



Refuse Rates Administrator's Report



Office of the Controller
Office of Refuse Rates Administration

March 13, 2026

**Rate Year 2026
Status Update**

**Refuse Rates
Administrator**

Rate-Setting Process Improvements

Goal: Support Decision-Making

- **Develop Capital Planning Process:** Contract Raftelis to develop framework for capital planning process:
 - Asset Inventory and Needs Identification
 - Capital Oversight and Decision-Making Framework
 - Capital Monitoring and Post-Approval Oversight
- **Forecasting Improvement:** Structured forecasting program to validate revenue and cost assumptions.
- **Automatic Escalator Study:** Survey escalator methodologies and analyze risks and potential rate impacts



Rate-Monitoring Improvements



Goal: Improve rate-monitoring by developing sustainable and replicable processes.

- **Baseline Operating Metrics:** Form and Format Agreement
- **Customer Satisfaction Measurement:** Contract InterEthnica to conduct customer satisfaction survey. Multi-modal, 700-1,000 completed surveys.
- **Regular Reporting:** Database development. Annual Report. Quarterly Financial Dashboard Update.
- **Impound Account Transparency:** Documentation of impound account funded activities.

City Department Service Level Agreements

1

Refuse Rates Administration:

- Rate Setting
- Rate Monitoring

2

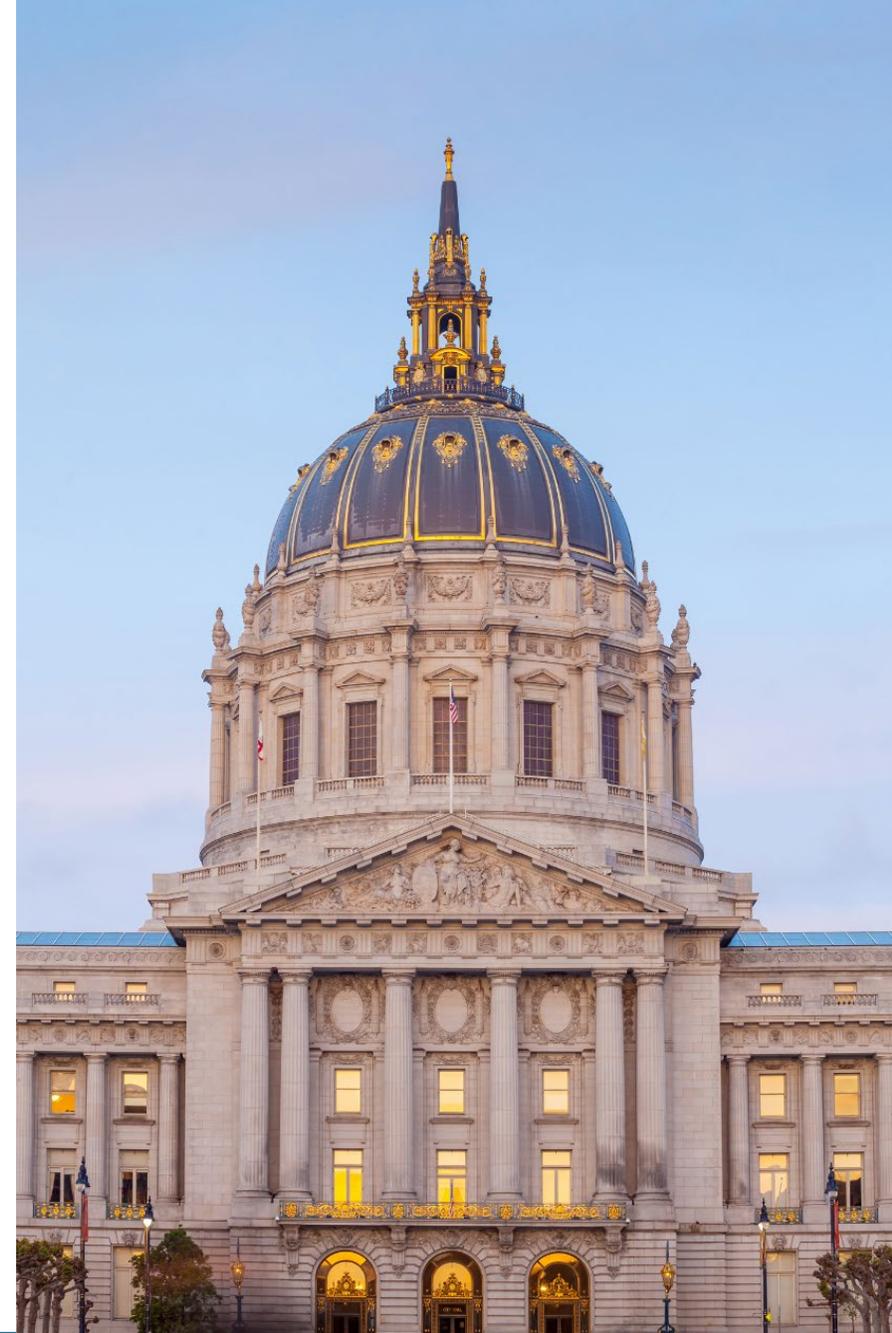
San Francisco Environment Department:

- Zero Waste
- Toxics Reduction and Healthy Ecosystems
- Community Partnerships and Engagement
- Policy and Communications
- Climate

3

San Francisco Public Works:

- OnE Team
- Litter Patrol and Mechanical Street Sweeping
- Public Refuse Receptacles



Annual Report: Rate Year 2025

**Refuse Rates
Administrator**

Financial Performance: Operating Ratio/Profit Margin



Operating Ratio on Profit Eligible Expenses	Allowable	Actual
Sunset Scavenger and Golden Gate	91.0%	96.2%
Recology San Francisco	91.0%	92.1%
Combined	91.0%	94.7%

- In Rate Year 2025, Recology generated \$521.1 million in OR eligible revenue against \$502.8 million in OR eligible expenditures, resulting in a net profit of \$18.3 million.
- The net profit represents a 5.3% profit margin, which is 3.7% below the allowable threshold.
- The primary driver of this shortfall was an over-projection of revenues.

Financial Performance: Balancing Account

Balancing Account	Total Balance	2025 Rate Order Projected Balance	Variance from Projected
2023 Rate Order Balancing Accounts	-\$9,114,936	-\$12,483,524	\$3,368,588

The 2023 Rate Order established a balancing account to capture 50% of any profit or loss variances relative to the 91.0% Operating Ratio target.

- **Current Balance:** 50% of the shortfall was added to the balance from the prior rate year. The resulting balance is $-\$9.1$ million.
- **2025 Rate Order Projection:** This outcome is more favorable than the $-\$12.5$ million balance projected in the 2025 Rate Order. The difference between projected and actual balances is $\$3.4$ million.



Operational Performance: Environmental Goals

Recology Tonnage	Rate Year 2015	Rate Year 2025	% Change
Landfill Disposal (Target -50%)	389,559	392,385	0.7%

The Climate Action Plan 2021 adopted a goal to reduce landfill by 50% compared to 2015 levels. There has been no change in the amount of tonnage when comparing Recology’s landfilled tonnage in 2015 to 2025, which can be attributed to two main factors:

- **Economic/Population Growth:** After 2015, the population continued to grow as did landfill disposal tonnage. This trend reversed during the pandemic and has since returned to 2015 tonnage levels.
- **Declining Recovery Rate:** Methodology for calculating recovery rate has changed over time. However, recovery rates have likely fallen due to end of sustainable crushing operations, China’s Sword Policy implemented in 2017, and organics pre-processing that increased organics residual going to landfill.



Operational Performance: Collections Operations



Collections Metrics	Rate Year 2024	Rate Year 2025
Lifts per Route Hour	34.9	35.5
Cost per Lift	\$9.66	\$10.10
Cost per Route Hour	\$364.22	\$387.12

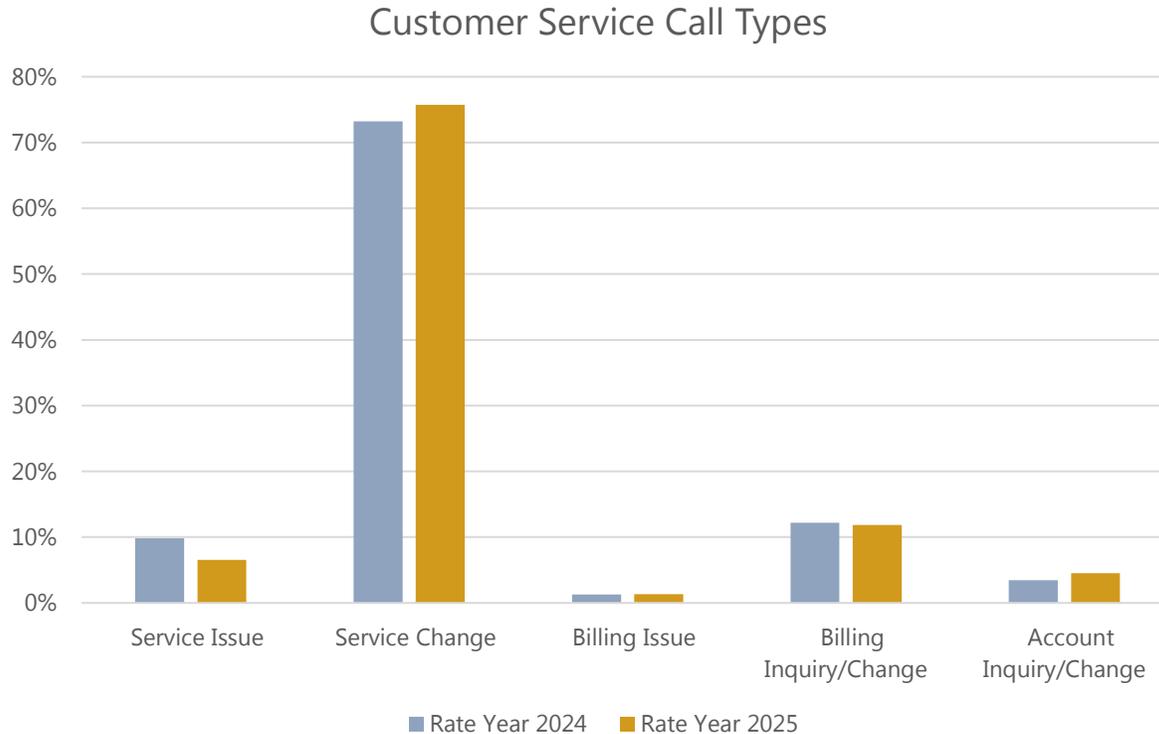
- **Service Volume:** Recology serviced nearly 163k customers and collected over 485k tons in Rate Year 2025, requiring over 32 million lifts.
- **Resource Utilization:** This service was conducted over 913k route hours requiring 605 route and maintenance personnel operating 369 active fleet units.
- **Operational Efficiency:** Lifts per route hour improved between Rate Year 2024 and 2025, however staffing increases to meet approved staffing levels have offset financial benefit from productivity gains.
- **Cost Efficiency:** Between Rate Year 2024 and 2025, cost per lift grew by 4.5% and the cost per route hour grew by 6.3%.

Operational Performance: Post-Collections Operations

Post Collection Operations (Avg Per Ton Rate)	Rate Year 2024	Rate Year 2025	Comp Avg
Landfill	\$37.96	\$40.31	\$60.05
BVON Organics	\$92.23	\$94.72	\$116.67
Recycling (Incl Transport)		\$190.79	\$173.67

- Landfill and Organics processing rates compare favorably to other jurisdictions.
- Recycling costs are allocated from Recology San Francisco costs and include the cost of transport and freight and are offset by sales of commodities. Cost per ton compared to other jurisdictions is above average.
- Transfer Station operations operational efficiency can be measured by tons per load. MSW averaged 25.6 tons per load and organics averaged 22.7 tons per load.

Operational Performance: Customer Service



- Recology had 359k calls or emails to customer service in Rate Year 2025.
- 76% of calls were related to change of service.
- 7% related to service issues, 96.5% of which were missed or partial pick up.
- Recology had 2.8 missed pick up calls per 10,000 lifts.
- This compares favorably to a national survey of 13 cities that showed an average of 7.7 missed pick ups.

Missed Pick Up Rate	Rate Year 2024	Rate Year 2025
Missed Pick Up per 10k Lifts	7.7	2.8

Compliance Overview

Status Legend	
Compliant	
Partially Compliant	
Not Compliant	
N/A	

Review of adherence to 2023 Rate Order and other agreements showed no significant compliance issues. All approved funded projects and pilots were completed.

- **Reporting:** Some reports were delayed by a day or two in Rate Year 2025.
- **Billing:** While no agreements or terms related to billing were outlined in the 2023 Rate Order, the Department of Public Health has obligations under the Health Code to adjudicate bill disputes and have raised several issues such as rounding errors in fees, no bill/invoice for ratepayer accounts with positive balances etc. These issues are expected to be resolved with Recology Ready software.
- **Abandoned Material Collection:** 112k tickets in RY2025 and an SLA achievement of 94.3%. Up from 33.8% in RY2023.
- **Public Receptacle Collection:** 87k tickets in RY2025 and an SLA achievement of 95.7%. Up from 37.5% in RY2023.

Service Level Agreement Area	Compliance Status
Core Collections	
Abandoned Materials Collections	
Facilities	
Billing	
Customer Service	
Bulky Item Collection	
Holiday Tree Collection	
Household Hazardous Waste	
Public Disposal and Recycling Area	
Public Receptacle Collection	
City Self-Haul of Material	
Sustainability Education Program	
Waste Zero Program	
Weekend Cleanup Events	
Reporting Requirements	

Solid Waste Impound Account Overview

SWIA Disbursements		
Department	Rate Year 2024	Rate Year 2025
San Francisco Environment	\$12,242,134	\$11,429,050
Public Works	\$11,961,629	\$12,036,775
Total	\$24,203,763	\$23,465,825

- In addition to rate funding ,the 2023 Rate Order approved use of fund balance for various programs. Fund balance use on projects during the rate cycle amounted to \$3.6 million and include projects like trash processing pilot, landfill contract work, waste characterization study, and supporting rate administration work.
- Other approved uses include new trash receptacles. Procurement of receptacles was delayed to 2026.
- Net Available Budgetary Basis Fund Balance ended with \$4.1 million in Fiscal Year 2024-25, which accounts for funds encumbered for future projects approved in the 2025 Rate Order such as new trash receptacles, customer satisfaction survey, EIR study, etc.



Recology Presentation

Refuse Rate Board Hearing

March 13, 2026



Introduction & Highlights



- Successful Rate Year 2025
- Early implementation of RY26 enhancements – many supporting street cleanliness
- Introduction of several technology pilots
- Robust operational response to Super Bowl LX activities
- Expansion of unique recycling & collection programs
- In-depth infrastructure assessment, site optimization & future capital planning

RX25 Financial Results

	Rate Year 2025 Projection			Rate Year 2025 Actual			\$ Variance			
	(in millions)	SSGG	RSF	Combined	SSGG	RSF	Combined	SSGG	RSF	Combined
Revenues		\$ 372.1	\$ 167.2	\$ 539.3	\$ 360.3	\$ 161.1	\$ 521.4	\$ (11.73)	\$ (6.15)	\$ (17.88)
Expenses		351.9	155.3	507.2	352.0	150.8	502.8	0.08	(4.48)	(4.39)
Net Profit		\$ 20.1	\$ 12.0	\$ 32.1	\$ 8.3	\$ 10.3	\$ 18.6	(11.82)	(1.67)	(13.49)
OR Eligible Expenses		\$ 203.5	\$ 121.0	\$ 324.5	\$ 211.3	\$ 119.7	\$ 331.0	7.85	(1.30)	6.55
Operating Ratio		91.0%	91.0%	91.0%	96.2%	92.1%	94.7%			
Operating Ratio on ALL Expenses		94.6%	92.8%	94.0%	97.7%	93.6%	96.4%			
Profit Margin on ALL Expenses		5.4%	7.2%	6.0%	2.3%	6.4%	3.6%			

Revenue Variances

RSF Lower inbound volume
 RSF Higher recycling revenue
 SS/GG Lower rate payer revenue

Expense Variances

RSF Lower disposal & processing
 All Lower equipment lease expense
 All Higher payroll & related
 SS/GG Higher liability insurance
 SS/GG Higher bad debt

Q1 Financial Results

	Q1 RY2026 Projection			Q1 RY2026 Actual			\$ Variance		
	(in millions)	SSGG	RSF	Combined	SSGG	RSF	Combined	SSGG	RSF
Revenues	\$ 102.2	\$ 43.2	\$ 145.4	\$ 102.7	\$ 43.7	\$ 146.4	\$ 0.54	\$ 0.52	\$ 1.06
Expenses	96.6	40.1	136.8	96.3	39.0	135.3	(0.32)	(1.12)	(1.44)
Net Profit	\$ 5.5	\$ 3.1	\$ 8.6	\$ 6.4	\$ 4.7	\$ 11.1	0.86	1.64	2.50
OR Eligible Expenses	\$ 56.1	\$ 31.1	\$ 87.3	\$ 54.8	\$ 29.6	\$ 84.4	(1.34)	(1.48)	(2.83)
Operating Ratio	91.0%	91.0%	91.0%	89.5%	86.3%	88.4%			
Operating Ratio on ALL Expenses	94.6%	92.9%	94.1%	93.8%	89.2%	92.4%			
Profit Margin on ALL Expenses	5.4%	7.1%	5.9%	6.2%	10.8%	7.6%			

Revenue Variances

*Annual projections are not seasonalized

RSF Higher inbound volume

RSF Higher recycling revenue

SS/GG Higher rate payer revenue

Expense Variances

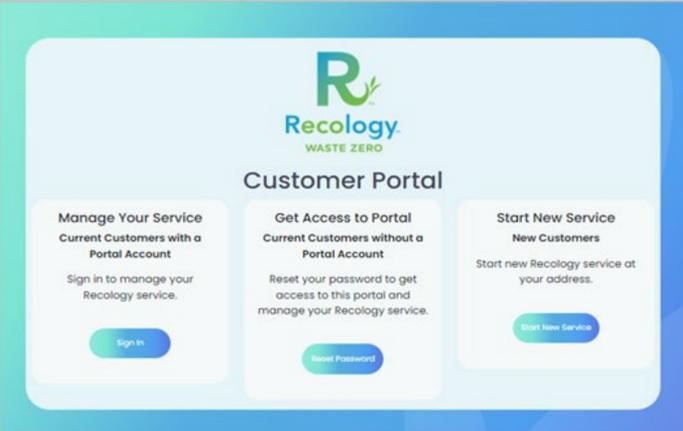
*Annual projections are not seasonalized

All Lower payroll & related

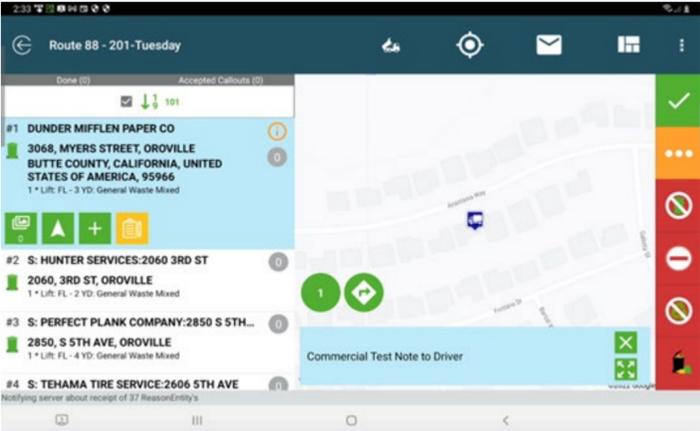
All Lower equipment lease expense

Recology Ready CRM Implementation

- City of Seattle go-live March 30th
- Focus shifts to SF in late Spring
- Planning meetings to be scheduled with City departments



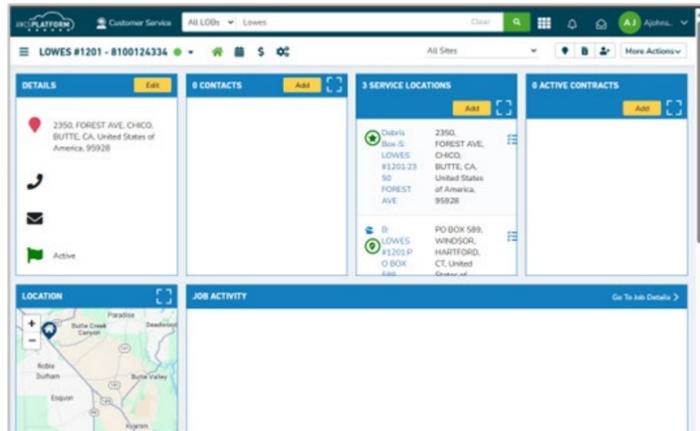
Customer Portal



Driver Mobile App



Pay Solution



Back Office Web Interface

Abandoned Material Collection (AMC)

- Three Afternoon AMC routes added as part of 2026 Rate Order
 - Routes start at 1 pm and expanded AMC coverage into evening hours
 - Tonnage up 26% in Q1RY26
 - 311 tickets flat overall YOY with <1% increase

	Q1RY26	Q1RY25	Increase/Decrease
Tons Collected	1,303	1,036	+26%
AMC 311 Calls	25,778	25,527	+.98%
SLA Compliance	91%	94%	-3.7%

Bulky Item Mailer to Apartment Residents

- RRA identified apartment move-in/move-outs as possible source of illegal dumping
- Mailed 40k postcards to individual units in high density areas
- In coordination with RRA, performing “A / B” testing to determine effectiveness of mailed outreach
- Social media will also be tested later this month with a targeted marketing campaign



The flyer features a central white box with the text: "Recology provides curbside collections for up to 10 bulky items at no additional charge to apartments". Below this, it says "Participating in the program keeps our city clean!". The flyer is decorated with illustrations of a winged armchair, a winged toaster, a winged sofa, and a winged desk. At the bottom, there is a QR code and instructions in three languages: English, Chinese, and Spanish.

Recology provides curbside collections for up to 10 bulky items at no additional charge to apartments

Participating in the program keeps our city clean!

綠源再生 (Recology) 免費為公寓住戶提供路邊大型物件收集服務, 每次可收取最多10件的大型物品, 不另收費。參與本計畫, 讓我們的城市更整潔。

Recology ofrece recogida en la puerta de su apartamento de hasta 10 objetos voluminosos sin costo adicional. La participación en el programa ayuda a mantener limpia nuestra ciudad.

Scan to make an appointment or contact your property manager.

掃碼立即預約, 或聯絡你的物業經理查詢。

Escanee el código para programar una cita o comunicarse con el administrador de su propiedad.

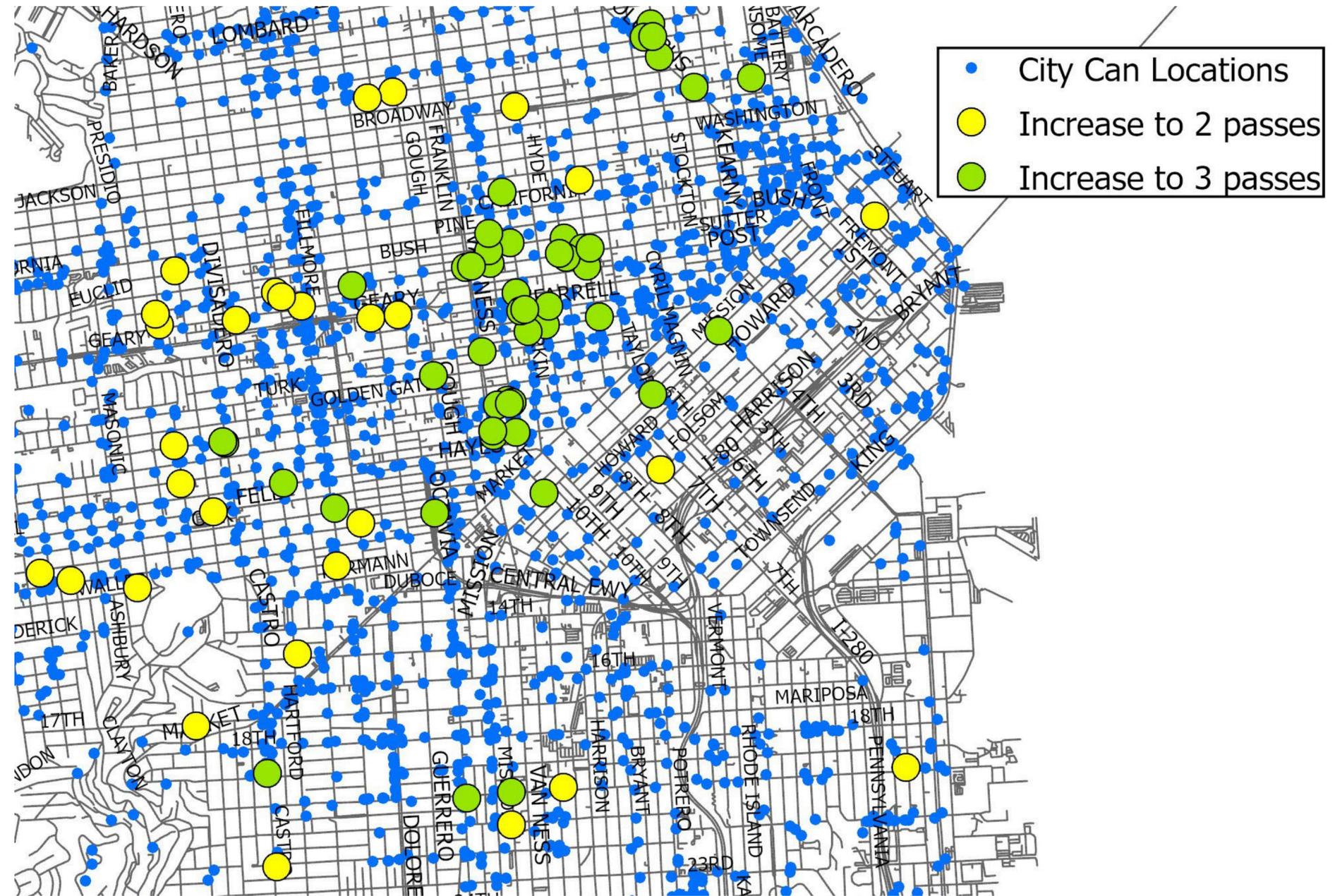
recology.com/sfbulky

Public Receptacles Collection (PRC)

	Q1RY26	Q1RY25	Increase/Decrease
Tons Collected (PRC routes only)	1,232	1,287	-4.3%
311 Overflow Calls	5,052	4,355	+16%
311 Sensor Requests	6,336	21,403	-70%
SLA Compliance	93%	95%	-2.7%

PRC Pilot with DPW & Mayor's Office

- Working group comprised of DPW, Mayor's Office, and Recology
- Using available foot traffic and 311 overflow data to determine service frequency needs of every can
- Service increases launched February 23rd and will run through March 23rd



PRC Route Cameras

- DPW requested service verification cameras be installed on all 12 dedicated PRC routes
- DPW, Recology, and RRA have worked on the new process
- Currently providing footage to DPW for their review



Contamination Pilot

- 3rd Eye – RY25
 - System functionality
 - 19% Conversion rate
 - \$190K - 3rd Eye revenue
- 3rd Eye – RY26 Q1
 - System updates
 - \$164K - 3rd Eye revenue
 - 88% Customer association
- Prairie Robotics - RY26
 - 6 FEL trucks
 - Status update
 - Approved FTE

3RD EYE	Total Events	Notice (1st) Letters	Warning (2nd) Letters	Final Notice Letters
RY25	10,700	231	43	12



Hopper Before



Hopper After Customer's Bin emptied



Plastic Bag

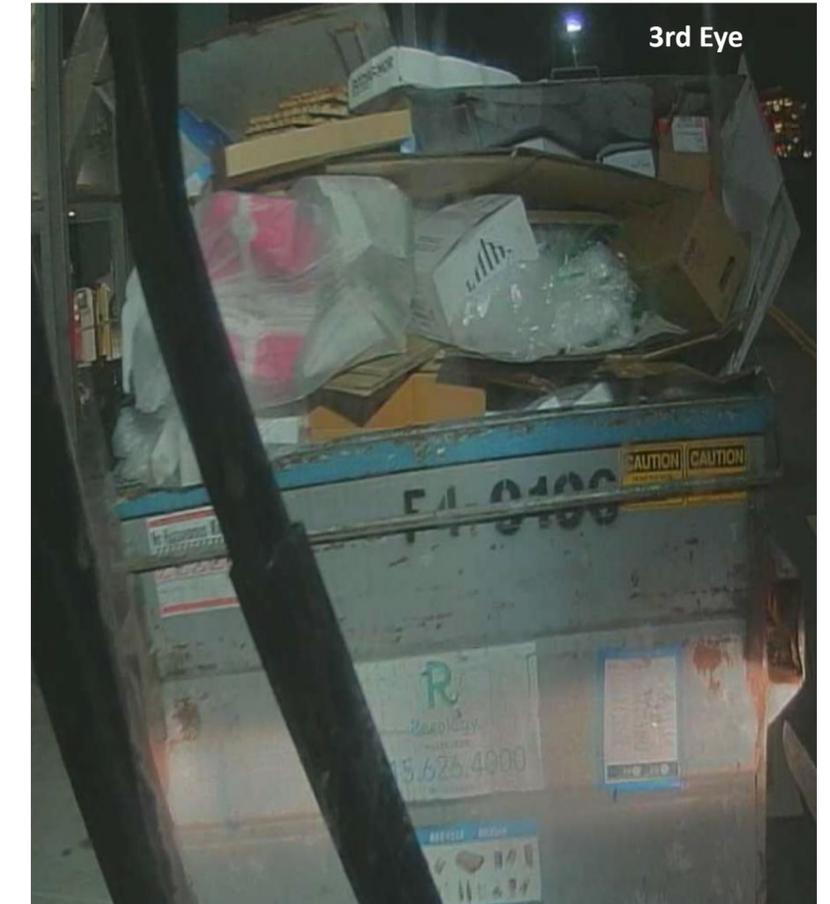
Overload Cameras

- Implementation
 - Go Live February 16th
 - 27 Trucks / 21 Routes
 - Over 80% Customer Association
- RGG and RSS Single Week Stats
 - System and Functionality
 - Back of Office Process
 - Events For Review
 - Warnings and Grace Period
 - Total Charges

Total Events	Warnings Letters	Grace Period	Events Per Route	Total Charges
1712	121	84	82	141



Overloaded Landfill



Overloaded Recycle

Pizza Box Enclosures

- Partnering with District 3
- Design and Functionality



Activities for Super Bowl LX

- Partnering With City Departments
- +550 Additional Route Hours
- 15 Special Events
- 7% increase in hauls
- 110 Ton Net Volume Increase

“ I’m just trying to stay focused on the people walking around and help make sure everybody has a great experience and they have clean streets”

MICHAEL MURRAY

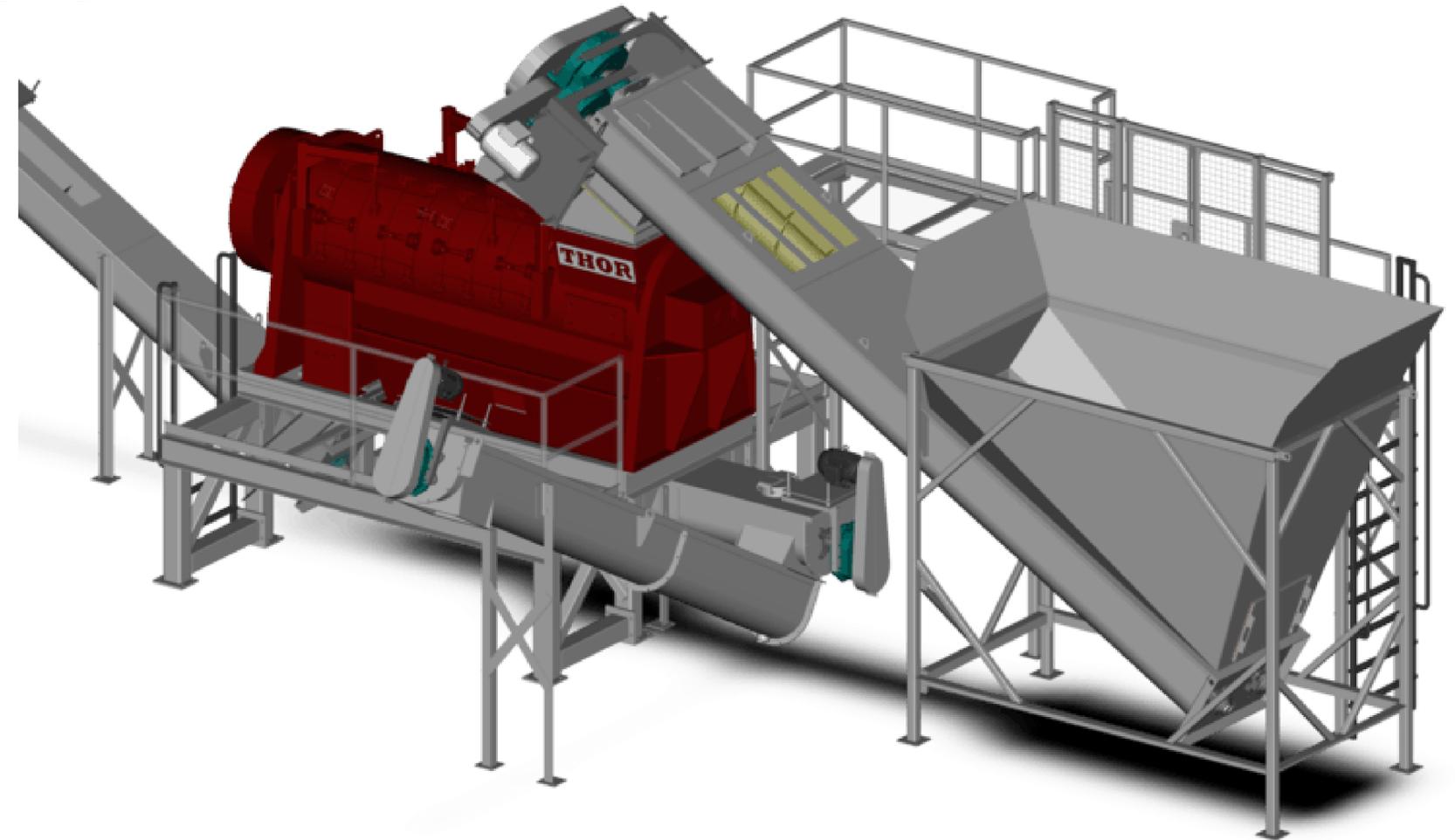
City Can Driver

Recology Golden Gate, 27 years



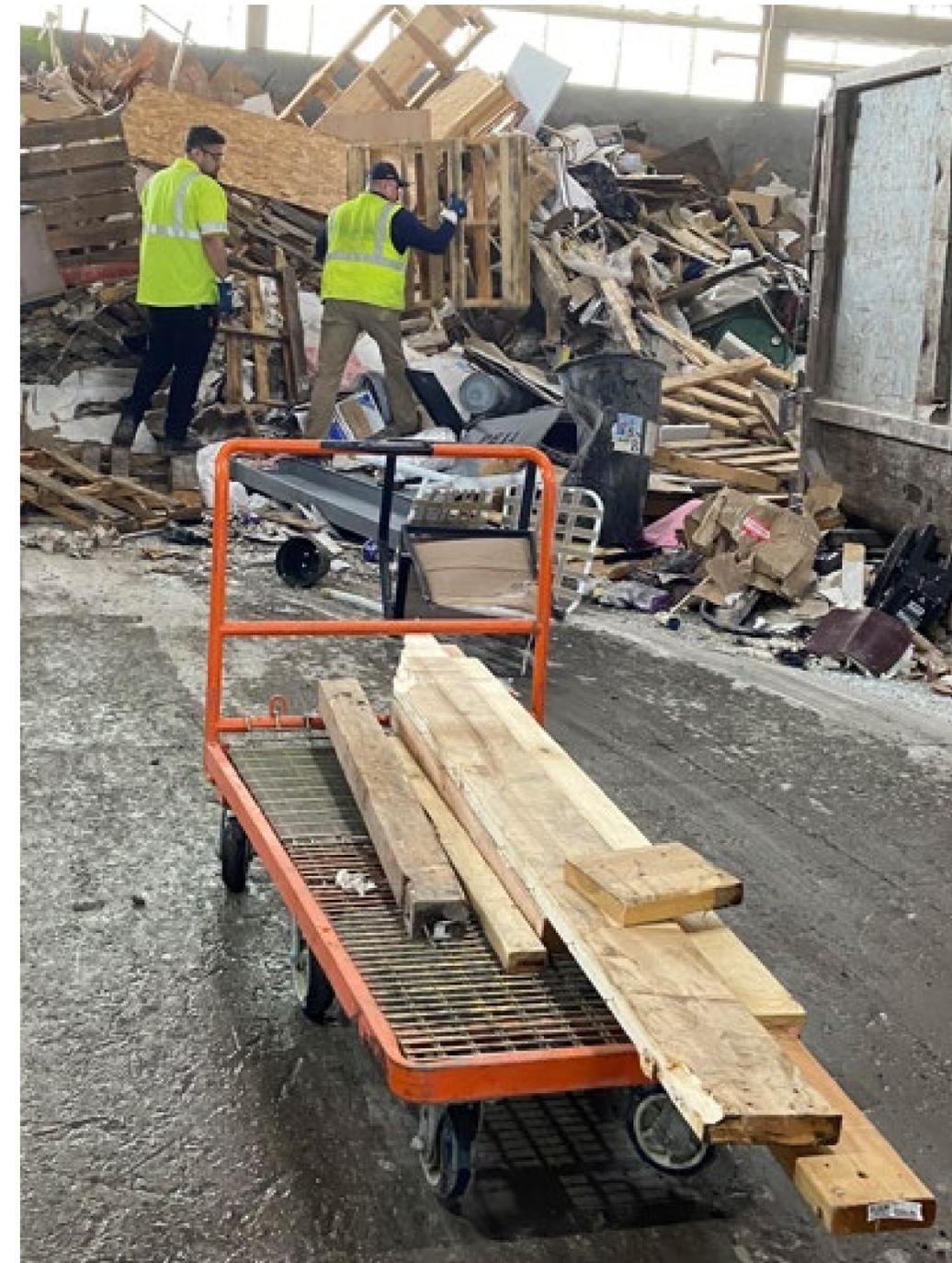
Organics Pre-Processing

- Organics De-Packager permitting, installation and Operations
- Permitting the installation and obtaining the proper entitlements to operate the equipment
 - SF Planning Department CEQA review
 - Permit application to BAAQMD
 - Solid Waste Facility Permit
 - Construction Permits
- Equipment order in July 2026
- Delivery end of Q1 RY27
- Operational beginning Q3 RY27



Wood & Mattress Recycling

- Recovery of re-usable lumber
 - Recology SF working with the SF Environment and The ReUse People
 - 8 Loads of re-usable wood delivered
 - 28.48 tons have been recovered RYTD
- Since October 1st. Recology has been accepting Mattresses and Box Springs at no charge from our customers at the Public Disposal & Recycling Area
 - To date we have received 2,426 units and 36.39 tons
 - 934 More units RYTD



Pier 96 Seismic Study

- Seismic Study & Facility Conditions Assessment - complete
- Full reports & cost estimates for retrofit and upgrades have been finalized. Project total is \$52.5 Million; breakdown of costs are outlined below
- Port of SF Real Estate & Engineering Departments are reviewing the reports & findings

Architectural/Facility Upgrades		Building/Seismic Retrofit		Seawall Repairs	
Project	Cost	Project	Cost	Project	Cost
Facility Upgrades	\$4,459,549	Seismic Retrofit	\$15,962,070	East Seawall Repair	\$3,799,898
Near Term Roof Repair	\$145,000	Full Roof Replacement	\$15,100,000	South Seawall Repair	\$13,043,784
Total	\$4,604,549	Total	\$31,062,070	Total	\$16,843,682

*all costs are escalated (2029 dollars)

Closing Remarks

- **Delivered strong operational performance under the approved rate order**, maintaining service levels while responding to increased demand and major citywide events
- **Expanded and optimized street-cleanliness programs**, including Abandoned Material Collection, Public Receptacle Collection, and targeted outreach to reduce illegal dumping
- **Used data and technology to drive smarter service delivery**, leveraging on-board cameras, 311 data, and pilot programs to improve compliance, efficiency, and transparency
- **Worked collaboratively with City partners**, including DPW, the Mayor's Office, SFE and the RRA, to align service levels with community needs and real-time conditions
- **Advanced recycling, diversion, and contamination-reduction efforts**, supporting the City's environmental goals while improving material recovery
- **Positioned the system for the future**, with planned investments in organics pre-processing, assessing facility resilience, and long-term infrastructure planning



Thank you





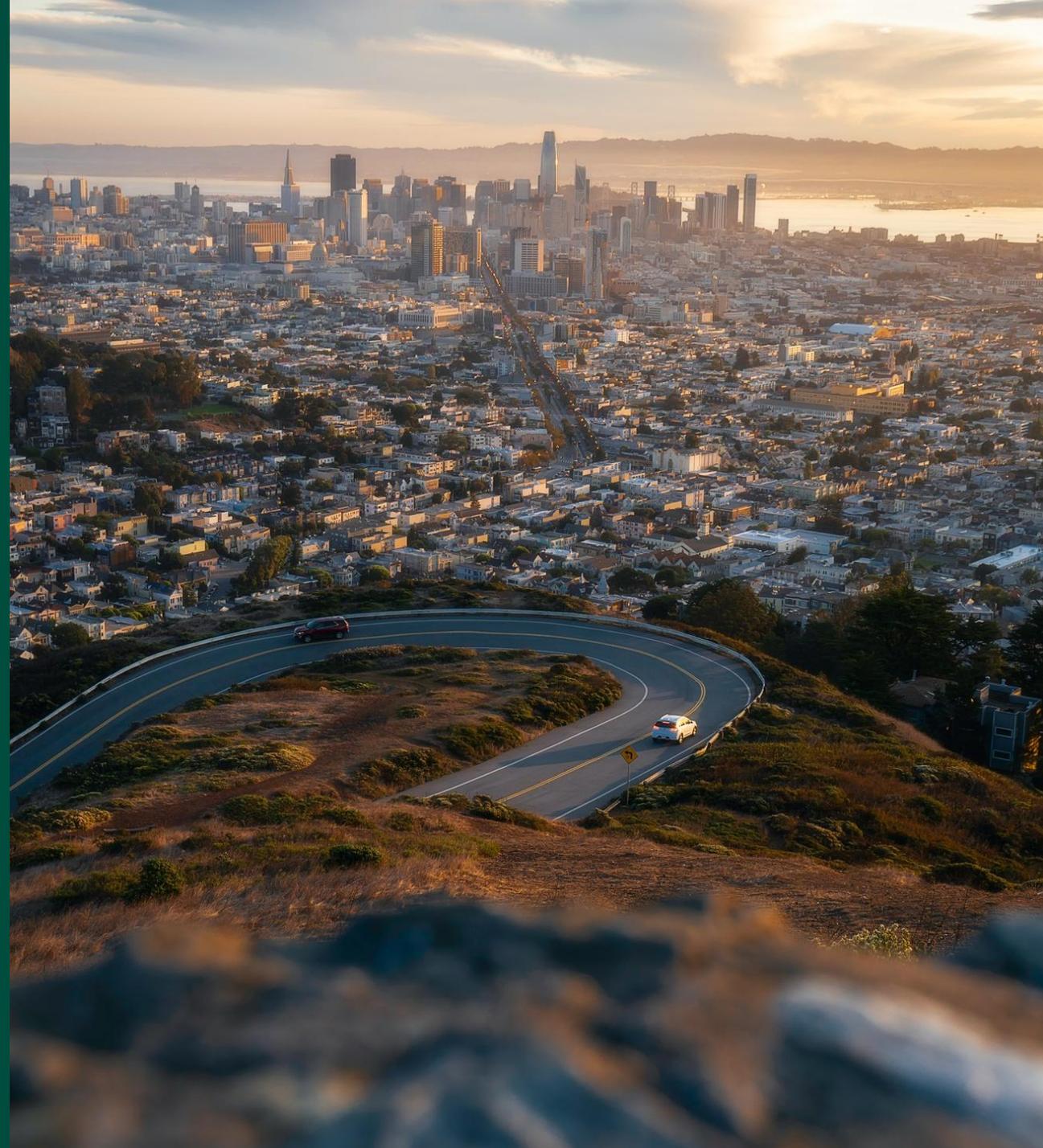
SF Environment Refuse Rate Board Hearing

March 13th, 2026

SAN FRANCISCO
ENVIRONMENT
DEPARTMENT

Agenda

- RY24-25 Update
 - Edible Food Recovery
 - Reusables Transition
 - Building Material Reuse
 - HHW Campaign: Battery Mailers
 - Waste Characterization Study
- First Quarter Updates RY 25-26
 - Rate Cycle Planning Meeting
 - Wood-to-Reuse Market Development
 - Landfill RFP
 - Trash Processing Feasibility Report
- Questions



SFE is the City's climate accountability, coordination, and equity engine.

Programs Overview

Impound Funded Programs

Zero Waste

**Toxic Reduction
& Health
Ecosystems**

**Community
Partnerships &
Engagement**

**Policy &
Communications**

Climate

Highlights from RY 24-25

Edible Food Recovery

- SF Environment (SFE) supported over 3 million pounds of food recovery
- Equivalent to over 2.5 million meals for San Franciscans in need
- Recovered food avoids SF's refuse system and reduces costs to rate payers
- SFE completed 308 inspections of food generators to comply with SB 1383 food donation requirements

SFE



Source: Excelsior Strong



Transition to Reusables

- **Converted 166 businesses and institutions to reusable foodservice ware**
- **Installed 19 dishwashers for San Francisco business through incentive programs**

Building Material Reuse

- Funded by SF Environment, Building Resources SF (BRSF), recovered 1,324 tons of building material supply through reuse
- BRSF sold \$761,245 worth of reused building materials
- BRSF completed site improvements and increase recovery tracking

SFE



Source: SFE staff

Battery recycling
回收電池現在就在你
Reciclaje de pilas



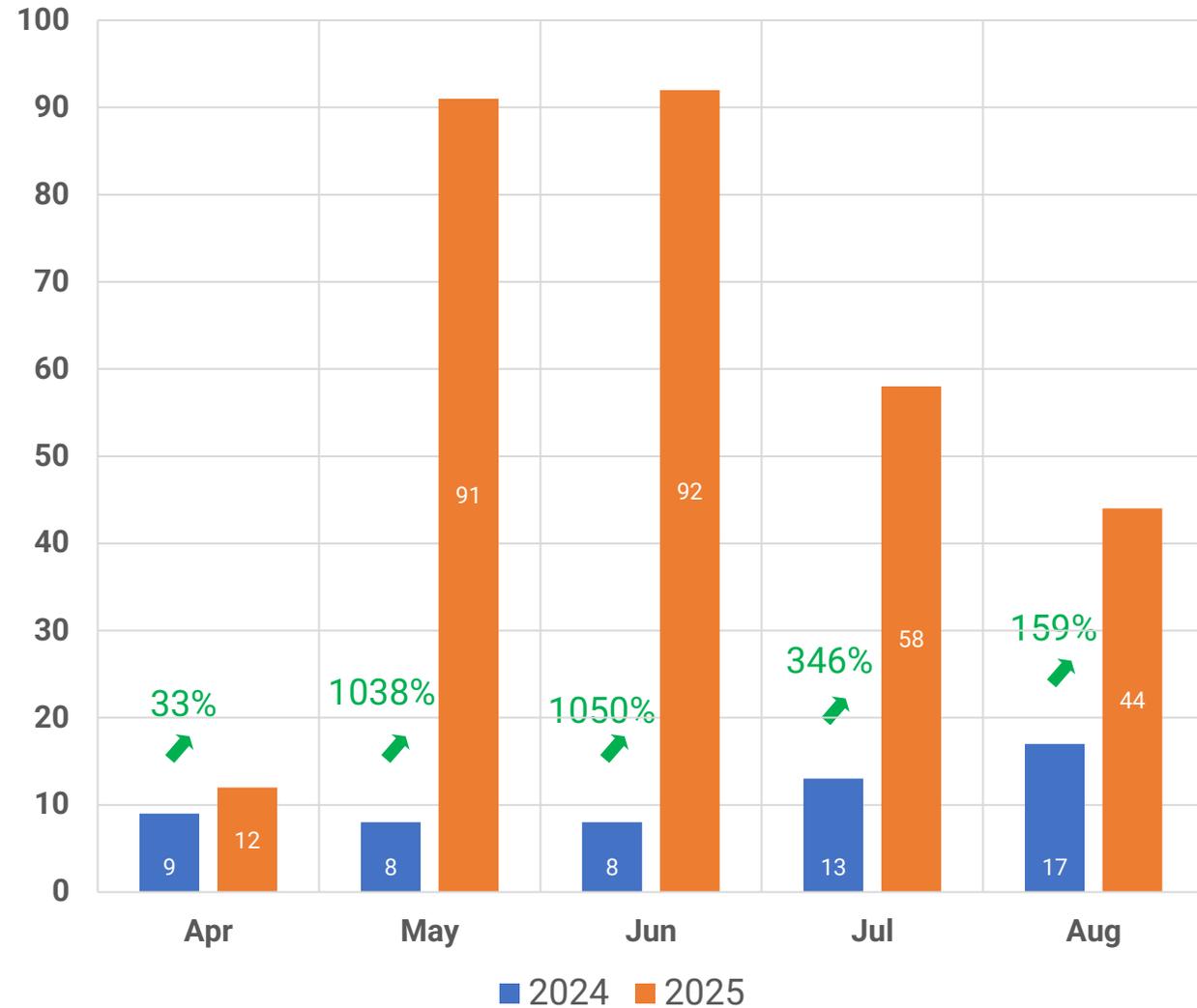
Campaign: Battery Mailers

- **Date of Distribution:** May 2025
- **Audience:**
Single-family mailers – 174,316
Multi-family mailers – 204,326
- **Languages:** English, Chinese, and Spanish

Increase in requests for Battery Buckets



of New Battery Bucket Requests

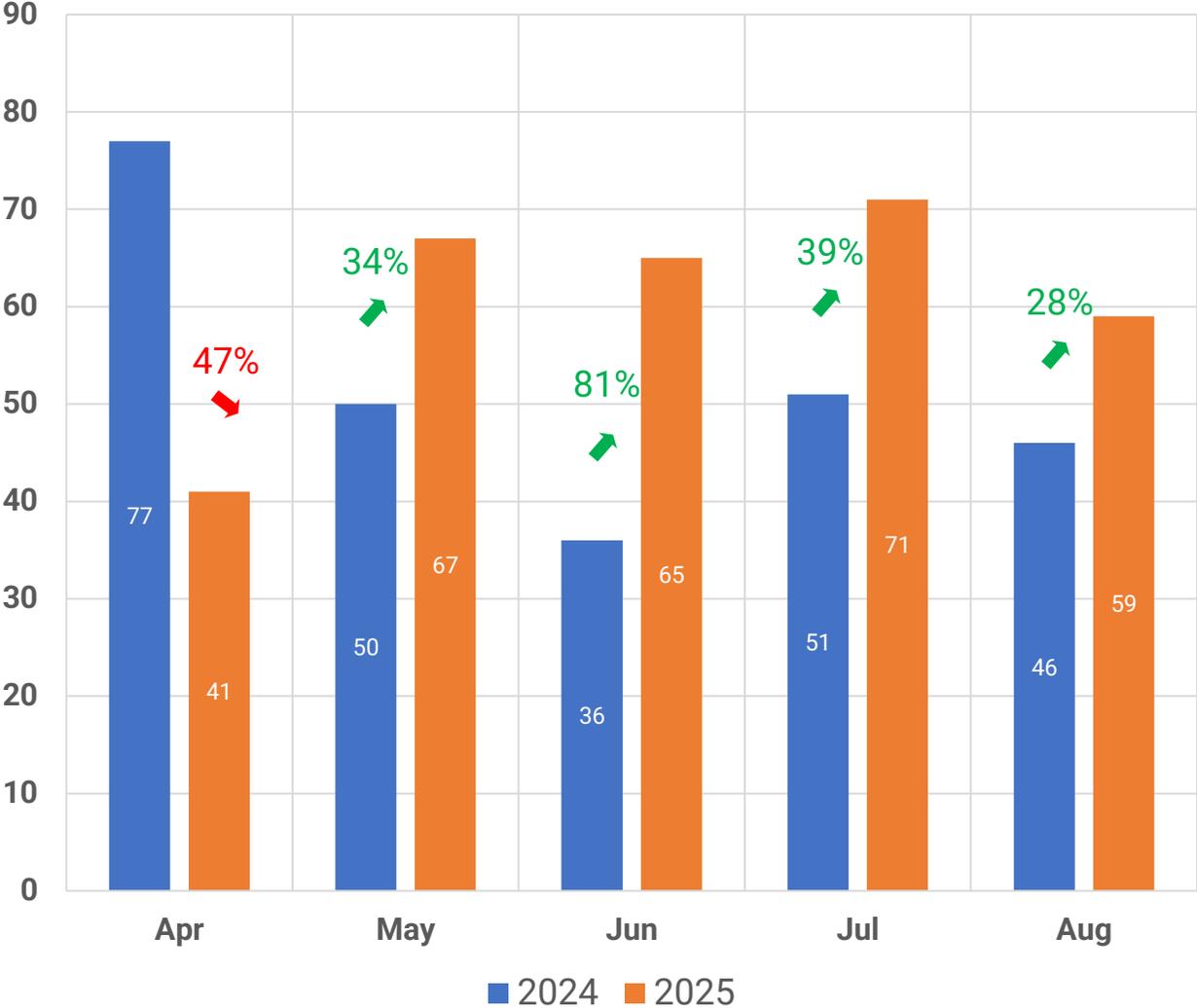


*Apartment mailer was sent on May 16th

Increase in Battery Bucket exchanges



of Battery Bucket Exchanges



*Apartment mailer was sent on May 16th



Household Hazardous Waste

- Recology received 1,006,563 pounds of material collected across all HHW programs
- 165,329 pounds of batteries collected
- 1,262,748 pounds of e-waste collected

Waste Characterization Study

4.2.1 Residential, Small Apartment, and Small Commercial Streams (Side Loader, Cart-based Collection)

LANDFILL – CART SERVICE

Table 4: Landfill – Cart Service, Detailed Composition

Material	Est. %	+ / -	Material	Est. %	+ / -
Paper	22.6%	1.3%	Organics	45.0%	2.5%
Paper Shopping Bags	1.1%	0.2%	Plant Trimmings	1.1%	0.4%
Other Paper Bags/ Kraft Paper & Brown Grades	2.2%	0.2%	Large Woody Trimmings	-	-
Clean Uncoated Corrugated Cardboard	0.8%	0.3%	Donatable Unpackaged Food	1.1%	0.3%
Coated Corrugated Cardboard	0.0%	0.0%	Donatable Packaged Food	3.2%	0.5%
Shredded Paper	0.1%	0.1%	Not Donatable Unpackaged Food	12.5%	1.6%
Coated Paper Cups	0.3%	0.1%	Not Donatable Packaged Food	10.0%	1.0%
Aseptics & Gable Top Cartons	0.3%	0.1%	Inedible Unpackaged Food	2.9%	0.6%
Wine & Liquor Cartons (CRV)	0.0%	0.0%	Inedible Packaged Food	1.4%	0.4%
Compostable Paper & Fiber Foodware	3.4%	0.6%	Clean Wood	0.4%	0.4%
Compostable Paper Tissue & Other Compostable Paper	10.3%	0.7%	Painted Wood	0.1%	0.1%
Other Coated Paper	0.2%	0.0%	Diapers	6.9%	1.6%
Newspaper, Office Paper, & Other Recyclable Paper	2.3%	0.4%	Animal Feces & Litter	5.2%	1.4%
Miscellaneous Paper Packaging & Other Composite Paper	1.5%	0.3%	Other Compostable Organics	0.2%	0.2%
Plastic	14.4%	0.9%	Hazardous	1.4%	0.7%
Single-use Compostable Plastic Foodware	0.2%	0.1%	Sharps	0.0%	0.0%

Updates for Quarter 1

Rate Cycle Planning Meeting

“The purpose of this ordinance is to reform and modernize the City’s process for setting residential refuse rates to be more fair, transparent, and accountable; and to help the City continue to pursue its Zero-Waste goals.”

Proposition F, Section 2(b)

Rate Cycle Planning Outcomes

- Clarification of roles and responsibilities
- Debrief of 2025 Refuse Rate Process
- Forward planning
- Written Agreements



Q1 Highlight



Wood-to-Reuse Market Development

- Makes SF economy **resilient** to disturbances in material supply chains
- The local reuse market is a higher-and-better end-of-life use case
- Lumber routed to **Building ReSources of San Francisco** for resale at discounted cost
- Reduces truck trips from 145-miles round trip to a regional mulch market and instead routes the same commodity to **Building ReSources** which is **5-miles roundtrip**

Landfill Contract

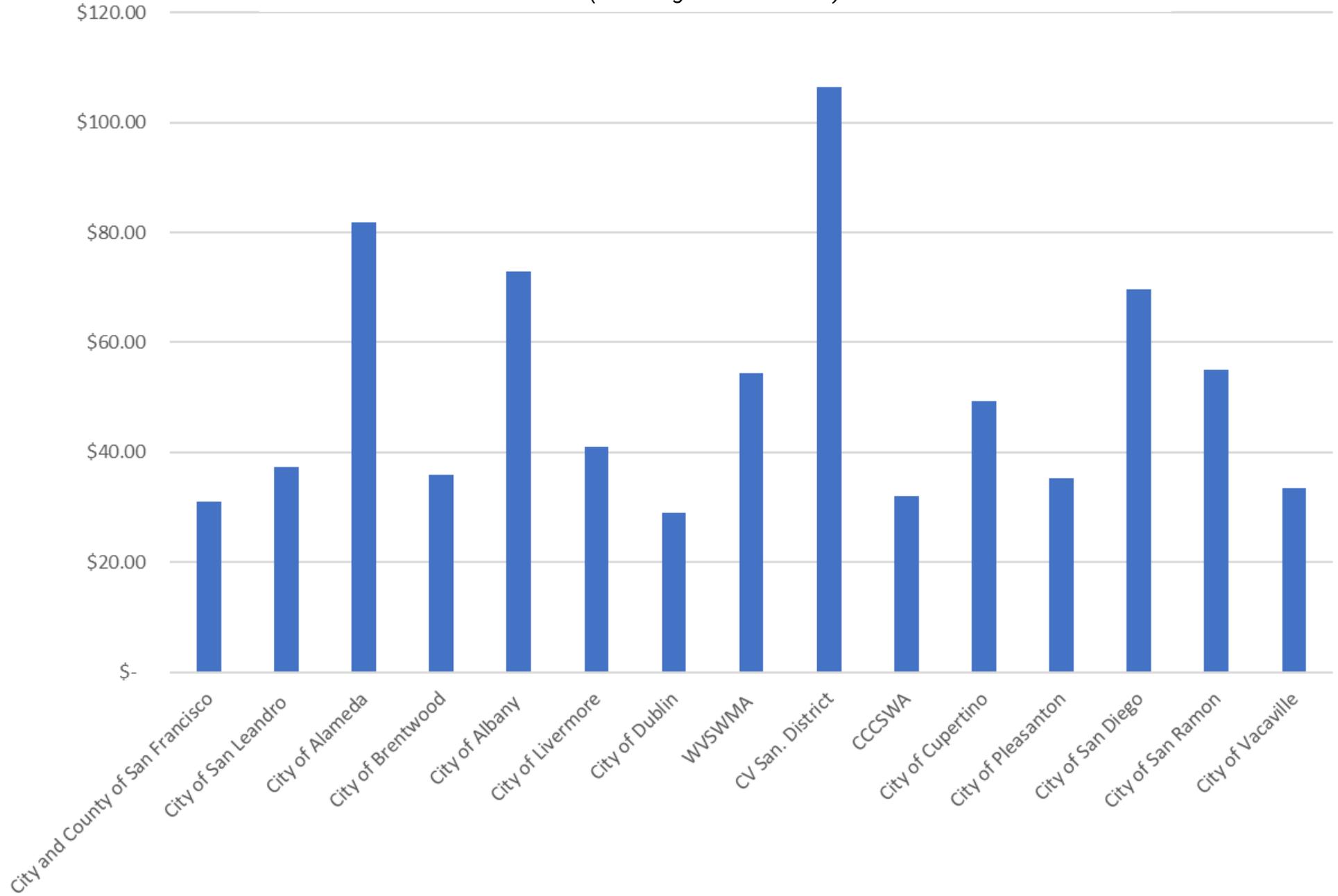
Landfill RFP Analysis

Current Contract Term ends in ~
April 2029

- Landfill costs will feed into the rates
- Incorporated 2023 audit findings into RFP
 - Changed contract term expiration
 - Included detailed reporting requirements
- Consultant provided industry guidance and expertise in developing RFP
- Refuse Rate Administrator reviewed draft and provided feedback



Greater Bay Area Cities Municipal Solid Waste Tipping Fee (without government fees)

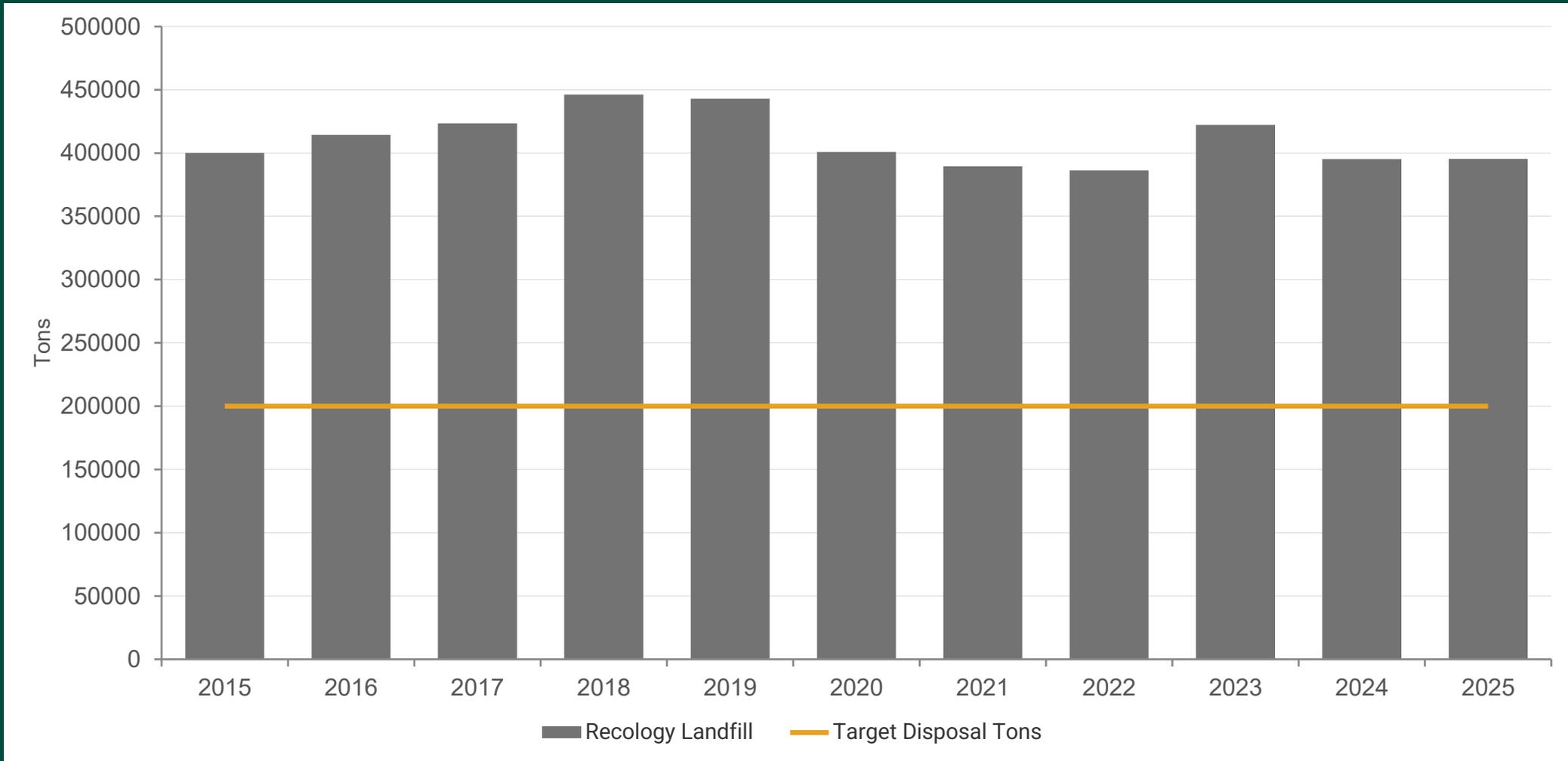




Tentative Landfill RFP Timeline

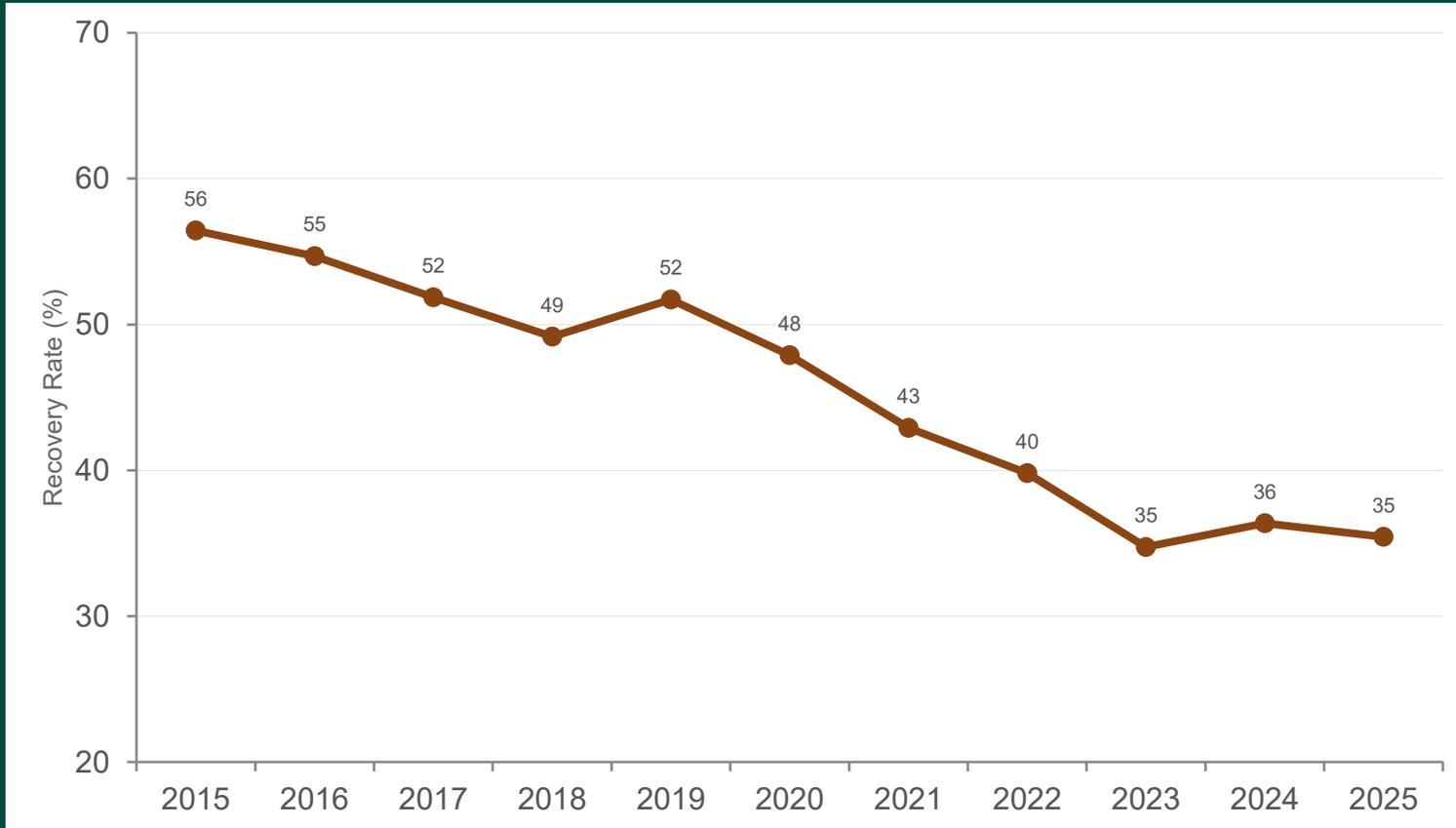
- March 2026: RFP released
- May 2026: Proposals due
- July 2026: RFP awarded
- September 2026: RFP finalized
- November 2026 : SFE Commission and Board of Supervisors Approval
- 2027 – 2028: CEQA Analysis
- 2028: Contract incorporated into Refuse Rates

Trash Processing Feasibility Report



Recology's Annual Tons to Landfill

Recology Recovery Rate | 2015 - 2025



Year	Recovery Rate
2015	56.4%
2016	54.7%
2017	51.8%
2018	49.2%
2019	51.7%
2020	47.9%
2021	42.9%
2022	39.8%
2023	34.7%
2024	36.4%
2025	35.4%

Trash Processing

Cost and Recovery Potential Analysis

Study Objectives:

- Demonstrate how technology-enabled trash processing will move SF closer to zero waste targets
- Compare processing facility costs, technologies and recovery potential
- Identify the system that produces the highest return on investment



Ratepayer Model Analysis

Objectives:

- Run example rate models where non-compliant accounts pay for trash processing
- Model a trash processing rate higher than source separate rate
 - Compliant accounts would be excluded from additional trash processing costs
- Identify cost savings opportunities
 - Recology operations cost savings
 - Landfill cost saving: tipping fee avoidance, reduced transportation

Questions?

Thank you.

Soko Made, Zero Waste Manager
SFEnvironment.org

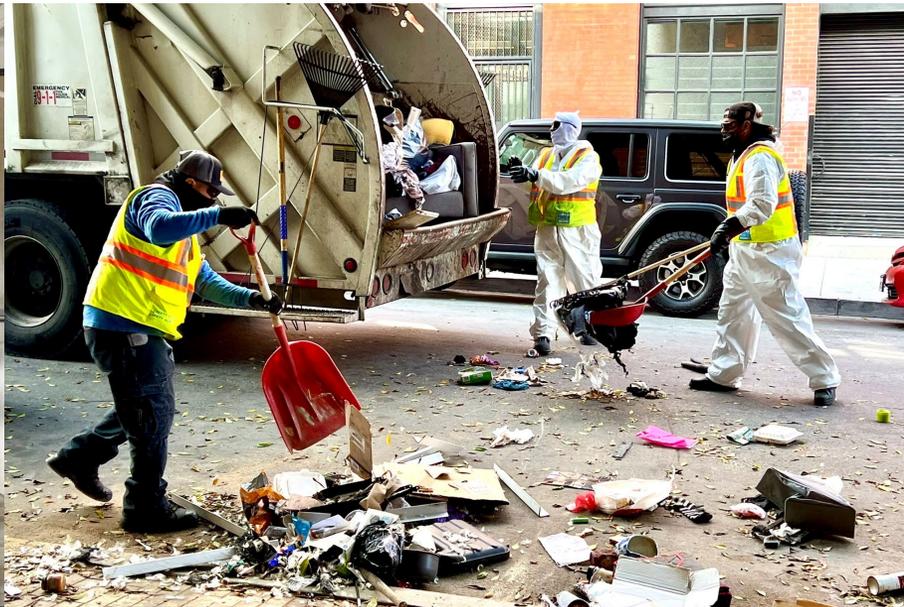
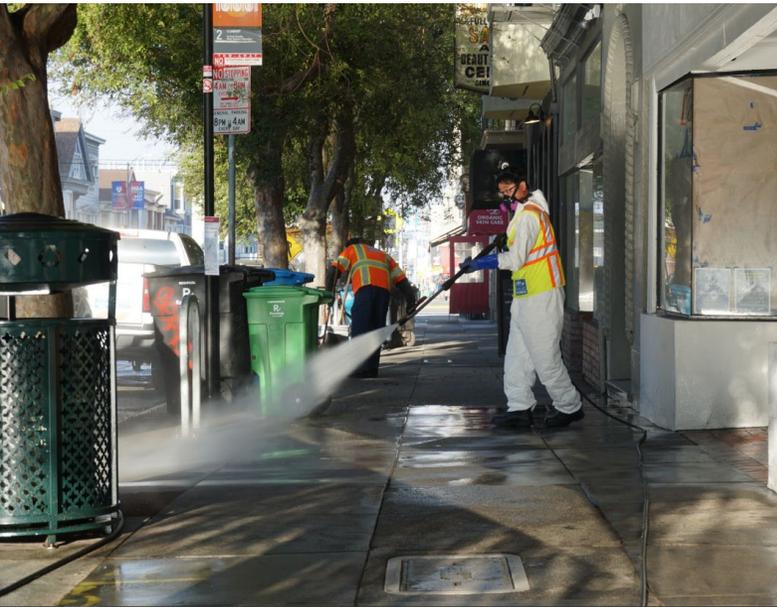


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Refuse Rate Board

March 13, 2026

Rachel Gordon
Director of Policy and Communications

Refuse Rate Goal: Enhance the Cleanliness of San Francisco

- **Continue Key City Initiatives**

- Outreach and Enforcement (OnE) Team
- Litter Patrol – neighborhood trash pickup in the public right of way
- Courtesy bulky item pickup (residential)
- Removal of reported illegal dumping on sidewalks and roads
- Abandoned materials collection
- Mechanical street sweeping to remove leaves and litter from the curb lane

- **Public Trash Cans**

- Ensure trash can pickup and service
- Monthly trash can steam cleaning
- Service and maintain existing trash cans in the public right of way
- New trash cans are in testing phase

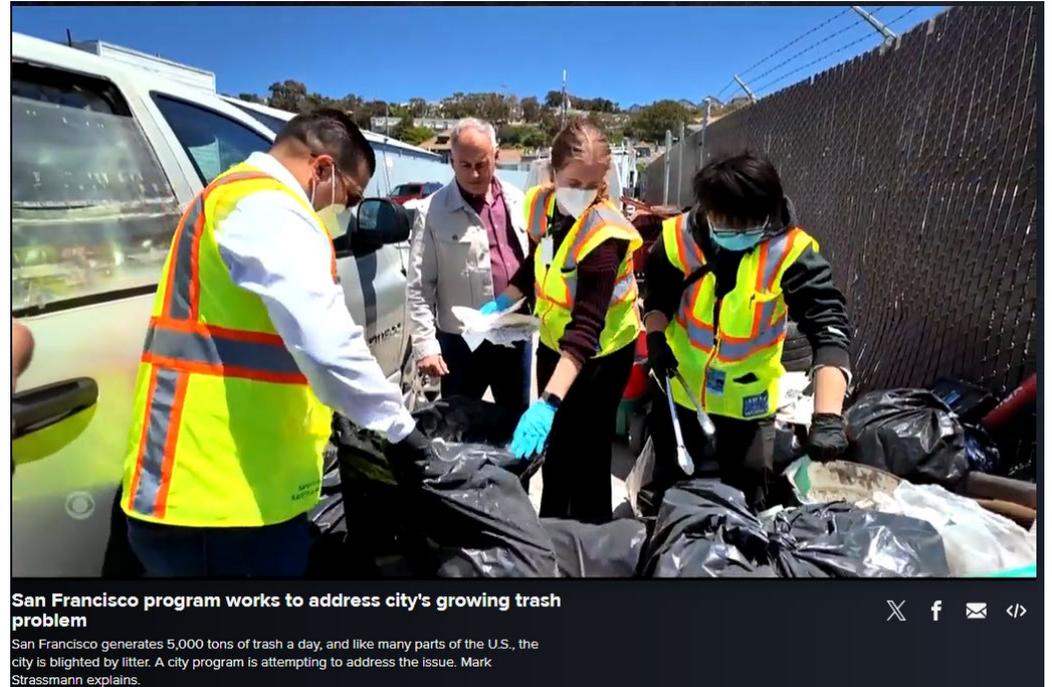


Public Works Impound Account Funding

Program	FY 25-26	FY 26-27	FY 27-28
Litter Patrol	\$ 5,125,205	\$ 5,304,587	\$ 5,461,603
Outreach & Enforcement (OnE) Team	\$ 2,865,289	\$ 2,965,574	\$ 3,053,355
Mechanical Sweeping	\$ 2,528,474	\$ 2,528,474	\$ 2,603,317
Public Trash Can Cleaning	\$ 1,719,837	\$ 1,761,113	\$ 1,813,242
Public Trash Can Administration	\$ 173,831	\$ 179,915	\$ 185,240
Public Trash Can Maintenance	\$ 97,346	\$ 100,753	\$ 103,735
Total	\$ 12,509,982	\$ 12,840,416	\$ 13,220,492

Public Works Impound Account – Labor

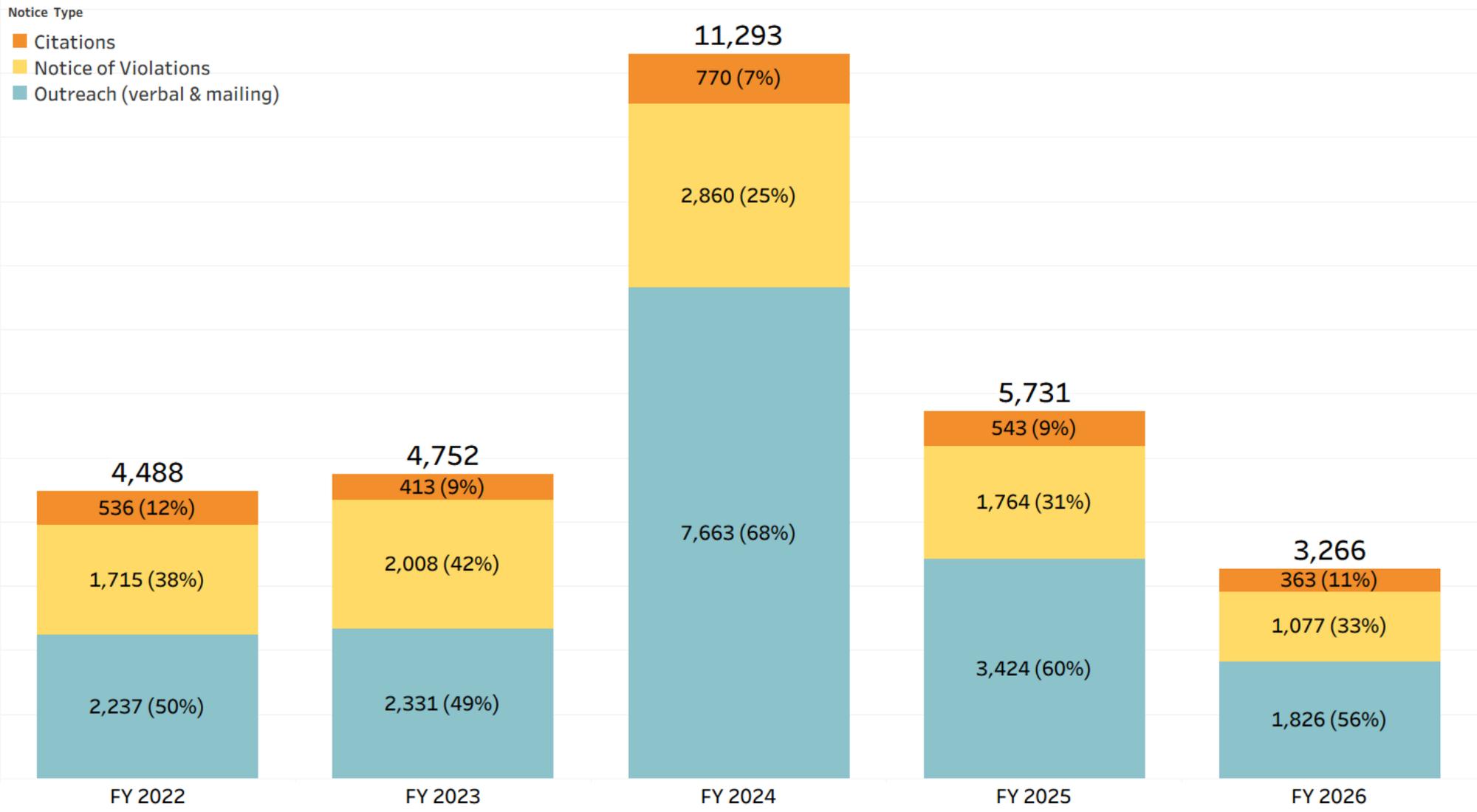
- **Outreach and Enforcement (OnE) Team**
 - 10.0 full-time employees (3.0 positions vacant)
 - Started in 2013
 - The team is responsible for:
 - educating merchants, property owners and residents of their rights and responsibilities regarding street and sidewalk cleanliness
 - enforcing City codes to ensure sanitation standards are met
- **Cleaning Staff**
 - 30.0 full-time employees
 - 7514 General Laborers
 - 7355 Truck Drivers
 - Responsible for Litter Patrol and block sweepers
- **Trash Can Manager**
 - 1824 Trash Can Manager joined Public Works in April 2025



Source: CBS News (<https://www.cbsnews.com/video/san-francisco-program-works-to-address-citys-growing-trash-problem/>)

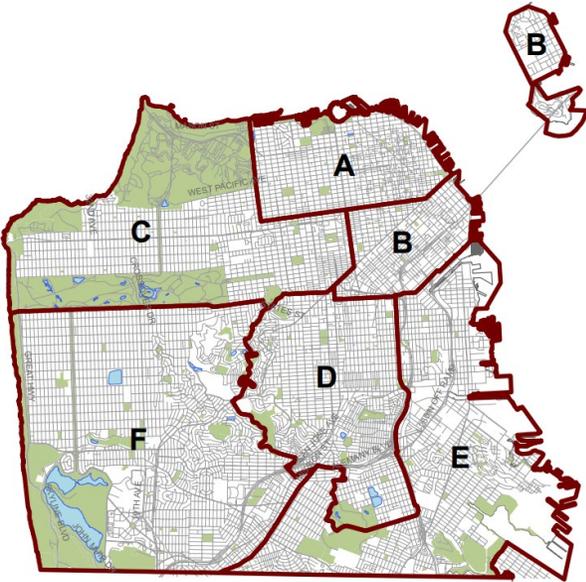
OnE Team Activity – By Type

Annual Total Actions by Type data through 3/3/26

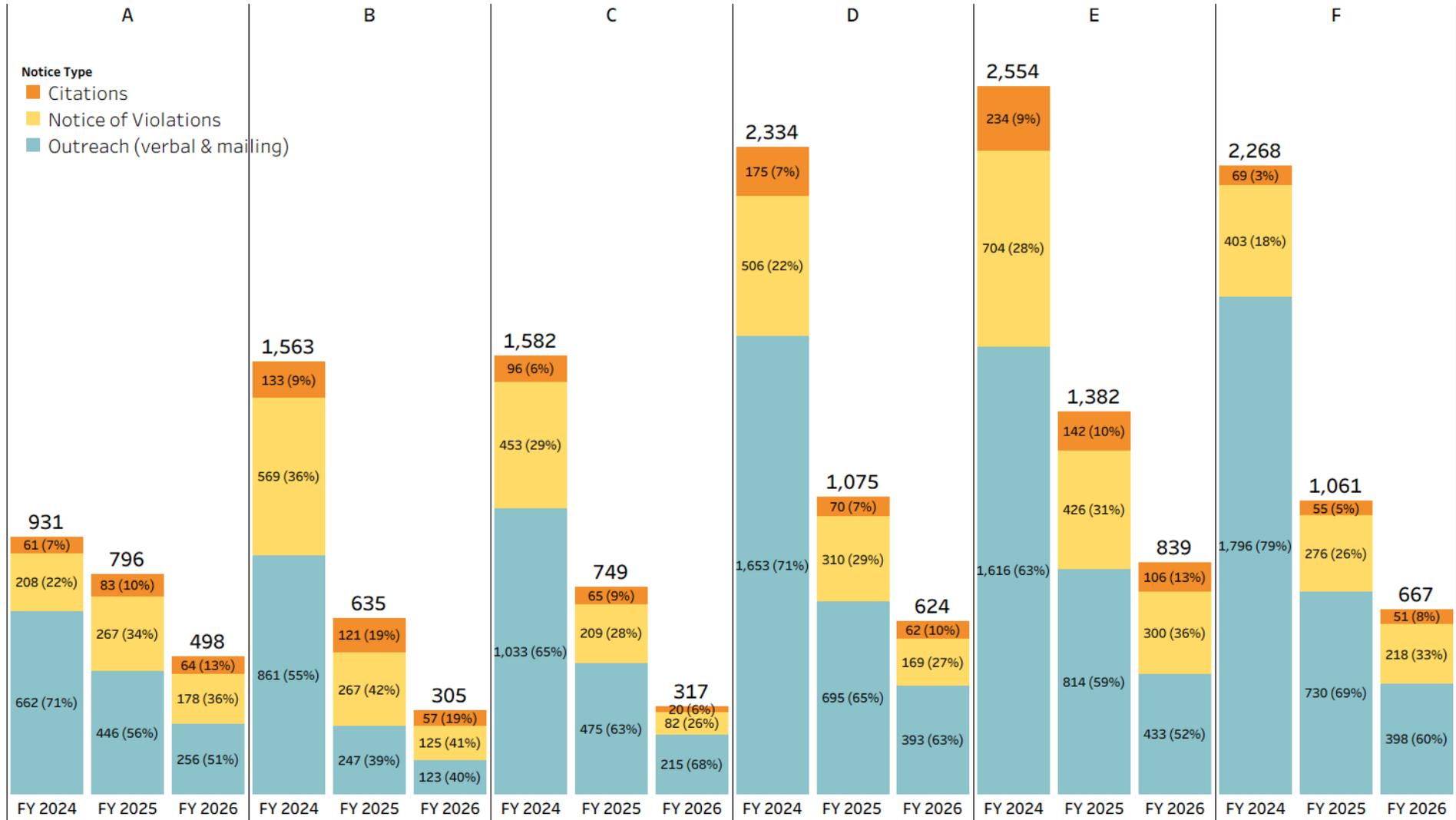


OnE Team Outreach Efforts – Activity by Type / Zone

Total Actions by Type and Zone (FY 2024, FY2025, FY2026) data through 3/3/26

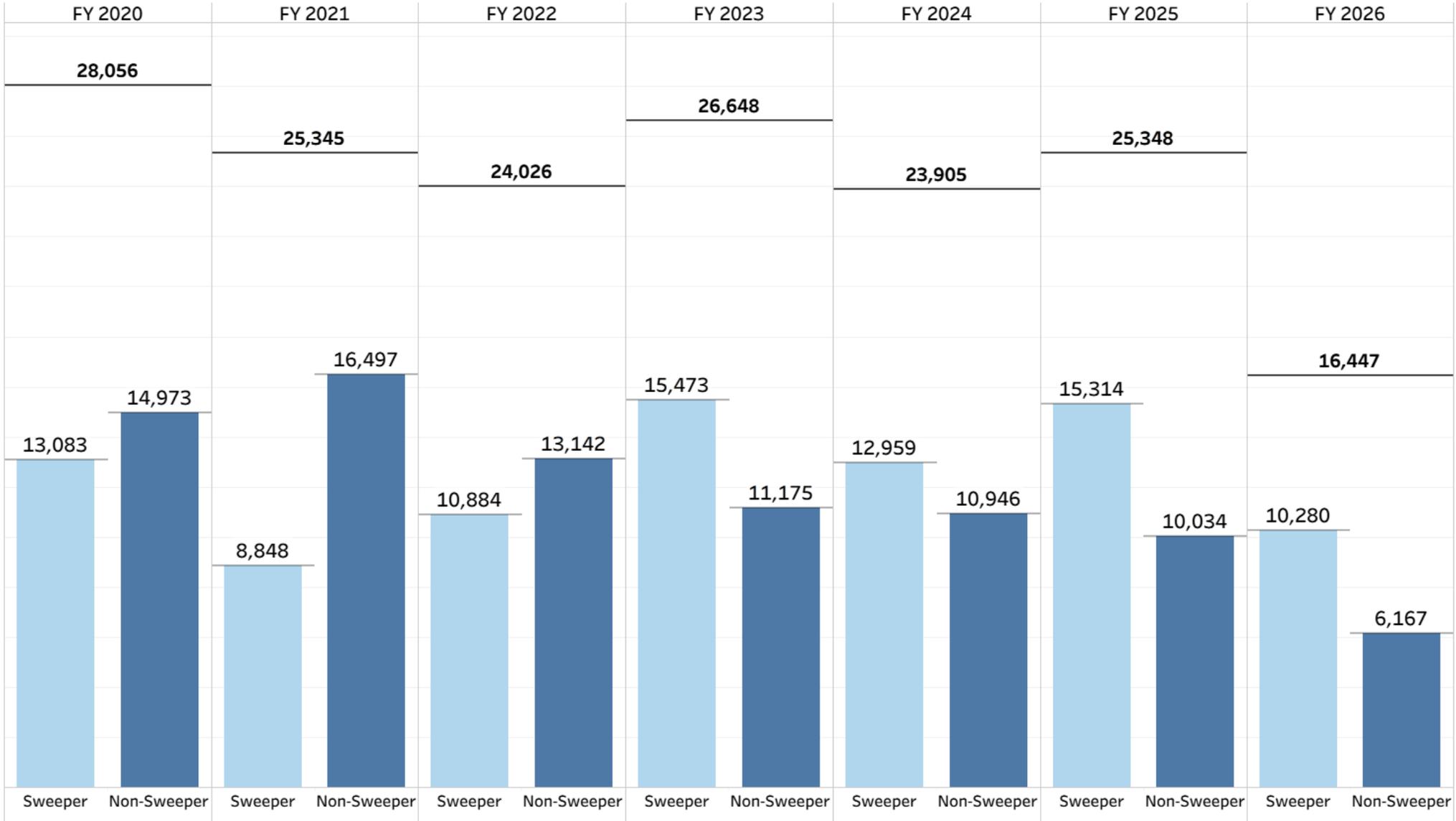


Zone map



Total Tons of Debris Collected by Fiscal Year

Annual Debris Tonnage Collected Public Works only, data through 2/21/26



Public Works Impound Account – Non-Labor

- **Enhanced Trash Can Steam Cleaning**
 - Started with 2017 rate process
 - \$1.7M in funding for nonprofit to do routine steam cleaning of trash cans citywide
 - Services provided by Community Youth Center of San Francisco (CYC) include:
 - Pressure washing of trash cans and surrounding area
 - Litter removal in areas surrounding trash cans
 - Notifying Public Works of graffiti and malfunctioning or damaged trash cans



Public Works Impound Account – Trash Cans

- **Public Trash Can Replacement (\$15.0M)**
 - One-time allocation of fund balance of approximately \$15.0M for trash can procurement
 - No additional impound account funding required in this rate process
 - No impact on rates
- **Need for new trash cans**
 - Durability issues – Persistent problem with Renaissance cans, locks and hinges
 - Renaissance cans' material is degraded and at end of useful life
 - Cannot repair Renaissance can parts
 - Increased use of cement cans
 - Recology requests 32-gallon rolling plastic liners for efficiency
 - Rummaging is a persistent problem



Source: <https://www.core77.com/posts/75587/urban-design-observations-san-francisco-edition-bizarre-public-trash-can>

Public Works Impound Account – Trash Cans

- **Trashcan Replacement Performance Criteria**
 - Rummage-resistant
 - Tamper-proof
 - Easy to service
 - Durable and easy to maintain
 - Rodent-resistant
 - Sensor-ready
 - Accommodate 32-gallon rolling plastic liners
 - Accommodate recycling exchange
 - Cost-efficient



Public Works Impound Account – Trash Cans

- **New City Trash Can**
 - Slim Silhouette
- **Vendor**
 - Tiger Supplies Inc.
- **Cost**
 - \$1,591 per unit (3,000+ quantity)
 - Can: \$1,495
 - Liner: \$96
 - Tariffs: \$158 (subject to change)



Public Works Impound Account – Trash Cans

- **Status**

- The first 10 cans were delivered this month for test phase:
 - Evaluating alignment with manufacturing specs
 - Evaluating durability, maintenance and usability with Operations staff
 - Street deployment of the test cans will follow

- **Rollout Plan**

- The manufacturer can deliver up to 600 per month, for a total of us to 3,500
- Anticipated start date: summer/fall 2026

