

# Appendix C: Pilot Project Implementation

	Page
Bin Decal Design, Printing Specifications and Cost	2
Letter Promoting the Effectiveness of Recycling	4
Temporary Labor Specifications	5
Training Session Agenda for Temporary Laborers	10
Decal Application: Lessons Learned	13
Telemarketing Specifications and Scripts	14
Telemarketing Quotes	21
Script for Telemarketer Training Video	22
Detailed Telemarketing Results	25
Telemarketing: Lessons Learned	28
Procuring Telemarketing Records	28
Costs for Telemarketing Records	28
Mailing: Procedures and Lessons Learned	29
Identifying Toter Buildings	30
Project Chronology	30
Project Costs and Funding	31
Vendor List	32

## ***Bin Decal Design, Printing Specifications and Costs***

### Design

Greg Smizer, Chair of the Waltham Recycling Committee, took photographs of the recyclables accepted in Waltham's program. Turkle Designs (state contract #RFR EQE H08-01) used the photographs to create a customized decal for Waltham. The decal was based on an original design created by Jessica Nolan, Recycling Program Manager for the City of Cambridge. Turkle Designs is able to customize the decal for other communities. (See the list of project vendors for contact information.) The design cost will depend on the extent of the changes desired.

□ **Tip:** Communities who wish to substitute photographs for the ones used in the current decal design should make sure the photographs are taken with a digital camera. Using digital photographs will cut down on design costs and provide the sharpest images.

### Printing Specifications

- Label Size: 8.00" x 8.50"
- Material Construction: 4 Mil White Vinyl with Permanent Adhesive
- Colors: 4 Color Process with Solar Clear Coat
- Lamination: None

### Quotes and Costs

□ **Tip:** Printing high quality decals requires specialized expertise. Quotes should be solicited from companies that have substantial experience in this area, or better yet, specialize in printing decals.

Waltham solicited printing quotes from:

1. **Sterling Printing** (on the state printing contract)  
Contact: Ricky Malrani 781-481-1234 x202
2. **Turkle Designs**  
Turkle Designs works with a decal printer that provides services only through Turkle Designs.
3. **Central Decal Company, Inc.** (See vendor list for contact information.)

Central Decal was chosen to print the decals. Their prices for various quantities of decals are as follows:

Quantity	Finishing Process	
	Die Cut in Rolls	Kiss Cut to Liner, Waste Removed, Cut into Individual Sheets
1,000	\$.427 ea.	\$.468 ea.
2,000	\$.300	\$.435
3,000	\$.259	\$.289
5,000	\$.225	\$.254
7,000	\$.211	\$.240
8,000	\$.207	\$.238
10,000	\$.200	\$.235
25,000	\$.186	\$.218
50,000	\$.181	\$.212
One Time Charges: \$495 Preparation Charge if Photographs are Changed \$160 Preparation Charge if Text Only is Changed Design costs not included.		

Prices as of May 16, 2002. Prices good for 30 days.

Decals cut into individual sheets were purchased for delivery to test area residents via the mail. Decals on rolls were purchased for application on bins. The decals were ordered in rolls of about 500, but it turned out that rolls of that size were too heavy to carry around.

□ **Lesson Learned:** Rolls of 50-100 decals each are the easiest to handle and do the best job of protecting the unused decals. Decals for bin application should be ordered in these smaller rolls.

The quantity of decals needed for **delivery to the test areas via the mail** was based on a household count provided by the City's mailing house. It also included an estimate of the number of residents on the Tuesday 282 route that would be willing to talk to their neighbors about the decals. Each of these residents was mailed one extra decal to provide to a neighbor as necessary.

□ **Tip:** If you obtain a household count from the mailing house that your community uses, make sure that duplicate heads of households are excluded. Households may be inadvertently counted more than once if the data contain duplicate heads of households. Duplicate heads of household may be present in city or town census data when more than one person at the same address identifies themselves as head of household. This problem also occurs in communities with transient student populations. Students who respond to the community census cannot be removed from the census data unless the community receives written notification that they are no longer a voter in that community. Since this notification rarely happens, the census may contain years worth of students who are supposedly residing at the same address, but who've actually moved away.

The quantity of decals needed for **application on bins** was based on the household count and the estimated participation rate. Extra decals were included in this order to account for unforeseeable contingencies and for the fact that some households set out two bins.

## ***Letter Promoting the Effectiveness of Recycling***

Dear Waltham Resident:

Did you know that the Boston Herald that you buy at the corner store is made from the newspapers that you recycle at the curb? And that the aluminum cans in your bin end up back in your Reynolds Wrap? Would you have guessed that your old soda bottles travel to Georgia and come back to life as carpet and yarn? And, when you enjoy a sunny day at the Waltham Common, recyclables are no further away than the bench near the bandstand. The bench (identified with a sign), as well as the walkway across the Calvary Street Footbridge, were constructed with plastic lumber, which is made from old plastic bottles.

A visit to the New Hampshire plant that sorts our recyclables is all it takes to realize that recycling is big business. Bulldozers are busily pushing piles of paper and containers onto conveyor belts, where the sound of glass clinking and machinery clanking keeps pace with workers, who quickly pick out the different recyclable materials and throw them into bunkers. Five feet high bales of cardboard or bright orange detergent bottles or crushed tin cans await the next truck out to Quebec, Georgia or Michigan, where they will be used in manufacturing.

I am proud that our City is returning waste materials to such productive uses. Waltham recycled almost 5,200 tons of paper, bottles, cans and yard waste in 2001. That's 400 trash trucks-worth of material that went to the sorting plant and on to productive uses instead of being burned at the SEMASS incinerator in Rochester, Massachusetts. Thanks to our recycling efforts, BFI only needs five or six trucks to pick up our trash in Waltham each day, rather than the seven or eight that it would take if we recycled nothing at all.

Finally, in fiscal year 2001, Waltham saved \$14 for every ton it recycled rather than threw away, for a total of \$51,564 for the year. \$51,000 pays for the annual maintenance of eight of our neighborhood parks -- an important contribution to our quality of life here in Waltham.

Please help us recycle even more by studying the enclosed decal to learn if anything that you have been throwing away can be recycled. Attach the decal to a convenient location like the inside of a kitchen cupboard door. Refer to it when you have questions about what can be recycled. If you are currently recycling, we attached an identical decal to your recycling bin while it was at the curb during the last two weeks, for your convenience.

If you need a recycling bin, an additional bin or a larger bin, please call the City at 781-314-3395. Thank you for participating in this worthwhile program.

Sincerely,

Mayor David F. Gately

**CITY OF WALTHAM, MASSACHUSETTS  
DEPARTMENT OF PUBLIC WORKS**

**Specifications for Employment Contracting Services**

BACKGROUND

The City of Waltham is testing an outreach strategy for increasing participation in its curbside recycling program. The test involves applying decals to the sides of recycling bins that have been set out at the curb. The City is seeking to hire temporary help to apply the decals. The scope of work is described below:

SCOPE OF WORK

The City of Waltham seeks to contract with a employment contractor to do the following:

1. Provide one 3 person crew with a vehicle on Monday, May 6<sup>th</sup>, and two 3 person crews with vehicles on Tuesday, May 7<sup>th</sup>. Provide one 1 person crew with a vehicle on Monday, May 13<sup>th</sup> and two 1 person crews with vehicles on Tuesday, May 14<sup>th</sup>.
2. The work start time for each day will be 6:50am. Crews will be expected to be in place and ready to begin work at 6:50am. Crews will be asked to report to work start locations in central Waltham.
3. On Monday and Tuesday, May 6<sup>th</sup> and 7<sup>th</sup>, crews will be asked to apply decals to roughly 450 to 550 bins each day. Regardless of whether the number of bins is higher or lower than the estimated range, the crews are expected to apply a decal to each bin at the curb on a designated route. On Monday and Tuesday, May 13<sup>th</sup> and 14<sup>th</sup>, the crews will be asked to examine each bin at the curb and to apply a decal to each bin that DOES NOT ALREADY HAVE ONE. The number of decals that will have to be applied is expected to be much lower on May 13<sup>th</sup> and 14<sup>th</sup> than on May 6<sup>th</sup> and 7<sup>th</sup>.
4. It is expected that the decal application will take between 7 and 9 hours each day, but the employment contractor will be paid for the number of hours the crews actually work, whether it is more or less than the above estimate.
5. The crews will be provided with a map showing the roads that need to be covered each day. The roads must be covered in a particular sequence, which will be designated. The route sequence will be the same as that followed by the recycling truck working in that area. The goal is for the decals to be applied to the bins as soon as possible after the bins are emptied by the recycling truck. The crews will be expected to make their best effort not to fall too far behind the truck and not to get ahead of the truck. This procedure will accomplish two goals: By keeping up with the truck, the crews will have a better chance of applying a decal to the bin before the householder retrieves their empty bin from the curb. By not getting ahead of the truck, the crews will have an easier time of applying the decal, since an empty bin can be turned on its side and a full bin cannot.

**□ Lessons Learned:** See Training Session Agenda for Temporary Workers

6. The crews will be provided with rags to be used to wipe off excessively dirty bins before decal application. The decals must be applied neatly and securely. Rainy weather will cancel decal application. Notification will be provided to the employment contractor by 5:00am if decal application is cancelled.
7. It is expected that the most efficient method of decal application is for the crews to leave their vehicle at an entrance point to a neighborhood and to walk the streets in a neighborhood while applying decals. The crews will carry decals in shoulder bags provided by the City of Waltham. A supply of decals will be kept in the vehicle so that the crews can resupply themselves between neighborhoods.

8. Decal application will involve kneeling on the ground near the bin, removing the backing from the decal, carefully applying the decal to the bin, and rising from a kneeling position, all while carrying a heavy shoulder bag. All crew members must have the physical capability and dexterity to carry out these motions repetitively over the course of 7-9 hours. Breaks taken by the crews will be expected to mirror the breaks taken by the recycling truck as much as possible. Some trucks take more breaks than others. The crews should bring a lunch with them that can be eaten on the go, as some trucks do not stop for lunch. Restrooms in public buildings will be identified along the routes for the crews' convenience.

**□ Lessons Learned:** See Training Session Agenda for Temporary Workers

9. One member of the three person crew must be an individual capable of assuming supervisory responsibility for the crew, while also doing decal application. The crew supervisor must have a cell phone whereby he/she is reachable by the Waltham Department of Public Works at all times while work is in progress. The one person crew must be a responsible individual who is capable of functioning at a supervisory level, and must have a cell phone and be reachable at all times. The supervisor must be literate, be able to read a map and will be expected to mark off streets on the maps provided as the streets are completed.
10. Because some householders may have questions for the crews regarding the decal application, it is important that each crew member speak sufficient English to explain the purpose of the decal in one or two sentences. If the householder has additional questions, the crew member must be capable of politely explaining that the crew has to keep up with the truck, and that the householder can get more information by calling the phone number on a Waltham Department of Public Works business card, with which each crew member will be supplied.
11. Because it is so important that the decal application be accomplished quickly and efficiently, a training session will be held with all crew members on April 25<sup>th</sup> or 26<sup>th</sup>. The training session will provide the crews with some practice in applying decals neatly and securely; practice in responding to householders quickly and politely; a review of the route sequence and instructions for dealing with a variety of situations that might arise during the course of the work. The training session will last no more than 1 \_ hours in length. The hourly rate charged by the employment contractor will be the same for the training session as for the actual work.
12. Crew members will be provided with fluorescent orange vests, which must be worn at all times while work is in progress.
13. A gas allowance will be provided at a rate of \$.34 per mile for miles driven between the commencement of work at 6:50am and the end of 7-9 hour work day.

## QUOTATION PROCESS

1. Quotes must be provided on the price summary form on the next page. Quotes should be faxed to Jan Aceti of Aceti Associate at 1-914-931-2038 by 5pm on Monday, April 8, 2002.
2. Quotes should be accompanied by a statement describing the firm's experience in providing temporary employment services.
3. **Quotes must be accompanied by three customer references that include contact names and phone numbers.**
4. Clarifications on the Scope of Work should be directed to:

Jan Aceti  
Project Consultant  
Aceti Associates  
19 Allen St. #2  
Arlington, MA 02474  
781-646-4593  
j.aceti@worldnet.att.net

**PRICE SUMMARY FORM**

All costs associated with the services set forth in the scope of work must be included in the hourly price, except for the gas allowance. Prices must remain firm throughout the entire period during which work is being done.

**Three person crew w/vehicle.....\$ \_\_\_\_\_ per hour**

**One person crew w/vehicle.....\$ \_\_\_\_\_ per hour**

---

Name of company representative

---

Signature of company representative

---

Phone Number of company representative

---

Email Address of company representative

---

Name of company

---

Address of Company

---

Fax Number

Potential Vendors (identified via the Yellow Pages)

Anadyne Corporation  
Christina  
617-471-7200 x36

L&L Associates  
Paul Sullivan  
617-423-4455

Labor Ready  
Bob Stewart  
781-894-2444

Remedy  
Lisa  
617-774-1775

## Training Session Agenda for Temporary Workers

□ **Lesson Learned:** The training session was valuable. The workers who attended the training session performed better in general than those who had not.

### Applying the Decals

Apply on either of the wide sides of bin

Wipe off excessive dirt first (City to provide rags)

Align carefully and eliminate air bubbles

Do not litter backing. Put in trash can or leave in your bag.

Apply to every bin unless there are two in front of a single-family home. Then, only apply to one of the two bins

□ **Lesson Learned:** This instruction was often misunderstood by the workers. A straightforward instruction to put a decal on every bin at the curb would have been a better idea.

You may see the truck emptying some big blue barrels with wheels and lids. Do not put decals on these containers.

### Following the truck

Be at start locations and ready to work at 6:50am. You will want to park your car as near to the start location as possible.

In some sections, it will be easier to walk and decal. In other sections, it will be easier to drive and decal.

Always work together as closely as possible on the same street

□ **Lesson learned:** It was more efficient for each crew member to complete a few streets on his or her own, and then come back to an agreed upon point, where the crew would consult the route map together and divide up the streets in the near vicinity among themselves again. Each crew member had their own copy of the route map to consult while they were on their own, in case they got lost.

Stay as close behind the truck as possible. Do not go ahead of the truck, as it will be very difficult to apply decals when bins are full.

□ **Lesson Learned:** Staying with the truck is virtually impossible. The best that can be hoped for is to be working in the same neighborhood as the truck is. Applying decals to full bins is not as easy as applying them to empty ones but it's not difficult.

You will probably lose the truck at some point. The maps indicate the order in which the truck will do different sections of the routes. Use the maps to figure out which neighborhood the truck will do next, and go there.

If the truck goes onto a street that is not on your map, follow the truck anyway, and write the name of the street down on the map.

Supervisor is to mark off each street on the map when it is completed.

If you can't find a street on the map, after looking carefully, call Jan or Eileen, whomever is on call that day. We will try to find it when we come out to meet you throughout the day.

There may an occasional street that does not have any houses on it.

### Breaks

We ask that you continue working as long as there are empty bins to be decaled. Bring a lunch with you. You may not have a chance to buy a lunch during the day. You may have to take turns grabbing a bite to eat in the car while the other two work. You will also want to bring beverages to refresh yourself throughout the day, as you may not be able to stop to buy anything.

□ **Lesson Learned:** It is unrealistic to expect that workers will bring lunches. Expect that they will need to take a lunch break

We don't know when or if the trucks will take breaks. If you have decaled all the empty bins, and can find only full bins, it is likely that the truck is taking a break. In that case, you are welcome to take a short break also.

The maps show the location of restrooms along the routes that you can use.

## Talking with the public

People may approach you and ask you questions while you are working. You will have cards with a phone number on it that people can call if they have questions that you can't answer. Here are some possible questions and answers.

Q: What are you doing to my bin?

A: We are giving everyone a decal that shows what can be recycled.

Q: That's a nice decal. Could I have another one of those?

A: I only have enough to give you one decal, but the city is going to send everybody another one in the mail in a few weeks.

Q: I don't want you to put a decal on my bin.

A: Ok, sir. I won't put one on.

Here are some questions that you do not need to answer. You can give them a card with the phone number to call.

Q: I think this is a waste of money. Who is your supervisor?

Q: I don't have a bin. How do I get one?

Q: Can you tell me if orange juice cartons are recyclable?

A: Here is the phone number of someone at the City that you can talk to about it, ma'am.

If you do not know how to answer a question, give the person a card with the phone number on it to call.

It is very important to be polite to people, but at the same time, you will not have time to have a long conversation with anyone. If you cannot answer their question in a few sentences, you can say, "Sir, I have to keep working, but here is a phone number you can call if you need more information."

## Safety

You must wear an orange vest at all times when you are working.

If you are getting tired to the point where you cannot work safely, stop and rest.

## Supervision

Someone from the City will stay with you for the first \_ to 1 hour of the day, in case you have any questions. During the day, someone from the City will call you several times to determine your location. We will then come out to your location to answer any questions you might have. We will also check the streets that have been completed to ensure that no streets have been missed and that the work is being done carefully.

If you have any questions or problems at any time during the day, call Jan or Eileen. Someone will be there to answer your call and to help you.

## End of Day.

Report to the 119 School St. office at the corner of School St. and Lexington St. at the end of the day to return decals and vests. We will also want to take a little time to ask you if you ran into any problems during the day. Finally, we will sign your time sheets.

## VIII. Gas Allowance

Note your odometer reading at the commencement of work at 6:50pm, and then when you arrive back at 119 School St. at the end of the day. The mileage driven will be used to calculate a gas allowance which will be paid to Labor Ready.

- IX. Practice putting decals on bins
- X. Role Playing Questions and Answers

## **Decal Application: Lessons Learned**

Although we were able to get the job done, using temporary laborers had drawbacks. Here are the lessons learned:

**Lesson Learned:** The specifications indicated that one member of the three person crew must be an individual capable of assuming supervisory responsibility for the crew, while also doing decal application. In reality, the agency was unable to provide anyone with this capability. As a result, project staff spent more time on supervision than had been anticipated. During most of the decal application, spot checking completed work every few hours was essential.

**Lesson Learned:** The agency was not able to provide the same workers on all four days of decal application. Furthermore, many of the workers were not the same ones who had attended the training session. Plan to provide a mini training session each morning for new workers who were not at the training.

**Lesson Learned:** The agency was not always able to provide workers at the agreed upon start time. Furthermore, the workers were not always prepared – gas tanks needed to be filled, minutes needed to be purchased for cell phones, clothing was not appropriate for the weather.

**Recommendation:** Communities planning to apply decal to recycling bins should explore the use of municipal workers with a responsible supervisor or committed volunteers if possible. If temporary laborers are used, adjust your expectations accordingly and plan to provide lots of supervision.

Table 1 indicates the time it took to complete decal application on each route.

	Monday 282		Tuesday 282		Tuesday 280	
Typical Completion Time for Recycling Truck	8 hours		7 hours		5 hours	
Number of Households on Route	2,039		1,086		1,018	
Number of Person Hours to Complete Decal Application	Week 1 33.75 hrs	Week 2 14.5 Hrs	Week 1 21hrs	Week 2 9.5 hrs	Week 1 20.5 hrs	Week 2 7.5 hrs
Number of Crew Hours to Complete Decal Application (Week 1: 3 person crew; Week 2: 1 person crew)	11.25 hrs	14.5 hrs	7 hrs	9.5 hrs	6.8 hrs	7.5 hrs

**Recommendation:** Assign, or hire enough people so that a crew can complete the decal application in the same or fewer hours than it takes the truck to finish the route.

On one day, decals were applied in the rain, in order that the decals would be applied during the same two weeks that the phone calls were being made. While this is doable, it is not recommended. The drawbacks of applying stickers in the rain outweigh the benefits of applying them while the phone calls are being made. Inspections done several weeks later indicated that the stickers applied on this part of the route were less likely to be properly secured to the bin. The adhesive worked in wet weather. However, the decals did not always adhere well because the rain kicked up a lot of grit onto the bins. The unpleasant working conditions made it less likely that the crew members took the time to try to clean the bins off.

**Recommendation:** Apply decals only during good weather. In order to accommodate uncertainty in the weather, do not set a schedule for the phone calling and the mailing until the decal application is complete. (It is important that the mailing follow the phone calling as closely as possible so that residents' commitment to review the decal is fresh in their mind when the mailing arrives. The phone call could include a reminder to residents that a decal had also been applied to their bin several weeks before.)

**CITY OF WALTHAM, MASSACHUSETTS  
DEPARTMENT OF PUBLIC WORKS**

**Specifications for Telemarketing Services**

BACKGROUND

The City of Waltham is testing an outreach strategy for increasing participation in its curbside recycling program. The test involves calling households in a particular geographic area to attempt to secure a commitment from them to place a decal with recycling information on their recycling bin or another convenient location in their home. The decal will subsequently be sent to them in the mail. Telemarketing services will be required to carry out this pilot project. The scope of work is described below:

SCOPE OF WORK

The City of Waltham seeks to contract with a telemarketing firm to do the following:

1. Call the households located in one to two test areas between May 6th and May 17, 2002. Each test area has 1,180 households. The City will provide a list of names, addresses and phone numbers for the test areas in an Excel spreadsheet. The City expects to be able to provide phone numbers for 70-85% of the households in the test areas. The number of test areas, and therefore the number of households to be called will be determined by the City based on the cost of the telemarketing services and the funds available for this project.

□ **Tip:** Spreading the calls over a two week period increases the likelihood that people will be found at home on one of the attempts to reach them.

2. Make two or three attempts to reach each household, depending on the number of attempts requested by the City. It is understood that the number of households that can be reached depends in part upon the quality of the phone number data provided by the City. However, the City directs the telemarketer to make its best effort to reach at least 60% of the households for which phone numbers are provided if two attempts are requested and at least 75% if three attempts are requested. Furthermore, the City directs the telemarketer to make its best effort to achieve a survey completion rate of at least 65% of the households for which phone numbers are provided

□ **Lesson Learned:** The targets for households reached are very near the upper limit for this type of project. One firm declined to bid because they were concerned about unrealistic expectations. A more realistic goal for three attempts would be to reach 65% of households.

3. Draft scripts for the phone calls can be found in Appendix A. Script I will be used in one test area and Script II in the second test area, should the City decide to conduct telemarketing in both areas. The firm that is chosen to perform the work will review the draft script and suggest revisions as necessary. Five days of lead time will be provided between the awarding of the work and the commencement of phone calling for script review and revisions and caller training. The City will also provide a list of frequently asked questions about the recycling program and appropriate responses.
4. Provide the following information to the City for each test area at least once during each calling attempt. Following the telemarketing campaign, provide the following information for each test area for each calling attempt and for the telemarketing campaign as a whole.

- a. Percent invalid phone numbers

- b. Number of households reached
- c. Percent refusals
- d. Percent of surveys completed
- e. Percent of households who made a commitment to review the decal and put it on their bin
- f. Percent of households who were willing to have their name published in the newspaper
- g. Percent of households who knew collection is weekly
- h. Percent of households who did not currently have a recycling bin
- i. Percent of households who have a bin, but whose bin is not big enough
- j. Percent of households who were willing to talk with their neighbors

**Lesson Learned:** The variety of possible resolutions to a telemarketing call is actually much broader than the list given here. See the telemarketing results in section VI of the report for a more extensive list of items upon which the telemarketer might be asked to report back. Our experience indicates that the more detailed the guidance provided to the telemarketer regarding the reports, the more likely it is that you will receive the information that you need in a timely manner.

**QUOTATION PROCESS**

1. Quotes must be provided on the price summary form on the next page. Quotes should be faxed to Eileen Zubrowski, Waltham Recycling Coordinator at 781-314-2033 by 5pm on March 29, 2002.
2. Quotes should be accompanied by a statement of qualifications of no more than two pages in length that describes the firm's experience in telemarketing, the background of the project manager and the staff and equipment resources that the firm will use to accomplish the scope of work.
3. **Quotes must be accompanied by three customer references that include contact names and phone numbers.**
4. Questions regarding this Request for Quotes should be directed to the appropriate person as listed below.

**CONTACT INFORMATION**

For Questions On:	Contact	Contact Information
1) Quote Submission Process	Eileen Zubrowski Waltham Recycling Coordinator	119 School St. Waltham, MA 02451 781-314-3391 781-314-3032 (fax) ezubrowski@city.waltham.ma.us
1) Clarifications on Scope of Work	Jan Aceti Project Consultant	Aceti Associates 19 Allen St. #2 Arlington, MA 02474 781-646-4593 j.aceti@worldnet.att.net

**PRICE SUMMARY FORM**

All costs associated with the services set forth in the scope of work must be included in the hourly price. Prices must remain firm throughout the entire period during which work is being done. The number of households is based on the assumption that the City will be able to provide phone numbers for roughly 78% of the households in each test area. The telemarketer will be expected to call the actual number of households for which phone numbers are provided, whether that number is higher or lower than the number stated below. The total fee paid to the telemarketer will be adjusted proportionately based on the number of phone numbers provided and therefore, the number of hours. The work will be awarded based on the sum of the total price for calling plus one time fees, the statement of qualifications, reference checks and the City of Waltham's budget.

Number of Households and Number of Attempts	Number of Hours	Price per Hour	Total Price
920 Households Script 280			
2 attempts	hrs	\$	\$
3 attempts	hrs	\$	\$
920 Households Script 282			
2 attempts	hrs	\$	\$
3 attempts	hrs	\$	\$

One time fees for script review, database import, preparing fields for data capture, training, and reports			\$ _____
--	--	--	----------

\_\_\_\_\_  
Name of company representative

\_\_\_\_\_  
Signature of company representative

\_\_\_\_\_  
Phone Number of company representative

\_\_\_\_\_  
Email Address of company representative

\_\_\_\_\_  
Name of company

\_\_\_\_\_  
Address of Company

\_\_\_\_\_  
Fax Number

APPENDIX A

**SCRIPT #280**

(No neighbor to neighbor outreach)

Hello, my name is \_\_\_\_\_ and I am calling for the City of Waltham's Recycling Department. Could I speak just for a moment to the person in your house who would handle recycling? REPEAT INTRODUCTION IF ANOTHER PERSON COMES TO THE PHONE. I'm calling to give you a little information about the recycling program and also to ask you a couple of questions about it. This should take less than 3 minutes. Would that be ok?

1. First of all, did you know that Waltham now collects recyclables every week on trash day rather than every other week?

1.1 [IF YES] – Good. We're finding that most people do know.

1.2 [IF NO] – Yes, you can now set your recyclables out with your trash every single week on trash day. It's a lot more convenient that way than storing them for two weeks, and then trying to remember if it's the right week for recycling.

2. My second question is: Does your household have a recycling bin?

2.1 [IF YES] Good. Is your bin big enough? [If yes, skip to item 3]

2.1.1 [IF NO] Well, the City now has bins that are about 4 gallons larger than the ones that were handed out when the recycling program started. You can also get a second bin from the City for only \$3. I can give you the phone number to call if you'd like [781-314-3395] or, you'll be getting some information in the mail the week of May 20th with the phone number in it. Would you like the phone number now, or would you rather wait?

2.2 [IF NO] Well, bins are available from the City if you'd like one. I can give you the phone number to call if you'd like [781-314-3395] or, you'll be getting some information in the mail the week of May 20th with the phone number in it. Would you like the phone number now, or would you rather wait?

3. So, I also wanted you to know that between May 6<sup>th</sup> and May 17<sup>th</sup>, we'll be attaching decals to recycling bins while they're at the curb. The decal has big, beautiful photographs on it that show all the things that are recyclable in the City's program. We'll also be sending you a second decal in the mail the week of May 28th, just in case you'd like to put one in another convenient location, like the inside of a kitchen cupboard door or in the pantry.... So my question for you is: Would you be willing to take a careful look at the decals when they arrive and also to refer to them later if you have questions about whether something's recyclable?

4. [IF NO] Well, thank you for taking the time to talk with me and have a good day (evening).

4.1 [IF YES] Thanks! That's great! The City is also planning to purchase an ad in the Daily News Tribune in order to recognize everyone who has made this pledge to review the decal. We also think that printing an ad with the names of recycling program supporters will get more people interested in the program. We can print your first and last name, or just last and initial. There is no cost to you whatsoever. May we include your name, and if so, how would you like it to appear?

4.1.1 [IF YES] Thank you. Am I speaking to \_\_\_\_\_? Is this spelling correct? \_\_\_\_\_. Thank you again for your time. It's been a pleasure talking with you. Have a good day (evening).

4.1.2 [IF NO] That's fine. Not everyone is comfortable having their name appear in the paper. Thank you for your willingness to review the decal and refer to it as needed. It has been a pleasure talking with you. Have a good day (evening).

## SCRIPT #282

(Includes neighbor to neighbor outreach)

Hello, my name is \_\_\_\_\_ and I am calling for the City of Waltham's Recycling Department. Could I speak just for a moment to the person in your house who would handle recycling? REPEAT INTRODUCTION IF ANOTHER PERSON COMES TO THE PHONE. I'm calling to give you a little information about the recycling program and also to ask you a couple of questions about it. This should take less than 3 minutes. Would that be ok?

1. First of all, did you know that Waltham now collects recyclables every week on trash day rather than every other week?

1.1 [IF YES] – Good. We're finding that most people do know.

1.2 [IF NO] – Yes, you can now set your recyclables out with your trash every single week on trash day. It's a lot more convenient that way than storing them for two weeks, and then trying to remember if it's the right week for recycling.

2. My second question is: Does your household have a recycling bin?

2.1 [IF YES] Good. Is your bin big enough? [If yes, skip to item 3]

2.1.1 [IF NO] Well, the City now has bins that are about 4 gallons larger than the ones that were handed out when the recycling program started. You can also get a second bin from the City for only \$3. I can give you the phone number to call if you'd like [781-314-3395] or, you'll be getting some information in the mail the week of May 20th with the phone number in it. Would you like the phone number now, or would you rather wait?

2.2 [IF NO] Well, bins are available from the City if you'd like one. I can give you the phone number to call if you'd like [781-314-3395] or, you'll be getting some information in the mail the week of May 20th with the phone number in it. Would you like the phone number now, or would you rather wait?

3.0 So, I also wanted you to know that between May 6<sup>th</sup> and May 17<sup>th</sup>, we'll be attaching decals to recycling bins while they're at the curb. The decal has big, beautiful photographs on it that show all the things that are recyclable in the City's program. We'll also be sending you a second decal in the mail the week of May 28<sup>th</sup>, just in case you'd like to put one in another convenient location, like the inside of a kitchen cupboard door or in the pantry.... So my question for you is: Would you be willing to take a careful look at the decals when they arrive and also to refer to them later if you have questions about whether something's recyclable?

3.1 [IF NO] Well, thank you for taking the time to talk with me and have a good day (evening)

3.2 [IF YES] Thanks! That's great! The City is also planning to purchase an ad in the Daily News Tribune in order to recognize everyone who has made this pledge to review the decal. We also think that printing an ad with the names of recycling program supporters will get more people interested in the program. We can print your first and last name, or just last and initial. There is no cost to you whatsoever. May we include your name, and if so, how would you like it to appear?

3.2.1 [IF YES] Thank you. Am I speaking to \_\_\_\_\_? Is this spelling correct?  
\_\_\_\_\_.

3.2.2 [IF NO] That's fine. Not everyone is comfortable having their name appear in the paper.

3.3 [IF YES OR NO] OK, here's my last question. We're simply not going to be able to reach everyone by phone during this campaign. So, in order to help spread the word about the decals, we're asking if each person we contact might be willing to mention the decals to a neighbor or two, and pass along the request that people take a careful look at them when they get them. Is this something you could help us with?

4.1.3.1 [IF YES] Thank you. How many neighbors do you anticipate being able to talk with? \_\_\_\_ That's great! We will send you an extra decal in the mail, just in case it turns out that someone didn't get one. I have your address as \_\_\_\_\_. Is that correct? . [If not, make correction in spreadsheet.] Thank you again for your time. It has been a pleasure talking with you. Have a good day (evening).

4.1.3.2 [IF NO] OK, that's fine. . It has been a pleasure talking with you. Have a good day (evening).

Potential Bidders (Identified via Verizon and online yellow pages)

Larry Quemere  
 Appointment Setters  
 Abington  
 781-878-5556  
 781-878-6465 fax

Marie Gurley  
 AccessTelemarket Incorporated  
 Methuen  
 978-683-3939  
 978-685-2551 fax

William Tilburg  
 APB Inc  
 Stoughton  
 888-832-6272  
 781-341-1247 fax

Michael MacIntire  
 MacIntire Marketing Enterprises  
 888-324-0564  
 727-587-9467 fax  
 macintiremkgent@tbi.net

Dan Burbank  
 Boston Voice  
 Portsmouth, NH  
 800-439-8103  
 6003-766-6292 (fax)

**□ Lesson Learned:** We received three quotes for telemarketing services. Because the quality of the services provided were so essential, and because telemarketing was the most expensive service used in the project, all of the quotes are summarized below. All bidders quoted the same number of hours for script 280 and script 282.

Number of Households and Number of Attempts	Number of Hours		Price per Hour	One Time Fees
	2 attempts	3 attempts		
Appt. Setters	60	90	\$30	\$0
Access	65	85	\$32	\$1,620
MacIntire	35	40	\$26	\$0

A conversation with MacIntire Marketing confirmed that getting through the calls quickly was paramount for them. When making commitment phone calls, it is important that the callers be able to take a few extra moments in the conversation if need be. It did not seem as though MacIntire Marketing would have been a good choice for this project.

## Script for Telemarketer Training Video

My name is Jan Aceti.

I managed recycling programs for the City of Cambridge for many years, and am now working with the City of Waltham to test several strategies for increasing participation in their curbside recycling program.

We have developed these strategies using an approach called community-based social marketing.

One of the principles of community-based social marketing is that when personal contact is used to deliver a message, people are more likely to engage in the activity that's being promoted. That's where you come in. You will be making that personal contact with Waltham residents for us.

The strategies that we are testing in Waltham have never before been used in Massachusetts to promote recycling. The state Department of Environmental Protection and the City of Waltham have both contributed a considerable amount of funding to testing these innovative strategies. If they're successful, it is likely that they will be used in communities throughout the state to increase recycling participation. So, you are part of something very new and cutting edge, and your work on this project has far reaching implications. Once the phone calls are complete, we will be monitoring the amount that people recycle for about six weeks. After we evaluate the project, I will let Larry know how the strategies worked, so that he can inform you of the results of your efforts.

The strategies that we are testing revolve around personal contact through phone calling and also around the provision of a decal to residents that shows photographs of recyclable items. We are hoping that presenting people with information in a vivid way, through pictures, will help people to remember what is recyclable. Each of you has a printout of the decal design so that you will know what you are referring to in the phone conversation.

We are testing two strategies involving phone calling and the decal – each strategy will be tested in an area covered by a different recycling truck. One area is covered by truck 282 and the other area is covered by truck 280. In both of areas, we will be applying a decal to each recycling bin that is out at the curb over a two week period and we will also be sending everyone a decal in case they don't have a recycling bin or want to put a second decal in a location that is more convenient than their bin. The difference in the strategies will be that the phone calling scripts that we use in each area will be different in a small but important way.

Research also shows that public commitments are more powerful than private ones, so we will also be letting people know that we are planning to recognize everyone who has pledged to review the decal by publishing their names in the local newspaper -- with their permission, of course.

Ok. Now we've arrived at the difference between the two scripts. In one area we are going to add an additional element to the script. We are going to ask people if they would be willing to talk with their neighbors about the decal. We are interested in testing this element, because # 1, as you know, we are not going to be able to reach everybody by phone. #2, as I mentioned, personal contact is very powerful, so we would like to encourage that neighbor to neighbor contact. Finally, research shows that people who are asked to talk with others about engaging in an activity are actually more likely to carry out the activity themselves than those who are not asked to do so. You might be saying to yourselves, "I don't think so. People don't talk much with their neighbors anymore." Actually that was the opinion of two long time residents of Waltham who work for the City. So, a decision was made that I would do a little test by calling enough households to reach 20 people. To everyone's surprise, including mine, 75% of the people we reached were willing to talk with neighbors. On average, people were willing to talk to about 3 neighbors each!

We also tested the rest of the script, and I thought you might be interested in the results. 86% of the households were willing to make a commitment to review the decal. 67% were willing to have their names published in the newspaper. And we took names randomly out of the phone book. This was not a special population. So, I think the chances are good that people will be responsive to our requests, as long as we approach them with genuine enthusiasm and with respect and sensitivity. So, I have a challenge for you. I challenge you to do even better than I did, to get commitments to review the decal from more than 86% of the households, to get permission from at least 67% to agree to have their names published in the newspaper and to get more than 75% to agree to talk with their neighbors.

[The "neighbor -to -neighbor" script was role-played here.]

Here's a couple of things to keep in mind:

1. It's ok to go off script a little bit, if it seems called for. The point is to convey the message that we are really interested in talking to people about this, and we are really interested in their response. However, as you know, there's a balance to be found between extending the conversation and getting through all the calls. I leave that up to your discretion.
2. Research also shows that commitment will not work if people feel pressured to commit. If we convey our request with genuine enthusiasm and interest in people's response and they're not interested, it ends there. We thank them and move on.
3. What if someone does not have a recycling bin? They obviously can't be recycling if they don't have a bin. Do we ask them all the other questions anyway? Yes.
4. If people are not willing to review the decal, we do not ask them if we can publish their names or whether they will speak to neighbors

5. If people pledge to review decal, but don't want their name in paper, we still ask them if they will talk to neighbors.
6. . We must ask people's permission to put name in paper and must ask them how they want it to appear
7. .If you ask someone if they have a bin, and they say their building has the big containers, you can ask, "the barrels with wheels and lids?" If so, end the interview. We have tried to eliminate the addresses of buildings that have these containers but may not have been successful.
8. The frequently asked questions refer several times to a flyer or calendar. If someone indicates that they do not have one of these, but would like one, please record this in the appropriate column.
9. What if someone says they don't have enough material to recycle? Elderly people will sometimes think this. You can run down the list of things that are recyclable and ask them if they have them. If all else fails, a simple suggestion that you can make is that they recycle junk mail in a paper bag. Everyone has junk mail, and everyone can get paper bags, even if they are inside plastic bags, at the grocery store. It probably does not make sense to continue the interview much past the junk mail suggestion, if it comes to that.
10. Someone may say that they don't have a bin, but use a container of their own choosing. This is fine, just continue on.
11. What if someone wants to be sent more than one additional decal to give to their neighbors? The answer is: The City will be happy to provide you with some more extras, but I will need to ask you to call 781-314-3395 to request them, if you wouldn't mind. The system I have here is only set up to put in a request for one extra decal."

CSD Route - Survey Totals			(Number of Telemarketing Records = 1003)								
# of phone #'s called	1003		# of phone #'s called	571		# of phone #'s called	413		# of phone #'s called	1003	
<u>Attempt 1</u>	<u>Total</u>	<u>Percent</u>	<u>Attempt 2</u>	<u>Total</u>	<u>Percent</u>	<u>Attempt 3</u>	<u>Total</u>	<u>Percent</u>	<u>Total Results</u>	<u>Total</u>	<u>Percent</u>
<b>Hshlds Not Reached</b>			<b>Hshlds Not Reached</b>			<b>Hshlds Not Reached</b>			<b>Hshlds Not Reached</b>		
Busy	0	0.00	Busy	1	0.00	Busy	5	0.01	Busy	5	0.005
Disconnected Number	58	0.06	Disconnected Number	6	0.01	Disconnected Number	2	0.00	Disconnected Number	66	0.07
Do Not Call	10	0.01	Do Not Call	1	0.00	Do Not Call	0	0.00	Do Not Call	11	0.01
No Answer	504	0.50	No Answer	368	0.64	No Answer	308	0.75	No Answer	308	0.31
Not Applicable	0	0	Not Applicable	432		Not Applicable	590		Not Applicable	0	
No Number	2	0.002	No Number	0	0	No Number	0	0	No Number	2	0.002
Fax Number	4	0.004	Fax Number	0	0	Fax Number	0	0	Fax Number	4	0.004
No Results	0	0	No Results	0	0	No Results	6	0.015	No Results	6	0.006
<b>Households reached</b>	<b>425</b>	<b>0.42</b>	<b>Households reached</b>	<b>195</b>	<b>0.34</b>	<b>Households reached</b>	<b>92</b>	<b>0.22</b>	<b>Households reached</b>	<b>601</b>	<b>0.60</b>
<b>Total Dials</b>	<b>1003</b>		<b>Total Dials</b>	<b>1003</b>		<b>Total Dials</b>	<b>1003</b>		<b>Total Dials</b>	<b>1003</b>	
<b>2 Wheel Bin</b>	<b>89</b>	<b>0.21</b>	<b>2 Wheel Bin</b>	<b>2</b>	<b>0.01</b>	<b>2 Wheel Bin</b>	<b>0</b>	<b>0.00</b>	<b>2 Wheel Bin</b>	<b>91</b>	<b>0.151</b>
Please Call back	8	0.02	Please Call back	4	0.02	Please Call back	0	0.00	Please Call back	0	0.00
Completed Survey	205	0.48	Completed Survey	124	0.64	Completed Survey	48	0.52	Completed Survey	377	0.63
Not in	59	0.14	Not in	40	0.21	Not in	28	0.30	Not in	28	0.05
Refused	0	0.00	Refused	7	0.04	Refused	2	0.02	Refused	9	0.01
Not interested	32	0.08	Not interested	9	0.05	Not interested	4	0.04	Not interested	45	0.07
Language barrier	9	0.02	Language barrier	2	0.01	Language barrier	2	0.02	Language barrier	13	0.02
Duplication	17	0.04	Duplication	1	0.01	Duplication	3	0.03	Duplication	21	0.03
Ineligible	0	0.00	Ineligible	1	0.01	Ineligible	1	0.01	Ineligible	2	0.00
Moved	0	0.00	Moved	0	0.00	Moved	1	0.01	Moved	1	0.00
Recycles w/neighbor	0	0.00	Recycles w/neighbor	1	0.01	Recycles w/neighbor	0	0.00	Recycles w/neighbor	1	0.00
Wrong Number	6	0.01	Wrong Number	4	0.02	Wrong Number	3	0.03	Wrong Number	13	0.02
<b>Review stickers</b>	<b>201</b>	<b>0.98</b>	<b>Review stickers</b>	<b>122</b>	<b>0.98</b>	<b>Review stickers</b>	<b>47</b>	<b>0.98</b>	<b>Review stickers</b>	<b>370</b>	<b>0.98</b>
Names published	114	0.56	Names published	64	0.52	Names published	26	0.54	Names published	204	0.54
No bins	12	0.06	No bins	5	0.04	No bins	3	0.06	No bins	20	0.05
Bins not big enough	20	0.10	Bins not big enough	17	0.14	Bins not big enough	9	0.19	Bins not big enough	46	0.12
Knew about weekly	196	0.96	Knew about weekly	111	0.90	Knew about weekly	36	0.75	Knew about weekly	343	0.91
<b>Talking to neighbors</b>	<b>171</b>	<b>0.83</b>	<b>Talking to neighbors</b>	<b>105</b>	<b>0.85</b>	<b>Talking to neighbors</b>	<b>39</b>	<b>0.81</b>	<b>Talking to neighbors</b>	<b>315</b>	<b>0.84</b>
Number of neighbors	503		Number of neighbors	277		Number of neighbors	87		Number of neighbors	867	
Number of flyers	6		Number of flyers	4		Number of flyers	5		Number of flyers	15	

**Note:** The percentage of households reached that were in buildings served by toters was significant on both routes: 15% on the CSD route and 20% on the Commitment route (see next page for Commitment route results). The intention had been to exclude these buildings from the pilot altogether. If a comprehensive listing of toter buildings had been available, we would have excluded toter buildings addresses from the telemarketing records. If these ineligible households had been excluded, the percentage of households reached that completed surveys would have been 74 - 75% on both routes.

**Partial Glossary:**

**Do Not Call** - Callers were instructed not to call addresses on a small street that turned out not to be on route 282.

**Not Applicable** - phone numbers that did not need to be called again because they had been resolved in one way or another in the previous attempt (survey was completed, number was disconnected, etc.)

**No Number** - Phone numbers were inadvertently left out of the telemarketing records for a small street.

**No Results** - The data showing the results of these conversations could not be located.

**Households Reached** - The sum of all call resolutions from "2 wheel Bin" through "Wrong Number."

**Total Dials** - The sum of households not reached and households reached. This sum always equals the number of telemarketing records.

**2 wheel Bin** - The householder indicated that they lived in a building served by toters.

**Not In** - The member of the household who handles the recycling was not in.

**Duplication** - The phone number reached someone in a household that had already been called.

**Ineligible** - The person resided outside of the test area.

**Number of Flyers** - If the resident happened to mention that they did not have a Waltham recycling flyer and wanted one, the callers were instructed to note this so that Waltham staff could send one out.

**Bases for Percentages:**

**Items Under "Hshlds Not Reached"** - Based on # of phone #'s called.

**Households Reached** - Based on # of phone #'s called

**"2 Wheel Bin" through "Wrong Number"** - Based on Households Reached

**"Review Stickers" through "Talking to Neighbors"** - Based on Completed Surveys

Commitment Route - Survey Results			(Number of Telemarketing Records = 897)								
# of Phone #'s called			# of Phone #'s called			# of Phone #'s called			# of Phone #'s called		
897			615			371			897		
Attempt1	Total	Percent	Attempt 2	Total	Percent	Attempt 3	Total	Percent	Total Results	Total	Percent
Hshlds Not Reached			Hshlds Not Reached			Hshlds Not Reached			Hshlds Not Reached		
Busy	0	0	Busy	0	0	Busy	1	0.003	Busy	1	0.001
Disconnected Number	54	0.06	Disconnected Number	9	0.01	Disconnected Number	0	0	Disconnected Number	63	0.07
Do Not Call	0	0	Do Not Call	0	0	Do Not Call	0	0	Do Not Call	0	0
No Answer	598	0.67	No Answer	333	0.54	No Answer	264	0.71	No Answer	264	0.29
Not Applicable	0	0	Not Applicable	281		Not Applicable	525		Not Applicable	0	
No Number	0	0	No Number	0	0	No Number	0	0	No Number	0	0
Fax Number	0	0	Fax Number	0	0	Fax Number	0	0	Fax Number	0	0
No Results	0	0	No Results	0	0	No Results	0	0	No Results	0	0
Call won't connect	1	0.001	Call won't connect	1	0.002	Call won't connect	1	0.003	Call won't connect	1	0.001
Households reached	244	0.27	Households reached	273	0.44	Households reached	106	0.29	Households reached	568	0.63
Total Dials	897		Total Dials	897		Total Dials	897		Total Dials	897	
2 Wheel Bin	2	0.01	2 Wheel Bin	110	0.40	2 Wheel Bin	1	0.01	2 Wheel Bin	113	0.199
Call back	1	0.004	Call back	1	0.004	Call back	1	0.01	Call back	1	0.002
Completed Survey	182	0.75	Completed Survey	104	0.38	Completed Survey	54	0.51	Completed Survey	340	0.60
Not in	16	0.07	Not in	37	0.14	Not in	38	0.36	Not in	38	0.07
Refused	6	0.02	Refused	1	0.004	Refused	0	0	Refused	7	0.01
Not interested	24	0.10	Not interested	10	0.04	Not interested	4	0.04	Not interested	38	0.07
Language barrier	0	0	Language barrier	2	0.01	Language barrier	1	0.01	Language barrier	3	0.005
Duplication	5	0.02	Duplication	0	0	Duplication	0	0	Duplication	5	0.009
Ineligible	0	0	Ineligible	1	0.004	Ineligible	0	0	Ineligible	1	0.002
Moved	2	0.01	Moved	3	0.01	Moved	5	0.05	Moved	10	0.02
Recycles w/neighbor	0	0	Recycles w/neighbor	0	0	Recycles w/neighbor	0	0	Recycles w/neighbor	0	0
Wrong Number	6	0.02	Wrong Number	4	0.01	Wrong Number	2	0.02	Wrong Number	12	0.02
Review stickers	180	0.99	Review stickers	103	0.99	Review stickers	54	1.00	Review stickers	337	0.99
Names published	113	0.62	Names published	73	0.70	Names published	38	0.70	Names published	224	0.66
No bins	19	0.10	No bins	7	0.07	No bins	3	0.06	No bins	29	0.09
Bins not big enough	12	0.07	Bins not big enough	16	0.15	Bins not big enough	10	0.19	Bins not big enough	38	0.11
Knew about weekly	157	0.86	Knew about weekly	91	0.9	Knew about weekly	47	0.87	Knew about weekly	295	0.87

## **Telemarketing: Lessons Learned**

□ **Lesson Learned:** It is important to review the record-by-record results a few days after calling begins and after each calling attempt is completed. These reviews enabled the project staff to identify and correct a number of problems (i.e. phone numbers had been inadvertently omitted from the records provided to the telemarketer for one small street; some records that were to have been switched from one route to the other had not been). Furthermore, reviewing the record-by-record results alerted the staff that the telemarketers were identifying totter buildings that needed to be removed from the mailing list.

## **Procuring Telemarketing Records**

In addition to procuring telemarketing services, the City also procured records for the test areas that included a householder's name, address and phone number. Telemarketing firms expect that these "telemarketing records" will be provided to them by the client. These telemarketing records are procured from a "list service." Telemarketing records can be obtained in one of two ways:

1. Telephone Appending: Provide a list of names and addresses to the list service and they will match them up with phone numbers.
2. Postal Carrier Routes: Provide a list of postal carrier routes to the list service that covers the area you are interested in. They will provide telemarketing records that include a householder's name, address and phone number.

The disadvantage of telephone appending is that it provides only a 40-60% "hit rate" (the percentage of addresses to which the list service will be able to match phone numbers). Using postal carrier rates can result in a significantly higher hit rate. Telephone appending is also more expensive than using postal carrier routes and takes longer (7-10 days for telephone appending; 2-3 days using carrier routes). The disadvantage of using postal carrier routes is that the geographic area comprised by the carrier routes does not match the geographic area of the truck routes exactly. Therefore, the telemarketing records obtained via carrier routes need to be edited to remove the records that are outside the boundaries of the truck routes. A list service can provide the records along with a wizard that allows them to be imported into an Excel spreadsheet for editing purposes.

□ **Tip:** Label columns in the telemarketing spreadsheet that correspond to each question that the callers will ask residents. The telemarketing staff can fill in these columns as they complete each call. This will help ensure that the telemarketer understands what information you expect them to gather and report on.

Waltham chose to use postal carrier routes in order to obtain the highest number of telemarketing records possible for the test areas. For the Tuesday 282 route, Waltham was able to obtain telemarketing records for 81% of the "non-totter building" households on the route. For the Tuesday 280 route, Waltham was able to obtain telemarketing records for 74% of the "non-totter building" households on the route.

## **Costs for Telemarketing Records**

### Postal Carrier Route Method

Number of Records	Price per Record*
1,001-3,500	\$.20
>3,500	\$.12
There was an additional \$20 charge for translating the records from database to Excel spreadsheet format.	

\*Telemarketing records were obtained from InfoUsa (see vendor list for contact information). Prices were scheduled to increase shortly after the records were purchased for Waltham.

InfoUsa provided 3,005 telemarketing records for the 20 carrier routes encompassing routes Tuesday 282 and Tuesday 280. These records were edited down to 1003 records for Tuesday 282 and 897 records for Tuesday 280. In addition to removing addresses that were outside the boundaries of the truck routes, addresses of units in buildings known to use toters for recyclables collection were also removed. The pilot project did not target households in toter buildings.

□ **Tip:** A list of streets in each postal carrier route for your community can be obtained at no cost from the post office.

## **Mailing**

The City's mailing house carried out the following tasks for the pilot project:

- prepared the mailing lists for the three test routes based on a list of streets provided by project staff
- printed copies of the Mayor's letter
- purchased manila envelopes and printed the return address of the Recycling Dept, the City seal, and in large letters, "Recycling Sticker Enclosed" on the outside of them
- stuffed each envelope with one letter and one decal
- included a second decal in envelopes addressed to residents who had agreed to talk with their neighbors about the decals. The mailing house extracted these addresses from the spreadsheets on which the telemarketing staff had noted the survey answers from each resident that they spoke with.

□ **Tip:** Households may be inadvertently included in a mailing list more than once if the municipal census data used by the mailing house contain duplicate heads of household. Review an address-by-address mailing list before the mailing house begins printing and preparing the mailing to ensure that duplicate mailings are not sent to the same household.

□ **Lesson Learned:** Upon reviewing the mailing list before the mailing was prepared, project staff flagged a number of errors that needed to be corrected. The mailing house did not properly remedy all of the errors, however. Consequently, some streets were inadvertently left off the mailing list. About 18% of the households on Tuesday 282 and about 3% of the households on Monday 282 did not receive the mailing at all. Always review and approve a final mailing list before printing and mail preparation begin.

□ **Lesson Learned:** By chance, after the mailing went out, data from the municipal census and from the telemarketing records were compared for about eight streets. Because addresses with unlisted phone numbers are not included in telemarketing records, one would expect that the number of telemarketing records for a given street would be less than the number of addresses for that street shown in the city census data. In fact, the reverse was true for almost all of the streets. Because the completeness of municipal census data is dependent upon how many people return their census forms, it appears that postal carrier route data obtained from a list service may be more comprehensive. A list service can provide address records without phone numbers attached, in which case addresses for homes with unlisted phone numbers would be included also. It may be possible to carry out a more accurate mailing by having the mailing house edit postal carrier route address records purchased from a list service in order to match the pilot test areas.

## Identifying Toter Buildings

As discussed in the strategy design section, buildings that use toters for recyclables collection were not included in the pilot project. We identified and excluded households in toter buildings from the phone calling and mailing lists in a number of ways:

1. BFI, the City's hauler, provided a list of known toter buildings that are served under the City's recyclables collection contract. These addresses were eliminated from the telemarketing records and mailing list.
2. To be on the safe side, the telemarketing staff was alerted to the possibility that we might not have been able to eliminate all of the toter buildings from the telemarketing records. They were told how to confirm the presence of toters if residents described having recycling containers other than curbside bins. If they confirmed that a resident lived in a building with toter service, they were to discontinue the interview. Some additional buildings with toters were identified in this fashion.
3. Project staff carefully examined the mailing lists before the mailing was prepared. Street addresses with many apartment listings were checked to determine if they were toter buildings. This review was especially helpful on the Monday 282 route, where phone calling did not take place.

## Project Chronology

Mid September, 2001	Work on project begins
November 15, 2001	Focus Groups to Evaluate Barriers to Participation
December 15, 2001–January 15, 2002	Phone Survey
January 22, 2002	Market Research Report/Strategy Recommendations Completed
February 5, 2002	Focus Groups to Evaluate Social Marketing Strategies
February 20, 2002	Strategy Revisions Completed
March 18-April 23, 2002 [1]	Baseline measurement period
May 6, 7, 13, 14, 20, 27 & 28, '02 [2]	Decal application occurs
May 7 – May 20, 2002	Phone calling takes place
June 12, 2002 [3]	Mailing goes out
June 24-July 23, 2002	First follow up measurement

[1] Baseline measurements were collected for five weeks. This period is six weeks long because of a truck breakdown during one week.

[2] Decal application was intended to take place on May 6, 7, 13 and 14<sup>th</sup>. However, because some parts of the Monday 282 and Tuesday 282 routes only became known to the project staff on May 6<sup>th</sup>, additional decals had to be ordered. Some decal application was completed on the later dates.

[3] Three and a half weeks elapsed between the completion of the phone calling and the delivery of the mailing to the post office. Much of the delay was due to the discovery of the new route areas on May 6<sup>th</sup>. Housing counts needed to be revised before material was printed and more decals needed to be ordered. Ideally, the mailing would have followed more closely upon the heels of the phone calling.

□ **Lesson Learned:** The time period between the completion of the market research report on January 22<sup>nd</sup> and the strategy evaluation focus groups on February 5<sup>th</sup> was too short. Because there were some inconsistencies in the phone survey responses regarding people's knowledge of recycling, it would have been helpful to have more time here. A longer time period would have allowed us to do a small waste composition study to determine which phone survey responses were more consistent with what people were actually recycling.

## Project Costs and Funding

### Project Expense Summary

Project Expense	Amount	Funding Source
Consulting Services	\$ 27,871.98	DEP
Focus Group Research	\$ 19,500.00	Waltham
Demographic Analysis	\$ 900.00	In Kind Donation
Decal design	\$ 570.00	Waltham
Decal Printing [1]	\$ 2,809.47	Waltham
Telemarketing [2]	\$ 5,230.00	Waltham
Telemarketing Records	\$ 621.00	Waltham
Temporary Labor [3]	\$ 1,326.29	Waltham
Printing and Mailing	\$ 2,829.00	Waltham
<b>Total</b>	<b>\$ 61,657.74</b>	

[1] This amount paid for 7,679 decals at .254 per decal plus a prep charge of \$795. In the end, only about 5,930 decals were used in the pilot.

[2] The telemarketing fee was \$5,430, but \$200 was deducted because of the extensive review time required on the part of project staff in the process of generating accurate telemarketing reports.

[3] This amount does not reflect 7.25 hours of decal application that were carried out by project staff.

### Estimated Strategy-Specific Expenses

Strategy	Apply Decal Mail Decal & Letter	Apply Decal Mail Decal & Letter Commitment Phone Call	Apply Decal Mail Decal & Letter Commitment Phone Call with Social Diffusion
Route	Monday 282	Tuesday 280	Tuesday 282
# of Hshlds	2,039	1,018	1,086
Costs [1]			
Decals [2]	\$ 749.05	\$ 373.89	\$ 479.04
Telemarketing	\$ -	\$ 2,569.00	\$ 2,861.00
Telemarketing Records	\$ -	\$ 300.00	\$ 321.00
Decal Application	\$ 623.86	\$ 365.49	\$ 397.80
Printing & Mailing	\$ 1,489.00	\$ 733.00	\$ 782.00
<b>Total Costs</b>	<b>\$ 2,861.91</b>	<b>\$ 4,341.37</b>	<b>\$ 4,840.84</b>

[1] Some expenses are adjusted to give a more accurate picture of the cost for each strategy. The decal and printing/ mailing costs are adjusted upward to reflect what the cost would have been if the mailing house had not accidentally omitted some of streets in the test areas. The telemarketing cost is adjusted to reflect the full amount that the telemarketing firm would have been paid if their report preparation had not been deficient. The decal application cost is adjusted to include the additional cost that would have been incurred if 7.25 hours of decal application completed by project staff had been charged at the same rate as the temporary laborers.

[2] The estimated decal costs for each strategy assume that the participation rate was the same on each route. In reality, this is unlikely, but the actual participation rate for each route is unknown.

## Vendor List

Service	Vendor
Focus Group Research	Contact: Karla Buhsmer Research International (State Contract # RFR-FY98-15) 955 Massachusetts Avenue Cambridge, MA 02139 Ph: 617-661-0110 x103 Fax: 617-661-3575 Email : <a href="mailto:K.Buhsmer@research-int.com">K.Buhsmer@research-int.com</a>
Demographic Analysis	Contact: Susan Aceti Community Maps, Inc. 5490 Cedar Lane B-1 Columbia, MD 02864 Ph: 410-772-2297 Fax: 410-772-2297 Email: <a href="mailto:susanaceti@earthlink.net">susanaceti@earthlink.net</a>  (Demographic analysis of the test areas was provided as an in-kind contribution to the project by Commmunity Maps, Inc.)
Decal Design	Contact: Nancy Turkle Turkle Design (State Contract # RFR EQE-H08-01) 29 Britt Lane Groton, MA 01450 Ph: 978-448-6225 Fax: 978-448-6225 Email: <a href="mailto:turkle_design@charter.net">turkle_design@charter.net</a>
Decal Printing	Contact: Bud Labine Central Decal Company, Inc. 6901 High Grove Blvd. Burr Ridge, IL 60521 Ph: 603-325-9892 x16 Fax: 630-325-9860
Temporary Labor	Labor Ready, Inc. Waltham Branch 1825 139 Moody Street Waltham, MA 02453 Ph: 781-894-2444 Fax: 781-894-0753 Email: <a href="mailto:1825-br@laborready.com">1825-br@laborready.com</a>
Telemarketing	Contact: Larry Quemere Appointment Setters by Parity and Associates 313 Adams St. Suite 301 Abington, MA 02351 Ph: 781-878-5556 Fax: 781-878-6465 Email: <a href="mailto:Larryq@Telemarketingcoach.com">Larryq@Telemarketingcoach.com</a>
Telemarketing Records	Contact: Pat Dudzinski InfoUsa PO Box 3603 Omaha, NE 68103-0603 Ph: 888-677-6443 Email: <a href="mailto:pat.dudzinski@infousa.com">pat.dudzinski@infousa.com</a>
Mailing House	Contact: Tom Burge LHS Associates 978-683-0777 110 <a href="mailto:tomb@lhsassociates.com">tomb@lhsassociates.com</a>

