

Public Collection Study

Ramsey and Washington Counties have conducted this study of Public Collection to determine if each County should change the overall approach to collection and management of solid wastes in their county in order to meet the goals of their Solid Waste Management Plans.

These goals are aimed at ensuring that solid waste management protects public health, safety and the environment.

Methods

The study on public collection consisted of two main elements. 1) Research to better understand public collection, and 2) public engagement, to inform the public about the solid waste system, challenges related to it, and to get input on the concept of public collection.

The research included:

- **Case Studies** - Staff and consultants evaluated public collection systems and experiences in other parts of the United States and Canada, and have prepared several case studies. The purpose of these was to identify the experience with public collection in other areas. Case studies can be found in Appendix 4.

- **Municipal database** - Staff and consultants created a computer database of solid waste collection information for cities and townships in the two counties, including information gleaned from hauler licenses and municipal ordinances. This information was used to help define the current collection system, in developing a framework for public collection, and could be further developed for the design of services.
- **City/Town histories** -- Staff conducted extensive interviews with all cities/townships in Ramsey and Washington Counties about their experience in public collection of MSW and recyclables. A summary of these interviews was prepared to assist in understanding the current system, local concerns about public collection, as well as processes for implementing public collection systems. The results of these interviews can be found in Appendix 7.
- **Summary of surveys** -- Staff conducted a review of public surveys that have been conducted on solid waste issues by cities/towns and counties in the metropolitan area, particularly in Ramsey and Washington Counties. Results of those surveys were reviewed and summarized. This information was used to understand public perceptions of solid waste, and to learn about processes used by cities/towns in approaching collection issues. The results of this review can be found in Appendix 6.
- **Survey of residents** - A resident survey was conducted by MarketLine Research, and analysis of the data was carried out by County staff and consultants. The purpose of the survey was to create a baseline of information about residents' thoughts about Public Collection and to determine what residents consider important in trash collection and disposal. The survey attempted to answer the following:
 - What is important to residents in garbage service;
 - If they have an initial preference for Public Collection or open collection;
 - What their preference is for how trash is managed once it is collected; and
 - Specific concerns if their city or the county negotiated a contract with a private hauler for garbage collection service.

The results of the survey can be found in Appendix 5.

- **Legal review** – As part of the project the legal team reviewed appropriate statutes and court cases to help in framing the legal issues around public collection. This included research into financing mechanisms for a public collection system.

- **Framework** – A Preliminary Public Collection Framework was produced to provide an outline of what a public collection system could look like, based on public input during the first part of the study. The preliminary elements of the framework include these facets:
 - Services to be provided;
 - Service delivery;
 - Service zones;
 - Service standards;
 - Number of haulers per zone;
 - Procurement options;
 - Funding/payment methods;
 - Facilities; and
 - Draft potential approaches for municipalities.

The framework provided a basis for further discussion with the public during the second part of the study, and is discussed later in this report. The Framework is included in Appendix 16.

Description of Public Collection

Cities, townships and counties are charged by the State of Minnesota with protecting public health, safety and welfare, and protecting the environment. Garbage collection is a necessary public service to assure those charges, such as proper handling of sewage, provision of safe drinking water, providing safe roads, and fire and police protection services.

Some local governments have decided just to license and regulate private companies that provide waste collection services. Others have decided that it is in the best interest of residents and businesses to have the local government provide or arrange for the service.

Public collection of waste is when a city, township or county provides or arranges for collection services on behalf of residential, commercial and/or multifamily housing waste generators. The services can collect a wide range of wastes, including garbage, recyclables, compostables (such as yard waste or food waste), bulky items (such as major appliances), household hazardous wastes, and tree and shrub waste.

Some cities own trucks and have municipal employees to do the work. The City of Minneapolis uses public employees to provide collection service for garbage, recyclables, yard waste and other items to half of the residents of that city. The City contracts with a consortium of private haulers to serve the other half of the City.

Many local governments in the Twin Cities area provide public collection through a contract with a private waste hauler to provide the service in a defined area. Fifteen cities/towns in Ramsey and Washington Counties have done this for garbage collection, and 39 cities and towns in the two Counties have contracted with a recycler to provide residents curbside recycling.

Local governments have legal authority granted by the State of Minnesota to provide the service directly. If Ramsey and Washington Counties decided to pursue public collection, they could do so under such authority.

The purpose of Public Collection would be to utilize the authorities of Minnesota counties to develop the structure and mechanisms in Ramsey and Washington Counties to carry out the Counties' role to:

- Implement State policy;
- Meet environmental goals;
- Conserve resources;
- Reduce/minimize long-term liability;
- Link generators directly to their responsibility; and
- Ensure continued private sector competition for cost-effective services.

Solid waste, once generated, has an effect on public health and the environment no matter how it is managed. The degree of impact varies with the management method. Proper management of solid waste is a necessary public service. Local governments are responsible for solid waste management within their jurisdictions. Counties, such as Ramsey and Washington, have authority to arrange for collection of solid waste at the generator by adopting an ordinance to provide collection of solid waste as an essential public service. In keeping with the value of Public/Private Partnerships, in a public collection system the Counties would contract with private companies to provide the required services. The Counties' decisions on the types of services required will be guided by the goals in the Solid Waste Management Plans.

A framework for public collection was developed based on input during the first phase of public engagement, and the research conducted. The framework is found in Appendix 16.

The framework identified seven components that would guide how public collection would be implemented.

- Protect the environment, health and safety of the community by managing the waste stream and using waste as a resource.
- Individual communities are provided options for the design of the system in their community.
- Healthy competition between haulers is maintained.
- Local/independent haulers can stay in business.
- Offer a choice of haulers where the community desires it; fewer haulers on the street where the community desires it.
- Fair and competitive prices.
- Top-quality service.

The framework envisions a structure with these parts:

- **Generators:** The Counties would implement a public collection system for residential, commercial and multi-family housing generators.
- **Types of waste:** The public collection system would address mixed municipal solid waste (what most people call “garbage” or “trash”), recyclables, yard waste, brush, bulky wastes (such as furniture), compostable wastes, and household hazardous wastes.
- **Community preference:** The Counties would implement public collection based on community preference, in which municipalities would indicate how they would like services to be designed in their communities.
- **Existing public collection:** In those cities/townships where the community already has contracts in place for service, the Counties will partner with those communities.

- **Zones:** Service Zones would be created:
 - The Counties would create service zones for residential garbage and recycling services, generally along the lines of cities/townships and planning districts in Saint Paul, in which services would be provided.
 - The Counties would create service zones that are countywide for commercial services. Multiple haulers would offer service on a competitive basis in these large zones
- **Private haulers:** The Counties would contract with private haulers to provide garbage and/or recycling service for residential, commercial and multifamily housing.
- **Service Standards:** The Counties would establish service standards to assure that waste is handled according to the County's specifications.
- **Customer Choice:**
 - One or more haulers could provide residential garbage service in a zone, depending on community preference.
 - For residential recycling service, one collector would be selected.
 - For commercial and multi-family housing garbage and recycling, the zones would be countywide, and all existing haulers would be under contract and able to compete for service. New haulers would be allowed to enter into contracts and enter the market.
- **Financing:** The Counties would reduce or eliminate the waste management service charge on the property tax statement, saving taxpayers money. The cost of waste management would be shifted to the waste-hauling bill. There are different funding mechanisms available, depending on the specific structure that is ultimately selected. The most likely option is to maintain a waste management service charge, but have it be collected by waste haulers rather than on the property tax statement. The financing mechanism would need to be designed to sustain the varied services needed to meet the goals.
- **Countywide residential services:** Some residential services would be countywide, such as household hazardous waste collection sites, certain community clean-up events, and yard waste drop-off sites.

The framework includes community profiles for each city and township in the two Counties. For the City of Saint Paul, there are profiles included for each of the seventeen planning districts. Each profile includes a description of the existing system and public collection options for various waste types and various types of generators.

Public Engagement

Both County Boards, in adopting the resolutions to commence the study, clearly stated that there were no predetermined decisions, and that an important part of the study was public input. As a result the staff designed a very thorough public engagement process, to cover the Counties broadly and to seek input in a variety of ways.

Public collection has a history of being controversial, and the review of case studies from Minnesota and elsewhere showed that to get balanced input would be a challenge. The waste industry, understandably, has strong concerns about government involvement in collection, and has a history of engaging customers to advocate for the industry position. Because of this, and to get meaningful input for the County Boards the staff put significant effort into gathering input.

Methods

The public engagement process occurred in two phases. The first phase was from August 2001 through January 2002, and the second was during February and March 2002. The public engagement process had four goals for all audiences:

- *Understand the current situation for waste management in Ramsey/Washington County;*
- *Understand the concept of public collection and how it could be implemented;*
- *Understand the sequence of events for exploring and implementing public collection; and*
- *Express ideas, opinions and concerns about public collection options.*

The approach used was to engage a variety of audiences in various ways to provide information and gather meaningful input. In order to do this a variety of tools were developed to explain solid waste issues, and also to gather the input.

Broad categories of audiences included:

- Cities and Townships in Ramsey and Washington Counties: 51 total
- Saint Paul Planning Districts: 17 Total
- Waste haulers: (There are 105 licensed haulers in the Counties, but many of those are “self-haulers.” There are about 65 haulers that provide service to customers)
- Businesses
- Institutions
- State agencies
- Other organizations

General categories of tools used were:

- ***One-on-one meetings***
- ***Meetings with groups of people*** – such as waste haulers, business organizations, civic organizations, etc.
- ***Community meetings*** – most of these were hosted by a city/township, organization, or district council
- ***Presentations to community organizations*** – the following community groups were presented to from February to March 2002: Woodbury Lions Club, Wildwood Lions Club, New Brighton League of Women Voters, Croix Valley Lions Club, St. Paul East Parks Lions Club, Roseville Lions Club, Park/Port Lioness Club, Falcon Heights/Lauderdale Lions Club, and the White Bear Lions Club.
- ***Letters and emails*** – There was a lot of correspondence on this issue, to introduce the topic, invite people to meetings, respond to comments, etc. Email was used whenever possible to transmit documents and reduce paper and postage costs.
- ***Fact Sheets*** – about a dozen different fact sheets were developed to introduce the topic, describe the study, summarize solid waste issues, and introduce the preliminary framework (once it was produced).
- ***Trash Today*** – two issues, mailed in September and February to all households and businesses in the two Counties. The February issue was devoted entirely to the topic of public collection.
- ***Responses to input*** – many people asked questions, which prompted either phone calls or emails from staff. Every person that emailed comments received an email response of thanks, with some general information. This often resulted in several more emails being exchanged, with further information.
- ***Ramsey County Profile*** – 217,000 copies of this County newspaper were printed and distributed in Ramsey County, with the lead article in the fall issue being on the public collection study.
- ***Media Packets*** – mailed twice to over 50 local news organizations, containing information about the study. These resulted in several interviews and articles in local papers.
- ***Media contacts*** – local and regional media contacted staff and commissioners, and were provided information and contacts to assist in their work. This resulted in a number of articles in major and local newspapers.
- ***Media releases*** – several news releases were issued, early in the study, and when the Preliminary Framework was released for comment.
- ***Cable television appearances*** – on local cable in both Counties, and special shows produced by both Counties' public information staff.
- ***Collection Connection*** – a short newsletter sent by email or US Mail several times to provide updates to all of those people that expressed interest in the topic.
- ***Hauler News*** – sent about monthly to waste haulers with updates about the study and other issues;

- **PowerPoint presentations** – were used in various meetings.
- A portion of the **Resource Recovery Web site** was dedicated to public collection, with pages dedicated to fact sheets, timelines, meeting schedules, links to other relevant sites, and the opportunity to give feedback. A special slide show to explain about solid waste management was developed and placed on the site.
- **Six focus groups** – conducted by a subcontractor to the Project’s public affairs consultant, with three held in each County, and of those two dedicated to businesses and four to residents.
- **Preliminary Framework for Public Collection** – mailed to all waste haulers, placed on the web site, and copies were placed for public viewing in all public libraries in the two counties, at all municipal offices, and at all Saint Paul District Council offices.

A variety of tools were created to provide for input into the study. These included:

- Recording comments made in individual and group meetings and preparing written summaries;
- Creating a dedicated e-mail address (Public_Collection@co.Ramsey.mn.us) to receive messages;
- A dedicated voice-mail number where people could leave messages;
- A feedback link on the web site where users could leave comments
- Publication of the Project’s fax number
- Publication of the Project’s U. S. Mail address
- Prepaid postcards distributed from August 2001 until February 2002
- Letter-sized mailers included in the February 2002 issue of *Trash Today*;
- Comment sheets at public meetings;

One of the most valuable parts of this study was the comments received from the public. For this reason great care was taken to design a system to receive, handle, record, analyze and track input. As the information came, it was recorded, classified, and filed in a central place. That central file was accessible to staff working on various tasks. Key points for the feedback were gleaned from the input, and are noted in summary documents in this report.

Managing this input was a huge task. Each voice mail, email and comment card was listened to, recorded and categorized. Great care was taken to respect the time the sender took to provide comments.

From the public input, several contact lists were developed for people that requested feedback and follow-up. These people then received issues of *Collection Connection* when they were released.

Results

The following are summaries of the results of public input. More detailed results can be found in Appendix 9.

Municipalities: Washington County

See also Appendix 9A.

All of the cities and townships in the County received information and were continually engaged throughout the public collection study process. From January to March 2002, staff attended over eleven meetings and conducted numerous phone conversations with cities and townships. Letters have been received from several cities including: Grant, Afton, Woodbury, West Lakeland Township, and Lake St. Croix Beach. Comments through meeting minutes or phone conversations have also been received from: Oakdale, Cottage Grove, Lake Elmo, Mahtomedi, St. Paul Park, and Stillwater.

A few of the cities oppose public collection (Afton and Mahtomedi). Some have strong concerns over public collection (Lake St. Croix Beach, West Lakeland). The major reasons cited include:

- Possibly reduction of choice of hauler
- Impact on city decision making ability
- Impact on competition
- Impact on small haulers
- Possible increase in County contract administration costs

The cities of Woodbury, Oakdale and Lake Elmo stated strong support for:

- The solid waste management goals and purposes
- The solid waste hierarchy of waste reduction and recycling first, waste processing second and landfills last
- Use of a Hauler Collected Service Charge to make costs more visible and to link generators with the actual costs associated with waste disposal

The City of Oakdale expressed the support for using the Ramsey/Washington County Resource Recovery Facility for its full life cycle (beyond the contract date). The City of Woodbury supports the County's continued exploration of the public collection issue.

Municipalities and Saint Paul Planning Districts: Ramsey County

Municipalities became engaged and sought further information, especially at the staff level. Several cities had been examining changes in collection, and had committees looking into the subject. More detail can be found in Appendix 9B, including quotes from municipalities.

- *Support for goals:* Generally, municipalities support the environmental, health and safety goals in the Solid Waste Master Plan.

- *Communities Currently Organized:* The municipalities that currently have organized collection for mixed municipal solid waste (Little Canada, North Saint Paul, Vadnais Heights, White Bear Lake, White Bear Township) are pleased with the arrangement and find benefits in it. They indicate a desire to remain in control of waste collection in their municipalities and to meet County goals. Communities that currently have organized recycling service for residents (which is almost all) are pleased with this arrangement.
- *Reasons for change:* Those municipalities that have been studying whether to make changes in collection were engaged in the public collection process and indicated various reasons for pursuing change, but mostly related to city infrastructure and nuisance issues (such as noise).
- Municipalities that have not recently studied changes in collection were not as engaged in the discussion. Several cited concerns for small businesses. Others cited vocal citizens that prefer choice.
- Municipalities acknowledge the difficulty in changing collection for businesses.
- Most Saint Paul Planning Districts became very engaged, tracked the issue carefully, and some surveyed residents.
- *Community Surveys:* Several communities have recently conducted surveys of residents, and relayed those results to the County. Residents are supportive of environmental goals, but are split on issues of government involvement. People are concerned about cost, choice, small business, and the effect of garbage trucks on city streets.

Businesses

The public engagement process used a variety of methods to gather input from businesses, including meetings, mailings, emails and responses through the Trash Today publication. There appeared to be fewer comments from businesses than residents, although in emails and mailings businesses did not always identify themselves. More detailed information can be found in Appendix 9D.

General observations include:

- Businesses expressed concern on whether public collection would restrict a business' choice of hauler.
- There were concerns about government becoming involved in collection, and concern that this could drive up costs.
- The knowledge of business liability for waste varied; some businesses are very aware of the liability they face for waste disposal; others were unaware.
- Many commented that commercial properties generate more wastes and some stated that costs should be based on volume with those who produce more wastes paying more of the costs.
- Several comments were received concerning the current lack of recycling in the businesses sector. Some noted that many small businesses do not

have any recycling programs. There was support for increasing recycling efforts in all businesses.

General Public

The public engagement process used a wide variety of methods to gather input. The following are the major findings that are summarized from the resident survey, the focus groups, and the input by voice mail, email, post cards, letters, and conversations. This is only a summary of the comment. More detail can be found in Appendix 9C, including a sampling of quotes from residents.

The “first phase” of public input, which was from the start of the study until the end of January 2002, resulted in 1,340 recorded comments. Of those, 215 were voice mail messages, 130 were emails, 932 were post cards, 44 were phone calls, and the remainder were from other means.

The “second phase” of input began when the Preliminary Framework was released, and lasted until the end of March 2002. During this period there were 6,240 recorded comments. Of these, 5,361 were feedback letters from the Trash Today mailing, 398 were voice mail messages, 291 arrived via email, and the rest were post cards, faxes, phone calls or letters.

- *The term “public collection” is confusing.* A number of people believe that “public collection” means government trucks and crews. Others believe it automatically-means one-truck per zone. There is some confusion about what the study is about.
- *People support the environmental goals.* As with previous surveys conducted in the Counties and in the region, along with outcomes from the SWMCB Citizens jury, this study reflected extremely strong support for the stated environmental goals and the order of preference established by the waste management hierarchy.
- *Government has a role, but primarily to protect health and the environment.* The support for the type and level of involvement is varied, but there appears to be a clear role in establishing environmental standards. Many people believe that the Counties should require haulers to adhere to environmental standards. Some stated they do not want government involved but at the same time they want to “just have the haulers regulated to bring their wastes to the appropriate sites”. Many suggested that the government should just mandate how the waste should be handled.
- *People do not see a connection between the problem and public collection as a solution.* While people strongly support the environmental goals, they do not generally see a problem with the current waste collection system. The public typically does not understand the legal connection that to control where and how waste is managed requires control to start at the point of collection. Some residents, particularly in Saint Paul, are

concerned with people that do not have collection service creating nuisances and illegal dumping.

- *Of those that responded to the Counties' study by phone, email, postcard or letter, and who expressed a position on public collection (about 75%), slightly more than half were opposed to or leaning against public collection, and slightly less than half supported or leaned in favor of public collection. About one quarter of those responding stated no preference.*
- *Of those that opposed public collection, the five most frequently stated reasons for opposing it were:*
 - *A desire to maintain choice of hauler,*
 - *Opposition to government involvement in collection,*
 - *Concern about quality of service,*
 - *Concern that costs would go up in a public collection system, and*
 - *Concern with the effect on competition, particularly on small haulers.*
- *Competition is a key issue for people, and is a deeply held value. This concern takes several forms:*
 - *Concern for locally owned, small businesses;*
 - *Having choice and ability to leverage good service;*
 - *Competition keeps companies sharp;*
 - *Competition keeps costs lower.*
- *Of those that supported public collection, the five most frequently stated reasons were:*
 - *It helps meet environmental goals,*
 - *Support for the resource recovery facility,*
 - *Public collection will reduce truck traffic and improve safety,*
 - *It would reduce costs, and*
 - *Concern with truck traffic and the effect on the environment.*
- *Many respondents stated that if more people knew about the issues, they would be more conscious of how their wastes are handled. Many identified the need to educate residents about where their garbage goes, the effects of a waste management system on the environment, how to recycle, etc.*
- *Many of those that stated that they lived in a community with organized collection supported Public Collection.*
- *Many supported the idea of Public Collection but wanted competition maintained and protection for the small, local haulers, particularly when it came to the bidding process and the largest hauling company winning the majority of the contracts.*
- *Some stated that they would pay more for their service to better manage the wastes in order to protect the environment and save it for future generations. A number of comments referenced the idea of a volume-based fee system for waste. Respondents did not want to pay the same as their neighbor when they themselves were generating less waste.*

Other Organizations

Staff met with several organizations that expressed an interest in the issue. The Recycling Association of Minnesota (RAM) policy committee met with staff twice to learn about and offer comments on public collection. RAM is an organization with private and public sector members, whose mission is to further recycling in the State. RAM expressed interest in public collection as long as it promoted increased recycling.

Ramsey County staff and consultants met with representatives of the Saint Paul Neighborhood Energy Consortium (which, during the course of the study reorganized, with the formation of a recycling firm called Eureka Recycling). There were several meetings and phone calls. Eureka has significant experience in operating recycling programs in Saint Paul, for residential and multi-family housing. Eureka has stated that public collection has the potential to address many solid waste issues, and strongly encourages that public collection be explored to solve solid waste problems.

Waste Industry

There was a lot of interaction with the waste industry during the study. Appendix 9E explains the methods used to gather input, and includes more detail about the industry's efforts to engage their customers in the discussion. The National Solid Waste Management Association (NSWMA), members of which are mostly larger firms, conducted a very active campaign against public collection, resulting in significant feedback. Smaller hauling firms sent letters and also engaged customers.

The following summarize industry concerns:

- **Maintain Ability to Compete** - Haulers prefer to preserve the current open and organized collection system, (i.e. Customer Choice). Smaller hauling firms believe they can compete in a number of ways that allow them to differentiate their service from the competition. Competitive measures include:
 - Providing quality customer service
 - Niche marketing (providing specific, limited services and not trying to be “all things to all people”)
 - Maintaining long-term customer relationships
 - Appealing to customer preferences for supporting locally-owned independent businesses
- **Growth Opportunities** - Establishing Service Zones and limiting the number of haulers in a zone could reduce the potential for companies to grow their business in the manner they currently use, pursuing new customers in an open hauling market.
- **Value of the Company** - Some independent haulers expressed concerns regarding the value of their business in a Public Collection system. The value (i.e., what they can sell for) is based upon their annual revenues. If they lose any of their customer base as a result of Public Collection, their annual revenues will decline, and therefore the price they receive when

selling. Some haulers indicated that they plan to use the proceeds from the sale of their company as their retirement fund.

- **View of the Future Market** - The large companies expect that there will continue to be 2 or 3 large national companies and several (4 to 8) mid-sized independents, under the status quo. Some of the smaller independents stated that they either plan to pass the business on to their sons and daughters or plan to sell their business in approximately 5 years and retire.
- **Access to Disposal/Level Playing Field** - Some independent haulers are concerned about the continued availability of disposal or recycling facilities that are not controlled by competing hauling companies. Clearly most independent haulers strongly prefer to deliver MSW to the Resource Recovery Facility, but state that if it went away, they would be able to deliver waste to competitors' landfills or transfer stations. However, they are concerned about the tipping fee price and whether they would be able to remain competitive for collection accounts.
- **Establishment of Service Zones** - If service zones are too large, only large companies will be able to compete for that business. If a specific zone was required to be serviced only on one day, some small haulers would have more customers than they could serve on that day with the number of trucks they own while on other days, their trucks would be underutilized.
- **Procurement Process** - There is extensive concern regarding independent haulers not being able to compete effectively in a competitive bidding process. They believe they are at a competitive disadvantage when cities bid for service because the lowest bidder almost always gets the contract. They acknowledge that they can do all stops in a neighborhood cheaper than in open systems, but so can large companies who have more opportunity to cover lower margins from business elsewhere. Further, municipal bid requirements typically require bidders to post significant bid bonds and provide significant amounts of excess insurance coverage – both requirements are cost prohibitive for smaller haulers.
- **Evolution of Public Collection Procurement Processes** - Some independent haulers expressed concern that even though the Framework for Public Collection includes an option for negotiating contracts with current haulers to establish multiple contracts within any given Service Zone, the system will evolve over time into a competitive bidding process awarding contracts to a single hauler in a Zone. That has been their experience elsewhere in this market, as demonstrated recently in the City of North St. Paul.
- **Municipal Preference** - Haulers are concerned with the concept of “Municipal Preference” in the Public Collection Framework. Their experience to-date is that local officials lean more toward single hauler service areas and competitive bidding as the process to award the contract rather than utilizing hauler negotiations or request for proposals.

- **Recycling Incentives** - In an open collection system, many independent haulers have difficulty charging adequately to support their recycling collection, processing, and materials marketing activities. There is also a strongly held expectation that markets should pay revenue in excess of collection costs for recyclables. Thus, when haulers discuss the Counties' goals to increase recycling, they are frustrated. There were suggestions to improve recycling via:
 - Providing incentives to haulers for recycling;
 - Providing access to independent (i.e. other than Waste Management or BFI) recycling processing facilities;
 - Providing more education for the public;
 - Setting specific standards and requiring mandatory recycling for commercial businesses.
- **Billing** - Haulers clearly prefer to retain the billing process with their customers. Concerns with the third-party billing concept included losing direct customer contact, added paperwork, cost, complaint handling, handling bad debt, etc.
 - Several haulers expressed a preference for a Hauler-Collected Service Charge (HCSC) over third-party billing, even to the extent that the HCSC was promoted as a way to accomplish several of the Counties' goals without implementing Public Collection.
 - Several haulers stated that an HCSC could create an economic incentive for increased recycling and allow tipping fees at processing facilities to be set at competitive rates with the cost of doing so being collected via the HCSC.
 - Some haulers stated the HCSC could even be used to develop a funding mechanism to create incentives for haulers to increase customer participation in recycling by their customers with the haulers receiving a payment from the fund for their recycling performance.
 - In discussions regarding volume-based approaches to the HCSC (such as Western Lake Superior Sanitary District – Duluth) versus percentage of gross receipts (such as Hennepin County and the current State solid waste tax), there was a preference for the percentage-based approach.
 - There were some concerns expressed about a HCSC such as potential increased illegal dumping and bad debt as direct costs to customers go up.
- **Summary** - The majority of haulers are opposed to Public Collection with the opposition based in perhaps 3 general categories:
 - The first is a basic fear of the unknown and the potential for change to adversely affect existing business;
 - The second is a general mistrust of government;
 - The third is their view of the market. The large national companies view Public Collection as a threat to their significant share of this market and their preference to internalize waste to their landfills. The mid-sized and larger independents view Public

Collection as a barrier to their continued growth. Several mid-to-small size independents view Public Collection as a threat to the value of their company and their planned retirement.