

Department of Resources Recycling and Recovery

SCOPE OF WORK (also STATEMENT OF WORK or SOW)

Tire Outreach and Market Analysis

I. INTRODUCTION/OBJECTIVES

The Tire Outreach and Market Analysis (TOMA) contract is designed primarily to: 1) provide an annual in-depth analysis of the waste tire market in California as has previously been provided through the Tire-Derived Product Business Assistance Program (TBAP) contract; and 2) conduct technical outreach and education targeted at stakeholders that are in a position to procure TDPs (Tire-Derived Products) and/or have the authority to specify them in future projects. The goal of this effort is to increase demand for tire-derived products, foster the application of new technologies, and expand the use of waste tire derived material into a variety of applications, including higher value-added products.

Utilizing the market analysis and working in collaboration with the stakeholders targeted for outreach and education, and other applicable entities, the Contractor will identify gaps in TDP data and specifications that pose a barrier to TDP market expansion. The Contractor will then conduct research and testing to address those gaps and present the results to stakeholders.

The Contractor will assist CalRecycle in developing, coordinating, and presenting material at two CalRecycle Tire Conferences.

The high level of expertise required from various disciplines necessitates that the Contractor assemble a team of highly experienced and respected consultants to effectively provide the necessary assistance. Members of the Contractor's team must be highly knowledgeable regarding the waste tire and tire derived product industries and California and national markets for tire-derived products.

II. WORK TO BE PERFORMED

The Contractor is responsible for developing technical resources, research projects, and focused technical outreach and education assistance activities that will help to strengthen the TDP industry in California and help support CalRecycle's tire market development programs. These activities will aim to benefit one or more industry sectors as opposed to providing assistance to individual businesses. The following is a general overview of the work that the Contractor shall perform.

Task 1. Annual Tire-Derived Product Materials Market Analysis and Report, Stakeholder Communications, and Recommendations Regarding Tire Market Development

- Task 2. Focused Technical Outreach and Education to Promote TDPs to Government and Private Entities
- Task 3. Research and testing to further utilize TDPs as feedstock in existing products (feedstock conversion) and advance potential new applications, products, and technologies that use waste tires
- Task 4. CalRecycle Tire Conferences
- Task 5: Administration and Reporting

III. TASKS IDENTIFIED

Task 1: Annual Tire-Derived Product Materials Market Analysis and Report, Stakeholder Communications, and Recommendations Regarding Tire Market Development

- A. Conduct three annual TDP markets surveys and analyses, coordinating with a designated CalRecycle staff “trainee” as requested by the CalRecycle Contract Manager. The contractor will:
 - i) Administer an annual market survey using protocols from prior year TBAP contracts that will be provided to the Contractor by the CalRecycle Contract Manager (Contract Manager). The survey must gather information, including but not limited to, capacity, throughput, types and amounts of input (by specification) and outputs (by product type), types of customers, actual and perceived market drivers, barriers, and opportunities for market expansion;
 - ii) Analyze and summarize the market trends for targeted TDPs. This will include periodic updates regarding opportunities and market development mechanisms to address barriers. The contractor will compile detailed cost and performance data on targeted TDPs. (Note: some lifecycle and performance information is already available in existing rubberized asphalt concrete (RAC) and tire derived aggregate (TDA) projects, including RAC lifecycle costs and project specific information regarding TDA);
 - iii) Provide information on the current supply/demand balance and capacity, including recent and expected expansions or contractions in general processing and ground rubber production capacity, TDP production capacity, export market impacts and overall market demand, waste tire diversion rate; and
 - iv) Identify regional infrastructure and infrastructure needs.
- B. Prepare an annual report for CalRecycle that includes all of the market analysis research and findings.

- C. Present annually at a public meeting a summary of the findings from the market analysis conducted that year.
- D. Update the market survey and analysis guidance document based upon lessons learned in conducting the market surveys and analyses. The guidance document was initially prepared under the prior TBAP contract and presents protocols and templates to enable CalRecycle staff to maintain the market surveys and analyses in future years.
- E. Institute a consistent means of providing and receiving real time communications with stakeholders regarding emerging market influences, potential avenues for increasing waste tire diversion, and TDP market expansion opportunities.
- F. Utilize the market analysis, other necessary research, and the ongoing feedback and communication from stakeholders to make recommendations regarding additional market development activities to address TDP performance, health and environmental impacts, regional supply and demand barriers, and suggest a strategy for improving TDP product markets.

Task 2: Focused Technical Outreach and Education to Promote TDPs to Government and Private Entities

- A. Identify federal, state, and local agencies; public and private colleges, universities, and schools/districts; major retailers; and other public and private entities that are in a position to procure TDPs and/or have the authority to specify them in future projects. For example, Caltrans, the California State University system, architects, and green builders.
- B. Develop resources and create and implement a detailed plan for targeted technical education and outreach to the entities identified in Task 2 A.
- C. Update and keep current the TDP Architect's Guide and the TDP Catalog and expand education, outreach, and marketing efforts to promote the use of the guide.
- D. Develop a minimum of six case studies annually that are two pages in length and are in a common format suitable for publishing on the CalRecycle web site or as handouts. In selecting which case studies to develop, priority should be given to existing TDPs for which there is a high potential for new or expanded sales opportunities, new TDPs with a high potential for successful entry into the TDP market, and existing products newly incorporating waste tire feedstock(s). Case studies should
 - (i) detail successful real-world application of TDPs by actual users, including high quality color photographs;

- (ii) identify the uses and benefits of TDPs including suitable applications for the given type of TDP and comparisons to competing products that are not made from waste tires;
 - (iii) highlight key cost and performance data, including lifecycle costs and benefits.
- E. Compile other education, marketing and technical specification materials from TDP companies, and as applicable TDP users, and prepare materials such as brochures, fact sheets, Power Point presentations, both electronically and web-based, to assist in targeted education, outreach and marketing TDPs to the targeted entities. Where applicable, and in consultation with the Contract Manager, incorporate relevant research information (e.g., health effects, lifecycle cost analyses, etc.) into marketing materials.
 - F. Conduct targeted outreach and education such as roundtables, meetings, training sessions, workshops, webinars, and utilize other methods, such as written communications, identify and secure sponsors as needed for mealtime learning sessions and work to educate the targeted entities to advance TDPs market development.
 - G. Conduct follow up to all initial targeted technical outreach and education efforts and provide focused TDP education and assistance to stakeholders as requested.
 - H. Coordinate closely with the Contract Manager to ensure that CalRecycle staff has the latest information, data, and resources for promotion, outreach, education, and training activities.
 - I. Monitor and provide quantitative as well as qualitative measurement of the results of the technical education, outreach, and marketing and the resulting sales of TDPs.
 - J. Utilize lessons learned through providing targeted technical outreach and education to potential purchasers of TDPs to provide training to TDP businesses. The Contractor will utilize workshops and other means to educate TDP businesses on strategies to identify entities with a high potential for purchasing TDPs and efficient methods to market and sell TDPs to those entities.

Task 3: Research and testing to further utilize TDPs as feedstock in existing products (feedstock conversion) and advance potential new applications, products, and technologies that use waste tires

- A. Collaborate with potential users of large quantities of TDPs to identify what information and data they need in order to overcome roadblocks to purchasing TDPs. Identify gaps in research and product testing that are necessary to fill in order to significantly expand markets for TDP. This effort should build upon the performance standards identified in the prior Tire Derived Product Business Assistance Program: Industry-Wide Support Activities contract.

- B. Conduct research and product testing to provide product data, specifications, and performance results for applicable TDPs or categories of TDPs in order to expand markets for TDPs, increase feedstock conversion, evaluate potential health and environmental impacts, and advance new products and technologies using waste tires.
- C. Compile information and data for CalRecycle and any other entities relevant to the research and/or testing. With consent from all relevant entities, provide information and data to entities that have potential to convert their feedstock for existing products to utilize TDPs and advance new applications, products, and technologies that use waste tires. This may include making presentations, developing reports, writing data sheets, etc. This task, along with others identified in this scope of work, may involve information and data from businesses that must remain confidential.

Task 4: CalRecycle Tire Conferences

- A. In coordination with the Contract Manager, assist with any specialized needs in development and implementation of two CalRecycle tire conferences, including
 - (i) soliciting stakeholder input on topics to be addressed,
 - (ii) developing educational activity plans/priorities,
 - (iii) organizing conference sessions,
 - (iv) identifying and securing potential presenters, attending and participating/speaking at the conferences.

Task 5: Administration and Reporting

- A. Develop Work Plans:
 - (i) Work with the Contract Manager and any other applicable CalRecycle staff to prepare a work plan detailing all tasks and deliverables (including reports; presentations and/or dissemination of information to stakeholders; materials to be posted or revised on the existing web and newsletter or list serve functions, or communicated by other means).
 - (ii) The work plan will include a timeline for all tasks and deliverables. CalRecycle will not pay Contractor's Administration time for compilation of billing/invoicing or delivery of invoices.
 - (iii) The work plan will identify any entities with which the Contractor will coordinate to accomplish the identified tasks, such as Recycling Market Development Zone Administrators, industry organizations, (e.g., Rubber Manufacturers Association, American Institute of Architects, Rubber Recycling Network), local jurisdiction recycling coordinators, etc.
 - (iv) No other work shall be conducted until the work plan is approved by the Contract Manager.
 - (v) Should changes to the work plan be necessary, the Contractor will submit any such changes to the Contract Manager for approval before conducting other work.

B. Reporting

- (i) The Contractor will communicate with the Contract Manager on an ongoing basis and provide written reports, on a monthly basis at a minimum, to the Contract Manager covering activities that are in progress, completed, and upcoming; any issues that have arisen; a budget status; a status of meeting the timelines established in the work plan, etc.
- (ii) If significant issues arise, the Contractor shall not wait for a scheduled report and will report them to the Contract Manager immediately.
- (iii) All documents and/or reports drafted for publication by or for CalRecycle in accordance with this contract shall adhere to CalRecycle's Contractor Publications Guide at www.calrecycle.ca.gov/Publications/PubGuide/ and must be reviewed by a technical editor of the Contractor's choosing to ensure that the reports comply with CalRecycle's publication guidelines, after which they shall be submitted to and reviewed by the Contract Manager in consultation with the CalRecycle editor.

(The Contractor is encouraged to consult with the CalRecycle project management and editorial staff early in the development process to ensure deliverable requirements are clearly understood and to minimize the need for revisions.)

- (iv) The Contractor will submit to CalRecycle by August 31, 2016, a final report on the contract and the work performed, including an evaluation of its effectiveness (with qualitative and quantitative results). The Contractor shall submit a draft final report to the Contract Manager six weeks prior to the due date for the final report. The draft will be reviewed by CalRecycle staff who will provide comments or questions that the Contractor will address or incorporated into the subsequent draft of the report. Any requested changes must be completed by the Contractor and resubmitted to the Contract Manager for final approval. Only when all revisions are made and approved by the Contract Manager will the report be deemed final.
- (v) Contractor will not receive final payment until the final report has been approved by the CalRecycle Contract Manager.

IV. CONTRACT/TASK TIME FRAME

The contract is estimated to begin September 1, 2013 and end August 31, 2016. The timeframe below reflects the task/time frame of the contract from date of award:

Task	Deliverable(s)	Estimated Timeframe
Task 1: Annual Tire-Derived Product Materials Market Analysis and Report, Stakeholder Communications, and Recommendations Regarding Tire Market Development	Draft and web-ready reports, presentation materials, mechanism for communications with stakeholders, tire market development recommendations	Spring 2014, Spring 2015, Spring 2016
Task 2: Focused Technical Outreach and Education to Promote TDPs to Government and Private Entities	Targeted outreach and education plan; education, outreach, and technical specification materials; updated TDP architects guide; case studies; assistance; and applicable materials and reports	Ongoing through August 2016
Task 3: Research and testing to further utilize TDPs as feedstock in existing products (feedstock conversion) and advance potential new applications, products, and technologies that use waste tires	Research reports, testing results, analyses, presentations	Ongoing through August 2016
Task 4: CalRecycle Tire Conferences	Assistance, presentations	First quarter of 2014 and third quarter of 2015
Task 5: Administration and Reporting	Work plans. Monthly and final reports	Progress reports monthly Final report for all activities due August 2016

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 assign to the Department of Resources Recycling and Recovery (CalRecycle) any and all rights, title and interests to any copyrightable material or trademarkable material created or developed in whole or in any part as a result of this Agreement, including the right to register for copyright or trademark of such materials. The Contractor shall require that its subcontractors agree that all such materials shall be the property of the CalRecycle. Such title will include exclusive copyrights and trademarks in the name of the 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 the 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 the 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 CalRecycle in accordance with this contract shall adhere to CalRecycle's *Guidelines For Preparing CalRecycle Reports (available upon request)* and shall be reviewed by the 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 the Board’s uses.

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

B. CONFERCING 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.