

DEPARTMENT OF RESOURCES RECYCLING AND RECOVERY
(CalRecycle)

SCOPE OF WORK

Conduct Program Workshops and Conferences throughout the State of California and Administration of Recycling Market Development Zone Incentive Funds

I. INTRODUCTION/OBJECTIVES

The Department of Resources Recycling and Recovery (CalRecycle) conducts and sponsors workshops and conferences designed to educate local government and recycling related industry representatives. Additionally, CalRecycle administers the Recycling Market Development (RMDZ) Program, which provides Zone Incentive Funds (ZIF) for local outreach to Zone Administrators (ZA). The objective of this contract is to secure a Contractor to plan, in consultation with CalRecycle, logistics and coordination of conferences and training workshops, and distribution of ZIF monies for the Fiscal Years (FYs) 2014/15, 2015/16, and 2016/17, as the budget allows. Total funding for this three-year contract is an amount not to exceed one million three hundred ten thousand dollars (\$1,310,000) (See Table 1 below). The exact number of conferences, workshops, and funding will depend on the availability of funds and passage of the Budget Acts for the corresponding fiscal years. Additionally, CalRecycle may decide to host or sponsor these conferences and training workshops in conjunction with other entities, which could change funding and timing needs.

A. Workshops/Conferences

The workshops/conference component of this contract is to coordinate logistics and to administer and conduct the following conferences and training workshops: RMDZ Administrator Training workshops, the Used Oil Recycling/Household Hazardous Waste (Used Oil/HHW) conferences, the Tire Recycling Management conferences and training workshops (Tire), and other conferences as the budget allows. Funding for this component is an amount not to exceed eight hundred thirty-five thousand dollars (\$835,000) (\$685,000 for direct conference costs and \$150,000 to ZAs for travel and expenses associated with attending RMDZ workshops).

The goal of these conferences and training workshops is to share resource management information amongst local government representatives, various program collectors, recyclers, contractors, non-profit entities, and CalRecycle staff. These conferences and training workshops will provide interactive stakeholder discussions on CalRecycle programs, including market development activities; grant procedures; and legislative, regulatory, and policy initiatives. Additionally, CalRecycle's staff, stakeholders, and other participants will be able to share relevant information on individual program issues, current research, new technologies, and model programs, as well as provide training for field personnel, grantees, and others. Additionally, funding under the conference

component includes \$1,000 per ZA/year for Zone Works ZA registration, lodging and travel reimbursement.

B. Zone Incentive Funds

The ZIF Program component is for the administration and distribution of incentive funds to local ZAs for outreach and promotion of the RMDZ program locally and regionally. Specifically, this contract is to acquire administrative support for payment of ZIF monies, compile program data, provide analyses, and to report on the ZIF Program.

The goal of the RMDZ Program is to create a sustainable infrastructure and enhance local markets for recyclable and compostable materials generated within California's RMDZs. The ZIF Program incentivizes local governments to provide outreach services and to work closely with the regional post-consumer commodities industry to stimulate the use of recyclable and compostable materials as raw products by manufacturers. By doing this, the ZIF program helps create jobs in the post-consumer commodities industry and diverts valuable resources from disposal. The ZIF program complements CalRecycle's marketing and outreach efforts to promote RMDZ services and activities. This program will provide targeted financial support to Zones for funding vital local marketing and outreach activities.

Note: Funding for Zone Works ZA registration, lodging and travel reimbursement in the amount of \$1,000 per ZA/year is included separately in the conference component of the contract as noted above in Section A. The funding in this ZIF portion of the contract is specifically for Zone outreach and promotional activities.

Total funding for this component of the three-year contract is an amount not to exceed four hundred seventy-five thousand dollars (\$475,000). For FY 2014/15, the funding will be \$124,000 (\$3,100 per each of the 40 Zones) and \$33,000 (\$8,000 is included in the total for project management and administrative costs) for the contractor's services and deliverables. For each of FYs 2015/16 and 2016/17, the funding will be \$124,000 (\$3,100 per each of the 40 Zones) and \$31,000 for the contractor's services and deliverables. To accommodate the need of ZAs to support larger, multi-year marketing efforts, an individual ZA will have three options for using the funding:

- **Scenario 1:** The ZA may use \$3,100 in August 2014-June 2015, \$3100 in July 2015-June 2016, and \$3100 in July 2016-April 15, 2017.
- **Scenario 2:** The ZA may combine the first and second year funding for a total of \$6,200 to be used from July 2015-June 2016, and separately use \$3,100 from July 2016-April 15, 2017; or,
- **Scenario 3:** A ZA may choose to combine all three years of funding for a total of \$9,300 to spend on projects during July 2016-April 15, 2017.
 - Note: If a ZA chooses this option they cannot implement a project until July 2016 or after, and they will have to submit invoices by April 15, 2017.
 - If ZAs choose this option, it is very important that they carefully assess whether the project can be completed between July 1, 2016, and February-

April 1, 2017, e.g., basically the project(s) would need to be initiated, completed and invoiced in less than 9 months.

If a ZA does not use the annual \$3100, in full or part, and does not formally designate by February of that year that their annual allocated amount is rolled over for the use in the following year, the ZA's funds will constitute as unused funds and get equally redistributed to ZA's for use in the following year. Each ZA may only receive up to \$1,900 of unused funds in each year, e.g., each ZA depending on the amount of unused funds may receive \$3,100 plus up to \$1,900 for a total of \$5,000). Staff may seek augmentation of the original contract funding if additional zones are designated by CalRecycle during the course of this contract.

Table 1
SCHEDULE OF EVENTS, DATES, AND FUNDING

Fund	Description	Calendar Year Event Date(s)	Amount Requested & Funding Year
Used Oil/HHW \$250,000 Used Oil Recycling Fund	Southern California Conference	Spring 2015	\$125,000 (FY 14/15)
	Northern California Conference	Fall 2016	\$125,000 (FY 14/15)*
Tires \$225,000 Tire Fund Account	2015 Conference	Winter 2015	\$50,000 (FY 14/15)
	Multiple Workshops	July 2014-June 2015	\$25,000 (FY 14/15)
	Multiple Workshops	July 2015-June 2016	\$35,000 (FY 15/16)*
	Multiple Workshops	July 2016-May 2017	\$40,000 (16/17)*
	2017 Conference	Spring 2017	\$75,000 (\$40,000 (FY 15/16)) (\$35,000 (FY 16/17))*
RMDZ \$210,000 RMDZ Sub- Account	2-day Training Workshops	Summer/Fall 2014	\$35,000 (FY 14/15)
	2-day Training Workshops	Winter/Spring 2015	\$35,000 (FY 14/15)
	2-day Training Workshops	Summer/Fall 2015	\$35,000 (FY 15/16)*
	2-day Training Workshops	Winter/Spring 2016	\$35,000 (FY 15/16)*
	2-day Training Workshops	Summer/Fall 2016	\$35,000 (FY 16/17)*
	2-day Training Workshops	Winter/Spring 2017	\$35,000 (FY 16/17)*
RMDZ \$50,000 RMDZ Sub- Account	Zone Works Zone Administrator Registration and Travel Reimbursement**	Fall 2014/Winter 2015/Summer 2015	\$50,000 (FY 14/15)
RMDZ \$50,000 RMDZ Sub- Account	Zone Works Zone Administrator Registration and Travel Reimbursement**	Fall 2015/Winter 2016/Summer 2016	\$50,000 (FY 15/16)*
RMDZ \$50,000 RMDZ Sub- Account	Zone Works Zone Administrator Registration and Travel Reimbursement**	Fall 2016/Winter 2017/Spring 2017	\$50,000 (FY 16/17)*
RMDZ \$165,000 RMDZ Sub- Account	RMDZ Zone Incentive Funds	FY 2014-15***	\$165,000 (FY 14/15)
RMDZ \$155,000	RMDZ Zone Incentive Funds	FY 2015-16***	\$155,000 (FY 15/16)*

Fund	Description	Calendar Year Event Date(s)	Amount Requested & Funding Year
RMDZ Sub- Account			
RMDZ \$155,000 RMDZ Sub- Account	RMDZ Zone Incentive Funds	2016- Spring 2017	\$155,000 (FY 16/17)*
TOTAL			\$1,310,000

* SUBJECT TO AVAILABILITY OF FUNDS AND PASSAGE OF FYS 2014/15 THROUGH 2016/17 STATE BUDGET ACTS.

** AMOUNT EQUATES TO \$1,000 PER ZONE ADMINISTRATOR PER YEAR.

***AS DESCRIBED IN TEXT ABOVE, ZAS COULD COMBINE THEIR FUNDS AND USE THEM IN FY 2015/16 AND/OR 2016/17.

II. WORK TO BE PERFORMED

The Contractor, in partnership with CalRecycle's Contract Manager and key individual CalRecycle program conference coordination staff, shall plan and coordinate the 2014-2017 workshops and conferences and participate in the administration and distribution of RMDZ Zone Incentive Funds as outlined in this section.

A. Workshops/Conferences

The Contractor shall plan and coordinate the 2014-2017 RMDZ, HHW/Used Oil, and Tire conferences, training workshops, and other conferences and training workshops, as directed by the CalRecycle Contract Manager and as the budget allows. The conferences and workshops shall have the following characteristics:

- Be one to five days in length.
- Be held in California.
- Accommodate up to 500 registrants, including speakers.

CalRecycle reserves the right to change the number of conferences and training workshops or combine some events into a larger conference if CalRecycle's research or feedback from stakeholders, budgetary concerns, or other information is obtained to warrant such actions.

The Contractor shall perform the following duties (as detailed below in Section IIIA), as applicable:

- Secure, confirm and monitor facility arrangements;
- Assist in developing structure of the conference or training workshops;
- Incorporate conference or training workshop graphics into conference or workshop materials;
- Coordinate and confirm speaker participation and presentations;
- Develop and distribute conference and training workshop announcements and registration materials and guides;
- Coordinate and confirm the registration of all attendees;
- Coordinate and confirm vendor participation;
- Solicit stakeholder attendance;
- Publish and electronically distribute conference and training workshop proceedings;

- Complete and submit electronically, a final report of each conference and training workshops;
- Coordinate translation services, as needed; and,
- Coordinate sponsorship of other related events.

B. Zone Incentive Funds

The Contractor shall perform the following duties (as detailed below in Section IIIB):

- Participate in kick off meeting;
- Develop a work plan for managing the ZIF Program;
- Develop a budget and standardized expense request forms;
- Create and distribute guidelines and instructions for ZAs;
- Review and process payment of ZIF activities as directed by CalRecycle;
- Consolidate program information that can be used to analyze the program's effectiveness; and,
- Develop and submit an annual summary report and program recommendations.

III. TASKS IDENTIFIED

The Contractor shall complete the following tasks as listed below. All tasks are subject to the Contract Manager's approval.

A. Workshops/Conferences

1. SECURE, CONFIRM AND MONITOR FACILITY ARRANGEMENTS FOR EACH CONFERENCE OR WORKSHOP

The Contractor shall provide the following services as needed:

- Identify several potential locations (based on individual program needs for each conference or training workshop) that are accessible to attendees and vendors.
 - Evaluate and consider facilities that follow waste management principles that encourage the minimization, reuse and recycling of waste, procurement of recycled content products and development of energy efficient operations.
 - The locations should be willing to implement the source reduction and recycling tips outlined in CalRecycle's quick reference brochure [Waste Reduction Tips for Large Venues and Events](#). This brochure provides tips on how to implement a successful venue or event waste reduction program.
 - For RMDZ workshops, locations within the established RMDZs will first be considered, if cost-effective.
- Outline, in written form, the potential locations identifying all potential costs, space available, lodging costs and amenities for attendees, benefits of each location, and concerns.
- With approval of the Contract Manager, negotiate hotel accommodations for participants which must fall within the approved State per diem rates.

Final selection of any facility will be approved in writing by the Contract Manager. After selection, the Contractor shall do the following:

- Enter into a contract with the facility. Any indemnity provisions must be approved by the Department of General Services.
In addition, any agreement to pay cancellation fees must be approved in writing by the Contract Manager prior to the Contractor agreeing to such fees or entering into any contract.
- Check at least twice each week that all information being provided to conference participants by the hotel or conference facility is accurate and that all room block arrangements are in place.
- Confirm all room set-ups, food, audio-visual, internet, web cast and other facility arrangements.
- Review all details with the Contract Manager two weeks prior to the event and again one to two days prior to the event.
- Coordinate all activities during the event including registration and check-in, vendor support, audio-visual, internet and webcast set-up, and catering follow-up.
- Act as the point of contact for facility personnel for any issues that arise during the course of the conference.
- Make all facility arrangements including, but not limited to, assessing meeting room needs, making arrangements for room set-up, providing signage for identification and direction, arranging meals (to be paid through conference registration fees and [potentially] sponsorship), and providing for audio/visual and internet or webcasting requirements.
- For RMDZ workshops the Contractor shall coordinate the funding of travel, registration, and meal expenses, as the budget allows.
- Work with the Contract Manager in arranging, promoting, and coordinating networking and social events during the Conference or Workshop.
- Submit draft budget(s) for review and approval by the Contract Manager. Categories and line items of estimated charges in budget should match the categories and line items of the actual charges in the invoice submitted to CalRecycle. All cancellation fees must be approved in writing by the Contract Manager before payment of such fees is made.

2. ASSIST IN DEVELOPING STRUCTURE OF THE CONFERENCE OR TRAINING WORKSHOP

In consultation with the Contract Manager, the Contractor shall assist in developing a conference structure to foster networking, large group and small group discussions, effective time with vendors as appropriate, and concurrent tracks, if needed, that meet the needs of the diverse group of attendees. The content and structure of each workshop must receive final approval from the Contract Manager.

3. INCORPORATE CONFERENCE AND TRAINING WORKSHOP GRAPHICS

The Contractor shall incorporate CalRecycle's approved graphic image for all conference and training workshop materials. This design shall be used on conference

and training workshop registration materials for attendees and vendors, websites, printed session materials, nametags, forum guides, and all signage for the events.

4. COORDINATE AND CONFIRM SPEAKER PARTICIPATION AND PRESENTATIONS

The Contractor shall contact speakers designated by the Contract Manager, with contact information provided by the Contract Manager. The Contractor, with the assistance of the Contract Manager, may contact a small number of local government, non-profits, grant recipients, or other CalRecycle contacts to solicit speakers. The Contractor shall compile and submit copies of all abstracts, if applicable, to the Contract Manager for speaker selection. The Contractor shall request biographies, abstracts, and supporting materials for all presentations and coordinate the completion of these items directly with speakers. The Contractor shall confirm speaker participation with speaker(s).

5. DEVELOP AND DISTRIBUTE CONFERENCE AND TRAINING WORKSHOP ANNOUNCEMENTS, REGISTRATION, AND WORKSHOP GUIDES AND MATERIALS

The Contractor shall provide the following services in consultation with Contract Manager:

- Provide announcements of the conference or training workshops at least twelve (12) weeks prior to the event and registration materials at least eight (8) weeks prior to the event.
- Deliver all registration materials and update information via email, web, or U.S. Mail, as needed.
- Make registration information available on-line to reduce resource use, waste, and costs, using links established from the Contractor's website and CalRecycle's website.
 - The website, address, and links must be approved by the Contract Manger.
- Develop a draft of the conference or training workshop guide, including session schedules, descriptions, attendee lists, training handouts, evaluation forms, advertisements, and general layout for review by the Contract Manager no less than four (4) weeks prior to the event.
 - The final version of the guide and any other written materials must be approved by the Contract Manager before printing.
- Arrange for the printing and shipping of all conference materials with an emphasis on minimizing the volume of paper generated.
 - The final version of the packet and any other training materials must be approved by the Contract Manager before distribution.

6. COORDINATE AND CONFIRM THE REGISTRATION OF ALL ATTENDEES AND SPEAKERS

The Contractor shall provide the following services:

- Receive and process all registrations for the event, ensuring that all attendees and speakers have provided adequate information for tracking and evaluation.

- Confirm in writing to the Contract Manager the registration of all attendees two (2) weeks prior to the conference.
- Keep the Contract Manager informed of the status of registration and track attendees by jurisdiction on a weekly basis for follow-up prior to the event.
- Coordinate lodging needs for workshop attendees and speakers as needed.
- Develop a confirmation packet of information to be approved by the Contract Manager and sent to all participants two (2) weeks prior to the conference.
- Provide a confirmation packet to confirm in writing the registration of each of the attendees, vendors, speakers, and guests. Note: This material may be sent electronically to attendees, as appropriate.

The confirmation notice and packet will include information specific to the recipient's role in the conference.

- For attendees, this will include information that will assist the participants with their own arrangements, such as parking and shuttle availability.
- For dignitaries and speakers, this confirmation will include copies of all information provided, such as biographies and session summaries.
- The packet will also confirm any travel arrangements coordinated by Contractor and any fee reduction provided.
- For moderators and room monitors, this confirmation will include copies of all information provided, such as biographies and session summaries of the sessions for which they are responsible as moderators or room monitors.
- The Contractor shall provide training on the responsibilities of moderators and room monitors.
- For RMDZ Zone Works the Contractor shall do the following:
 - i. Zone Administrators (ZA) may be reimbursed for Zone Works conference registration, lodging, and transportation for up to 2 trainings per year. For Zone Works registration and travel reimbursement (with the exception of a second night's lodging request that must be pre-approved by CalRecycle Local Assistance and Market Development Zone Contract Manager), no proposal from the ZAs is required. Once Zone Works is finished, the ZA shall complete appropriate travel forms, identified by the Contractor, and necessary evidence of travel expenditures to complete the reimbursement process. The ZAs shall submit forms directly to the Contractor for payment. No program metric or proposal will be required for reimbursement of Zone Works registration and travel costs.

7. COORDINATE AND CONFIRM VENDOR PARTICIPATION

The Contractor shall provide the following services:

- Receive guidance from the Contract Manager on potential vendors.
- Contact and confirm vendors for participation in the vendor exhibit, where appropriate.

- Work with each vendor to develop a full exhibit with a balance of types of businesses represented.
- Develop ad space in the forum guide for vendors and coordinate the receipt of acceptable ad copy from each exhibitor.
- Provide vendors with all information regarding registration, travel, shipping, and set-up arrangements.
- Confirmation will include registration information of all representatives, exhibit set-up guidelines, shipping arrangements, clean-up responsibilities, and transportation issues specific to the exhibit, as well as ad copy for the guide.

8. SOLICIT STAKEHOLDER ATTENDANCE

At a minimum of four (4) weeks prior to the event, the Contractor shall promote and publicize the conference or workshop to key stakeholders. The Contractor shall document each contact and response and submit these to the Contract Manager, for review and additional direction. The contractor shall report on stake holder attendees and seek review and additional direction from contract manager as needed.

9. PUBLISH AND DISTRIBUTE CONFERENCE AND TRAINING WORKSHOP PROCEEDINGS

The Contractor shall compile presentation materials, session information, and notes and handouts for distribution on-line. This information shall be organized with the proper title and session block and distributed electronically to conference participants.

10. COMPLETE AND SUBMIT A FINAL REPORT OF THE CONFERENCE OR TRAINING WORKSHOP

Using the session evaluation forms approved by the Contract Manager and completed by conference attendees, the Contractor shall do the following:

- Evaluate the audience response to each session.
- Evaluate the overall forum, including the registration process, facility, and follow-up by CalRecycle and Contractor staff.
- Provide an evaluation on the success of the source reduction and recycling program.
- Contact each vendor directly to assess their participation in the event and any suggestions for improvement.
- Prepare a report containing the following:
 - Summary of sessions and overall evaluation and an analysis of the results.
 - Vendor's assessment of the conference based on personal contact after the conference.
 - Contractor's assessment of the conference or workshop and recommended changes for future events.
 - Summary of the results of the following evaluations: 1) training evaluation, 2) individual session evaluation, and 3) overall evaluation, including issues, concerns, criticisms, and

recommendations of session attendees. The Contractor will work with CalRecycle Contract Manager to develop all evaluation content.

- Spreadsheet summarizing number and type of attendees (such as local jurisdictions, non-profits, stakeholders, and vendors), amount of funding received (from registration or sponsorship), list of participants with name, organization, address, phone number, and email address.
- Prepare and mail certificates of appreciation to all speakers, vendors, and others as identified by the Contract Manager.

11. COORDINATE TRANSLATION SERVICES

Conference and Training Workshops for activities along the border may require translation services in both verbal and written translations from English to Spanish and Spanish to English for the events. The Contractor shall coordinate translation services when needed.

12. COORDINATE SPONSORSHIP OF OTHER RELATED EVENTS

The Contractor shall also plan and coordinate CalRecycle sponsorship or participation in other related conferences or training workshops with the Contract Manager based on the approval of the Material Management and Local Assistance Division's Deputy Director. The Contract Manager, with the approval of the Deputy Director, may approve or deny any funding request for other related tasks, activities, or events.

B. Zone Incentive Funds

The Contractor shall complete the following tasks. All tasks are subject to the Contract Manager's approval.

1. PARTICIPATE IN INITIAL MEETING

The Contractor shall participate in an initial meeting with the Contract Manager. As part of or prior to this meeting, the Contract Manager will provide historical ZIF program background information to the Contractor.

2. DEVELOP WORK PLAN

The Contractor shall develop and submit to the Contract Manager for approval tasks and timelines associated with the contract activities, including a process to review and approve expenditures.

3. DEVELOP A BUDGET AND STANDARDIZED FORMS

The Contractor shall coordinate with the Contract Manager to develop a yearly budget to track payments to the ZAs, and to provide periodic and end of the year status reports and assessments to determine the amount of excess funds, if any. The Contractor shall develop a budget with the Contract Manager that allows ZAs to combine ZIF funds for multiple years. The Contractor should also be able to handle payment requests and reimbursement where multiple zones pool their money for one ZIF activity and payment is either made directly to the vendor or divided amongst the participating zones.

4. CREATE GUIDELINES AND INSTRUCTIONS

In consultation with and subject to the approval of CalRecycle Contract Manager, the Contractor shall develop instructions and guidelines for ZAs regarding the ZIF Program. The guidelines shall include information regarding the eligible expenses and eligibility criteria for the ZIF program.

a) **Eligible Expenses**-- The following are the eligible ZIF expenses:

Graphics, Printing and Advertising

- Advertising design and placement costs in industry and trade publication
- Customizing brochures and placement of PSAs (using CalRecycle's template and CARMDZ materials, or materials developed by the local ZA, with approval from Local Assistance and Market Development Division (LAMD) and Office of Public Affairs (OPA)
 - Customizing and placement of PSAs (developed by CalRecycle, or materials developed by the local ZA, with approval from LAMD and OPA)
 - Duplicating or reprinting brochures, posters, and other program graphics
 - Developing or updating local Zone web pages

Direct Zone Support/Outreach

- Distribution expenses for brochures and follow-up letters
- Creation of localized marketing data-bases, newsletters, articles
- Feedstock for sample runs
- Cover costs for zone expansion or re-designation

Industry Trade Shows, Conferences

- Creation or upgrades for trade show display graphics and associated hardware (backdrop and lighting, etc)
- Exhibitor registration fees for Zone related events
- Local and In-State travel for Zone related events
- Specialized training related to Zone activities

Business Leads and Tracking

- Purchasing costs for lists of leads for marketing
- Purchasing of business tracking and communication software
- Hiring resources, such as a consultant, to develop leads and tracking of Zone businesses

Other qualifying projects

- Unique ZA initiated projects preapproved in writing by LAMD Section Manager(s) and Zone Liaison(s)

b) **Eligibility Criteria**-- At the end of the fiscal year and each following fiscal year, the Contract Manager, LAMD Section Manager, and the Contractor shall determine each ZA's eligibility. Should an individual ZA not be eligible for ZIF funds, the CalRecycle Contract Manager and Section Manager will inform the ZA.

- i. For an individual ZA to qualify to receive ZIF funding, he or she must, at the end of the first year and each following fiscal year, do the following:
 - Apply for access to ZIF monies or notify the Contract Manager and Zone Liaison as to the reason why they will not be applying (e.g., they plan to combine funding).
 - Submit a completed Zone Action Plan (ZAP) outlining the plan for ZIF funds by the due date established by CalRecycle;
 - Submit by April 1 of each year a completed Zone Annual Report to the Department or notify the Zone Liaison by the due date if there is a need for additional time and the reason; and,
 - Comply with payment process procedures developed by the Contractor pursuant to this SOW and approved by the Contract Manager.

5. REVIEW AND PROCESS FOR PAYMENT OF ZIF ACTIVITIES

The ZIF process begins with the ZA's proposal, based on activities included in their current ZAP and using one or more of the eligible funding categories described above. The proposal shall include the amount requested, a brief description of how funds will be spent, how requested funds will meet individual Zone marketing or business outreach objectives, and proposed program metrics. Examples of program metrics include:

- Number of the public or businesses expected to be contacted or reached with outreach materials;
- Number of contacts expected to be initiated as a result of postcard or brochure mailings; or,
- Number of new prospective businesses expected to be identified as a result of the purchase and use of a specialized mailing list or hiring of a specialized consultant.

The proposal shall then be sent to the ZA's assigned Local Assistance and Market Development (LAMD) Zone liaison staff. Once the liaison staff has reviewed this with the LAMD Section Manager and approved the proposal (within 5-7 business days), the ZA shall be notified and a copy shall be submitted to the Contractor and CalRecycle Contract Manager. Once received, the ZA can then proceed and incur expenses. Should the proposal require modification or not be approved, the Zone liaison shall contact the ZA.

When work is completed and actual program metric information is available, the ZA can submit a payment request form with approved back-up documentation to the Contractor. Note: In some instances, complete program metric information may need to be provided at a later time. The Contractor, pursuant to protocols established under this SOW, shall review, modify if necessary, and approve payment for ZIF activities.

Expenditure requests shall be processed by the Contractor on a quarterly basis. At the end of each quarter the Contractor shall process all expense requests received within 21 working days. The Contractor shall provide a copy of the processed expense requests to the Contract Manager and Zone liaison staff. Should the Contractor find that an expense request should not be paid, the Contractor shall immediately notify the Contract Manager, who will coordinate with the LAMD Zone liaison staff to contact the ZA to address the situation.

The Contractor shall coordinate with the Contract Manager to obtain access and training to utilize the Zone Information Reporting System (ZIR) as the tool to obtain details and direction about ZIF activities approved for payment, and to input and track details about processed payments.

6. CONSOLIDATE PROGRAM INFORMATION AND ANALYZE PROGRAM EFFECTIVENESS

The Contractor and Contract Manager shall develop a process for consolidating program information. The Contractor shall consolidate program information by expenditure categories, program metrics or other groupings, as required by the Contract Manager. The Contractor shall review this information with the Contract Manager on an annual basis.

7. DEVELOP AND SUBMIT ANNUAL SUMMARY REPORT AND RECOMMENDATIONS

The Contractor shall submit an annual summary report of the ZIF program to the Contract Manager. The summary shall include recommendations to improve the program.

IV. CONTRACT TASKS SUMMARIZED/ TIME FRAME

(Changes to this timeline are subject to the prior written approval of CalRecycle Contract Manager).

1 HHW Conference, 2 RMDZ Training Workshops, 1 Tire Conference, and Various Workshops Annually-See Table 1)

TASK(S)	DELIVERABLE(S)
Task 1	Secure, Confirm and Monitor Facility Arrangements For Each Conference or Workshop
Task 2	Assist in Developing Structure Of The Conference or Training Workshop
Task 3	Incorporate Conference and Training Workshop Graphics
Task 5	Develop and Distribute Conference and Training Workshop Announcements, Registration and Workshop Guide and Materials
Task 4	Coordinate and Confirm Speaker Participation and Presentations
Task 6	Coordinate and Confirm Registration of All Attendees and Speakers
Task 7	Coordinate and Confirm Vendor Participation
Task 8	Solicit Stakeholder Attendance
Task 9	Publish and Distribute Conference and Training Workshop Proceedings
Task 10	Complete And Submit A Final Report Of The Conference or Workshop
Task 11	Coordinate Translation Services
Task 12	Coordinate Sponsorship of Other Related Events

Zone Incentive Fund Tasks/Deliverables/Timelines

All tasks except for Task 1 will be repeated for each fiscal year.

Schedule of Deliverables		
TASK(S)	DELIVERABLE(S)	TIMEFRAME(S)
1	Participate In Initial Meeting	July 2014
2	Develop a work plan	August 2014
3	Develop a budget and standardized forms	August 2014
4	Create guidelines and instructions for ZAs	Fall 2014
5	Review and process payments for ZIF activities	July 2014 and ongoing
6	Consolidate program information	July 2014 and annually

	and analyze the program's effectiveness	
7	Develop and submit an annual summary report and program recommendations	July 2014 and annually

The following provisions will be included in the Terms and Conditions or Special Terms and Conditions of the Contract:

V. COPYRIGHT PROVISION

The contractor shall establish for the Department good title in all copyrightable and trademark able materials developed as a result of this Scope of Work. Such title shall include exclusive copyrights and trademarks in the name of the State of California, CalRecycle.

VI. CALIFORNIA WASTE TIRES

Unless otherwise provided for in this Scope of Work, in the event the contractor and/or subcontractor(s) purchases waste tires or waste-tire derived products for the performance of this Scope of Work, only California waste tires and California waste tire-derived products shall be used. As a condition of payment under the agreement, the contractor shall be required to provide documentation substantiating the source of the tire materials used during the performance of this Scope of Work to the contract manager.

VII. WASTE REDUCTION AND RECYCLED-CONTENT PRODUCT PROCUREMENT

In the performance of this Agreement, Contractor shall use recycled content, used or reusable products, and practice other waste reduction measures where feasible and appropriate.

Recycled Content Products: All products purchased and charged/billed to CalRecycle to fulfill the requirements of this contract shall be Recycled Content Products (RCPs), or used (reused, remanufactured, refurbished) products. All RCPs purchased or charged/billed to CalRecycle to fulfill the requirements of the contract shall have both the total recycled-content (TRC) and the postconsumer content (PC) clearly identified on the products. Specific requirements for the aforementioned purchases and identification are discussed in the Terms and Conditions of the Contractual Agreement under Recycled-Content Product Purchasing and Certification.

The Contractor should, at a minimum, ensure that the following issues are addressed, as applicable to the services provided:

A. WRITTEN DOCUMENT PROVISION

All documents and/or reports drafted for publication by or for the Board in accordance with this contract shall adhere to CalRecycle's *Guidelines For Preparing CalRecycle Reports (available upon request)* and shall be reviewed by CalRecycle's Contract Manager in consultation with one of CalRecycle's editors.

In addition, these documents and/or reports shall be printed double-sided on one hundred percent (100%) recycled-content paper. Specific pages containing full-color photographs or other ink-intensive graphics may be printed on photographic paper. The paper should identify the postconsumer recycled content of the paper (i.e., "printed on 100% postconsumer paper"). When applicable, the contractor shall provide the contract manager with an electronic copy of the document and/or report for CalRecycle's uses.

To the greatest extent possible, soy ink instead of petroleum-based inks should be used to print all documents

B. CONFERENCING PROVISION

The contractor shall take any and all steps necessary to make sure that the event is a model for future recycling, waste prevention, diversion, buy recycled, and waste management events.

Paper Products: All paper products used to fulfill the requirements of this contract (nametags, badges, letters, envelopes, brochures, etc) must contain at least 30% post-consumer recycled content fiber.

Re-usable Cups, Plates & Utensils: To the greatest extent possible, use re-usable/washable utensils, dishes, tableware, etc., rather than single-use disposable products.

Leftover Food/Beverages: All leftover food and/or beverages associated with the event will be donated to an established food donation outlet. Arrangements for the donation must be made prior to the date of the event. CalRecycle staff will assist the contractor in identifying these donation outlets, if needed.

Recycling/Composting: Arrangements must be made with the venue, sponsor, or by contract, to provide adequate collection bins for recyclables, organics (food waste) or biodegradable materials, and trash (non-recyclables). The bins should contain at least 30% post-consumer plastic. In addition, the contractor shall work with the venue and/or sponsors to maximize diversion of the discarded materials.

Soy-based Printing Ink: To the greatest extent possible, soy ink instead of petroleum-based inks should be used to print all documents needed for the event.