

# Solid Waste Hauler Commercial Franchise Hauler Presentation

MIAMIBEACH  
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Update  
From  
April 29, 2022, FERC Meeting

# Takeaways from the Last Presentation

## ***1. Low Response to the On-Line Survey***

- a. Only 15 Responses Received

## ***2. Limited Municipality Data Sampling Reviewed***

- a. 13 Municipalities

# Solid Waste Forum

## *In-Person Public Meeting*



Join the City of Miami Beach for a solid waste forum to discuss our commercial franchise waste hauler services for larger condominium, apartment buildings and businesses. Staff will be present to answer questions and collect input using a customer service survey.

**Thursday, July 7, 2022 from 6 PM to 7:30 PM**

Miami Beach Golf Clubhouse  
2301 Alton Road

For more information, please contact Kevin Pulido at [kevinpulido@miamibeachfl.gov](mailto:kevinpulido@miamibeachfl.gov)

**MIAMIBEACH**

[www.miamibeachfl.gov](http://www.miamibeachfl.gov)

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# Summary of Industry Forum

- Attended by approximately 40 persons; with 32 registered on sign-in sheet.
- Provided an update to the Community
- Survey provided; hard copies and on-line (over 140 responses received)
- Q & A
  - What works, what doesn't
  - How can we improve
  - Overall Satisfaction

# Survey



## MIAMIBEACH

### Solid Waste Survey

In 2022 the City of Miami Beach will be rebidding its franchise agreement or contract for waste and recyclables collections from commercial establishments and apartment and condominium buildings inside city limits. The current franchise agreement has been in place since October 2014 and authorizes Waste Connections (formerly Progressive Waste Solutions) and Waste Management to provide services to Miami Beach commercial properties and apartment and condominium buildings.

Providing high quality services at a competitive cost to our business community is of the utmost importance and we would greatly appreciate if you would take a few minutes to complete the following survey on your waste and recycling services. Your input will not just help us assess satisfaction levels with current services, but also inform how we solicit services as part of the upcoming rebid of the City's solid waste franchise agreements. The survey shouldn't take more than five minutes to complete, and your responses will remain anonymous.

Additional information regarding these services can be found on the City's websites at:  
<https://www.miamibeachfl.gov/city-hall/public-works/sanitation-division/commercial-waste-haulers/>  
<https://www.mbrisingabove.com/your-home/recycling-waste/recycling/commercial-properties/>

Thank you in advance for your feedback.

#### Questions

**1** Do you pay directly for your own trash and recycling service or does your landlord or property manager handle this? Check one.

☐ Pay direct

☐ Landlord/property manager pays

**2** Please let us know about your business:

Address: \_\_\_\_\_

Property Type: (hotel, restaurant, retail, apartment/condo, other?) \_\_\_\_\_

Number of employees or dwelling units: \_\_\_\_\_

**3** How satisfied are you with the following aspects of your trash and recycling service?

	Great	Good	Average	Poor	No Opinion
Quality of Service:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Cost of Service:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

What is more important to you:


☐ Getting high-quality service

☐ Having the ability to hire another waste services provider

☐ Getting the lowest price for services provided

☐ No opinion

1



## MIAMIBEACH

### Solid Waste Survey

**4** Who is your current waste hauler?

☐ Waste Connections/Progressive Waste

☐ Waste Management

☐ Don't know

**5** How do you dispose of your waste materials? (check all that apply)

☐ In a dumpster

☐ In cart(s)

☐ In roll-off container

**6** How many days per week does waste get collected?

\_\_\_\_\_

**7** Do you receive recycling collection services?

☐ Yes

☐ No

**8** If answered "Yes" for recycling, which materials are collected (check all that apply)

☐ Paper & cardboard

☐ Plastic bottles & containers

☐ Aluminum & steel cans

☐ Glass bottles & jars

**9** How do you recycle your recyclable materials?

☐ In a dumpster

☐ In cart(s)

☐ In roll-off container

**10** How many days per week does recycling get collected?

\_\_\_\_\_

**11** Would you be willing to share information about the prices you are currently paying for service?

☐ Yes – I can forward a copy of my most recent bill to City staff and the consultant

☐ Yes – here are details: \_\_\_\_\_

☐ No

**12** Do you wish to share any comments or feedback?

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

2

# Some Results from the Survey

How satisfied are you with the following aspects of your trash and recycling service?

Response	Quality of Service	Cost of Service
No Opinion	1%	12%
Poor	35%	45%
Average	31%	24%
Good	22%	11%
Great	11%	7%

What is more important to you?

Response	Rate
Getting high-quality service	27%
Having the ability to hire another waste services provider	41%
Getting the lowest price for services provided	29%
No opinion	3%

# Background- Types of Agreements

←  
Less Regulatory Control

→  
More Regulatory Control

## Open Market

- Allows for larger number of companies to compete
- Solid waste generators hire their own hauler
- No limit as to the number of operators within a geographical area

## Non-Exclusive

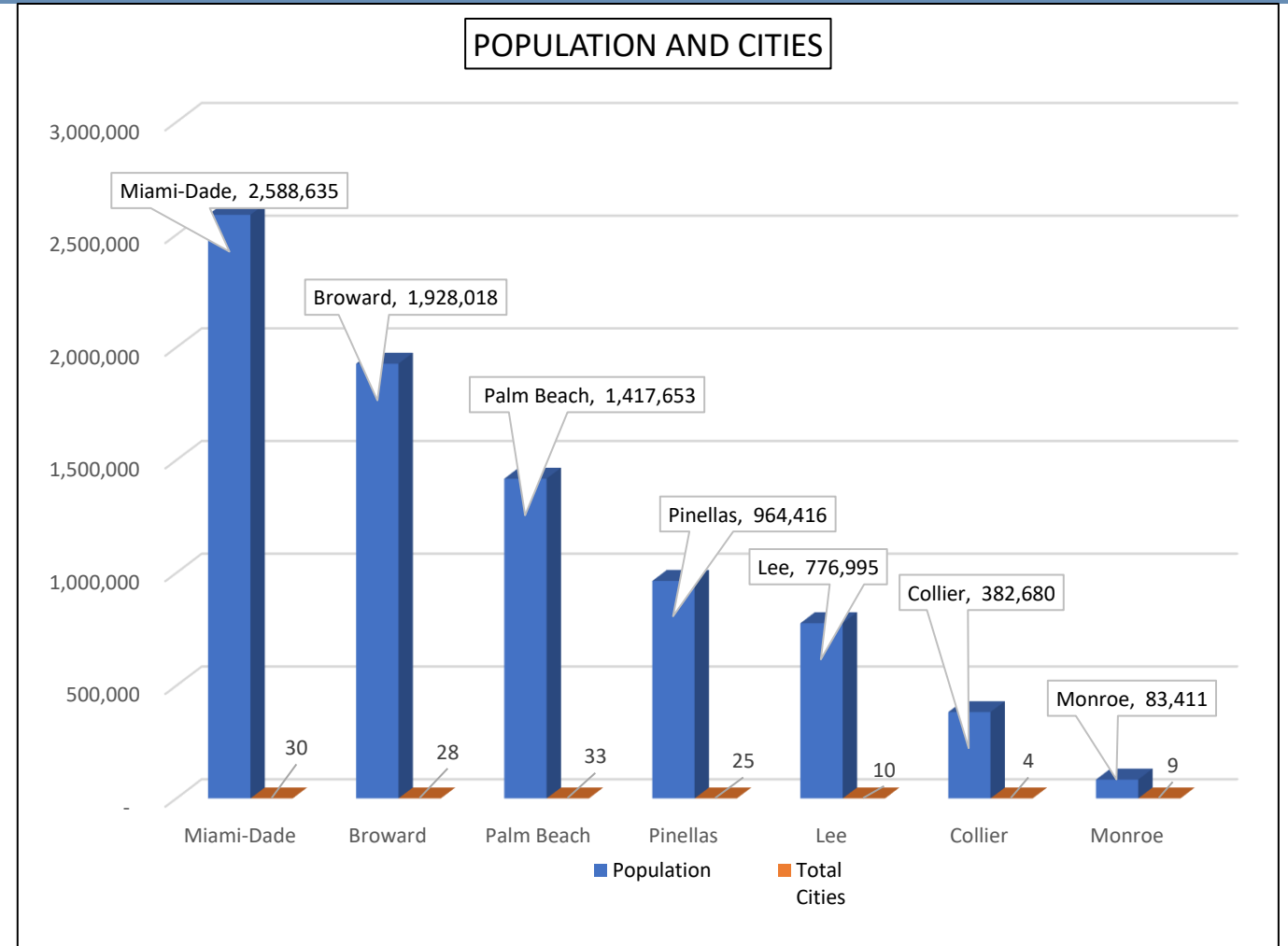
- Can permit multiple franchisees who compete for service
- Can be organized by geographic area
- **Current system in Miami Beach**
- Section 90-229 of the City Code allows up to five franchises

## Exclusive

- Franchisee is only service provider and has exclusive “right” to provide service
- Prices are pre-negotiated between franchisee and the City
- Provides price stability over life of the contract

# Population by County and Number of Cities reviewed

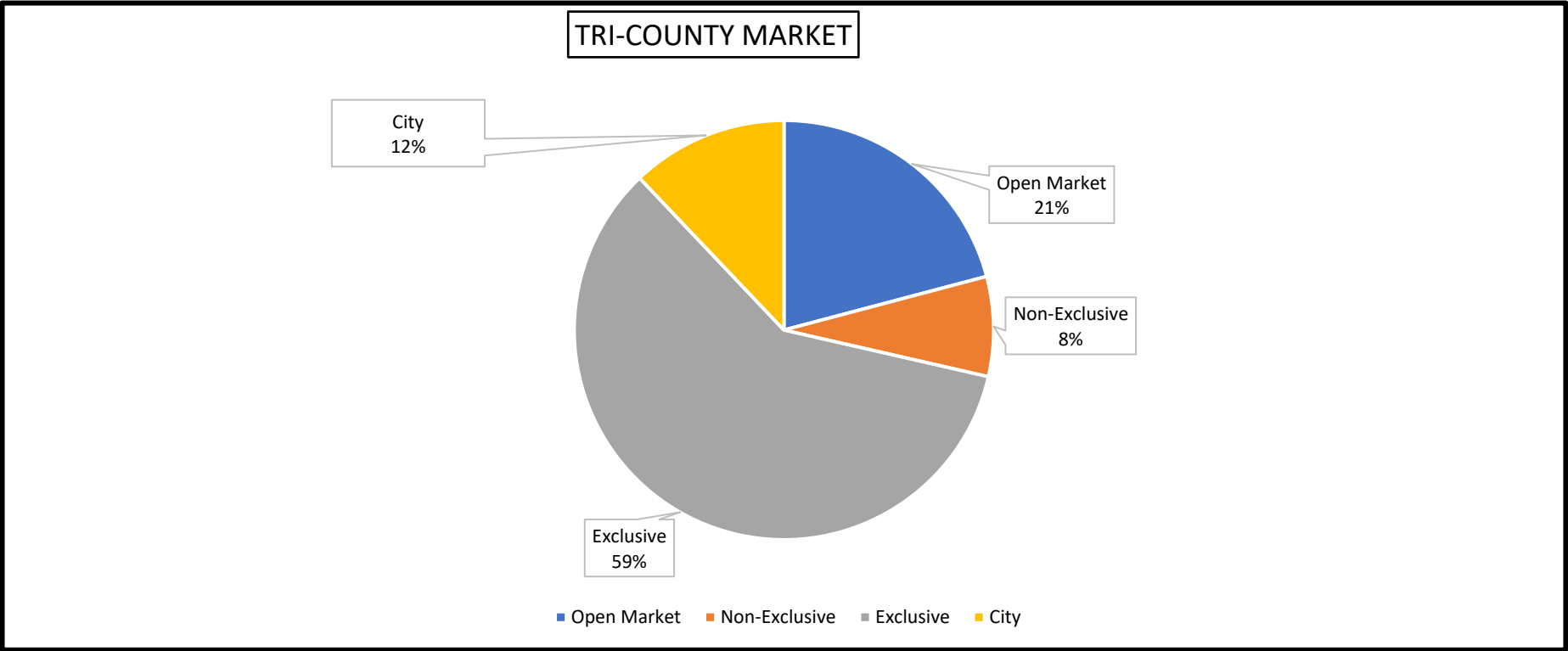
- **91 Municipalities in Tri-County Area**
- **48 Municipalities in Four Additional Counties**
- **Total of 139 Municipalities Reviewed**
- **Population numbers reflect municipalities that provided data**



# Breakdown of Franchise Type

<i>Cities Reviewed</i>						
County	Population	Total Cities	Open Market	Non Exclusive	Exclusive	City
<i>Miami-Dade</i>	2,588,635	30	15	4	8	3
<i>Broward</i>	1,928,018	28	3	1	21	3
<i>Palm Beach</i>	1,417,653	33	1	2	25	5
<i>Pinellas</i>	964,416	25	3	0	12	10
<i>Lee</i>	776,995	10	0	0	9	1
<i>Collier</i>	382,680	4	0	0	3	1
<i>Monroe</i>	83,411	9	0	0	9	0
<b>Totals</b>	<b>8,141,808</b>	<b>139</b>	<b>22</b>	<b>7</b>	<b>87</b>	<b>23</b>
Population numbers reflect municipalities that provided data			16%	5%	63%	17%

# Tri-County Market By Percentage



County	Open Market	Non-Exclusive	Exclusive	City	Total Cities
Tri Counties	19	7	54	11	91
	21%	8%	59%	12%	100%

# Miami-Dade

County	City Names	Open Market	Non Exclusive	Exclusive Franchise	City		
MIAMI - DADE COUNTY	Unincorporated	1,197,784					
	Bal Harbour			3,084			
	Biscayne Park	3,119					
	Coral Gables			50,193			
	Cutler Bay	45,478					
	Doral		80,703				
	Golden Beach				955		
	Hialeah		225,493				
	Hialeah Gardens			23,055			
	Indian Creek			84			
	Key Biscayne	14,815					
	Medley	1,047					
	Miami		449,747				
	Miami Beach		82,785				
	Miami Gardens	112,508					
	Miami Lakes	30,857					
	Miami Shores				11,548		
	Miami Springs	13,851					
	North Bay Village				8,211		
	North Miami				60,175		
	North Miami Beach				43,749		
	Opa-locka	16,570					
	Palmetto Bay	24,499					
	Pinecrest	18,419					
	South Miami	12,071					
	Sunny Isles Beach	22,655					
	Surfside					5,593	
	Sweetwater	19,941					
	Virginia Gardens	2,371					
	West Miami				7,275		
		Total Service by Population	1,535,985	838,728	195,826	18,096	2,588,635
		Total # of Cities	15	4	8	3	30

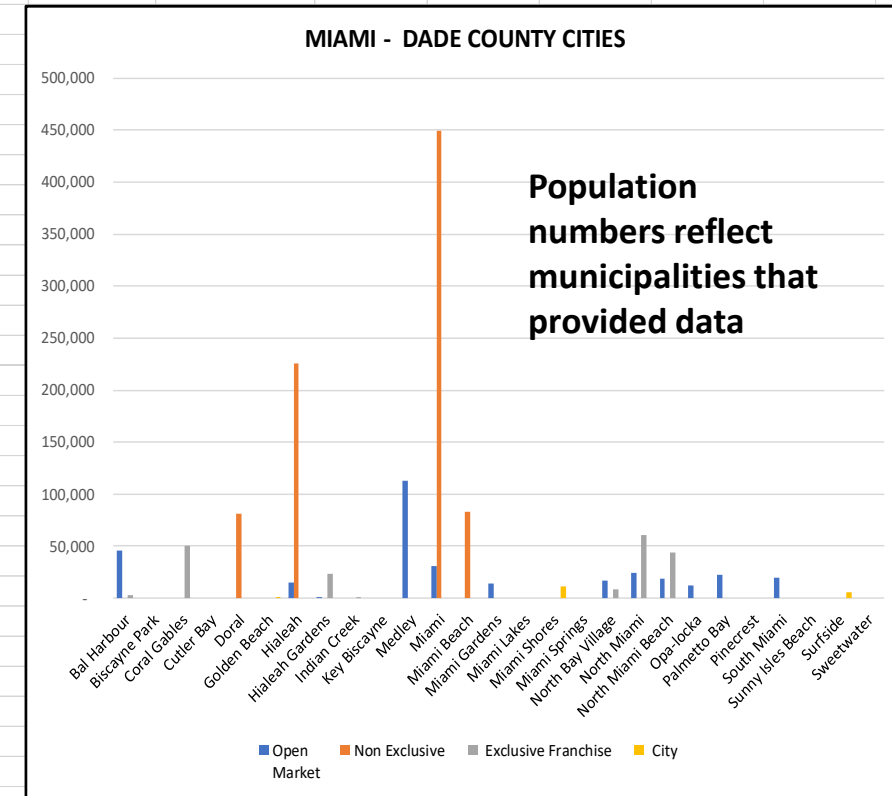
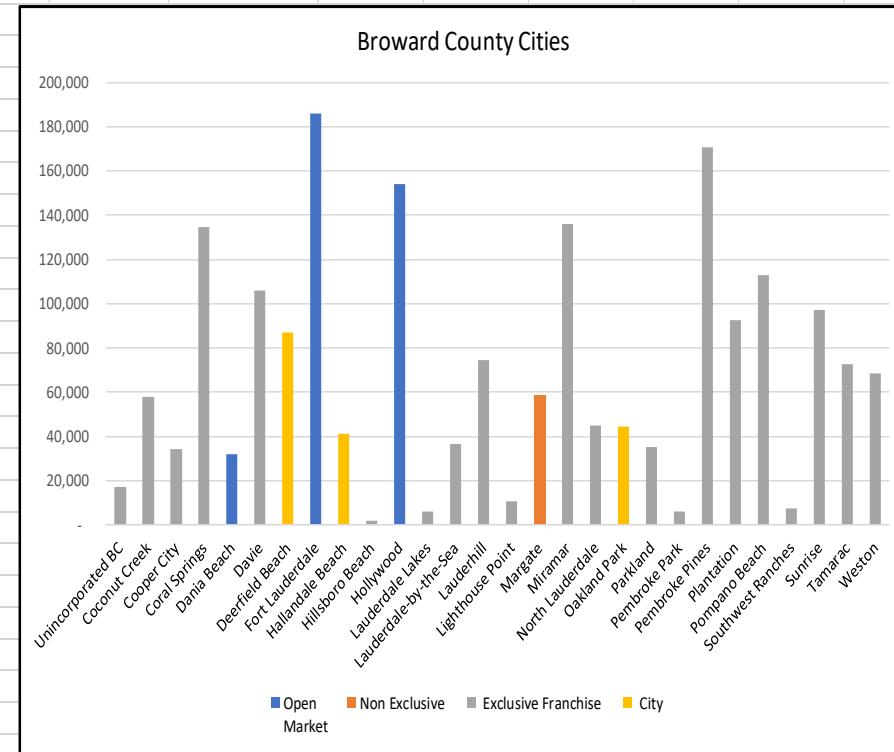


Chart excludes unincorporated Miami - Dade County which has a population of 1,197,184 and is open market.

# Broward

County	City Names	Open Market	Non Exclusive	Exclusive Franchise	City	
<b>BROWARD COUNTY</b>	Unincorporated BC			17,079		
	Coconut Creek			57,871		
	Cooper City			34,397		
	Coral Springs			134,558		
	Dania Beach	31,837				
	Davie			106,199		
	Deerfield Beach				87,106	
	Fort Lauderdale	186,076				
	Hallandale Beach				41,157	
	Hillsboro Beach			1,986		
	Hollywood	153,854				
	Lauderdale Lakes			6,203		
	Lauderdale-by-the-Sea			36,647		
	Lauderhill			74,538		
	Lighthouse Point			10,499		
	Margate		58,714			
	Miramar			136,007		
	North Lauderdale			44,855		
	Oakland Park				44,296	
	Parkland			35,440		
	Pembroke Park			6,222		
	Pembroke Pines			170,857		
	Plantation			92,628		
	Pompano Beach			113,144		
	Southwest Ranches			7,675		
	Sunrise			97,359		
	Tamarac			72,509		
	Weston			68,305		
	Total Service by Population	371,767	58,714	1,324,978	172,559	1,928,018
	Total # of Cities	3	1	21	3	28



Population numbers reflect municipalities that provided data

# Palm Beach

County	City Names	Open Market	Non Exclusive	Exclusive Franchise	City	
PALM BEACH COUNTY	SWA Zone 1 - 6			653,174		
	Belle Glade				16,893	
	Boca Raton		98,046			
	Boynton Beach				81,011	
	Delray Beach			66,948		
	Greenacres			44,549		
	Gulf Stream			949		
	Haverhill			2,193		
	Highland Beach			4,300		
	Juno Beach			3,862		
	Jupiter			61,121		
	Lake Clarke Shores			3,562		
	Lake Park				9,039	
	Lake Worth Beach				42,572	
	Loxahatchee Groves			3,379		
	Mangonia Park	2,142				
	North Palm Beach				13,167	
	Ocean Ridge			1,828		
	Pahokee			5,580		
	Palm Beach			9,253		
	Palm Beach Gardens			59,755		
	Palm Beach Shores			1,330		
	Royal Palm Beach			39,144		
	South Bay			4,924		
	Tequesta			6,152		
	Wellington			61,768		
	West Palm Beach		119,255			
	Westlake			1,757		
	Total Service by Population	2,142	217,301	1,035,528	162,682	1,417,653
	Total # of Cities	1	2	25	5	33

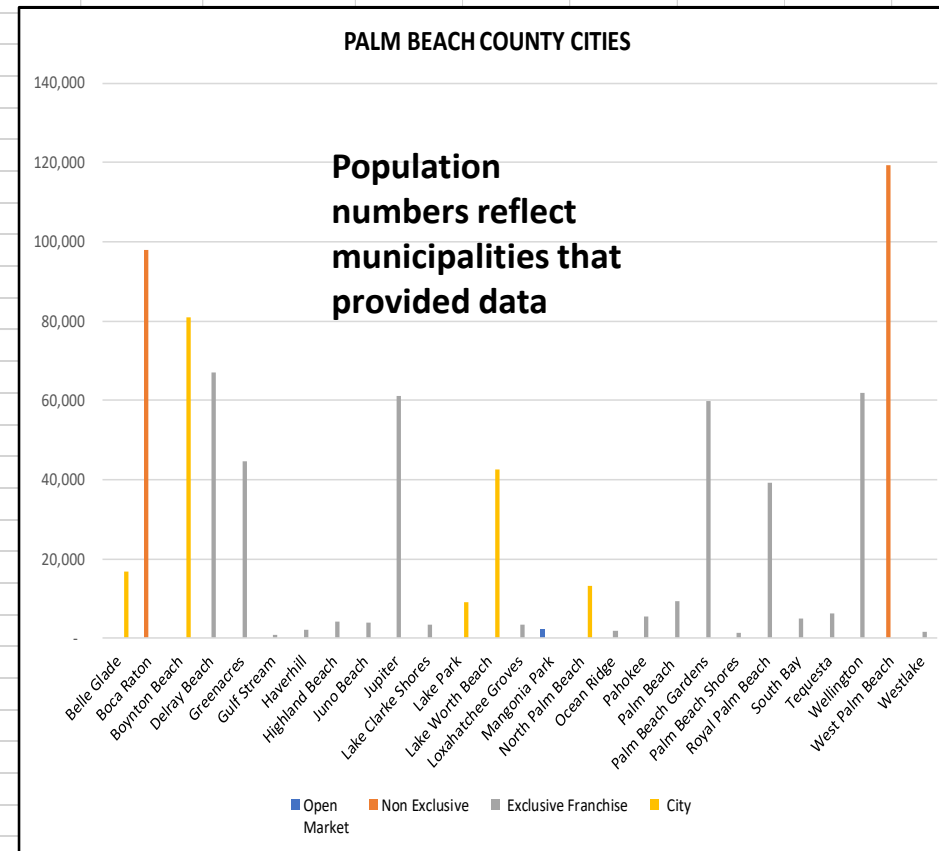
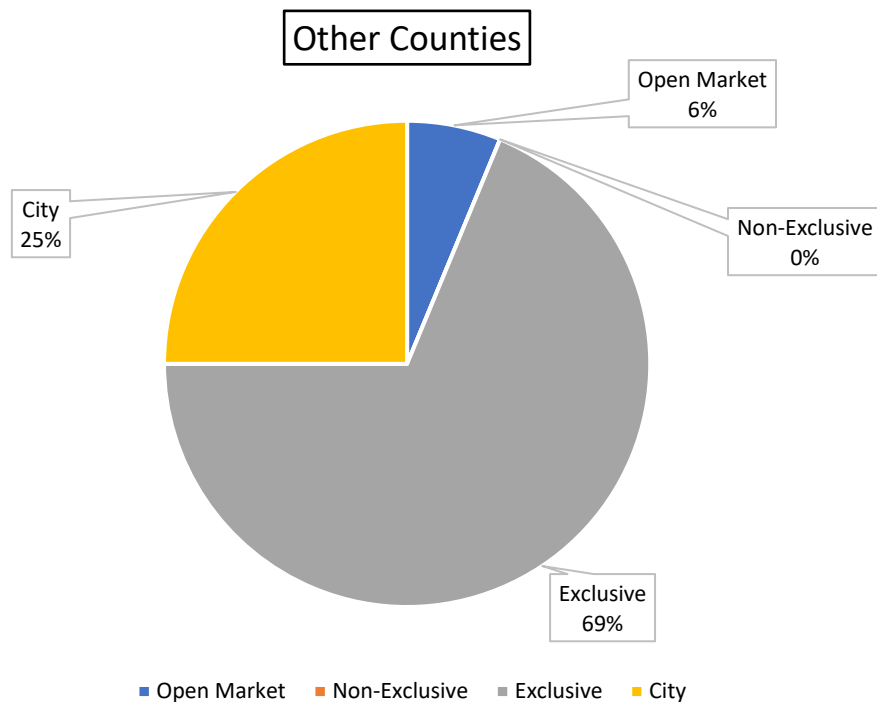


Chart excludes SWA ("Solid Waste Authority") zones 1- 6 which has a population of 653,174 and is exclusive franchise.

# Other Florida Counties By Percentages



Population numbers reflect municipalities that provided data

County	Population	# of Cities	Open Mkt	Exclusive	City
Pinellas	964,416	25	3	12	10
Lee	776,995	10	0	9	1
Collier	382,680	4	0	3	1
Monroe	83,411	9	0	9	0
Totals	2,207,502	48	3	33	12
		100%	6%	69%	25%

# Summary of Industry Forum & Survey

- Industry Forum held on July 7<sup>th</sup>
- Received a total of over 140 responses to Survey
  - Over **65%** of participants rated **Quality and Cost of Service** as **Average or Poor**.
  - **Having ability to hire another Provider and getting the lowest cost** accounted for **70%** of **what is most important** to participants.

# Summary of Municipal Data Sampling

- Reviewed 139 Municipalities
  - **91** in Tri-County Area
  - **48** in Four Additional Counties: Pinellas, Lee, Collier and Monroe
- Miami-Dade County favors Open Market = **15/30** or **50%**
- Broward and Palm Beach favor Exclusive = **46/61** or **75%**
- Pinellas, Lee, Collier & Monroe Counties favor Exclusive = **33/48** or **69%**
- Non-Exclusive has the smallest market share = **7/139** or **5%**

# Options for Your Consideration

- **Continue with the Non-Exclusive Franchise Agreements**
  - Section 90-229 of City Code allows up to Five
  - Note: In 2014 the City opted to select only Three
- **Consider an Exclusive Franchise Agreement**
  - Our current Residential Solid Waste Hauler has an Exclusive Agreement
- **Do Not Recommend an Open Franchise Model**
  - Unlimited Haulers in seven square miles will increase traffic congestion

# Comments / Questions ?



An aerial photograph of Miami Beach, showing a mix of modern high-rise apartment buildings and older, lower-rise structures. A large, flat-roofed building is prominent in the foreground. The city extends to the water's edge, with a pier and several large port cranes visible in the distance across the bay. The sky is clear and blue.

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**Thank you**