

Department of Resources Recycling & Recovery

SCOPE OF WORK

Critical Review of Used Oil Life-Cycle Assessment Study

I. INTRODUCTION/OBJECTIVES

As part of Senate Bill (SB) 546 of 2009, CalRecycle was directed to 1) Contract with a third-party consultant with recognized expertise in life cycle assessments (LCA) to coordinate a comprehensive life cycle analysis of the used lubricating and industrial oil management process, from generation through collection, transportation, and re-use alternatives; 2) solicit input from representatives of all used oil stakeholders in defining the scope and design of the LCA; 3) evaluate the impacts of certain components of SB 546; and 4) submit a report to the Legislature on the results and “any recommendations for statutory changes that may be necessary to promote increased collection and responsible management of used oil.”

CalRecycle staff has chosen the contractor to conduct the LCA (LCA Contractor). The LCA Contractor will perform all the duties necessary to perform the analysis. This contract represents the duties of the Critical Review Contractor (Review Contractor) and supports the successful completion of the LCA project by assuring that it complies with International Organization for Standardization (ISO) standards and protocols.

II. WORK TO BE PERFORMED

The Review Contractor will oversee and coordinate critical review services for the used oil LCA study from the beginning of the project through the completion of the LCA study report. The Review Contractor will participate in all phases of the study effort to help to ensure that the study meets International Organization for Standardization (ISO) standards (14040 and 14044) and that the study is conducted in the most efficient and effective manner. The Review Contractor will provide technical assistance to CalRecycle staff when responding to stakeholder questions and/or comments concerning the process being used to ensure that the LCA study is being carried out in a way that is scientifically and technically defensible. In this capacity the Review Contractor will provide assistance in selecting the appropriate framework and details for conducting the used oil LCA study including goal definition and scoping, life-cycle inventory, and life-cycle impact assessment.

At various stages in the project, the Review Contractor shall provide written review of the outputs to verify compliance with ISO standards and accepted procedures of LCA Contractor.

III. TASKS IDENTIFIED

All written deliverables are subject to the Contract Manager's written approval. Approval will be based on completeness and fulfillment of task objectives.

Task 1. Provide Technical Assistance to CalRecycle.

Task 1a. Project coordination.

Task 1a.i. Prepare work plan. The Review Contractor will convene with the Contract Manager, the CalRecycle project team, the Expert Facilitator (separate contract provided by CalRecycle), and the LCA Contractor to discuss the project objectives, budget, timelines, and implementation of tasks, activities, and deliverables. The Review Contractor will develop a detailed work plan, subject to approval by the CalRecycle Contract Manager, following this meeting.

Deliverables: Work plan.

Timeline: This deliverable is expected to be completed by September 2011.

Task 1a.ii. Convene with project team. The Review Contractor will participate as needed in discussions between the Contract Manager, CalRecycle project team, the Expert Facilitator, and the LCA Contractor to ensure that the LCA study is conducted in the most efficient and effective manner. At a minimum, the Review Contractor will convene with the Contract Manager and the CalRecycle project team after each stakeholder meeting and LCA study milestone.

Deliverables/Tasks: A minimum of six 2-hour touch-base conference call meetings with CalRecycle project team and other project contractors.

Timeline: These deliverables are expected to be completed by March 2013.

Task 1b. Participate in stakeholder meetings. Due to the fact that a stakeholder group will be providing input on the scope and design of the LCA study (with final determination being made by CalRecycle), the Review Contractor will attend and participate in appropriate stakeholder meetings and conference calls as determined by the Review Contractor and CalRecycle project team. Review Contractor will attend (in person) 8 stakeholder and/or CalRecycle Public meetings as scheduled by the CalRecycle Contract Manager.

The Review Contractor will provide technical assistance to CalRecycle staff when responding to stakeholder questions and/or comments concerning the process being used to ensure that the LCA study is being conducted so that the results and conclusions are scientifically and technically defensible.

In this capacity, the Review Contractor will provide assistance in guiding the selection of appropriate framework and details for conducting the used oil LCA study including:

- Goal definition and scoping
- Functional unit
- System boundary
- Systems modeling
- Criteria for selecting appropriate life-cycle impact assessment models

- Life-cycle inventory
- Methodology for data gathering
- Data quality assessment

- Life-cycle impact assessment
- Sensitivity and uncertainty analysis
- Interpretation

Deliverables/Task: Attend and participate in 8 stakeholder and/or public meetings.

Timeline: The stakeholder meetings are expected to be completed by December 2012. The CalRecycle public meetings are expected to be completed by March 2013.

Task 2. Coordinate LCA Study Critical Review Panel

Task 2a. Establish critical review services. The Review Contractor will act as the critical review panel chair for the used oil LCA study from the beginning of the project through the completion of the final LCA study report. The Review Contractor will coordinate with up to four additional independent critical reviewers (chosen and contracted with by CalRecycle). All efforts related to the ISO critical review shall be in accordance to ISO standards 14040 and 14044.

Deliverables: Coordinate with up to four additional independent LCA study reviewers.

Timeline: The four additional critical reviewers are expected to be in place by September 2011 and coordination with expected to be completed by March 2013.

Task 2b. Oversee critical review services.

Task 2b.i. Review of LCA study scoping work. The Review Contractor will review the LCA goal definition and overall scope and boundaries in order to submit a written review and verify compliance with ISO standards 14040 and 14044 and accepted procedures of LCA Practitioner (see Task 3b.i.).

Deliverables/Tasks: Review of goal definition and overall project scoping.

Timeline: This review is expected to be completed by approximately October 2011.

Task 2b.ii. Review of draft and final LCA study reports. The Review Contractor, along with the Critical Review Panel, will review the draft and final LCA study reports prepared by the LCA Practitioner (see Tasks 3b.ii. and 3b.iii., respectively) to ensure that the results and conclusions are scientifically and technically defensible and that the LCA conforms to appropriate ISO standards. Review Contractor shall provide detailed comments to CalRecycle and the LCA Contractor regarding any concerns, missing pieces, inconsistencies, etc that are found during these reviews.

Deliverables: Review of draft and final LCA study reports.

Timeline: Review of the draft and final LCA study reports are expected to be completed by September 2012 and December 2013, respectively.

Task 3. Reporting

Task 3a. Quarterly progress reports. The Review Contractor shall submit progress reports on work done under this contract and Technical Assistance either provided to LCA Contractor or to CalRecycle on a quarterly basis.

Deliverables/Tasks: Quarterly progress reports.

Timeline: These deliverables are expected to be completed by March 2013.

Task 3b. Critical Review reports. The Review Contractor shall provide written review of the outputs to verify compliance with ISO standards 14040 and 14044 and accepted procedures of LCA Contractor. This written review shall be provided at the end of the following work stages (and as further detailed in Tasks 3b.i. and 3b.ii.):

Goal definition and scoping (see Task 2b.i.);
Life-cycle inventory and life-cycle impact assessment; and
LCA report completion.

Task 3b.i. Goal definition and project scoping. The Review Contractor will submit a written review of the outputs to verify compliance with ISO standards 14040 and 14044 and accepted procedures of LCA Practitioner based on review the LCA study goal definition and overall scoping of the project (see Task 2b.i.).

Deliverable: Project scoping report.

Timeline: This deliverable is expected to be completed by approximately October 2011.

Task 3b.ii. Interim Critical Review report. Following review of the draft LCA study report (see Task 2b.ii.), the Review Contractor shall submit an interim Critical Review Report summarizing critical review findings and recommendations for improvement of the study.

Deliverable/Tasks: Interim Critical Review report.

Timeline: This deliverable is expected to be completed by September 2012.

Task 3b.iii. Final Critical Review report. Upon completion of the final LCA study report by the LCA Contractor, the Review Contractor shall submit a Critical Review Report summarizing final review findings that will be included as an appendix to the final Legislative report prepared by CalRecycle.

Deliverables/Tasks: Final Critical Review report.

Timeline: This deliverable is expected to be completed by December 2012.

IV. CONTRACT/TASK TIME FRAME

The timeframe for this project is estimated from September 1, 2011 through June 15, 2013. The timeline will follow the overall project timeline below and as amended during the course of the project.

Task	Timeframe	
	Begin	End
1. Provide Technical Assistance to CalRecycle.		
1a. Project Coordination.		
1a.i. Prepare work plan.	September 2011	September 2011
1a.ii. Convene with Project Team.	September 2011	March 2013
1b. Participate in stakeholder meetings.	September 2011	March 2013
2. Coordinate LCA Study Critical Review Panel.		
2a. Establish critical review services.	September 2011	March 2013
2b. Oversee critical review services.	September 2011	March 2013
2b.i. Review of LCA study Phase I scoping work.	September 2011	October 2011
2b.ii. Review of draft and final LCA study reports.	October 2011	September 2012 & December 2012, respectively
3. Reporting		
3a. Quarterly progress reports.	November 2011	March 2013
3b. Critical Review reports.		
3b.i. Goal definition and project scoping.	September 2011	October 2011
3b.ii. Interim Critical Review report.	October 2011	September 2012
3b.iii. Final Critical Review report.	October 2012	December 2012