



# Recycling Steering Committee

Modernizing Oregon's recycling system with support from Oregon Consensus

## Recycling Steering Committee Meeting

### Agenda

**Friday, May 10, 10 a.m.-3 p.m.**

**Meeting Purpose:** Review/approve Stakeholder Engagement Plan; review milestone work of Infrastructure Research, Contamination and Legal/Relational Framework Sub-committees; and learn about domestic market opportunities in plastics and paper industries.

**10 a.m. Welcome, Introductions, Frame for the Day, Revisit SC Work Plan, Timeline and Desired Outcomes**

*Objective:* Set context for today's discussion in the bigger process goals.

**10:15 a.m. Stakeholder Engagement Plan:** The Stakeholder Engagement Subcommittee will roll out a draft plan for engaging stakeholders through this process.

*Objectives:* Establish SC's plan to inform key constituents, gather input, and set a "no surprises" pathway for deliberating on significant policy or other changes to the Oregon recycling system toward meeting the 2050 Vision for Materials Management. Identify SC member primary channels and information for current milestone of work.

**11 a.m. Process/Product Milestones:** Subcommittee March-April progress reports

*Objectives:* For Steering Committee members to gain awareness of key activities, updates, work products, and/or achieved outcomes from its various subcommittees.

- Infrastructure Research (Brian Stafki)
- Contamination (Dylan de Thomas)
- Legal/Relational Frameworks (Kristan Mitchell and Loretta Pickerell)

**Noon Break**

**12:30 p.m. (Working Lunch) Domestic Markets**

- Justin Gast and Peter Spendelow, DEQ, will share a high level overview of Developing Markets: Definition, Examples, 2050 Context
- Julie Robertson, Washington Department of Ecology, will share information on the Washington Recycling Development Center
- Business Oregon will share information on tools and programs available in Oregon

- Steve Alexander, Association of Plastic Recyclers, and Jay Simmons, Norpac Paper, will present information about plastics and paper industry domestic markets: national trends, application to Oregon, and any specific challenges, opportunities, or needs from industry perspective.

*Objective:* The SC will discuss potential roles for government in developing domestic recycling markets and determine what, if any, role the SC can/should play in furthering efforts in this area.

**1:45 p.m. Break**

**2 p.m. Continue Domestic Markets Presentations and Discussion**

*Objective:* The SC will discuss potential roles for government in developing domestic recycling markets and determine what if any role the SC can/should play in furthering efforts in this area.

**2:30 p.m. Public Comment:** Members of the public may ask questions or weigh in on the discussions. As needed to allow time for all who wish to speak, time may be limited to two to three minutes per person.

**2:45 p.m. Wrap Up and Next Steps**

*Objective:* Determine action items out of today's session; tee up items for next Steering Committee meeting.

**3 p.m. Adjourn**

## Meeting summary

Updated: Friday, May 17

### ACTION ITEMS:

ACTION	BY WHOM?	BY WHEN?
• Draft meeting summary to SC members	OC	5/16
• Edits/refinements to meeting summary provided to OC.	ALL	5/23
• Develop Oregon Recycling system goals poster for each SC meeting.	Brian Stafki, DEQ	Next SC meeting
• Stakeholder Engagement Subcommittee to share SEP Google Doc with all SC members.	Amy Roth & Pam Peck	Completed (5/15)
• SC members to build out SEP high influence / high interest contact list with assigned members.	ALL	5/31

ACTION	BY WHOM?	BY WHEN?
<ul style="list-style-type: none"> <li>SC members to choose one medium-high interest stakeholder to engage and use the approved talking points. Members will report any feedback on the Google Doc, as well as at the following SC meeting.</li> </ul>	ALL	5/31
<ul style="list-style-type: none"> <li>Stakeholder Engagement Subcommittee to revise draft Op Ed and resubmit to the SC for approval.</li> </ul>	Pam Peck & Amy Roth	
<ul style="list-style-type: none"> <li>Robin to work with Kristan Mitchell and others to draft “ask” of DEQ and agenda for short-term actions discussion</li> </ul>	OC	ASAP
<ul style="list-style-type: none"> <li>Contamination subcommittee to update process map and circulate to all SC members</li> </ul>	Contamination Subcommittee members	ASAP
<ul style="list-style-type: none"> <li>Colin Sears, Business Oregon, will share resource documents with OC for distribution to SC</li> </ul>	Colin Sears to OC	Completed (5/15)

### Meeting Attendees:

Steering Committee Members: Dylan DeThomas, Sarah Grimm, Jason Hudson Nicole Janssen, Scott Keller, Laura Leebrick, Kristan Mitchell, Jeff Murray, Pam Peck, Loretta Pickerell, Amy Roth, Timm Schimke, Jay Simmons, Vinod Singh, Matt Stern, and Bruce Walker.

Facilitation Team: Robin Harkless and Amy Delahanty

DEQ Staff: Brian Fuller, Justin Gast, Peter Spendelow, Steve Siegle, Brian Stafki, and Abbey Waterman.

### SUMMARY

#### Welcome, Agenda Review and Workplan Updates

Facilitator Robin Harkless, Oregon Consensus, welcomed the group and members provided brief introductions. Robin then reviewed the meeting agenda and purpose, which were to 1.) Review/approve Stakeholder Engagement Plan; 2.) review milestone work of subcommittees; 3.) learn about domestic market opportunities in plastics and paper industries; and 4.) explore what role, if any, there is for government and/or Steering Committee in the discussion.

Brian Stafki, DEQ, shared the Steering Committee (SC) project plan will be adjusted to reflect where the SC is in progress. Brian anticipated changes to the research timelines as well as including the potential for additional SC meetings towards the end of the process. Brian then shared DEQ is talking with Oregon Consensus about extending their contract to provide additional facilitation services.

## Stakeholder Engagement Subcommittee

Amy Roth (AOR) and Pam Peck (Metro) provided progress updates to the SC members on the current work products and status of the Stakeholder Engagement Subcommittee. The Subcommittee has met several times and produced the following work products:

- Draft talking points to support SC members' communication with the stakeholder groups they represent. (The SC approved these talking points by consensus.)
- Further developed recommended protocols for serving on SC subcommittees, as well as protocols for posting information about the SC on DEQ's website.
- Developed draft Stakeholder Engagement Plan for SC review.

***Draft Stakeholder Engagement Plan.*** Pam reviewed the process by which the Subcommittee developed the draft Stakeholder Engagement Plan (SEP), including sharing the goals, outcomes, and suggested engagement methods. The purpose of the SEP is to assist DEQ and the SC with managing and facilitating future stakeholder engagement around this process. The SEP divides stakeholders into groups (collaborate, involve, consult and inform) and proposes tailored engagement strategies through the various stages of the process. The first key target group of the SEP is key stakeholders that have been identified as "high influence / high interest" (*additional details found in appendix B of the draft SEP*). It was explained the high influence stakeholders are those that have decision making/funding or other influence and a high interest in the outcome of this effort, therefore need to be informed and engaged early (and often) throughout the process. It was acknowledged engaging the general public will require a different engagement strategy and may require additional resource commitments and leadership from local governments.

Finally, it was stressed SC members are considered liaisons to those groups they represent. They will be responsible for further developing the key stakeholder contact list; identifying the right "champions" to spread the word; and sharing any concerns from their constituencies with the SC so these can be considered in process. It was shared this was in hopes to ensure voices are heard and to further facilitate trust and transparency in the process.

### ACTION ITEMS:

- Stakeholder Engagement Subcommittee to share SEP Google Doc with all SC members (ASAP).
- SC members to build out SEP high influence / high interest contact list with assigned members (Due 5/31).
- Each SC member to choose one medium-high interest/influence stakeholder to engage using the approved talking points. Members will report any feedback on the Google doc (due 5/31).

***Messaging.*** To support consistent messaging and materials when SC members are conducting outreach, the Subcommittee developed content via the approved talking points as suggested messaging for the first collective outreach assignment of the engagement plan. Additional materials to be developed will include a PPT, FAQs and possibly an op-ed (see below). Any content developed will be shared with the SC for final approval. SC members will also be recruited as needed to assist with formatting materials.

**Op Ed.** Amy Roth shared that following a series of conversations, a subset of the Stakeholder Engagement Subcommittee identified an idea to present an Op Ed piece to hear the historical background of recycling in the region, the reality of the national SWORD, the SC process, and serve as a tie back to the talking points. Amy said this was, in part, to share a balanced narrative of the recycling story to high influencers and the general public. Following Amy's review of the Op Ed, the following suggestions were given:

- Balance positive message with the reality of the other side of the narrative. Remove the statistical language as it is misleading.
- Emphasize this SC effort is to develop long-term strategies and that short term efforts are also underway. Include short-term examples that are also addressing the issue.
  - Include information about contamination and what is being done short term to address these issues. Reference DEQ's concurrence process.
- Provide additional detail about what the various audiences "might have heard" about recycling. (Remove reference to 'the media'.)
- Put in more understandable terms. E.g. Chinese Blue Sky Initiative is not known to most. Consider revising to say something about the Chinese initiative for cleaner air.
- Include a positive message about the potential for the 2050 Vision effort to create opportunities to recycle domestically, resulting in traceability/transparency.
- Suggested language: "The markets have changed and the value of materials have changed, so there is a large change in the program, but we are working collaboratively to address that locally, regionally, nationally and globally."

#### **ACTION ITEMS:**

- Stakeholder Engagement Subcommittee to revise draft Op Ed and resubmit to the SC for approval.
- Next steps will be determined after the content is agreed on. Ideas included AOR submitting the Op Ed piece on behalf of a subset of SC members (AOR, ORRA, DEQ), or the full SC with accompanied logos.

#### **Other Subcommittee Updates**

The following is a brief bulleted list of process milestones.

#### ***Infrastructure.***

- Provided Contractor with baseline information — DEQ provided the Contractor with Material Recovery Survey and Waste Composition Study data from past years. DEQ is working with the Contractor to make minor corrections before beginning projection research.
- Provide guidance to Contractor for projection research.
- A final draft of the research contract was sent to the SC for review the week of May 6.
- Phase 1 research is expected to be completed by the end of June — approximately seven weeks behind the original schedule.

- The contractor will run a workshop in the fall to help DEQ and the SC narrow options to one infrastructure scenario, followed by additional research.
- The SC members agreed the infrastructure tasks and SOW will not need consensus to move forward with the contracted work, rather just a review of the results. This was in an effort to expedite the contracting and research process.

#### ***Contamination.***

- Subcommittee met on April 15 to map out the various contamination definitions from the various sectors within the system. How each sector 'sees' and defines contamination will illuminate the scope of issues needing to be addressed.
- A smaller set of the subcommittee met and compiled top contaminants in the categories of impact, prevalence, health/safety, and marketability. A process map was developed and is currently being refined to help inform other short-term and long-term subcommittee efforts within the recycling system.
- **ACTION:** The subcommittee will update and recirculate (through OC) the updated documents.

#### ***Recycling Systems Framework.***

- The subcommittee spent two meetings doing a gap analysis exercise to understand how well Oregon's current system meets the desired future state key functions described and agreed to by SC members. The information will be used to help inform the research and information gathering to determine if other frameworks perform those functions well and how they might be applied in Oregon.
- It's anticipated the contractor report (and possible workshop in fall) will show the group different ways a framework can achieve those functions and the SC will identify what options for frameworks are most appropriate for Oregon.
- A draft scope of work was approved by the subcommittee and shared with the SC.
- A concern was raised about not having processors on the subcommittee. This felt particularly concerning to one SC member because there was a perception the bulk of the research will focus on evaluating processing and putting most of the onus on that piece of the system to change. Kristan Mitchell (ORRA) shared the research is based on the SC approved Functions Document, which focuses on system functions beyond processing (e.g. laws, contracts, roles and responsibilities that will provide government structures). Kristan explained once the contractor is in place, it will be important for them to get expert advice from the processors and is expected they will reach out to them directly. Robin then reminded the group the SC subcommittees are not the spaces to negotiate on solutions, but rather gather information in order to tee up options for the SC to consider in its deliberations.

**AGREEMENT:** SC members present approved by consensus the draft statement of work. There was **strong consensus** among the group (all 1s and 2s). Loretta shared the goal is to have the contractor selected by mid-July with research completed by Fall 2019.

## **Domestic Markets Presentations**

The following presentations were made on domestic markets:

- Justin Gast and Peter Spendelow, DEQ, shared a high level overview of Developing Markets: Definition, Examples, 2050 Context.
- Julie Robertson, Washington Department of Ecology, shared information on the Washington Recycling Development Center;
- Colin Sears, Business Oregon shared information on tools and programs available in Oregon.
- Steve Alexander, Association of Plastic Recyclers, and Jay Simmons, Norpac Paper, presented information about plastics and paper industry domestic markets: national trends, application to Oregon, challenges and opportunities from an industry perspective.

A number of questions were raised following each presentation related to: ways to incentivize brand owners to participate in the system in a good-faith effort; other impacts on the marketplace; Business Oregon resources; impacts of flexible film packaging on paper markets.

**The SC agreed that the next step** for developing markets conversations would be exploring public/private partnership opportunities through the Frameworks subcommittee inquiry. All relevant information following this meeting will be passed on to the Frameworks Subcommittee for this effort. Colin offered to share his resource documents with the group and join the conversation if/when it makes sense, and Julie agreed to update the SC on progress of the Washington Recycling Development Center, still in its very infant stages of development, in the coming months.

## **Public Comment**

No public comment was given.

## **Other**

A question was raised by a SC member about how this group can address short-term actions related to contamination concerns which are still of priority attention for many players in the system. While it was acknowledged that there are parallel conversations convened by DEQ to look at short term actions while the SC focuses on long-term system changes, some group members felt there is no decision-making authority or process for building a comprehensive short term response based on new knowledge and information about what can work. Some felt frustrated that they are not able to make short term collective progress while the longer term work is being developed, which will take time to actualize in the system. It was suggested OC work with interested SC members to help frame the “ask” to DEQ and set an agenda for further discussion of the matter.

## **ACTION ITEMS:**

- Robin will work with Kristan Mitchell and others to understand a draft a framing agenda for the short-term actions discussion, and work with DEQ on ideas for how best to convene this.

# Talking points about the Recycling Steering Committee

The following talking points are for members of the Recycling Steering Committee to use when describing the work of the SC to other stakeholders. The talking points can be adapted for a variety of uses, including newsletter content. Remember to use accessible language when talking with stakeholders who are less familiar with the recycling system. Please link back to the project website at <https://go.usa.gov/xmYYe> for more information.

Main messages		
<b>Message 1:</b> The Recycling Steering Committee, a collaborative of representatives from local and state governments, businesses and organizations that play a role in Oregon’s recycling system, is working together to determine how to modernize Oregon’s recycling system.	<b>Message 2:</b> The Recycling Steering Committee is considering how to modernize Oregon’s 35-year old recycling system. The goal is to ensure the recycling system optimizes benefits for the environment, is strong and adaptable to change, and restores and maintains public trust in the system.	<b>Message 3:</b> The Recycling Steering Committee is engaging with stakeholders and the public throughout the process to better understand Oregonians’ perspectives, interests and values.
Supporting messages		
The committee is convened by the Oregon Department of Environmental Quality, beginning in May 2018, in response to disruptions to global recycling markets. The committee is working together to identify what we want our recycling system to look like, conduct research and by early summer 2020, recommend changes to achieve that future system.	The committee’s outcomes will include recommendations about which materials should be the focus for recycling; methods and facilities needed to collect, sort and process those materials for markets; and how to encourage residents and businesses to participate and recycle correctly. The committee will also recommend changes in laws, policies, contracts, responsibilities, and other parts of the organizational framework for Oregon’s future recycling system.	Committee representatives will consult with the stakeholders they represent throughout the process.
The committee is made up of representatives from the Association of Oregon Counties, Association of Oregon Recyclers, Association of Plastics Recyclers/Denton Plastics, EFI, Far West Recycling, Lane County, League of Oregon Cities, Metro, North Pacific Paper Company, DEQ, Oregon Refuse & Recycling Association, City of Portland, Recycling Partnership, Rogue Disposal & Recycling, Waste Connections and Waste Management.	Throughout this work, the committee will look to balance economic and social needs from all parts of the state, existing systems and infrastructure, and the needs for the future.	Subcommittees will guide research, discuss topics in more depth, and narrow options for the committee to consider. Subcommittees will focus on collection and processing infrastructure, public education, legal and relational frameworks, and stakeholder engagement. Subcommittees are made up of Steering Committee representatives and other interested and engaged stakeholders.
The committee is supported by Oregon Consensus, a program of Portland State University and the National Policy Consensus Center. Oregon Consensus brings community members, government representatives and businesses together to solve problems and plan for the future.	The committee’s work is guided by Oregon’s Materials Management 2050 Vision and Framework for Action which seeks to reduce the environmental impacts of the materials and products we use across their full life cycle from design to production to use to end of life. The committee will use this holistic approach to focus on materials and processes that optimize environmental benefits.	Steering Committee and subcommittee meetings are open to the public, include opportunities for public comment at the end of each meeting, and can be accessed remotely by phone or web.



# STAKEHOLDER ENGAGEMENT PLAN TEMPLATE

DRAFT 2 | April 28, 2019

## ENGAGEMENT, OBJECTIVES & ENGAGEMENT STAGES:

**Purpose statement:** This Stakeholder Engagement Plan (SEP) will assist DEQ and the Steering Committee (SC) with managing and facilitating future stakeholder engagement through the various stages of the SC process. This may include information gathering, deliberation, negotiation, and/or through the development of any implementation action plans.

**The key objectives of the SEP can be summarized as follows<sup>1</sup>:**

- Sustain and support mutually respectful, beneficial and lasting relationships between DEQ, the SC and their stakeholders;
- Develop both a stakeholder engagement process and public engagement process that allows for effective and meaningful engagement;
- Gain stakeholder and public trust in SC process

**Primary principles** (*see Appendix A for additional details*):

- **Conduct Education & Outreach:** Several goals of the SEP will be to: 1.) introduce and remind stakeholders of the goals outlined in the 2050 vision 2.) conduct outreach to stakeholders and the general public to provide an overview of the SC process; and 3.) gather input throughout the SC process that may be used to inform future SC decision-making.
- **Provide Clear and Consistent Communication and Messaging:** Clear and consistent communication through developed materials will assist the group to:
  - Communicate with other stakeholders, states, and the general public with clear and consistent messaging about the SC process. This consistent messaging (e.g. talking points, Steering Committee PPT presentation, etc.) will provide the opportunity to limit misinformation when discussing matters related to the SC, with the hopes of increasing transparency and opportunities for effective stakeholder engagement.
  - Provide an opportunity to reframe recycling and build awareness regarding life cycle thinking and the goals of the 2050 vision.
  - Leverage multiple platforms and communication channels to reach diverse stakeholder groups
  - Provide clarity regarding what is / is not being addressed by the SC process.
- **Utilize a “No Surprises” Approach.** Be aware of the “hot” issues DEQ and SC members will need to address in the process in an effort to: 1.) avoid unintended conflicts; 2.) understand the deal breakers; 3.) combat misinformation and unearth any hidden agendas; 4.) increase transparency; 5.) create opportunities to be active rather than reactive when issues arise.

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<sup>1</sup> Objectives adapted from: [https://s21.q4cdn.com/589145389/files/doc\\_documents/EN/Stakeholder-Engagement-Plan.pdf](https://s21.q4cdn.com/589145389/files/doc_documents/EN/Stakeholder-Engagement-Plan.pdf)

### Recycling Steering committee phases of work:

1. ***Goal / Problem Definition and Information Gathering Phase:*** The work of the Steering Committee is separated into three phases. The first phase of the work includes setting the Steering Committee table and identifying the problems the SC will seek to solve, within the defined broad goals identified in the 2050 Vision. Following this, the SC will provide input to DEQ to identify foundational research on a variety of topics, as well as lean on the expertise of SC members to inform the its work. Finally, Phase 1 includes the establishment of subcommittees to work deeper on issues.
2. ***Brainstorming & Deliberation Phase:*** Informed by the above, Phase 2 of the SC's work will be to brainstorm and deliberate potential options to modernize Oregon's recycling system This includes using a collaborative, consensus-based process to formulate proposed recommendations.
3. ***Development of Implementation Plans Phase:*** The third phase of modernizing Oregon's recycling system will be to develop action plans for implementation based on the SC approved recommendations generated in Phase 2. These action plans may include, but not be limited to, developing legislation for 2021.

### ENGAGEMENT STEPS *(for full list see Appendix C):*

#### Phase 1

**Step 1(A). Develop Background Packet Materials:** Develop a consistent packet of background materials with accompanied messaging to disseminate project information and invite key stakeholders and interested public to be part of the process. The background packet of materials would be made available as a link on DEQ's website and via email by request. The packet of materials may presented by SC members, as well as DEQ staff at events such as community gatherings, conferences, schools, and/or other existing recycling meetings. The packet of materials may include:

- FAQ list
- One pagers based on interest group
- PPT Slides

The packet of materials would include accompanying draft email messaging for SC members to disseminate to their priority groups.

#### Phase 1

**Step 1(B) Develop Key Stakeholder Contact list.** SC members to develop inventory/contact list of priority groups and stakeholders. Provide those identified members ways to engage and tools to connect. Find the liaison to the correct point of contact to further relationships and communication between groups and to solicit feedback. [REDACTED] will maintain the stakeholder contact list, which shall record all stakeholders, contact details, dates of engagement with comments and including follow up requirements.

The Stakeholder Engagement subcommittee has identified specific stakeholder groups and contacts, which can be found in **Appendix B**.

### **STEP 3 Develop Stakeholder & Public Engagement Actions**

#### **ENGAGEMENT METHODS:**

**Correspondence by phone/email/social media/interested parties listserv:** Disseminate project information to stakeholders interested public. Inform stakeholders about SC future SC and subcommittee meetings.

**“Road Show” Stakeholder Listening Sessions:** Conduct a series of listening sessions in different regions of the state for key stakeholders groups to gather in person and to hear about the SC process; discuss any issues; and provide their input to DEQ and the SC.

**Public meetings:** Present project information to the general audience and key communities. Allow groups to provide their views and opinions. Facilitate meetings using PowerPoint presentations, posters, videos and/or other project information documents

**Surveys:** Gather opinions and views from individual stakeholders through statewide survey(s) to provide the public the opportunity to weigh in on policy questions posed by SC members. Surveys will assist the group in gathering feedback from a wide variety of Oregonians on a range of topics and tradeoffs.

**Utilize Plain Language<sup>2</sup>.** Use language that is clear, concise, well-organized, and follows other best practices appropriate to the subject or field and intended audience. Use plain language to ensure the reader understands as quickly, easily, and completely as possible.

**Offer opportunities for equitable participation.** Provide resources and/or services that encourage and facilitate meaningful participation and contribution from stakeholders. This may include, but not limited to, providing stipends for participation; childcare; translation and/or interpretation services; plain language review; host meetings at different times of the day or in regions outside of the Portland-Metro area.

#### **TIMEFRAME (TBD)**

What is the timeframe for engaging various stakeholder groups? Is the timeframe realistic?

#### **ROLES AND RESPONSIBILITIES (TBD)**

Roles of subcommittee and SC members, DEQ staff related to plan implementation. Include plan/method for tracking roles and responsibilities and what has been completed.

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<sup>2</sup> <https://www.plainlanguage.gov/about/benefits/>

**BUDGET AND RESOURCE NEEDS (TBD)**

Estimated budget by major activity area, time needed from steering committee members and DEQ staff to support engagement.

**FEEDBACK PLAN (TBD)**

Indicate how stakeholder feedback will be provided to the steering committee, how stakeholder feedback will be tracked and responded to.

**EVALUATION PLAN (TBD)**

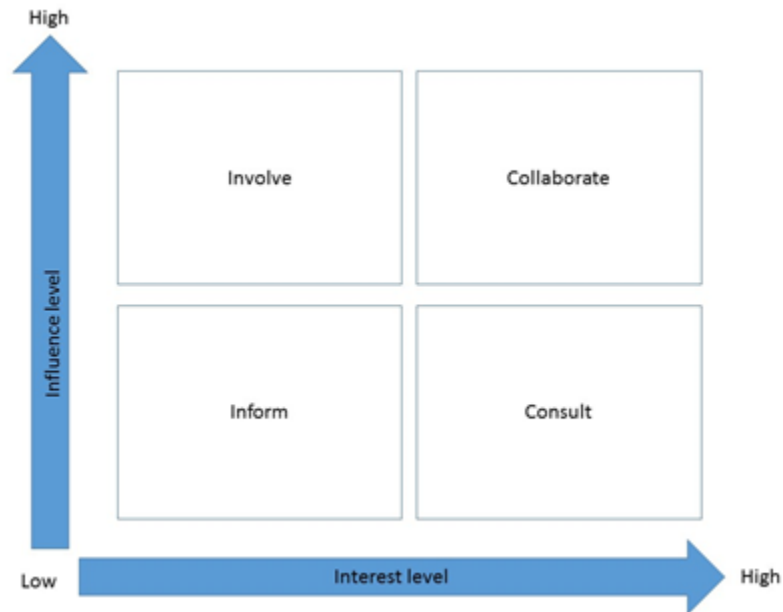
How will we know if the engagement objectives are being met? Are there specific points in the process when we should check in to evaluate and refine the approach?

## Appendix A

### Purpose Statement & Objectives Brainstorm:

- Introduce people to the 2050 vision for new Oregonians and remind others
- Gain support for outcomes
- Be most educated in the process and outcomes
- Input from different perspectives to get best outcomes
- People/Stakeholders are engaged
- Complex situations so perspectives are implicit
- Avoid unintended conflicts.
- Support public outreach about contamination
- Aware of the “hot” issues we need to address
- What are the deal breakers? No surprises
- Combat misinformation and set up conversation. No hidden agendas.
- There’s an opportunity for transparency
- Opportunity to be active rather than reactive
- More forward together
- Stakeholders are impacted e.g. businesses and lives, etc. This is an opportunity to understand how they are impacted.
- Help stakeholders have a uniform message when they talk
- Outcomes are within the bounds of what the Steering Committee is doing. People need to know so they don’t create parallel processes or competing efforts.
- Can communicate with other states (ID, WA, CA) and BC, Canada.
- Opportunity to reframe recycling and build awareness of life cycle thinking.
- Build allies
- Leverage multiple platforms and communication channels.

## Appendix B Stakeholders



### Collaborate (high influence / high interest)

Stakeholder Group	Engagement methods	Engagement Stage (note all or specific stages)	Key contacts /specific people to engage	Who is responsible for engaging this group?
Environmental Quality Commission	Briefings	All Stages		DEQ
Key Legislators, committees, committee chairs & co-sponsors of recycling related bills	Phone / email / text messaging One-on-one interviews Formal meetings	All Stages		
Government Industries / Agencies	Phone / email / text messaging One-on-one interviews Formal meetings	All Stages		
Governor's Office	Phone / email / text messaging One-on-one	All Stages		

	interviews Formal meetings			
<b>DEQ</b>		All Stages		
<b>Steering Committee Members</b>		All Stages		
<b>West Coast Recyclers &amp; Refuse Association</b>		All Stages		
<b>Source Separated / MRF Brokers</b>		All Stages		
<b>Other Trade Associations (APR &amp; ISRI)</b>		All Stages		
<b>Other States (WA ORRA, Econology, Cal Recycle)</b>		All Stages		
<b>Other MRFs in the market now</b>		All Stages		

<b>Involve (higher influence / medium interest)</b>				
<b>Stakeholder Group</b>	<b>Engagement methods</b>	<b>Engagement Stage (note all or specific stages)</b>	<b>Key contacts /specific people to engage</b>	<b>Who is responsible for engaging this group?</b>
<b>The Media</b>				
<b>Processors</b>				
<b>Oregon Rural Action</b>				
<b>Industry Associations (Grocers/hotels/ORLA)</b>				
<b>Persons with physical/mental limitations</b>				
<b>Diverse persons (MWESB)</b>				
<b>Businesses, chamber of commerce, rotary clubs</b>				

Business Oregon				
Economic Enterprise Zones (County and statewide economic development efforts)				
Material specific stakeholders for future program materials				
School Educators				
Innovators - creating new processes and processors OR those that are creating new uses for commodities				
Titus / BHS				

Consult (medium influence / medium interest)				
Stakeholder Group	Engagement methods	Engagement Stage (note all or specific stages)	Key contacts /specific people to engage	Who is responsible for engaging this group?
The Environmental Center			Mike Riley	
OLOCV - League of Conservation Voters				
Environmental Groups <ul style="list-style-type: none"> <li>- Marine debris</li> <li>- OEC</li> <li>- Recycling Advocates</li> <li>- Zero Waste</li> <li>- Climate action planning groups</li> </ul>				
Oregon Conservation Network				
College / University Campuses / Youth Groups / K-12 / Youth Councils				



Consumers who want to recycle everything				
Construction Industry				

Inform (low influence / high interest)				
Stakeholder Group	Engagement methods	Engagement Stage (note all or specific stages)	Key contacts /specific people to engage	Who is responsible for engaging this group?
Master Recycler Programs (OGS & Portland Program)				
Solid Waste Association of America				
Plastics Industry Association				
Source Separated Collectors				
Depots				

Inform (low influence / low interest)				
Stakeholder Group	Engagement methods	Engagement Stage (note all or specific stages)	Key contacts /specific people to engage	Who is responsible for engaging this group?
Senior Citizens / retirement homes				
Surfrider				
Very rural haulers and governments				
Manufacturers of products commonly recycled				
SWANA local				

New Oregonians that are untapped in recycling education				
Tillamook, Curry and Coos County				

## **Appendix C - Large and Small Group Work**

**What methods will best support steering committee member engagement with the stakeholder groups they represent?**

- Follow-up with reports from stakeholders and share regular status/progress updates
- Emails
- Meeting summaries with action items of who is doing what.
- Regularly remind Steering Committee members of action items and roles
- Focused messaging
- Templates of meeting summaries, action items, etc.
- Clearly defined roles and responsibilities.

**Are there existing engagement activities and/or communications channels that could be used for those that are high level and high influence?**

- Ability to access information on the DEQ website to direct people to information and resources
- Feedback surveys
- Find the liaison to the correct point of contact to further relationships and communication between groups and to solicit feedback
- Make meetings easier to participate, such as holding meetings outside of the PDX Metro area.

**What methods overcome barriers to stakeholder participation?**

- Make all information accessible e.g. 5th grade reading level and using common, plain language
- Libraries as connection point
- Mentoring or ambassadors program
- Online forum / chat for student leaders through social media
- Find Students who need to get course credit to lead engagement or participate in activities.
- Tap into steering group relationships with community-based organizations
- Connect with Master Recyclers of Color
- Speakers Bureau - volunteers that convey accurate messaging and steering committee members to partner with them.
- Connect with CBs to make them aware of the process and how it might align with their interest.
- Utilize stipends for participation
- Use incentives for participation such as providing a certificate in sustainability or recycling
- Offer childcare, translation, and interpretation services.
- Connect with leaders of student groups to let them know about the process and how they can influence it.

- Address and be aware of the physical limitations for those that are visually or hearing impaired.
- Be flexible with the methods and provide different avenues for engagement e.g. phone, online, and meetings at different times of day.

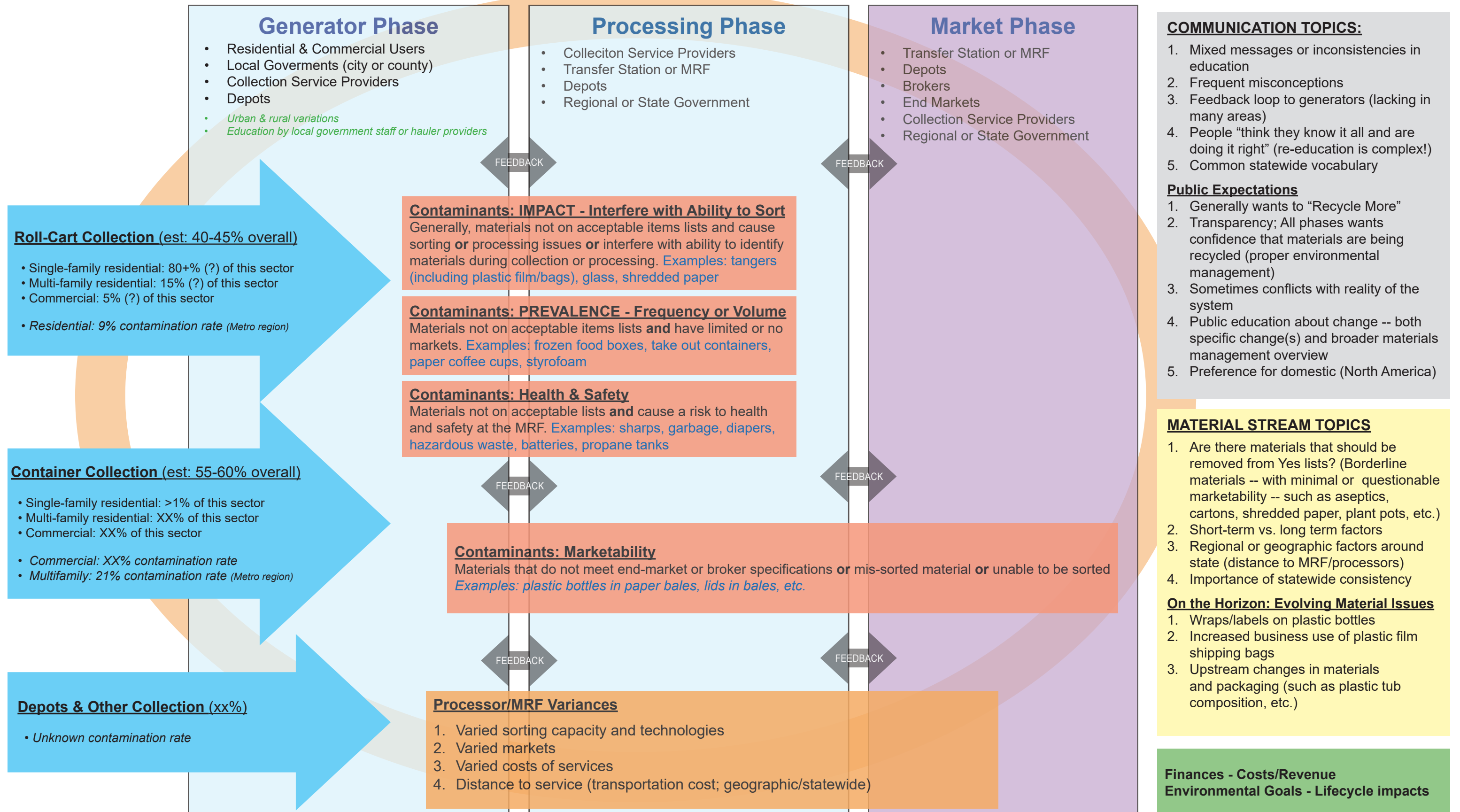
**Barriers to stakeholder involvement:**

- Short attention spans
- Access to accurate information
- High workload/low priority for both stakeholders and SC members
- High enthusiasm and low follow through
- Complexity - the issue is complex with significant unknowns, silos, and issues in collaboration
- Cost/resources restrictions
- Geographic issues - those in rural areas have to travel far to engage and there may be issues with access to technology.
- Issues with access to technology
- We don't know what we don't know
- Different messaging for different groups
- Language differences and uses of idioms, terms, access to services for hearing/visually impaired and content not available in multiple languages.
- Time/resources/methods to encourage under represented groups to attend meetings
- Challenges with making meetings accessible
- Relationship building with communities of color
- Efficiency with time and communicating
- Lack of trust
- Fear of change
- Culture of collaboration
- Bureaucratic barriers
- Barriers within members feeling adequately represented within their larger group/association
- There are lots of people to check with!
- Who are the "right" people to connect with? Who are the influencers?
- Competing messages

# Contamination

Updated 4/4/2019

Different phases: different perspectives, definitions, realities



	Orange = Limited/Mixed																
	Yellow = If Separated																
	Red = No																
	Green = Yes																
	Generator Phase											Processing Phase		Regulators		Market Phase	
	Residents/Businesses		Regulators: Local Governments		Collectors/Haulers				(Regional/State)								
Paper																	
Cardboard/OCC																	
Brown Paper Bags																	
Newspaper																	
Magazines																	
Miscellaneous Paper																	
Office Paper																	
Junk Mail																	
Milk Cartons	Regional Variances	Regional Variances	Regional Variances	Regional Variances	Regional Variances	Regional Variances	Difficult to sort from paper		Regional Variances	Regional Variances	Separated	Mixed					
Juice/Soup Cartons (Aseptics)	Regional Variances	Regional Variances	Regional Variances	Regional Variances	Regional Variances	Regional Variances	Difficult to sort from paper		Regional Variances	Regional Variances	Separated	Mixed					
Shredded Paper	If bagged	Loose	If bagged	Loose	Collection issues (if not bagged)		Difficult to sort		Regional Variances	Regional Variances	Limited Markets						
Frozen Food Boxes																	
Paper Take Out Containers																	
Paper Coffee Cups																	
Pizza Boxes																	
Plastic																	
Bottles & Jugs (#1 & #2)	Regional Variances	Regional Variances	Regional Variances	Regional Variances	Regional Variances	Regional Variances	Bottle wraps causing sorting/ID problems										
Tubs (#5)	Regional Variances	Regional Variances	Regional Variances	Regional Variances	Regional Variances	Regional Variances	Difficult to sort		Regional Variances	Regional Variances	Limited Markets						
Nursery Pots	Regional Variances	Regional Variances	Regional Variances	Regional Variances	Regional Variances	Regional Variances	Difficult to sort		Regional Variances	Regional Variances	Limited Markets						
Buckets	Regional Variances	Regional Variances	Regional Variances	Regional Variances	Regional Variances	Regional Variances	Difficult to sort		Regional Variances	Regional Variances	Limited Markets						
Styrofoam											ONLY If Source Separated (Limited!)						
Plastic Beverage Cups																	
Plastic Clamshells																	
Plastic Film/Bags																	
Plastic Lids																	
Plastics #3																	
Plastics #4																	
Plastics #6																	
Plastics #7																	
Metal																	
Aluminum Cans																	
Tin Cans																	
Metal Paint Cans																	
Scrap Metal (30", 30#)																	
Propane Tanks																	
Glass																	
Glass bottles & jars -- Separated																	
Glass bottles & jars -- Commingled																	
Glass -- Other (Non bottles/jars)																	
Other/Miscellaneous																	
Sharps/Needles																	
Garbage																	
Diapers																	
Batteries																	
Hazardous Waste/Misc																	
Textiles																	
Food																	

# Market Development

Recycling System Steering Committee  
May 10, 2019

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Peter Spendelow  
Justin Gast



# What is market development?

## Market development can be looked at in many ways

- **Stimulating demand** for recyclable materials and recycled-content products
- Taking action to **create new markets or expand existing markets** (markets could be mills or companies using recovered material)
- **Improving the quality of material**, so that material is seen as more valuable by potential buyers

## Who's responsible for market development?

- In some states, market development is the responsibility of a state's respective environmental or commerce departments, or it's a joint effort between both departments (e.g., WA Recycling Development Center).
- For other states, a multi-state non-profit organization is in charge of facilitating RMD work (e.g., NERC and SERDC).
- Non-profits operating on behalf of states (e.g., RMC)
- Private entity(ies) (e.g., Closed Loop Fund, trade associations, brands).





# Examples of market development efforts

## Stimulating demand for materials and recycled content products

- State laws or local ordinances
  - Recycled Content laws:
    - **OR:** newsprint (7.5%), glass containers (50%), telephone directories (25%) and rigid plastic containers (25%).
    - **CA:** rigid plastic containers (25%), trash bags (10%), EPS (loose fill must be made from 100% PCR to be sold/used in state), newsprint (50%), reusable retail bags (currently 20%, increases to 40% in 2020), fiberglass (30%) and glass containers (new glass containers must include at least 35% PCR or 25% if the cullet is mixed-color).
- Environmentally preferable purchasing/buy recycled policies (OR – The Sustainability Act of 2001).
- Voluntary efforts – brands making pledges to increase PCR use (APR's Demand Champions program).



# Examples of market development efforts

## Taking action to create new markets or expand existing markets

- Incentives, fees or tax breaks:
  - Colorado DPHE provided ReWall a \$1.5 mil Recycling Resources Economic Opportunity Grant that was a huge factor in ReWall siting there.
  - CDPHE also offers NextCycle grant funding to businesses interested in creating new, or strengthening, recycled material end-markets in Colorado.
  - \$12.5 million in tax credits for Publishers Paper (aka Blue Heron) allowed the mill in 1975 to expand to include a deinking operation for newsprint (by 1985, operation was handling over 250,000 tons annually).
- CA, MA, MI, NC, among others, have specific RMD grant/loan programs in place that, among other efforts, help site new businesses or allow existing businesses to expand (e.g., Recycling Market Development Zone or Recycling Revolving Loan funding).



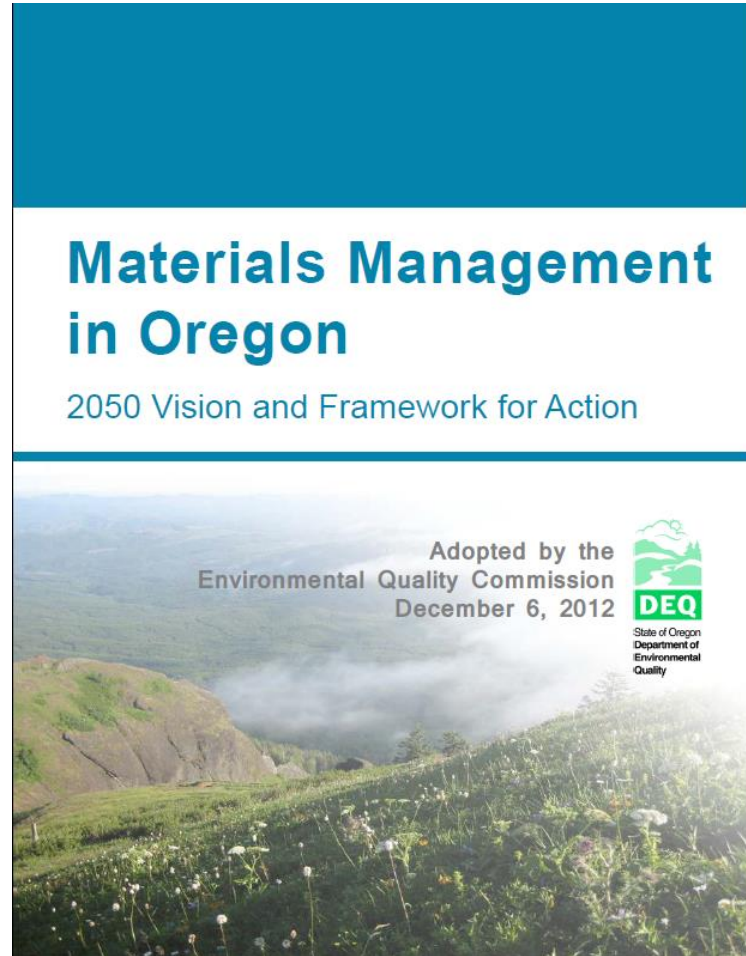
# More examples of market development efforts

## Improving the quality of material (processors and end-users)

- Financing and funding
  - **Local funding** (e.g., Metro's Investment and Innovation Grants (matching grant fund program)
    - Pioneer Recycling Services purchased two artificial intelligence-powered robotic systems for use on its container line.
    - Denton Plastics purchased a install a new continuous melt filter on an existing plastic extruder line.
  - **State funding** (e.g., Business Oregon)
  - **National funding** through trade associations or private partnerships (e.g., Closed Loop Fund, brands)



# Market development under 2050 Vision principles

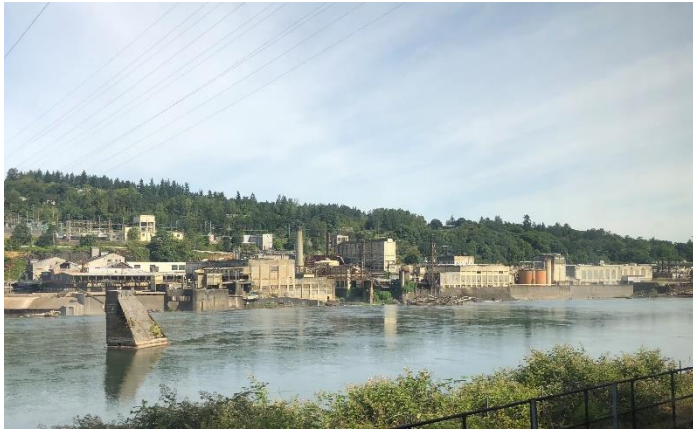


- How materials are produced often have higher impact than end-of-life management.
- Concentrate on markets that minimize environmental impacts and get materials to their highest and best use.

# Examples of market development evaluated through 2050 Vision principles

## **Publishers Paper (then Smurfit then Blue Heron) Oregon City Mill tax credits**

- Millions of tons of newsprint recycled over 36 years.
- Little local market for newsprint before then.
- Large environmental savings over making newsprint from virgin wood chips.



Blue Heron Mill in Oregon City  
Photo: Justin Gast, DEQ



Photo: Justin Gast, DEQ

## **Work on using glass as aggregate (1990s)**

- No local market for glass in Eastern and Central OR.
- Shipping glass to Portland expensive.
- But very little environmental gain from using glass as aggregate.

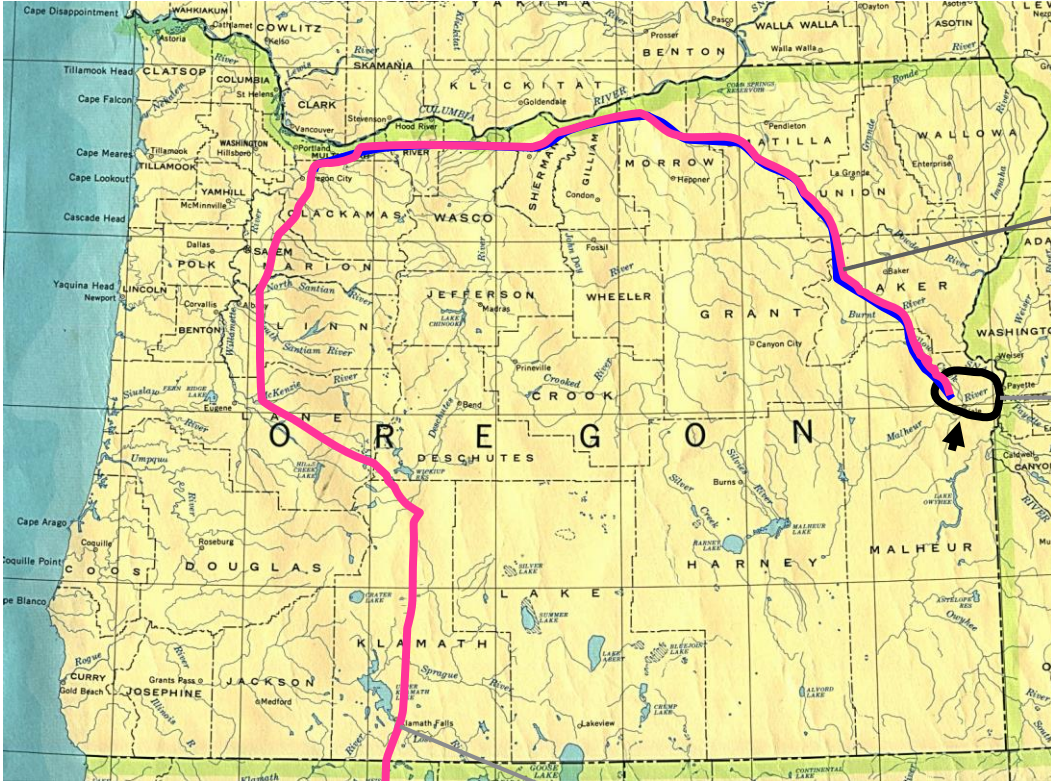


# End markets matter! (sometimes)

**Cullet to Bottle Recycling (Portland)**  
**Net Energy Savings: ~2.1 MMBTU/ton**

**Cullet to Aggregate Recycling (Local)**  
**Net Energy Savings: ~0.2 MMBTU/ton**

**Cullet to Fiberglass Recycling (California)**  
**Net Energy Savings: ~2.1-3.2 MMBTU/ton**



# Considerations for Prioritizing Market Development

- Will the project replace the harvesting of virgin materials or just produce a new product?
- Use Life Cycle Assessment to determine positive and negative environmental impacts
- Determine the most effective stage for market development – is it processing or end-use capacity?
- Will the project increase the use of recycled material/decrease the use of virgin material, or just change who uses the recycled material?

## ***Recycling Market Development in the United States – Looking Back and Looking Forward***

<https://www.oregon.gov/deq/FilterDocs/recMarketDevReport.pdf>



# Trends in Paper Markets

May 2019

Jay Simmons – NORPAC



# Major Paper Sectors

- Graphic Papers
  - Newsprint
  - Copy Paper
  - UCFS (UnCoated woodFree Sheet)
    - Commercial Printing such as; monthly statements, direct mailing
  - Envelope
  - Book
  - Magazine / Inserts
    - Inserts rimarily included in Newspaper but are transitioning to direct mailings

# Major Paper Sectors

- Containerboard
    - Medium
    - Liner
  - Bag & Specialty Kraft
    - Grocery & Dry Good Bags
    - Lightweight and Fast Food Carry Out
    - Specialty Kraft – Masking, Void Fill,
- 

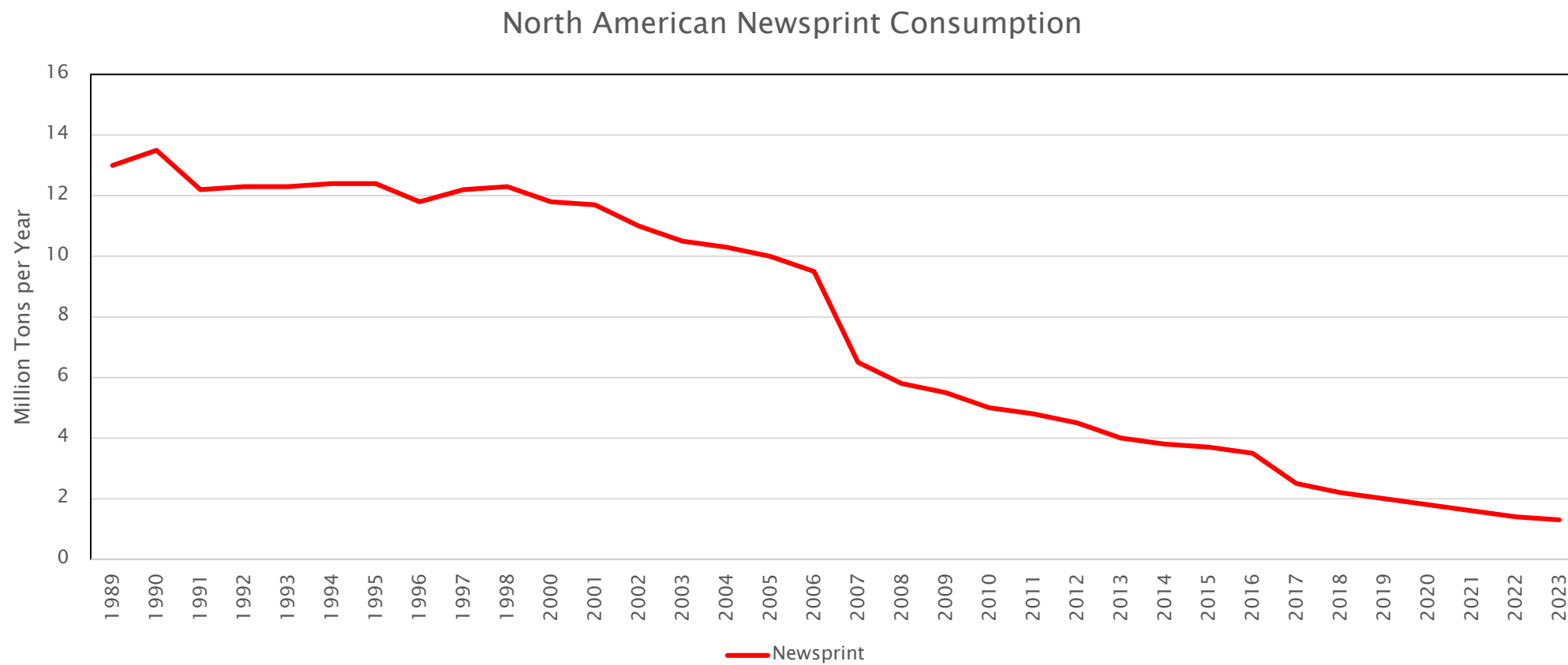
# Major Paper Sectors

- Tissue / Towel
- Market Pulp

# Graphic Papers – NEWSPRINT

- Newsprint
  - Brick & Mortar closures at 400,000 units in 2018
  - Related Inserts Drop
  - Large population centers see largest decline
  - Smaller communities actually seeing slight growth
  - Large Step Decline after 9/11
  - Great Recession created next step decline
  - Since 1995 market has lost 85% of consumption

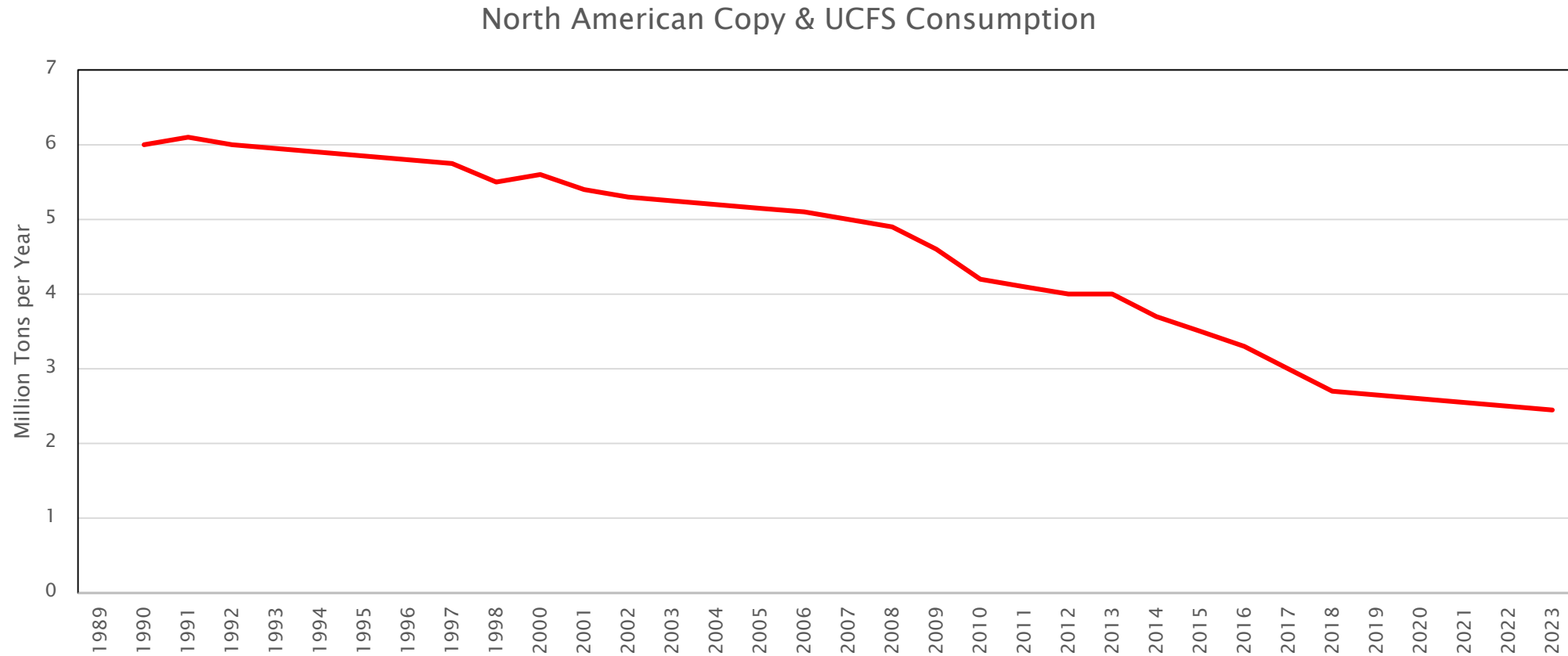
# Graphic Papers - NEWSPRINT



# Graphic Papers – COPY & UCFS

- Copy Paper (UCFS)
  - Decline Significant between Y2000 and Y2007
  - Great Recession “re-set” demand level driven by “.com” failures
  - Camas Closure May 2018
  - Port Hudson, LA mill closure March 2019
- Imports went from ~23% of market to ~13% in 2016 due to tariffs/penalties.

# Graphic Papers – COPY & UCFS



# Graphic Papers – ENVELOPE

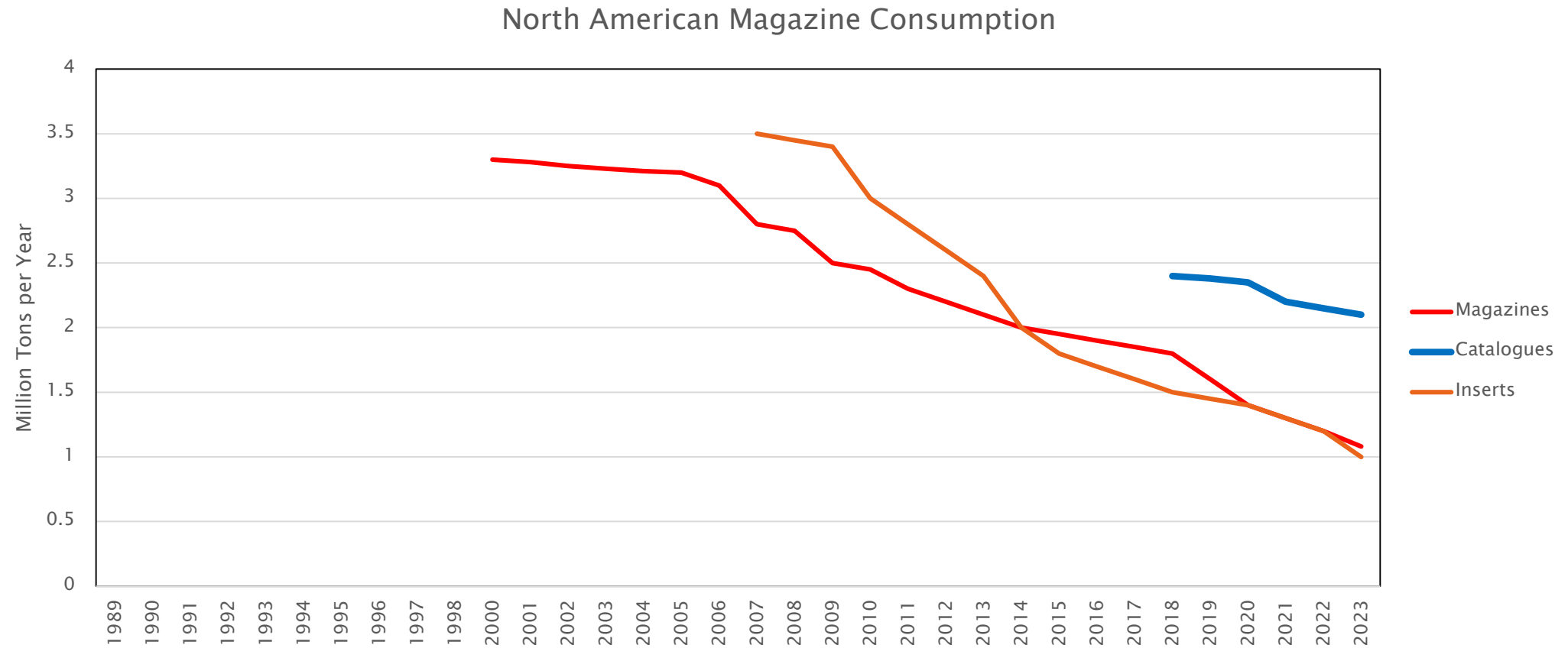
- Decline Significant since “.com” failures in 2007 – 2008
- Aligns with decline of Copy and UCFS



# Graphic Papers – MAGAZINE & INSERTS

- Magazine / Inserts
  - Large Decline in Magazine, Inserts (LWC)
  - Average Yearly decline of approximately 12%
  - Overall a smaller market as compared to Newsprint, UCFS, etc so less focus on decline
- 

# Graphic Papers – MAGAZINE & INSERTS

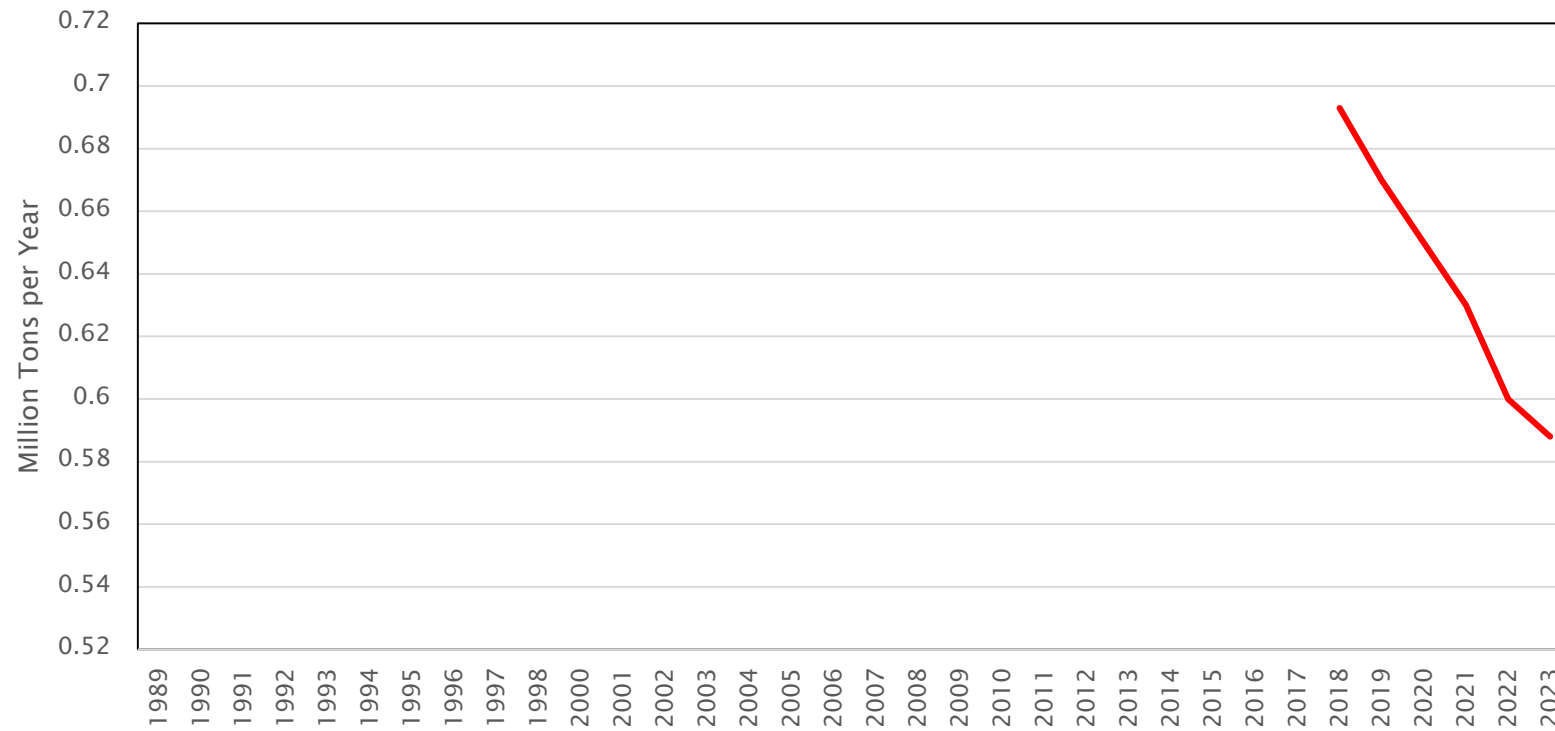


# Graphic Papers – BOOK


- Large Impact from e-Books beginning in 2010
- Trend flattened in 2016
- e-Books now on reverse trend

# Graphic Papers – BOOK

North American Book Consumption



# Tissue & Towel

- NA & Europe growth in consumption has leveled off
  - NA overbuilt capacity and driving prices down
  - Expect another 2 years for capacity and demand to back in balance
  - China expanding w/virgin only fiber
- 

# Market Pulp

- Types –
  - NBSK (Northern Bleached softwood Kraft)
  - SBSK (Southern Bleached Softwood Kraft)
  - BHK (Bleached Hardwood Kraft)
  - BEK (Bleached Eucalyptus Kraft)
  - BCTMP (Bleached Chemical Thermo Mechanical Pulp)

# Market Pulp

- Used primarily in producing the following grades—
  - Tissue / Toweling
  - Absorbent Products
  - White Top Board
  - Folding Cartons
  - Printing & Writing

# Market Pulp – cont.

- Pulp Demand heavily influenced by Chinese economy
  - Government agenda to raise the standard of living relative to health
  - Higher per-capita income allows for spending on more “convenience” items
  - Frequent new tissue/toweling machine startups in past 3 years

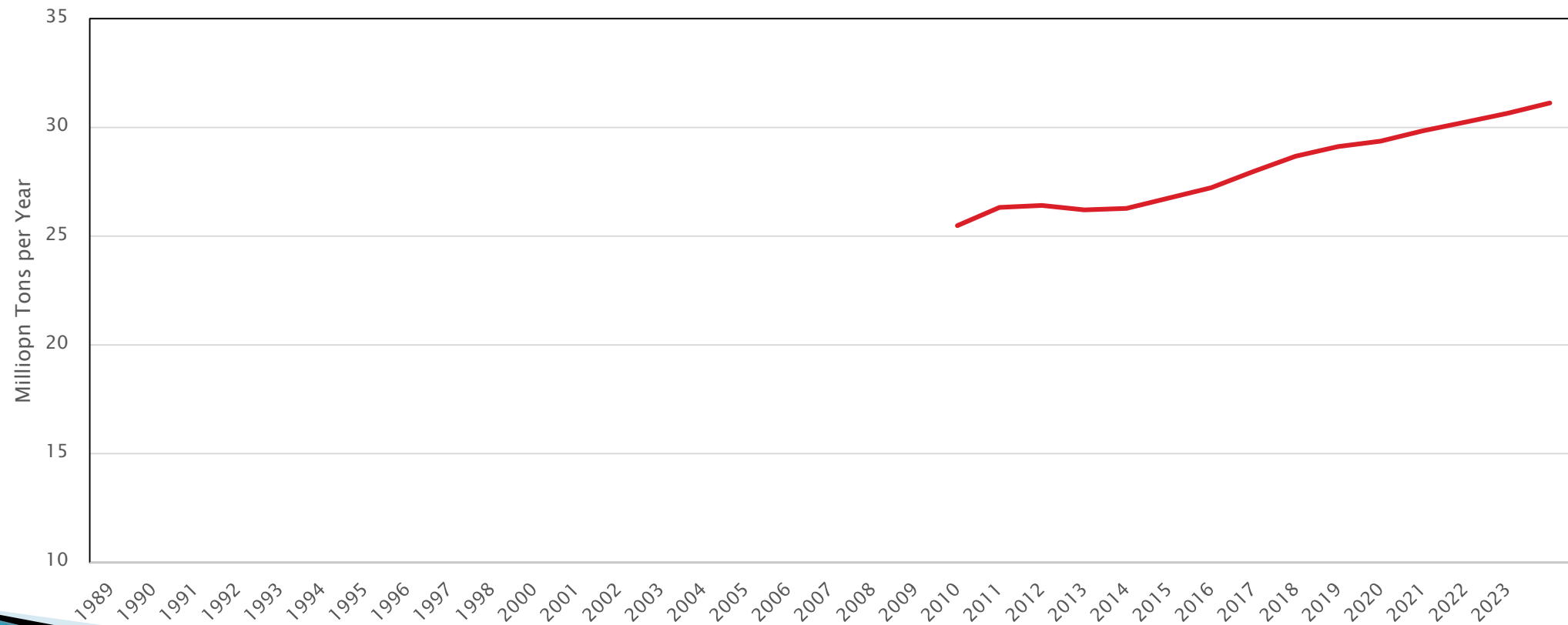


# Containerboard

- Growth 2014 through 2018 was an average of 2.06% against a 28 million ton/yr market
  - Amazon effect
  - Corporate Sustainability Goals / Image
  - Recycle percentage will grow to meet demand as there will be no “Greenfield Mill built in the US in our lifetime”
  - Export demand will increase the pressure on US production as China strives to replace scrap paper with pulp.

# Containerboard

North American Containerboard Consumption



# Bag & Specialty Kraft

- Anti-Plastic Bag Effect
  - West Coast is on a “single use plastic bag” free path conversion by 2020
    - Anti “Ocean of Plastics” agenda
  - Other major cities on same path or already achieved similar legislation
  - Corporate strategies to move away from plastics & Styrofoam – “Brown is the New Green”
  - Maine just banned Single Use Styrofoam food & beverage containers

# Bag & Specialty Kraft

- Specialty Kraft
  - Used in Void Fill
  - Used in specialized packaging
- Corporate strategies for greener image
  - Important for fast food / quick food sector
  - Reduce/eliminate plastics in product protection (molded fiber)
- Large growth sector but volumes relatively small as compared to boxes


# Summary Points

- Printing & Writing Sector
  - ALL Grades on a spiraling downward trend
- Containerboard
  - Growth Trend 1-2% per year
- Tissue & Towel
  - Flat to slight growth trend globally.
- Market Pulp
  - Tight Supply with majority of demand hinged on China's Economy

# Summary Points

- Bag
  - Increased demand of lighter weight products and high recycle content
    - Shortage of suppliers willing to produce = excellent fit for NORPAC
- Specialty Kraft

# Summary Points

- Mill closures negatively effect smaller communities with lack of access to larger employer base
  - Wages are “Family Level” such that they are high enough to support family with a single income
  - Estimates are each FTE position supports
    - 5 other mill support related jobs
    - 3 “Service” level jobs
  - Loss of high paying mill jobs negatively effects communities at numerous touch points
- 

# Summary Points

Mill	City	State	Product	Closure
Blue Heron	Pomona	CA	Newsprint	2009?
Snowflake	Snowflake	AZ	Newsprint	2012
Coos Bay	Coos Bay	OR	Containerboard	2002
Albany	Albany	OR	Containerboard	2006
Blue Heron	Oregon City	OR	Newsprint	2010
West Linn	West Linn	OR	Graphic Papers	2017
Armstrong	St. Helens	OR	Ceiling Tiles	2016
WestRock (SP Fiber)	Newburg	OR	Newsprint / Medium	2016
Nippon Dynawave	Port Angeles	WA	Directory	2016
Catalyst	Port Coquitlam	BC	Deink Pulp for News	2012
Georgia Pacific	Camas	WA	Copy Paper / UCFS	2018




# What Can Government Do

- Wastepaper Exports to countries other than China will increase –
  - Vietnam / Thailand / Cambodia / S. Korea
  - Indonesia announced a 1 Million ton/yr Pulping system startup in 2020
  - Malaysia announced a 1 Million ton/yr Pulping system startup in 2020
- Foreign countries are actively using quality enforcement techniques mirroring China program 2016-2017
  - Current quality levels will be insufficient in future months

# What Can Government Do

- Encourage Domestic Consumption of Forest Based Products as a Renewable Resource
    - Review legislation outlining recycling content mandates for government contracts
    - Allow “lower LCA footprint” products to compete with Recycle Content
- 

# What Can Government Do

- Paper is one of most recognizable and easiest waste commodities to collect and recycle into new products.
  - Paper industry has been successfully recycling since the mid/early 1940's in significant volumes
- 

# What Can Government Do

- Promote collection and separation of all grades/types of paper
- Return to a “paper separate” collection programs to increase value by removing non-fiber components from current stream
  - Improves MRF’s (Capital requirements, Quality)
  - Improves mill economics (less waste)
  - Improves marketability of paper based grades (larger customer base)
  - Improves value of grade (higher quality always improves market price)