

## **Department of Resources Recycling and Recovery**

### **SCOPE OF WORK**

#### ***Used Oil and Oil Filter Curbside Collection Research***

## **I. INTRODUCTION/OBJECTIVES**

The Department of Resources Recycling and Recovery (CalRecycle) Used Oil Recycling Program seeks to engage the services of a qualified contractor to research and identify the obstacles facing local jurisdictions in implementing a successful and sustainable used oil and oil filter curbside collection program. The contractor will then, based on the results of that research, develop a list of qualities or characteristics that would make a jurisdiction or program more likely to be successful in implementing such a curbside collection program. The contractor will then educate and provide training to local jurisdictions on how to effectively implement a successful and sustainable curbside collection program.

With the current economy and local governments' limited budgets, many jurisdictions need assistance and training in a variety of areas to ensure California residents are provided with convenient methods and access to recycle their used oil and oil filters.

The Used Oil Recycling Program was developed in response to the 1991 California Oil Recycling Enhancement Act (CORE Act, AB 2076 [Sher] Stats. of 1991, Ch. 817), and is designed to discourage the illegal disposal of used motor oil. Oil manufacturers pay a fee on every gallon of motor oil sold in California, which in part supports local jurisdictions' efforts to promote the proper collection and disposal of used oil through a per capita based payment program. In order for the jurisdiction to receive payments from the program, it must implement a collection program through either 1) establishing a Certified Collection Center (CCC) for every 100,000 residents or 2) providing a curbside collection program at least once a month. Senate Bill (SB) 546 (Lowenthal, Stats. of 2009, Ch. 353) amended the CORE Act by increasing the incentive payment made to CCCs and curbside collection operators from \$0.16 to \$0.40 cents a gallon for Do-It-Yourself (DIY) oil collection. Previous research, conducted in 2001, concluded that providing convenient curbside collection programs is more likely to reduce improper used oil disposal than CCCs because of the convenience to DIY-ers, especially older ones in single family dwellings. However, used oil and oil filter curbside collection is not available in almost 50 percent of the jurisdictions participating in the Used Oil Recycling Program. The contractor will be required to research the following: (1) identify and evaluate the obstacles to collection, (2) identify qualities and/or characteristics needed to implement a successful curbside used oil and oil filter collection program, (3) determine why many jurisdictions do not have a curbside program, (4) identify how a jurisdiction can establish and/or maintain a successful curbside used oil and oil filter collection program.

## II. WORK TO BE PERFORMED

1. Develop a work plan
2. Identify and evaluate the obstacles that impede a jurisdiction from implementing a curbside used oil and oil filter collection program
3. Identify what qualities and characteristics make a jurisdiction most likely to succeed in implementing a used oil and oil filter curbside collection program
4. Develop training and support materials for curbside used oil and oil filter collection program implementation
5. Conduct presentations, training and assistance for jurisdictional staff
6. Conduct project evaluation and include results in the progress and final reports
7. Prepare progress and final reports

## III. TASKS IDENTIFIED

### Task 1: Develop a Work Plan

Contractor shall develop a work plan for each task contained in this Scope of Work. The work plan shall be approved by the Contract Manager before any work begins.

*Deliverables: Work Plan*

*This deliverable is expected to be completed by July 1, 2014*

**Task 2: Identify the obstacles to, as well as the qualities and characteristics needed to make a jurisdiction or program most likely to succeed in implementing a used oil and oil filter curbside collection program. Evaluate and present those findings to jurisdictional staff on how to implement and/or maintain a successful used oil and oil filter curbside collection program.**

Contractor shall perform the following subject areas below:

- Identify current successful curbside used oil and oil filter collection programs in California
- Identify key elements that may help a used oil and oil filter curbside collection program succeed
- Identify which demographics are more suited for a used oil and oil filter curbside collection program
- Identify what makes one jurisdiction or program more successful at administering a used oil and oil filter curbside collection program than another
- Identify and evaluate what obstacles exist for implementing a used oil and oil filter curbside collection program
- Explain how to overcome those obstacles

- Identify new jurisdictions which have the potential to implement a successful used oil and oil filter curbside collection program
- Provide information on how to maintain a successful and/or improve a used oil and oil filter curbside collection program

*Deliverables: Provide a list identifying obstacles, demographics, characteristics, key elements and types of jurisdictions that could be candidates to implement a used oil and oil filter curbside collection program.*

*This deliverable is expected to be completed by October 15, 2014*

**Task 3: Develop training and support materials for jurisdictions that administer a used oil and oil filter curbside collection program.**

The training and support material shall include the subject areas below:

- How to identify and determine if your jurisdiction is a good candidate for implementing a used oil and oil filter curbside collection program
- How to implement a used oil and oil filter curbside collection program
  - How to improve an existing used oil and oil filter curbside collection program
  - How to advertise a used oil and oil filter curbside collection program
  - How to run an effective used oil and oil filter curbside collection program
- How to identify/handle contaminated used oil and provide resources to address this problem
- How to prevent illegal dumping of used oil and oil filters
- Develop used oil spill cleanup procedures
- How to access and use local websites regarding used oil and oil filter curbside collection program

Contractor shall create an online version of the used oil and oil filter curbside collection training and support material all jurisdictions. All of CalRecycle used oil publications are available as reference and can be utilized or updated as part of the training materials. All materials should be available electronically in Word format and ready for publication on CalRecycle's website. All print materials will be available for print and contractor must provide printed materials for designated training sessions.

*Deliverables: Develop Used Oil and Oil Filter Curbside Collection training and support materials.*

*This deliverable is expected to be completed by October 15, 2014*

**Task 4: Conduct Presentations and Training for CalRecycle Staff and Jurisdictions**

All presentations and training sessions shall be made in person by Contractor staff, using the list of jurisdictions identified by CalRecycle as being in need of assistance.

**Task 4a - CalRecycle Staff Training**

Contractor shall present information about the new training materials to CalRecycle's Used Oil/ Household Hazardous Waste Program staff at CalEPA's headquarters in Sacramento, before the on-site training begins for jurisdictions.

**Task 4b - Used Oil/Household Hazardous Waste Annual Conference (UO/HHW Conference)**

Contractor shall attend and present information about the materials that were created and revised (Task 3), at the UO/HHW Conference in the form of a training session and/or a general session, to be determined by CalRecycle staff, in Spring of 2015 at a Sacramento or Southern California location.

**Task 4c - Household Hazardous Waste Information Exchanges (HHWIEs)**

Contractor shall present information about the materials and research at up to four HHWIE Meetings (two meetings in Northern/Central California; two meetings in Southern California). Specific meetings shall be determined by CalRecycle staff.

**Task 4d – Potential Jurisdictions Implementing New Used Oil and Oil Filter Curbside Collection Programs**

Contractor shall conduct regional (Northern, Central, and Southern California) training sessions for several potential jurisdictions that want to implement a curbside used oil collection program. (Refer to Task 5 for more information)

Topics for each meeting are described below in chronological order:

Meeting 1: Present draft training materials and request feedback on revised documents (Task 2 and 3)

Meeting 2: Present results of contract

*Deliverables: Completion of presentation and training materials as described above.*

*This deliverable is expected to be completed throughout the contract.*

### **Task 5: Train and Assist Jurisdictional Staff**

The Contractor will provide a regional list of potential jurisdictions in California (10 Northern, 10 Central and 15 Southern) who are good candidates for implementation of new used oil and oil filter curbside collection programs. The contract manager will select 4-6 Northern, 4-6 Central and 5-10 Southern jurisdictions off this list of potential jurisdictions that are best suited for implementing a new used oil and oil filter curbside collection program. In order to better assist the contractor on which jurisdictions not to list the contract manager will provide a list of jurisdictions identified by CalRecycle that currently have an established used oil and oil filter curbside collection program. In addition, the contract manager will provide a list of all jurisdictions that are part of CalRecycle's used oil program.

Contractor shall assist and train the selected jurisdictional staff on how to implement, establish and manage a used oil and oil filter curbside collection program. A group training session shall be performed at each of the designated regions. A specific training location and date will be coordinated and selected with appropriate CalRecycle Program Advisor staff.

*Deliverables: Identify and train designated jurisdictions on how to implement, establish and manage a used oil and oil filter curbside collection program. Contractor shall work with the Contract Manager to maintain communication with jurisdictions in need of support.*

*This deliverable is expected to be completed throughout the term of the contract.*

### **Task 6: Conduct Project Evaluation and Prepare Report**

Contractor shall work with the Contract Manager to develop evaluation questionnaires. The questionnaires shall be provided to:

- Jurisdictions that received used oil and oil filter curbside collection training (Tasks 2 and 4)
- Jurisdictions that received a new or revised training material (Tasks 2 and 4)
- Jurisdictions that implemented a new used oil and oil filter curbside collection program (Tasks 2 and 4)

**Evaluation Report:** Contractor shall provide an evaluation report, as a component of the Progress and Final Reports. The evaluation section must include an assessment of Contractor's effectiveness in performing the duties of the contract, including all task revisions (based on the evaluation results). The evaluation report must include a summary of the following:

- *Evaluation questionnaires*
- *Original set of completed questionnaires*
- *Contract successes, failures, and recommendations for program improvements*

*Deliverables: The Evaluation Report shall be submitted as part of the Progress and Final Reports (Task 7). The evaluation results shall be presented at HHWIEs.*

*This deliverable is expected to be completed prior to first formal presentation and training session (Winter 2014).*

## **Task 7: Prepare Progress and Final Reports**

### **Task 7a – Monthly Budget Reports and Payment Requests:**

- Contractor shall provide monthly budget reports with invoices for reimbursement. The budget report shall describe the expenditure activities since the last budget report.
- *Note:* Ten percent (10%) of all payment requests are withheld until the Final Report is submitted and approved.

*Deliverables: Monthly Budget Reports and Payment Requests*

### **Task 7b - Progress Reports**

Contractor shall provide Progress Reports that summarize all the activities performed since the beginning of the contract or since the last submitted Progress Report. Each Progress Report should be submitted every six months during the contract term. Any Evaluation Report (Task 6) shall be included as part of the Progress Report. If significant and/or unforeseen complications or issues arise, Contractor shall not wait for a scheduled report and shall report the issues to the Contract Manager immediately. All issues should be included in the report with recommended action(s).

*Deliverables: Progress Reports*

### **Task 7c – Draft Final Report**

Contractor shall submit a draft final report that summarizes all activities and training materials created and/or revised for the entire contract period. The Evaluation Report (Task 6) shall be included. The final report must include an overall assessment of the contract scope with successes, failures, and recommendations on specific areas (if any) where additional attention is needed beyond the term of the contract. The draft final report is due to the Contract Manager six weeks prior to the final report due date. The Contract Manager will coordinate review by CalRecycle staff to consolidate and

provide comments to Contractor to address. Any requested changes to the draft final report must be completed by Contractor and resubmitted to the Contract Manager for final approval. The final report will be deemed complete after all revisions are made and approved by the Contract Manager.

*Deliverable: Draft Final Report*

**Task 7d – Final Report**

Contractor shall provide a Final Report that summarizes all activities, training materials created and/or revised, and a review of Contractor’s effectiveness. An Evaluation Report (Task 6) shall be included as part of the Final Report and on CalRecycle’s Contractor Report which can be found at the following link: <http://calrecycle.ca.gov/Publications/PubGuide/>

*Deliverable: Final Report*

*This deliverable is expected to be completed throughout contract on specified dates listed in Task IV.*

#### IV. CONTRACT/TASK TIME FRAME

Refer to each task for a full description of what shall be included in each deliverable. The term of the contract will be from approximately June 1, 2014 with all project deliverables completed by March 14, 2016.

| <b>Task</b> | <b>Deliverable</b>  | <b>Due Date</b>  |
|-------------|---|------------------|
| 1           | Development of Work Plan  | July 1, 2014     |
| 2           | Provide a list identifying obstacles, demographics, characteristics, key elements and types of jurisdictions that could be candidates to implement a used oil and oil filter curbside collection program. | October 15, 2014 |
| 3           | Develop Used Oil and Oil Filter Curbside Collection training and support materials  | October 15, 2014 |
| 5           | Train and Assist Jurisdictional Staff   | Ongoing          |
| 4b          | Presentation at Used Oil/ Household Hazardous Waste Conference  | Spring 2015      |
| 4c          | Presentation at up to four (4) HHWIEs   | Ongoing          |
| 6           | Develop Evaluation Questionnaires   | Winter 2014      |
| 7a          | Monthly Budget Reports and Payment Requests   | Ongoing          |
| 7b          | Progress Report 1   | December 1, 2014 |
| 7b          | Progress Report 2   | May 1, 2015      |
| 7b          | Progress Report 3   | October 1, 2015  |
| 7c          | Draft Final Report  | January 18, 2016 |
| 7d          | Final Report  | March 14, 2016   |

#### 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.