These deliverables ensure various mechanisms within RecycleBank function and maintain responsiveness within the project schedule. These deliverables include:

- Implementation Schedule (See Page 10)
- Training Delivery

The delivery of training to Contra Costa County, Waste Management, and possibly community personnel from Orinda and Moraga will further advance the success of the program and ensure for a smooth transition upon implementation. The following groups will be trained as part of the RecycleBank program:

- Customer Service Representatives
- Truck Operators
- Other City Officials as deemed necessary

The Project Manager will coordinate with City Staff and Waste Management the best timing to engage citizens and send them activation literature to join the RecycleBank program.

Once all threads are functioning, the program will go live and residents will start earning points for their responsible recycling efforts.

## D. Technology Implementation

### 1. Preparation Phase

#### A. Clarify Technical Install Base: One to Three Weeks

Identify equipment requirements with Waste Management. Once base system and capabilities have been identified, equipment procurement will commence.

#### B. Acquire Data Sample: One Month

In parallel to the other technology activities, an existing data sample or extract for the program routes will need to be procured for examination. Essentially, RecycleBank wants to see the same pick-up data the communities/Waste Management sees. This can be in the form of a standard report, data extract, etc.... After the sample has been received a review will take place and a data needs assessment will be completed.

### C. Acquire Address List: One to Two Weeks

Request a valid address list for recycling routes from Waste Management/County/Moraga and Orinda to begin address verification for RecycleBank account creation and incorporation into RecycleBank's proprietary EcoStrong System<sup>1</sup>. Verify trucks and routes match address list.

## 2. Project Implementation Phase

### A. Hardware Installation: One to Two Weeks

Once the hardware specifications have been determined, and hardware has been procured, RecycleBank will coordinate the installation of any additional recommended hardware required with Waste Management. Sufficient time needs to be allowed for post installation to resolve potential installation-related issues.

### B. Cart Retrofit: Three to Four Weeks

Where necessary, carts will be outfitted with RFID transponders to facilitate accurate reads. The estimate is 5% to 10% of carts may need to be outfitted with transponders, potentially less.

### C. Data Modifications: Four Weeks

In conjunction with the hardware changes, data modification and the development of an operational model to ensure proper data transmission between Waste Management and RecycleBank and other interested parties can begin. RecycleBank will continue to review all data and match up addresses to routes.

### D. Testing: Two to Four Weeks

After the hardware installation is complete, live testing to ensure proper format and data accuracy can begin. Address verification and data clean up continues.

### E. Data Clean Up: Two to Four Weeks

In parallel to the testing, all data formatting and address verification to ready system for go-live will be finalized.

## E. Rewards

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<sup>1</sup> EcoStrong is RecycleBank's system which converts truck weights to points (at a rate of 2.5 points per pound) and assigns them to participants in the program. EcoStrong also stores all rewards partners, and is RecycleBank's transaction engine for rewards redemption. Although Contra Costa County will not have direct access into the system, all Program metrics will also be derived from the database portion of EcoStrong using our Crystal reporting engine. During the build process, ongoing data verification will occur with RecycleBank's data team based in Philadelphia. This is a necessary step as EcoStrong is also the engine that drives all mailings.

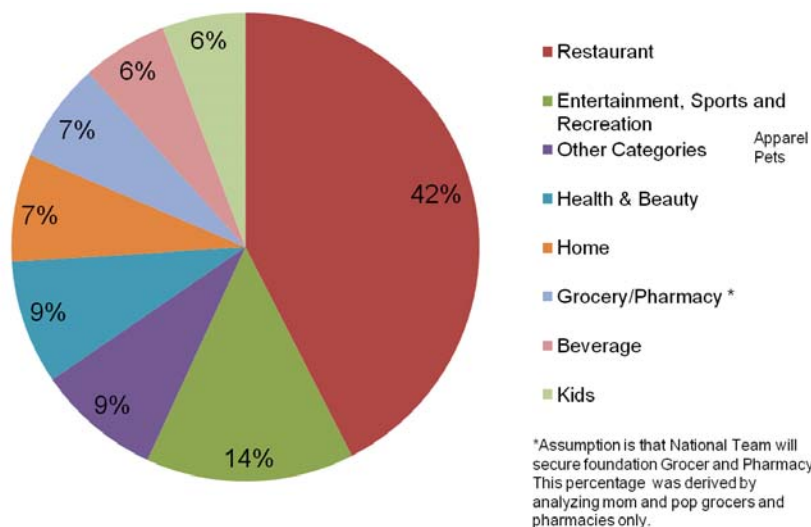
## 1. Preparation Phase

The national and regional/local RecycleBank rewards team has no work items during the discovery phase.

## 2. Project Implementation Phase

### A. Initial Discovery: 3 Weeks

Within 1 week of a project kick-off, the communities of Moraga and Orinda will be broken down into geographic areas using zip codes. Popular shopping venues will be targeted, both in and out of the immediate zip code range. Prior to kick-off, RecycleBank may purchase and download lead lists. Lead lists will contain local businesses that comprise RecycleBank's top redemption categories such as restaurants, grocery stores and entertainment venues. In addition RecycleBank will enlist the help of local economic development groups to fine-tune prospective rewards partners. National prospects in the same categories will be given to RecycleBank's National Rewards team to pursue. Regional Rewards Manager will scout area and speak to key partners upon first visit. This process will take two to three weeks. RecycleBank's rewards categories in order of popularity include:



### B. Rewards Build Out: 3 Months

As soon as RecycleBank begins creating its target list, it begins the build-out of Rewards Partners, as the lead time for some larger partners will take the entire time prior to first pick-up. Regional and local rewards will be signed by the Regional Rewards Manager over a period of 90 days prior to program deployment. Rewards Partners are presented with the RecycleBank opportunity and upon signing the Rewards Team will submit signed agreements with a partner description and reward description to the New York operations team to upload onto the RecycleBank website. Signed partners will be made live prior to the launch of RecycleBank in Contra Costa County.

### C. Rewards Post Launch: Periodically over the Course of the Program

Rewards Partners will continue to be signed following the launch to properly supplement the current subset of partners. Current partners in the program will be reviewed to examine the success of the rewards currently being offered. Rewards Partners will be updated to align with the needs of the local

market to get the maximum amount of redemptions to drive the success of the program. The Regional Rewards Manager will be in the market periodically, as necessary, to maintain partners during the pilot period.

## F. Marketing

### 1. Preparation Phase

#### A. Information Gathering: Two Weeks

At program launch, RecycleBank will begin to gain insight into the state of recycling into the targeted communities.

#### B. Communications Plan Creation: Two to Four Weeks

Once RecycleBank has gathered the information from the city (on the program area demographics and possible communication tools) RecycleBank will work with its local marketing resources to put a plan in place that outlines the marketing activities that will be performed to introduce and support the program, and when the target dates for execution are. The communications plan may include, but is not limited to the following marketing activities:

- Direct Marketing – welcome mailer
- Community Outreach – community presentations
- City Communications – bill inserts, articles in periodic newsletters, website
- School Outreach – flyers, presentations, Green Schools donations program
- Advertising - PSAs

### 2. Project Implementation Phase

#### A. Introduction of Program to Program Residents: Launch – 1 Month

Multiple communications channels, in addition to media outreach, will be leveraged to announce the launch of the program. These may include, but would not be limited to an initial mailings from the respective mayors of Moraga and Orinda introducing the program, and educational material mailings or handouts.

Local community and neighborhood ambassadors can assist in spreading the word about RecycleBank, activation and the benefits of recycling.

As the actual plan will not be designed until after kick-off, this is how a conceptual plan may look:

#### Conceptual Marketing Plan

Objective	Activity/Piece	Owner
Awareness	WM newsletter	RecycleBank to develop verbiage and provide design elements
Awareness	Handout for City Event	RecycleBank to design. City to print and distribute
Awareness/Activation	Welcome Packet:	RecycleBank to develop, design, print and mail

Objective	Activity/Piece	Owner
	Letter and insert	
Awareness	Moraga / Orinda utility bill	RecycleBank to develop and design.
Awareness	Moraga / Orinda Hill website	RecycleBank to develop verbiage and provide design elements
Awareness	WM website	RecycleBank to develop verbiage and provide design elements
Awareness	All social media sites:  Facebook, Twitter	RecycleBank to develop verbiage and provide design elements
Awareness	Media advertising: Orinda News?  Lamornida Weekly?  Others?	RecycleBank to purchase ad space and develop materials

**B. Ongoing Marketing Communication: Periodically during the Course of the Program**

Throughout the duration of the Program there will be continued gathering and evaluation of results and metrics, and outreach and communication to the Program residents as needed to drive and reinforce positive recycling behavior. These activities will be determined in collaboration between the County, the communities, Waste Management and RecycleBank. This communication will use various channels, from direct mail, to community outreach.

**G. PR / Communications**

**1. Preparation Phase**

There are no public relations and communications work items during the discovery phase of the project.

**2. Project Implementation Phase**

**A. Information Gathering: Four Weeks**

Once the project has kicked off, RecycleBank can begin its information gathering process. This will start with an in depth look into the Program phase geography, demographics and socioeconomics to understand the best methods of outreach to pursue. This may include but is not limited to an onsite overview and drive through; exploration with city official to share demographics and key understandings; meet and greet in selected neighborhoods for both residential and local business understandings, local

chamber of commerce, business associations, and development offices, and meetings with community councils.

Within this phase, it is important to know and understand the primary, secondary and tertiary messaging that Contra Costa County and the communities would like to utilize.

## B. Establish FAQ's and Talking Points Specific to the Contra Costa County Program:

### One to Two Weeks

Based on the outcome of the information gathering phase, RecycleBank will coordinate with community and county officials to build a coordinated internal and external communications approach. Frequently Asked Questions (FAQ's) will be developed to allow information for consumers to know and understand exactly how the program will work. A separate FAQ will be developed with the press and media market in mind so that all the necessary information is in hand for successful media story telling. Specific talking points will be created to handle any media inquiries that ensue and the communities will determine who will be the 'voice' of the program. RecycleBank will work closely with the marketing team to create any necessary collateral to support community outreach and media successes. All materials created to support the PR/Communications will be approved by the responsible Public Information Office (county, city, both). RecycleBank will coordinate an effective and useful tool kit of information.

Once all of the above mentioned materials are approved, RecycleBank will move forward with the press pack garnering any information and answering any questions that may be triggered by the media.

### D. Partnership Press Release: One Week

With the above knowledge at hand, RecycleBank will establish selected outlets for media to announce the Partnership with RecycleBank and state the goals and reasons for moving forward.

- One Press Release for National Wire
- One Press Release for Regional and very Localized Outlets
- If necessary, look to create Local Release in Languages according to Demographic findings

This approach will start the media buzz on education and awareness and interviews and media events can be scheduled accordingly.

## C. Ongoing Media Outreach: Periodically during the course of the Program

Once the initial phase of education and awareness has been launched, RecycleBank can proceed with a host of engaging stories to pitch localized media outlets creating buzz and excitement over the launch of an effective and sustainable recycling rewards program for the local residents of Contra Costa County. These include, but are not limited to:

- Increase in Recycling Volume (Weight)
- Local Economic Development and Residential Savings
- Profile a Family that never knew it was so easy to be Green
- Profile local Public Officials and Environmental Leadership
- Positive Economics for Local Government, Local Business, Local Residents

## **III. High level RecycleBank Implementation Work Plan**

Work Stream	Work Step/Deliverables	Dates
<b>Prelaunch</b>		
<b>Operations</b>		
	Kick-off Meeting attended by Contra Costa County, WM, and RB team members	August 2 (Tentative)
	Begin Bi-weekly Status Call	Biweekly after Kick-off
	Receive Address List, and detailed route information from Contra Costa County	August 16
	Complete Design of Mayoral Letters or any other written Mayoral endorsement of the program	August 30
	Customer Care Training	Week of September 6
	Activation Kit sent to Residents	October 11
	Testing ends	October 18
<b>Technology</b>		
	Clarify technical install base and procure	August 13
	Acquire existing real-time data for analysis, (including customer/address info).	August 23
	Cart Retrofit	August 30 – September 17
	Install Truck Technology	Week of September 13 (Estimate)
	Make data stream modifications (if required), and develop data transmission from WM - Zonar - RB	August 16 – September 6
	Test	September 13 – October 18
	Data Issues Resolution/Clean-up	September 20 – October 25
<b>Marketing/Outreach</b>		
	Initial Communications Call/Meeting: Discussion between County, Cities, and RecycleBank	Mid August
	Gather information about the Contra Costa County Program area landscape	
	Guide our PR and Marketing efforts for the program	
	Draft Initial Communications Plan	Early September
	Outlines the marketing and media materials, activities and channels for the project	
<b>Rewards</b>		
	Complete List of Local and Regional Retailers	16 August
	Regional Rewards Team visits Local and Regional Sponsors to discuss the Rewards Program	2 August – 29 October

Work Stream	Work Step/Deliverables	Dates
	National Rewards Team visits National Rewards Sponsors to discuss the Rewards Program	2 August – 29 October
	Execute contracts with Rewards Partners	2 August – 29 October
	Load Rewards Partners on to web site	27 September – 22 October
<b>Public Relations</b>		
	Information Gathering: Understand existing baseline, develop methods of outreach; ascertain what works/doesn't work in current system	2 August – 23 August
	Communication and Marketing Meetings and deeper dive into Program phase geography and demographics	30 August – 20 September
	Establish Press Release and selected outlets for media to announce Partnership with RecycleBank	27 September – 25 October
	Send out over National Wire	
	Regional Focus	
	Establish FAQ's and Talking Points on specifics of Contra Costa County Program	27 September – 25 October
	Begin to develop Press Pack and accompanying necessary materials	27 September – 25 October
	Determine Key Spokespeople for Program and begin outreach to create momentum and buzz	27 September – 25 October
	Local NGO's and non-profs for outreach and support	27 September – 25 October
	Determine Media Lists for Print, Radio, TV, Web 2.0	27 September – 25 October
<b>Launch</b>		
<b>Operations</b>		
	First RB Pick-up	1 November
<b>Technology</b>		
	Monitor Equipment and Data Feed	1 November – 19 November
<b>Marketing/Outreach</b>		
	Introduce program to residents and educational information to residents via multiple channels that may include, but is not limited to	25 October – 8 November
	Initial mailing from Mayor's office introducing program	
	Educational materials and info via mailer, cart attachment, or mailer	
<b>Public Relations</b>		
	Develop Launch Event (if viable). Possible Scenarios:	4 October – 29 October

Work Stream	Work Step/Deliverables	Dates
	Neighborhood Street Scene	
	Event at Reward Partner	
	Municipal Venue	
	Media Advisory and Outreach	4 October – 1 November
	Press Event	1 November
	Ongoing Stories to Tell	1 Week – 2 Weeks Post Launch
<b>Post/Launch</b>		
<b>Operations</b>		
	Status call continue biweekly then move to monthly account management calls	Biweekly first month, then monthly thereafter
<b>Technology</b>		
	Monitor Equipment and Data Feed	12 Months
<b>Marketing/Outreach</b>		
	Provide periodic outreach through various channels (direct mail, phone outreach, etc...)	12 Months
	Continually evaluate participation and redemption and plan targeted follow-up	12 Months
<b>Rewards</b>		
	Determine viability of existing local, regional, and national rewards partners and sign up new local, regional, and national rewards partners	Bi-Monthly
<b>Public Relations</b>		
	Continued Contamination Education and Awareness	12 Months
	Continued Education on Activation and Participation	12 Months
	Press Release - Metrics Success Story	Periodic During Program
	Ongoing Stories to Tell	Periodic During Program

## IV. RecycleBank Pricing

RecycleBank extends a price of \$.75 per household per month for the duration of the twelve month Program. The not to exceed total billing for the duration of the pilot is \$102,000, which equates to ~11,333 households. The monthly maximum bill would be \$8,500.

All activities established and described in this scope of work will be paid for by the monthly fee and annual amount allocated by the Central Contra Costa Waste Authority.

Should the Central Contra Costa Solid Waste Authority wish to employ RecycleBank for work outside of this scope of work, the following fee schedule applies:

1. Customization/design and creative work - \$100/hour
2. IT and technical work - \$150/hour
3. Project/program management - \$200/hr

## V. Team Overview

The following team members from RecycleBank will be part of the RecycleBank implementation throughout the implementation:

- Program Manager/General Manager: Axel Newe; [anewe@recyclebank.com](mailto:anewe@recyclebank.com); 916.899.9849
- Project Manager: Cameron Thorley; [cthorney@recyclebank.com](mailto:cthorney@recyclebank.com); 310.893.9935
- Project Engineer: Jeff Davis; [jdavis@recyclebank.com](mailto:jdavis@recyclebank.com); 215.316.6391
- Rewards Manager: Denise Araiza; [daraiza@recyclebank.com](mailto:daraiza@recyclebank.com); 602.448.5150
- Marketing Manager: Randi Desiderio; [rdesiderio@recyclebank.com](mailto:rdesiderio@recyclebank.com); 267.273.6691
- Public Relations Manager: Jeff Harse; [jharse@recyclebank.com](mailto:jharse@recyclebank.com); 917.208.0978
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