

Transforming for Good

DRIVING U.S. SYSTEM SOLUTIONS
TOWARD A CIRCULAR ECONOMY



We're positive, focused, and serious about solution-building. I invite all who are committed to shaping a more vibrant future for our people, our environment, and our economy, to join us.

From Our CEO

As a leading national nonprofit working toward a modernized U.S. recycling system, The Recycling Partnership has been consistently activating impactful change in communities since 2014. We view the U.S. recycling system as the foundation for designing a circular economy where products and packaging are increasingly recirculated through material supply chains with a goal of reducing greenhouse gases, enhancing the recycling economy, and diminishing the impacts of a take-make-waste society.

The Recycling Partnership's strategy for the next 18 months will focus on implementing smarter systems across the value chain. The current global pandemic has shined a light on just how loosely connected but highly dependent our recycling system is in the United States. We need to learn from this time to ensure that we build a resilient system supporting urban and rural communities alike – one that protects human health and supply chain disruptions in parallel. Systems change means implementing multiple steps in harmony.

In October of 2019, we unveiled our vision in the [Bridge to Circularity report](#), which included three key findings and corresponding initiatives to address them:

1. The speed of packaging innovation has outpaced the capabilities of recycling infrastructure. **The solution?** The Recycling Partnership has built an initiative to document and drive discussion on the Pathway to Circularity.
2. In its current form, the U.S. recycling system cannot deliver the supply of recycled materials demanded by the [commitments](#) of the industry. **The solution?** We must continue to invest in unlocking supply from all U.S. homes.
3. Fundamental underlying challenges require building, in parallel, a sustainably-funded and responsive future system. **The solution?** Advocate for transformative policy to ensure sustainable funding that creates and sustains the System of the Future.

The COVID-19 crisis has been painfully disruptive to people's lives and the normal way our society and economy work, including how materials are managed. While the crisis may be temporary, the impact it will have on our lives going forward is undeniable and, in many ways, unknown at this time. One of the things I do hope we all carry forward is the perspective and heightened awareness of how we, as humans collectively, impact the Earth and the responsibility we have to lighten that burden. **The good work of The Recycling Partnership, to create a circular economy and a healthy U.S. recycling system will resume and be more important than ever. With the active involvement of our growing circle of funders and stakeholders we will look forward to doing our part to help the recovery.**

The crisis has underscored some things we already knew about the system, pointing us to the challenges that will endure after the crisis has ended.

- **We live in a disaggregated recycling system, where the many individual decisions of communities, Materials Recovery Facilities (MRFs), and other stakeholders drive the overall shape of that system.** Communities and MRFs react to conditions and opportunities on their own terms. To scale change influencing their decision making is key – including providing adequate resources and technical assistance that support the best choices for the overall system.
- **Recycling is an essential supply chain in the U.S. economy.** Almost immediately as the crisis began to unfold, we saw concern about loss of required feedstock to make many of the products that are needed to help households weather the pandemic. When the crisis goes away, those same industries will still need a reliable supply to feed the manufacturing investments that represent the face of the circular economy.
- **Ample evidence points to the huge system effects from the use of automation in collection and processing infrastructure.** The crisis has pointed to yet another highly beneficial aspect of automation — worker safety, in addition to the long-term value of automation to drive system efficiency. The routine strategies used by The Recycling Partnership to capture more materials at lower cost also improves the resiliency of the system in a crisis situation.

As we navigate the impacts of COVID-19, one of the tasks ahead is to rebuild a strong U.S. economy in a way that supports people and the planet. Recycling will have a central role to play in that process. As documented in The Recycling Partnership's [2020 State of Curbside Recycling report](#), curbside recycling delivers an estimated 12 million tons of recyclable material each year to the circular economy. There is no reason that we can't double that number through consequential investment, smart policy, and strategic interventions into the system.

People make the system run and are the hub of change. That's why I'm honored to work side-by-side with The Recycling Partnership [team](#), our community partners, other aligned organizations, and our funding partners. Together we're a can-do group, tackling challenges head on, and finding real solutions to improve the U.S. recycling system and move us to a circular economy. We're positive, focused, and serious about solution-building. I invite all who are committed to shaping a more vibrant future for our people, our environment, and our economy, to join us.



Keefe Harrison

As we navigate the impacts of COVID-19, one of the tasks ahead is to rebuild a strong U.S. economy in a way that supports people and the planet. Recycling will have a central role to play in that process.



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Introduction

Recycling can't deliver the circular economy. But a circular economy could deliver robust recycling. Our job at The Recycling Partnership is to insist and assist companies in upholding their sustainability goals, delivering measurable impacts to all citizens. Every single day.

We apply a systems approach to our work, focusing on four key areas:

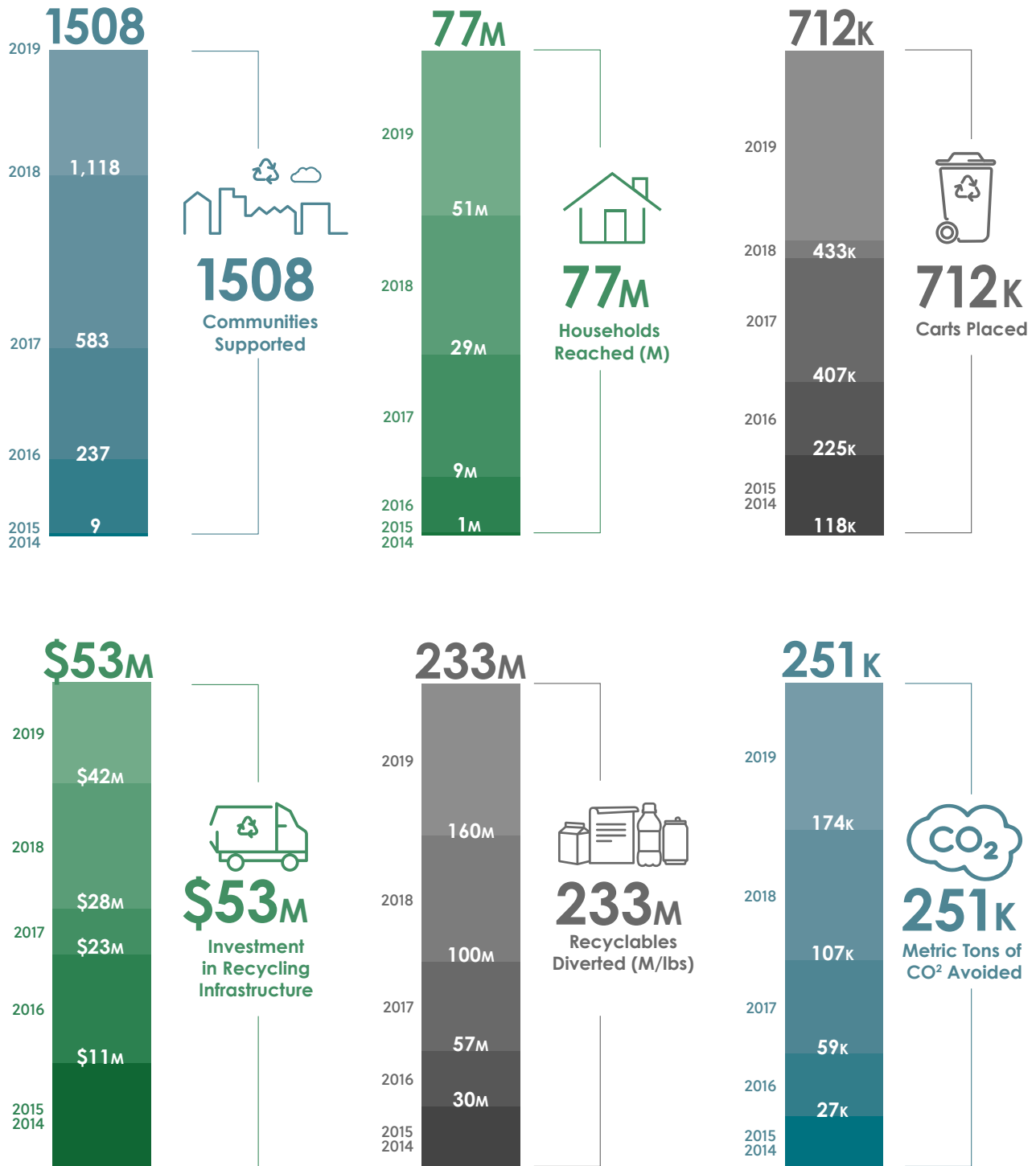
- **Community Engagement.** Our organization was designed to be an action agent, delivering better recycling programs nationwide. In six years, we've partnered with more than 1,500 communities, delivering stronger recycling programs to more than 60% of the U.S. population. This report showcases just a few examples of how we're improving access to recycling, leading new multifamily work, and partnering with communities to improve the quality and economics of recycling.
- **Pathway to Circularity to Advance Materials.** We can't solve circularity just by designing for recycling. The entire system must change, en masse, from point of design all the way through to the end market. Our work on the Pathway to Circularity will move products from technically recyclable to commonly recycled.
- **Policy to Drive Impact & Fight Headwinds.** All efforts to support and advance a circular economy rely on community programs staying in place and accepting more materials. Without significant policy-driven efforts to support community programs and to advance innovation to U.S. infrastructure, positive changes will be significantly hampered. The simple fact is that there is not equal access to recycling as there is to trash for many citizens across the country – and an estimated \$9.8 billion in investment is needed to create a truly robust system. We launched the Circular Economy Accelerator in April 2019 to drive change by building consensus and advocating for attainable policy and legislative solutions that rapidly advance the circular economy.
- **Data to Drive Decisions and Create Behavior Change.** Data is the heart of all we do and recent investments in our data infrastructure and team will allow for even better insights to drive a stronger U.S. recycling system. From centralizing community recycling information nationwide, to continuing our consumer research, to working with communities to change citizen behavior, we are finding the data points and messaging to change behavior, increase participation, and reduce contamination in the recycling stream.



Recycling can't deliver the circular economy. But a circular economy could deliver robust recycling.

A Snapshot of The Recycling Partnership's Year-over-Year Impacts

Our cumulative year-over-year impact data seen here shows our commitment to improving the U.S. recycling system and our dedication to being a change agent and moving our economy from a make-waste one to a circular one.

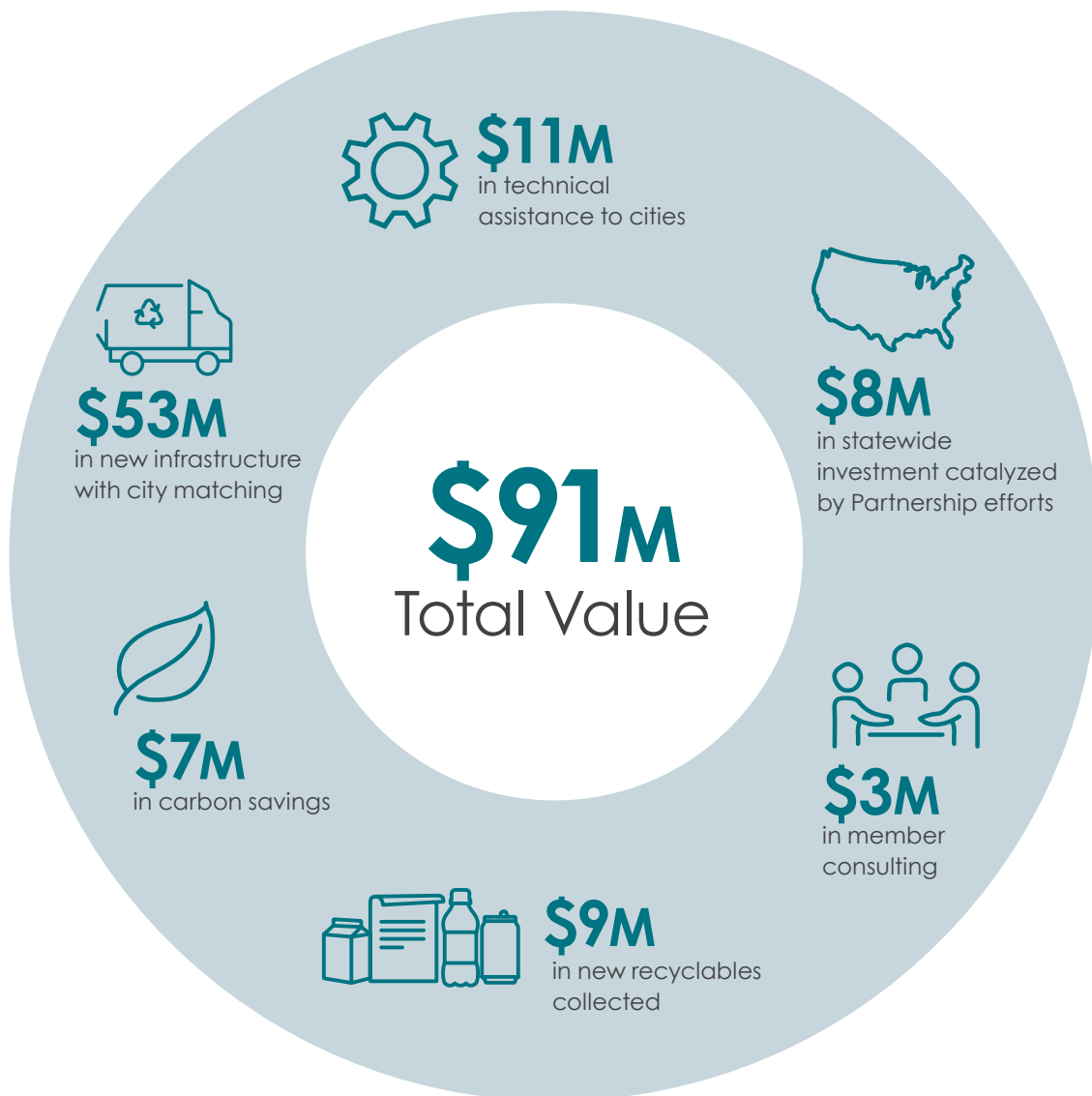


Over the last six years, we've seen amazing results. We've reached more than half of Americans educating them about how to recycle – but there's more to be done.

The change we lead is rooted in collaboration. Protecting the planet by activating a circular economy is our greater good.

Since day one we've committed ourselves to working across the entire value chain – from communities to corporations to citizens. From companies that extract natural resources to the NGOs who, like us, work to save them. We're as fiercely committed to our mission as we are to measurement. Being able to measure the work to date, and the needed work ahead, is critical for using our funding to drive as much change as possible.

Measuring our Cumulative Impacts, Creating Value





Community Engagement

SERVING CITIZENS NATIONWIDE

Advancing the recycling collection system to unlock supply from all U.S. homes is a core pillar of our work. We know that quality recyclables – the supply – are in the home, and recovering that supply is managed by cities, counties, and solid waste authorities. There are three words that define our philosophy as we support this system: action, collaboration, and scale.

In order to unlock supply at the scale the U.S. needs, we are reaching further, faster than ever. We have diversified our grant and resource development beyond individual towns, establishing strategic partnerships with United States Environmental Protection Agency (EPA) regions, states, MRFs, haulers, and regional governments. We seek out creative solutions that lead to game-changing initiatives in the industry, unlocking supply of quality recyclables at a rapid and replicable scale. We are building a network of amazing people that manage and link critical aspects of the U.S. supply chain who, with the right tools, will continue to transform our recycling system and catalyze the circular economy.

This report presents a representative sample of our work using these principles.

Addressing Contamination on the West Coast

In 2019, The Recycling Partnership launched the [West Coast Contamination Initiative \(WCCI\)](#) to work together with all recycling stakeholders in California, Oregon, and Washington State to improve the quality of recyclables collected at the curb. The investments went toward gathering data, engaging with stakeholders, hosting workshops, and creating collateral specifically for the West Coast communities – extending The Partnership's reach in a region where we previously had little to no presence.

The Recycling Partnership team connected with more than [300 recycling stakeholders](#) in these states through in-person meetings and networking events. Our data-gathering efforts reached 212 cities and 98 MRFs, while also getting critical feedback from more than 3,000 citizens, giving us insight into key issues affecting the diverse stakeholders and identifying opportunities to meaningfully improve material quality.

As a result of this initiative, we will be giving out grants to communities on the West Coast looking to address contamination. Our first community grant will go to Spokane County, Washington to reduce unwanted materials in the recycling carts of more than 340,000 citizens.

Minnesota: Leveraging Statewide Partnerships to Advance Multiple Communities at Once

In 2019, The Recycling Partnership capitalized on grant funding from the EPA to create change on a statewide level in Minnesota. Working with the Minnesota Pollution Control Agency (MPCA), The Partnership created a statewide messaging campaign to raise citizens' recycling IQs and incite more Minnesotans to participate in their local recycling program.

The turnkey element of the campaign was a basic list of what is and isn't recyclable, which standardized "the basics" of what is and is not recyclable throughout the entirety of the state. This, along with a statewide communications plan, armed state recycling leaders to teach municipal recycling coordinators how to push the new messaging to their citizens. Resources for community recycling programs included educational videos, recycling quizzes, an annual info card to be mailed to all citizens, social posts, and more. The statewide campaign and corresponding resources were released during workshops at the Recycling Association of Minnesota's annual conference. After the in-person trainings, The Partnership launched a website solely for state recycling coordinators to access the campaign materials. A series of pre-recorded webinars serve as an online tutorial for coordinators, who now have a home base from which to download and disperse resources to their communities.

As part of the EPA grant, five communities received seed grants to design and implement improved strategies for material capture in their multifamily recycling programs and measure the findings. Each of the five grantees – City of St. Paul, City of Minneapolis, University of Minnesota, Lyon County, and Pope Douglas County – focused on a different set of challenges for their multifamily communities – including outreach and messaging to property managers and information provided to citizens on existing recycling services available at their multifamily dwelling.



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Continuing Regional Impacts Across New Jersey

Recycling is the norm in New Jersey and has been for many decades. However, recent market pressures have necessitated communities to revisit how their programs run and move toward a more efficient cart-based collection system.

As The Recycling Partnership began granting funds to select communities in the state, the success of the cart deployment caught the attention of the community next door. Neighboring towns – ready for the next level of investment and modernization – saw the success of The Partnership-supported rollout firsthand, leading to a domino effect of infrastructure granting opportunities across the state.

The Recycling Partnership has implemented six grant projects in New Jersey since January 2019 and expects to fund more in the coming year. As individual towns share their successes with one another, our community partners have turned into organic ambassadors for The Partnership model – leading to collective change across the state.



The effort in Vineland in particular illustrates how carts can inject a new level of performance into an already strong system. Prior to distributing carts, the City of Vineland's curbside recycling program was collecting a robust 476 pounds per household per year. The distribution of carts and outreach materials helped propel the community to a new level of success, boosting annual program tonnage by nearly 21% and resulting in a post-cart collection rate of 575 pounds per household per year. Vineland's experience with carts was so successful that its neighbor to the south, Millville, decided to make the same transition just over a year later.

Vineland, NJ	The City of Vineland distributed recycling carts to just under 17,000 households in December 2018 to launch cart-based collection in January 2019.
Bergenfield, NJ	The Borough of Bergenfield distributed recycling carts and educational materials to just under 7,500 households in April 2019.
Beach Haven, NJ	The Borough of Beach Haven distributed recycling carts to nearly 2,100 properties in this coastal town to support the implementation of cart-based collection in May 2019.
Ventnor, NJ	Ventnor City distributed recycling carts to nearly 4,600 households to implement cart-based collection in June 2019.
Millville, NJ	The City of Millville distributed recycling carts to just more than 8,000 households in March 2020.

Expanding Multifamily Recycling in Orlando, FL

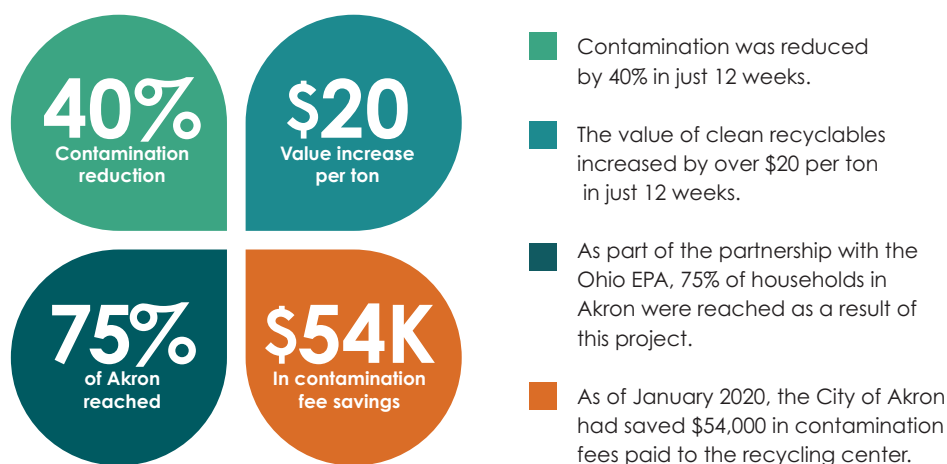
In 2019 The Recycling Partnership started to take action on the largest source of potential new material supply and recycling access in the U.S.: multifamily households. One of the first projects was in the city of Orlando, Florida, with a population of approximately 270,000 and nearly 75,000 multifamily residential units. Orlando recently passed a mandatory commercial recycling ordinance that includes multifamily properties. The ordinance will be phased in over four years and the largest multifamily properties are required to comply by April 2020. The overall pilot project is comprised of three main actionable components:

1. Add local staff capacity by hiring a full time Multifamily Recycling Project Manager.
2. Develop effective recycling education/information interventions specifically for Multifamily properties.
3. Conduct an in-depth waste and recycling audit on a select number of properties within the City.

The Partnership's work with Orlando focuses on examining the impacts of a mandatory multifamily recycling ordinance to both expand collection to properties not yet recycling and utilize coordinated outreach material to improve recycling at properties that are currently recycling. Education and outreach elements from the project will be directed at all multifamily properties in the city. Orlando hired a full-time multifamily recycling coordinator in January 2020 and has provided web-based and in-person Open Houses for properties striving to comply with the new ordinance as well as working with The Partnership on design for education materials. The waste and recycling audit portion of this pilot have been delayed until approximately July 2020 due to COVID-19.

Based on The Partnership's estimates, only 30-40% of multifamily units have access to recycling in the U.S., presenting a significant opportunity to establish best practices and unlock critical supply across the recycling system. The Partnership's work in Orlando, San Marcos, TX, Atlanta, and other U.S. cities will help to establish best management practices and new tools that can be implemented on a larger scale with future community partners.

Improving Economics by Reducing Regional Contamination in Partnership with Akron, Ohio, and the Ohio EPA



Source: Table graphics as reported by Keep Akron Beautiful, the organization that managed the work on the group in conjunction with The Recycling Partnership.

Like many communities across the U.S., Akron, Ohio was experiencing contamination levels of debilitating proportions. With a contamination rate of nearly 40%, the community's recycling program was in jeopardy. The Recycling Partnership and the Ohio EPA teamed up to tackle this challenge head on with Akron and four other pilot Ohio communities: Cincinnati, Columbus, Fairfield, and Centerville.

With additional partners Keep Akron Beautiful, Summit County, and Waste Management at the table, the City of Akron implemented The Recycling Partnership's "Feet on the Street" program in April 2019, deploying a targeted education and outreach campaign to inspect each of the area's 33,000 households for four consecutive weeks. An inspection crew was hired to identify contaminated carts by opening cart lids to survey what's inside, leaving behind an "oops tag" informing citizens of any materials incorrectly placed in their cart. Staying true to The Partnership model, contaminated carts were not collected. Instead, citizens had to remove the contaminants from their cart before their recycling would be collected. This action strongly incentivizes the citizen to change their behavior and is a tool we've found to be an important behavior-change lever through our ongoing research.

Akron saw meaningful results: contamination was reduced by 40% and the value of clean recyclables increased by over \$20 per ton, or 80%, in just 12 weeks. As of January 2020, the City of Akron had saved \$54,000 in contamination fees paid to the recycling center.¹

Building off this success in Ohio, the state of Michigan's Department of Environment, Great Lakes & Energy capitalized on The Partnership's creative model to improve quality at drop off locations and the curb throughout the state. That work will begin summer of 2020.

¹ Data from the City of Akron was reported by Keep Akron Beautiful — the organization that managed the project on-the-ground in conjunction with The Recycling Partnership.

COVID-19

While we celebrate our impact and the accomplishments with so many of our city and state partners, we also recognize the lasting impacts that the COVID-19 pandemic may have on recycling programs and supply nationwide.

At the release of this Impact Report in May 2020, we have started to see declines in commercial volume and increases in residential volume as people are spending more time at home. We also recognize that local government programs funded through general fund dollars like sales tax are facing the reality of budget shortfalls as they plan for next year's budget.

While the large majority of curbside programs and MRFs are still operating, some have temporarily suspended due to shortage of staff and health and safety.

We know our MRF and community partners put safety first and are dedicated to the well being of important front line workers in waste and recycling.

The Recycling Partnership continues to be attentive and flexible as needs in the marketplace may change. Our team of problem solvers are prepared to provide support, technical assistance, and grant dollars as recycling programs navigate the challenges that may lie ahead.

Do you Know What to Throw? Teaching North Central Texas Citizens to Recycle More, Better Where They Live, Work, and Play

As part of the national approach to increase the capture of more bottles and cans, The Recycling Partnership teamed up with Closed Loop Partners to launch a regional recycling education campaign in January 2020 to ensure that the citizens of North Central Texas know what to throw in their recycling carts. **This program highlights The Partnership's broader efforts to improve recovery of materials through existing recycling programs by using behavior change research, analytics, and best practices for communications to citizens.**

While some citizens incorrectly bag their recyclables before placing them in the bin, others wish that certain things could be recycled at the curb—such as plastic bags, plastic films and wraps, food, clothing, batteries, and small electronics—and mistakenly add those into their recycling. Some of these items can damage equipment in recycling facilities, some can be harmful to workers, and others can shut down a facility causing delays, all of which can be costly.

The Partnership's work with the North Central Texas Council of Governments (NCTCOG) started in 2019, with an effort that provided a free online portal for all 16 counties (covering more than 8 million people) that contained free education and outreach resources for the municipalities to educate citizens on what is and isn't recyclable in their region. The Partnership built upon our 2019 work for the 2020 campaign and reached out to citizens throughout the NCTCOG through newspaper ads, movie theater ads, Google search ads, and more to reduce contamination in recycling carts and raise awareness for recycling.





Cart Tagging



Multifamily



Residence Halls at Georgia State University

A Multi-Pronged Approach in Atlanta, GA Leads to Citywide Improvements

In 2019 The Recycling Partnership embarked on an ambitious new endeavor: make Atlanta a model city for recycling. To achieve this goal, The Partnership worked with multiple stakeholders, including universities, multifamily property owners, and commercial businesses to create a multi-pronged approach to improve recycling in Atlanta.

First, The Recycling Partnership's "Feet on the Street" cart tagging campaign was successfully rolled out citywide to reach all 98,000+ single-family households, with four consecutive weeks of household participation data and direct feedback to citizens about how well they are recycling in their curbside carts. Teams tagged citizens' carts with oops tags when they had nonrecyclable items in their carts and didn't pick up recycling carts with contaminated items. **The targeted routes showed a 19% decrease in contamination and a 9% increase in recyclable materials captured.**

The accompanying media and communications campaign achieved more than eight million total impressions and drew more than 19,000 new users to the City of Atlanta's recycling website to learn what is and is not recyclable -- more than tripling the traffic the site received in a similar period in the prior year. Increased traffic to the City's website is critical in improving citizen education and resulted in improved recycling behaviors.

The launch of our multifamily approach in Atlanta resulted in stakeholder meetings and collaborative problem solving with the Atlanta Apartment Association, multifamily property managers, haulers, and MRFs to identify gaps and opportunities. This groundwork will lead to new and improved recycling services for thousands of Atlanta multifamily residents in 2021.

In our Atlanta university work stream, The Recycling Partnership collaborated with Georgia State University (GSU) on an infrastructure improvement and education project for two large residence halls – home to more than 1,200 students. Additionally, we worked with simplehuman to direct a donation of 400 dual recycling and trash receptacles to provide more recycling access across GSU's campus.

The Partnership will continue to engage stakeholders in innovative ways to further the collective recycling system in Atlanta through 2022 and apply the learnings to advance other cities across the U.S. toward comprehensive programs.

Across the U.S., there are roughly 18,000 communities with populations under 25,000 citizens, making these communities a critical part of The Partnership's efforts to unlock supply of material.



Efforts in Smaller Communities Support Big-System Progress

Red Wing, Minn., Dickinson, N.D. and Sedalia, Mo. are examples of smaller communities throughout America's heartland making big investments in their recycling system with financial and technical assistance from The Recycling Partnership. **Across the U.S., there are roughly 18,000 communities with populations under 25,000 citizens, making these communities a critical part of The Partnership's efforts to unlock supply of material.**

- A town of 16,500 on the banks of the upper Mississippi River, Red Wing, Minn. made the switch to 96-gallon curbside carts in September 2019. In total, Red Wing saw a 25% jump in the per household recovery of all materials, including a doubling of the capture rate for polypropylene and a 41% increase for aluminum cans. As a sign of effective outreach, the contamination rate rose only slightly, from 5 to 6%, proving that a move to carts does not necessarily worsen material quality, if coupled with solid education.
- Dickinson, N.D. wrapped up their grant project in the Fall of 2019, distributing more than 7,400 recycling carts as part of implementing first-time collection in this community – which now recycles nearly 1,000 tons per year.
- Sedalia, Mo. was able to more than double the effectiveness of its municipal curbside recycling effort with the help of carts and educational support – their project showed a 135% annual increase in recyclables collected as of November 2019.

The Recycling Partnership's Free Open Source Resources for Communities

The Recycling Partnership's website offers free online resources to communities that outline the best management practices for tackling contamination at the curbside, at community dropoff recycling centers, homes, offices, or anywhere. In 2019, The Partnership launched [DIYSigns](#) -- an online tool with editable templates available in a variety of sizes from a bumper sticker to a poster. No special software is needed to edit any of our free resources and anyone can use them. The Partnership also recently updated our [Social Media Toolkit](#), [Anti-Contamination Toolkit](#) and [Campaign Builder](#) -- all of which have been designed to provide steps, tools, and free resources to improve the quality of community recycling programs. To date, more than 700 communities representing 3 million households have benefited by downloading our free videos, campaigns, social media kits, and other education tools.



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Expanding Recycling and Reducing Ocean-Bound Plastics in Sarasota County, FL

Sarasota County, FL operates a recycling program that serves approximately 283,000 citizens in the unincorporated areas of the county and provides curbside collection services for 158,000 households. As part of our work to stem the tide of ocean-bound plastics, The Recycling Partnership provided a grant to help the county transition its curbside recycling program from a dual-stream, 18-gallon bin-based system to a fully commingled cart-based system. Support from The Partnership also included technical assistance, access to educational resources and outreach materials, a Partnership-funded study to measure the before and after impact of the recycling program transition, and grant funding to conduct coastal cleanup initiatives.

From October through December 2019, the community distributed recycling carts and educational materials to its curbside recycling households. The new collection system kicked off in January 2020; results through the first quarter show a 17% increase in tonnage over the previous year. Citizens in the county are celebrating the new collection system and the county staff have received a great deal of praise for a well-executed transition.



Leading the Leaders: Surveying and Supporting the Recycling Needs of the Largest U.S. Cities

In 2019, The Recycling Partnership hosted its inaugural Leadership Summit: 50 Cities Driving the Circular Economy in Chicago, IL. The event brought together solid waste leaders and decision makers from 50 of the largest cities geographically dispersed throughout the continental United States for the two-day summit, which sought to drive recycling systems change across the country.

After the Summit, we flipped the script: instead of releasing an RFP outlining our latest grant opportunities, we asked participants to submit an RFI: what did they need to make their recycling programs more successful?

We received 28 applications totaling more than \$8.1 million. Requests ranged from assistance with multifamily programs to decreasing contamination and infrastructure and even staffing. Thanks to the generous support of Target and Walmart Foundation, we are able to fund 11 communities totaling more than \$2.7 million through our new Leadership Grants. The grants stemming from the event will reach an additional 2.2 million households across the country.

Building off the success of the inaugural Summit, The Recycling Partnership will host its second Leadership Summit: 50 Cities Driving the Circular Economy in Fall 2020. Additionally, The Partnership is launching a complementary 50 States Summit, where we will bring together state leaders to leverage connections and state dollars to supply more recycling grants on a larger scale throughout the U.S.

2019 Leadership Summit Grantees

PROJECT	PROJECT DESCRIPTION	HOUSEHOLDS REACHED
Baltimore, MD	Complete an anti-contamination strategy to include informational mailers, targeted informational mailers, and oops tags.	210,000
Houston, TX	Complete both a capture rate study to better target messaging and a pilot cart audit to test the acceptance and impact with residents.	40,000
Omaha, NE	Transition from bin-based manual curbside collection to automated collection of carts.	145,000
Philadelphia, PA	Complete an anti-contamination campaign. Perform a waste characterization study and community focus groups to better understand contamination issues.	580,846
Portland, OR	Grant funding supports testing new methods of proactive, culturally-relevant engagement of multifamily property owners and residents in areas of Portland most vulnerable to housing displacement. Culturally relevant multifamily education strategies will be co-created with community partners.	252,842
San Diego, CA	Conduct a pilot program to test six different outreach methods at multifamily properties for multicultural audiences.	484,336
Tacoma, WA	Expand on current multifamily programming and provide resources to improve material quality and increase participation.	80,012
Tucson, AZ	Complete anti-contamination strategy to improve the quality of curbside material.	194,786
Washington, DC	Working with the City to reduce contamination through education and increasing access to multifamily communities.	15,000
Central Virginia (Richmond Area)	Helping to start recycling programs in multifamily communities and improve quality of recyclables through education in communities where programs do exist.	
Detroit, MI	Grant to support the hiring of a recycling coordinator to oversee recycling program improvements and expansions.	255,957



THE CIRCULAR ECONOMY

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- @kwplastics
- @RecyPartn

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Pathway to Circularity to Advance Materials

The ideal destination of a circular economy where waste is eliminated is clear; what hasn't always been evident is how to get there. That's why we published the [Bridge to Circularity report](#), a roadmap designed to address systemic issues in the U.S. recycling system and catalyze the transition toward a circular economy for packaging. Endorsed by the Ellen MacArthur Foundation, the report established a set of concrete actions to create an improved system.

With that roadmap in hand, we've organized our work going forward around three key findings:

Finding	Initiative
<p>1 The speed of packaging innovation has outpaced the capabilities of recycling infrastructure.</p>	<p>Pathway to Circularity</p>
<p>2 In its current form, the U.S. recycling system cannot deliver the supply of recycled materials demanded by the New Plastics Economy Global Commitment.</p>	<p>Unlocking Supply</p>
<p>3 Intractable underlying challenges necessitate a parallel exploration of how to build a sustainably funded and responsive future system that addresses the current gap in infrastructure investment of \$9.8 billion.</p>	<p>Recycling System of the Future and Transformative Policy</p>

The ideal destination of a circular economy where waste is eliminated is clear; what hasn't always been evident is how to get there.





There is no single solution to transition to a circular economy for packaging. We must focus on improving recycling while seeking ways to reduce and reuse materials. Industrywide coordinated efforts will be needed to advance circularity solutions for all materials. Our Circular Ventures team focuses on identifying, and then bringing, these solutions to life.

The Partnership as a Change Agent – Pathway to Circularity

Many companies have ambitious sustainability goals related to the recyclability of their packaging portfolios. How to achieve those targets is not always clear, especially when it comes to critical factors such as end market development, MRF acceptability, and community engagement. **That's why we launched the Pathway to Circularity to guide producers through a strategic assessment to help them navigate the complexity of the industry, ensuring their packaging is recyclable and recycled in practice.**

Another output of the Pathway to Circularity aligns the industry on new standards and concrete steps to achieve circularity and true recyclability. To set these standards, we are convening the Pathway to Circularity Industry Council which includes representatives from more than 30 businesses and industry organizations representing all materials types and key stakeholders. **Together, we will catalyze system change. This is not something any one organization or business can do alone. That's why we are providing a platform to enable pre-competitive collaboration through material and packaging-specific coalitions to solve packaging challenges.**

Polypropylene Recycling Coalition – An Example of the Pathway in Action

In order to improve the system, we must also work on individual materials. The Pathway to Circularity methodology and emerging strategic assessment process provides the guidance to address unique challenges of specific packages and materials. The Polypropylene Recycling Coalition is an example of a Pathway to Circularity material-specific collaboration to build the pathway to circularity in the U.S.

While polypropylene (most commonly seen in yogurt cups, butter tubs, and coffee pods) is a recyclable material, it can often be included in the mixed plastics (3-7) bale, and consequently does not have its own recycling pathway. Through the Polypropylene Recycling Coalition, industry leaders are collaborating to address this challenge head on. The Coalition will provide grants, conduct research, and support education to increase curbside recycling access for

polypropylene. By working together, we aim to ensure polypropylene is widely accepted for recycling and ultimately reaches a high recycling rate so it can be reused rather than wasted.

Addressing System Challenges for the Good of All Materials – Film & Flexible Packaging

Due to its convenience and comparatively low carbon impact, more companies are using flexible plastic packaging. Yet, plastic film and flexible packaging is difficult to collect, sort, and process, and its thin, flexible properties make it a top contaminant in MRFs. We are working to address these challenges through the Film and Flexibles Coalition. Through this Pathway to Circularity initiative, we are building the necessary knowledge, tools, and partnerships to address this complex challenge.

Together with leading companies and organizations, we are creating the plan to explore potential systems to collect and sort film and flexible materials, providing strategies to engage consumers to be part of the solution, and working to ensure healthy end markets. Ultimately, we aim to have a scalable solution for recovering film and flexibles packaging while allowing communities to reduce contamination for the good of all materials.

Creating Our Future Together – Aligning Industry Efforts to Achieve a Circular Economy

The Polypropylene Recycling and Film and Flexibles Coalitions are just a couple of examples of The Recycling Partnership's collaborations to align industry efforts to achieve a circular economy. In early 2020, we convened paper and metal industry stakeholders, including mills, recyclers, MRFs, manufacturers, consumer brand companies, and industry associations, to discuss top headwinds and brainstorm resolutions to create a successful recycling future together. We are also working to advance tubes on the Pathway to Circularity as well as other materials and packaging formats.

Transitioning the U.S. to a circular economy is too big for any one entity to accomplish alone. That's why we are accelerating efforts by supporting the development of a Plastics Pact in the U.S. In November 2019, The Recycling Partnership was appointed to be the lead coordinator, working with Ellen MacArthur Foundation and World Wildlife Fund to bring the U.S. Plastics Pact to fruition. The U.S. Plastics Pact will bring together companies, government entities, NGOs, researchers, and other stakeholders to work collectively toward a circular economy for plastics.

The U.S. Plastics Pact is a collaborative alliance designed to thread together organizations and initiatives that have the potential to move the needle in the U.S. by amplifying the great work already being done and collaborating to fill gaps. The Plastics Pact serves as a model as The Recycling Partnership works to build the roadmap to the circular system of the future where all materials are carefully thought of as resources rather than wasted.

Together, we will catalyze system change. This is not something any one organization or business can do alone. That's why we are providing a platform to enable pre-competitive collaboration through material and packaging-specific coalitions to solve packaging challenges.





Policy to Drive Impact and Fight Headwinds

THE CIRCULAR ECONOMY ACCELERATOR

In the [State of Curbside](#) report, The Recycling Partnership estimated a need for \$9.8 billion in investment to create a truly robust recycling system in the U.S. The Circular Economy Accelerator launched in April 2019 to drive change by building consensus and advocating for attainable policy and legislative solutions that rapidly advance the circular economy.

This mission-driven policy arm pushes for and seeks to shape policy that incentivizes recycling over disposal; secures sustainable funding for recycling infrastructure and education; and expedites and innovates toward public-private solutions.

The team has worked with policymakers at all levels across the country to support and help shape legislation that moves more and better recyclables out of citizens' homes into the recycling system to be a part of the circular economy.

Indiana: Summer Study on Recycling

The policy team successfully launched an effort to study the economic impacts of the circular economy system in Indiana. This work lays the groundwork for future policy in a state with some of the greatest untapped populations for recyclable materials. Policies could not only support recycling collection for all residents, but also a robust recycling industry hungry for raw material feedstocks. While the study won't be ready until next year, the legislature will have a summer study committee to look at state recycling markets and the nature and extent of recycling resources to meet the needs of the state. The foundation was built support from Indiana's Department of Environmental Management, the Recycling Market Development Board, and talking with Governor Eric Holcomb and his policy staff about how they can support the circular economy in the Hoosier State.



Florida: HB 73 Environmental Regulation

The Accelerator successfully advocated to amend legislation that would have resulted in increased landfilling of recyclable materials in Florida. The Recycling Partnership worked with the bill sponsor and stakeholders to achieve consensus on amended language to help ensure that common recyclables could not be considered "contamination," and to ensure that landfilling of recyclables could not occur outside of hauling and processing contracts. We provided testimony to committees in both the State House and Senate in support of the amendment. At the time of publication of this report, the bill was awaiting action by the Governor.

Federal Landscape and Hill Testimony

In a year which saw more federal activity around recycling than has been seen in more than a decade, the policy team for The Recycling Partnership was brought to the table as the expert voice of the recycling system – providing guidance and data on bipartisan issues facing the supply chain and how to develop the circular economy.

With the RECYCLE and RECOVER Acts, The Partnership staff worked with stakeholders and policymakers to support two strong bills to help improve recycling at the federal level. **The bills, which would collectively inject more than \$1 billion into the recycling system, are focused on two key needs of the recycling system – federal financial support and coordination for recycling education and infrastructure.**

The Partnership has emerged as the go-to source for both big picture information and granular on-the-ground data about the residential recycling system. We are often called on to brief House and Senate Recycling Caucuses, House Appropriations members, and staff on issues and innovations in the circular economy.

Proposed Circular Economy Transformative Policy

The Circular Economy Accelerator is made up of more than 30 funding partners of The Recycling Partnership, including stakeholders from throughout the value chain and of all material types – glass, metals, plastics, and paper – to develop a policy proposal to transform recycling and catalyze the transition to a circular economy for all materials.



As acknowledged in [the Bridge to Circularity report](#), policy will play a key role in making the System of the Future possible and unlocking materials to feed into the circular economy. The four key objectives of our policy proposal to be released in Q2 2020 will be to:

1. Level the playing field between the costs of disposal and recycling;
2. Increase recycling rates and available supply of recyclable materials;
3. Lower operational costs and contamination; and
4. Improve the health of the U.S. recycling system

Our policy work is built on the fundamental principles of The Partnership: to bring together stakeholders in a pre-competitive field to create inventive solutions that are greater than the sum of their parts. The work of the Circular Economy Accelerator is ongoing in 2020 and we invite any companies that wish to work together with their peers to shape a uniquely American system of stakeholder intervention into the recycling system **[to come aboard](#)**.



Data to Drive Decisions & Behavior Change

LEVERAGING OUR CORE COMPETENCY TO SUPPORT A CHALLENGED SYSTEM

Data is the backbone of every initiative we undertake. It's the instigator for our new ventures, the constant variable in our special projects, the foundation for how we change citizen behavior, and the benchmark by which we measure our success. When executing our community grants, we measure the progress of every project to ensure results and tweak the model as needed to generate optimal recovery of recyclables.

When looking at our community data of how citizens recycle, we determine what messaging and images will help citizens know what to and not to recycle and increase public trust in recycling.

Here are a few ways The Recycling Partnership has championed data in 2019, and a look at how our work with data will be a part of our upcoming work in 2020.

Capture Rate Studies

A solid understanding of material generation, as well as trends and patterns of commodity recovery, helps define the dimensions of the task at hand in optimizing the curbside recycling system in the U.S. The Recycling Partnership contributes essential data through capture analyses connected to program interventions. We completed six major studies in 2019:

- Central OH – In conjunction with a collaborative project with the Solid Waste Authority of Central Ohio (SWACO) to bring carts to five Ohio communities, this first-of-its-kind study combined two different methodologies to show an increase in overall recovery.
- Red Wing, MN – This study measured an increase in curbside materials and gathered specific data on the generation of plastic film and flexible materials.
- Portland Metro – The Recycling Partnership supplemented funding to an ongoing project to gain insights into generation and capture and to gather more data on film and flexible materials.
- Hillsborough County, FL – This study supplemented a county effort to analyze inbound MRF materials, using a batched sample methodology.
- Denver, CO – To support a project on increasing material capture, a before/after study looked at three different neighborhoods and added data to two previous cycles of studies in 2017 and 2018.
- Sarasota County, FL – A before-and-after look at the impacts of a large-scale distribution of carts. The first phase of capture analysis was conducted with a special focus on e-commerce and pizza boxes, which gave us critical insights into the generation and capture of those materials. A second sort will be conducted in 2020.

These studies expanded The Recycling Partnership's substantial material generation and capture rate dataset, which in turn informs our strategies to deliver our vision of a high-performing U.S. curbside recycling system.



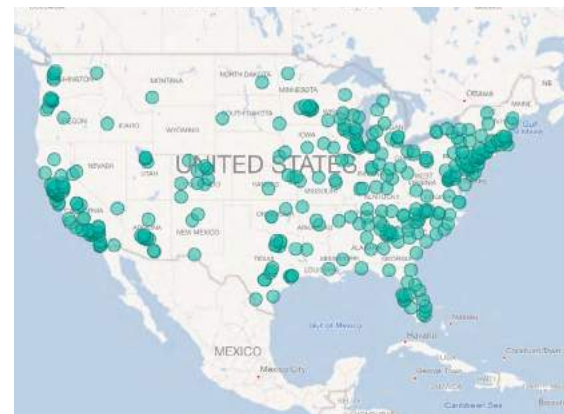
A solid understanding of material generation, as well as trends and patterns of commodity recovery, helps define the dimensions of the task at hand in optimizing the curbside recycling system in the U.S.

National Residential MRF Map Release

Material Recovery Facilities (MRFs) are where collected curbside materials move to market. To help track and understand the relative presence of these critical operations, The Recycling Partnership released its online, interactive [Residential MRF Map](#) in October 2019. The map is the first public display of residential processing infrastructure in the U.S.

Because good data helps everybody across the recycling system, The Recycling Partnership invites users to provide active feedback to make sure the map is as accurate as possible.

Since the launch of the MRF Map, more than 1,000 users have visited the site to obtain information about MRFs around the country.





Municipal Measurement Program (MMP) Debut

What if there was a platform for communities to record and track their recycling performance using standardized metrics and terms? Thanks to a partnership with Emerge Knowledge, The Recycling Partnership launched this type of platform in 2019 with the release of the [Municipal Measurement Program \(MMP\)](#). In its first year, MMP attracted submissions from 135 individual communities from 35 states, representing a spectrum of size, geography, and collection services. Cities from Alaska to Florida and from North Dakota to New Mexico completed MMP reports. The list will only grow in 2020 and helps give us a greater picture of the U.S. recycling system.



Behavior Change Studies

Experts estimate that the average person make 35,000 choices per day. For most people, those choices are shaped by a myriad of conscious and unconscious thoughts, personal and cultural values, and rational and irrational habits. So, when we set out to influence sustainable decisions, to unlock potential instead of creating waste, we are setting out on a critical quest – which can cumulatively result in millions of tons of recyclables either going back to use or going to waste. Those decisions then create even more data for us to use as the foundation for new ventures and new actions to unlock supply of recyclable material.

In order to further our understanding of how citizens think about recycling, how they know what to and what not to recycle, and what motivates citizens to recycle, The Recycling Partnership completed five major studies in 2019:

- **Earth Day Survey** – How does climate change impact millennials? How do Americans feel about recycling? This national online survey helped us to understand better how citizens feel about recycling as a public service and helped show the impact of climate change on our personal lives as Americans.
- **Houston** – How do Houstonians get their information about recycling and do they know what to throw? We asked citizens of the City of Houston these questions and more in focus groups and an online survey.
- **Denver** – Do Denver citizens know what to throw into their recycling and how do they feel about recycling? We asked these questions and more through a phone survey of Denver citizens.
- **Atlanta** – Who influences Atlantans most about recycling and where do citizens get their information? To help find these answers, we asked citizens of the City of Atlanta through a focus group and an online survey.
- **West Coast** – Why are plastic bags, needles, and batteries ending up in the recycling stream? To help understand citizen behavior, we asked citizens of California, Oregon, and Washington how they get rid of certain recyclable and non-recyclable materials in their households.

These studies give The Recycling Partnership insight into what motivates citizen behavior and how we can help them know what to throw into their recycling and how they feel about recycling.

2020 State of Curbside

As a complement to the [Bridge to Circularity report](#), The Recycling Partnership's [2020 State of Curbside Recycling report](#) presents a comprehensive overview of the current supply system to meet the raw material demands of the paper, metal, glass, and plastics industries. **The curbside system is highly dependent on healthy local curbside programs to capture as much of the 37.4 million tons of single-family home recyclables as possible each year. A current recovery rate of 32% shows a good foundation provided through the curbside services of thousands of communities, but also clearly room for additional deployment of best management practice solutions.**

Communities are challenged by market conditions that reduce their motivation to expand and improve their programs, and they need support in the form of access to infrastructure capital, technical assistance to address issues like inbound contamination, and policies that encourage program growth. Like the Bridge to Circularity report, The Recycling Partnership's 2020 State of Curbside Recycling [report](#) calls on all stakeholders, and especially brand companies, to do something new, different, and substantial to build robust curbside recycling material supply.

To build out critical information for the 2020 State of Curbside Recycling Report, our staff created and distributed a national survey of community recycling programs, exploring all the angles of program performance, from containers to tons, households served, containers used, participation rates, inbound contamination, program funding, and more.

We received an amazing response from more than 430 cities, counties, and regional and tribal governments from across the U.S., increasing our knowledge and awareness of program status and the challenges communities face.

Good Data is Critical to Effective Solutions

Through emerging partnerships with today's biggest tech firms, we are building a system that can keep national recycling information up to date. We are leveraging machine learning, data automation, and computer vision to check 8,000 communities for changes in their material guidelines and to update our standardized database. Our goal is to provide this information where consumers are already looking for it: in search engines, smart speakers, and virtual assistants.

This initiative will cover more than 75% of the population and will collect data on each curbside recycling program, including what materials and packaging are accepted, what types of containers are provided, and how citizens sign up. This data will provide the first living national picture of where each commodity is accepted. With end markets that continue to evolve, the reduction of exports to China, and most recently, the COVID-19 pandemic affecting collection, changes can have immediate effects on local programs. There is a need for national database to account for these changes in real time.

Providing consistent recycling information across the country is a key component of our strategy to regain consumers' trust in recycling. Combining this with other data that we collect on program performance, material quality, and end markets, we will continue to find gaps in the system where we can leverage investment to increase capture thus drive toward a truly circular economy.

Our behavior change research confirms that Americans care strongly about being less wasteful, protecting the environment, and ensuring we are good stewards for future generations.

OUR RECENT RESEARCH SHOWED:

81% think we are not doing enough as a society to combat wastefulness

84% of Americans view recycling as a valuable public service

80% say they are recycling as often as they should

In contrast, even though most people say recycling is easy, our data shows that people are not recycling what they could.

Within households that are participating,

55% of common recyclables are mistakenly placed in the trash

~20% admit to recycling items even when they are not sure if it is accepted

5% of respondents say they don't recycle, citing lack of convenient recycling and small households.

Recycling, choosing things made with recycled content, and supporting brands who are making a positive impact are easy ways choices can align with values and the trend is on the rise.

~80% say they are more conscious of supporting positive companies than they were five years ago.

In fact, they would go out of their way, would pay more (26% more), would stop supporting companies who fall short (45%) of their personal sustainability values. In fact, more than a third (37%) would vocally oppose a company who they do not view as sustainable.

The Recycling Partnership Team



Keefe Harrison
CEO



Karen Bandhauer
Granting & Strategic
Program Director



Liz Bedard
Senior Director of
Industry Collaboration



Elizabeth Biser
VP Policy &
Public Affairs



Ali Blandina
Director of Circular
Ventures



Joe Botempo
Chief of Staff



Anthony Brickner
Visual Media Designer



Allison Buchanan
Director of Brand
Engagement



Aaron Burman
VP of Data
& Analytics



Keysha Burton
Community Program
Coordinator



Jackie Caserta
Circular Ventures
Coordinator



Chris Coady
Director of
Community Programs



Bill Culbertson
VP of Strategy &
Chief Legal Officer



Spence Davenport
Granting and
Resource Manager



Sarah Dearman
VP of Circular
Ventures



Dylan de Thomas
VP of Industry
Collaboration



Lisa Dingman
Events Specialist



Cassandra Ford
Community Program
Coordinator



Allison Francis
Director,
Digital & Design



Katherine Huded
Manager,
Public Affairs



Nick Isbister
Community
Program Liason



Alita Kane
Community Program
Coordinator



Samantha Kappalman
VP, Strategic
Communications & Marketing



**Stephanie
Kersten-Johnston**
Director of Innovation



Rachel Kipar
Manager of Circular
Ventures



Vincent Leray
Community Program
Coordinator



Jessica Levine
Funding Partner
Liason



Cody Marshall
Chief Community
Strategy Officer



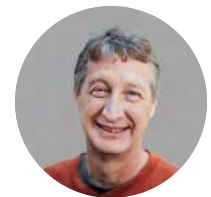
Jill Martin
Director of
Community Programs



Trina Matta
Circular Ventures
Director



Jeff Meyers
Chief Financial
Officer



Scott Mouw
Senior Director of
Strategy & Research



Heath Nettles
Director of
Communications



Erinn Richardson
Director of
People Ops



Beth Schmitt
Senior VP of
Development



Elizabeth Schussler
Senior Director of
Social Change,
Behavior & Impact



Lily Schwartz
Federal Affairs
Manager



Cecilia Shutters
Community Program
Manager



Ashley Smith
Finance Controller



Mary Souzzi
Logistics Coordinator



Asami Tanimoto
Community Program
Manager



Rob Taylor
Director of Grants
and Community
Development



Laura Thompson
Senior Director of
Strategic Projects



Tricia Tiedt
Events Manager



Craig Wittig
Director of
Community Programs



In Closing, a Letter from our Chairwoman, Kim Carswell

During my time as the Chair of The Recycling Partnership Board of Directors, it's become clear that this Partnership team is a team of doers. Dedicated, thoughtful, and fully engaged, the staff of this organization is committed to upholding their core values and delivering on their mission. In every engagement with them I see a strong, supportive team ready to solve problems, lend a hand, and proceed with speed and integrity. I also see a team that is open to the changing environment, and ready to pivot when needed to follow The Partnership's north star: To catalyze a billion dollars of investment in the U.S. recycling system. That's just what the circular economy needs in the U.S., and I'm glad to be a partner of this organization.

Dedicated, thoughtful, and fully engaged, the staff of this organization is committed to upholding their core values and delivering on their mission.

It's that community work, coupled with policy leadership and strategic thinking so evident in the Bridge to Circularity report, that will drive the change we need in the U.S. This organization is fiercely mission focused on supporting communities while engaging brands and their supply chains on meeting their goals. Since day one, this organization has been designed to bring companies and communities together to the problem-solving table and in several recent initiatives show the effectiveness of that model. Here are just a few examples:

- **Large Corporate Contributions to Advance Our Mission.** In 2019 The Recycling Partnership was issued an impressive \$50 million contribution from the American Beverage Association. These dollars are not a one-off project. Instead, over the next five years, they will fund the organization's core work of elevating the U.S. Recycling System for all materials, including bottles.
- **Material Specific Problem Solving.** Through a collaboration with Fibre Box and the American Forest and Paper Association, the team was able to develop and test messaging campaigns to increase the recovery of pizza boxes in Sarasota, Fla.

- **Helping Companies Deliver on Sustainability Pledges.** In 2018, The Recycling Partnership was issued a \$10 million grant from PepsiCo Foundation to launch a five-year All In On Recycling effort to improve the recycling opportunities for 25 million families. These grants help build stronger recycling programs for more than 13 communities to date. Similarly, when Coca-Cola made their 2018 World Without Waste pledge to recycle one for one every bottle they produce, they looked to The Recycling Partnership as a key partner to help deliver on their goals. They know that The Recycling Partnership's work is rooted in data, transparency, and system change.
- **Leveraging Carbon Credit.** In addition to donating Carbon Credit funds to The Partnership, the proceeds of Love Beauty Planet's Mother's Day and Holiday gift pack sales went to support recycling grants to communities as part of the brand's carbon offset program.

Many thanks to my fellow funding partners who collaborate for systems change in this country. Because of your support, this organization has had tremendous growth, and with you, we'll continue to help citizens and communities deliver stronger recycling and a clear path toward circularity. We all know this is what our citizens expect and that expectation will only grow. As The Partnership staff say, we're all in this bin together, and together we can lead meaningful solutions.

Be well –



Kim Carswell
Director, Packaging
Target

Since day one, this organization has been designed to bring companies and communities together to the problem-solving table and in several recent initiatives show the effectiveness of that model.

Thank You to our Funding Partners



Learn more at recyclingpartnership.org

