

Checklist for Pilot Projects & Trials



**Product
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Centre of
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**PRACTICE
NOTES**

February 2024



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SUMMARY

A well-designed pilot project or trial can serve to test stewardship options, collect data, and inform the detailed design of a more permanent national stewardship initiative that can be implemented either collectively by a Product Stewardship Organisation and its member companies or individually by a business.

This short practice note provides a list of key questions and considerations to assist in the development of pilot projects. They are grouped under three areas of consideration - planning and design; implementation and evaluation. Answers to each of the questions will help to clarify the specific aims, objectives, outputs and outcomes of the pilot project, and ensure the pilot serves its intended purpose in determining how to optimise and maximise stewardship actions, impacts and benefits.



Planning and design phase considerations

- Purpose of the pilot or trial, including clear objectives and envisaged output.
- What is the specific problem, challenge or opportunity that has been identified?
- What is being investigated, tested, and/or explored through a pilot?
- Plain-English description of the problem and/or opportunity being addressed through a pilot.
- Scope of the pilot i.e., what's in and what out, and why?
- Geographical coverage and why?
- Product scope and why?
- Timeframe; duration and timing, and why?
- Who will own the planning and design phase?
- What are the expectations of management and the leadership team?
- Identify and involve internal stakeholders in planning and design e.g., management team and leadership group, store managers, others?
- Identify and involve external stakeholders in planning and design e.g., service providers, researchers, federal state and territory government agencies and regulators, local government, peak bodies, industry associations, professional institutes, research organisations, consumer and environment NGOs, social enterprises and charities, other?
- Partners and collaborators. Who and why?
- Suppliers and service providers eg. logistics, post-collection processing and recycling, reuse, repair, refurb and remanufacturing, other? Who and why?

Implementation phase considerations

- Who will own and project manage the implementation of the pilot?
- Help desk for inquiries for store staff and the public.
- Collection and logistics providers/partners; who and why?
- Post-collection processing providers; who and why?
- Downstream processing requirements or standards imposed by recycler and manufacturer.
- Collection infrastructure and materials handling; off-the-shelf or purpose-built?
- Training for trades and other personnel including workplace safety and OH&S requirements.
- Project, marketing and general communications collateral – online and hardcopy, signage, customer information.

- Relevance and value of exit survey of commercial and residential consumers and other stakeholders.
- Data collection activity; who will own and conduct this activity; privacy considerations?

Evaluation phase considerations

- Who will own and project manage the evaluation phase?
- How will the data, results and insights be used and by who?
- Quantify environmental, economic, and social costs / benefits.
- Data related to product and materials flows.
- Data and insights related to financial flows and costs.
- Data and insights related to information and knowledge e.g. public attitudes and perceptions.
- Will you provide evaluation results to internal stakeholders? In what form and why?
- Will you provide evaluation results to external stakeholders and partners, and why?

Closing comments

Pilot projects can be an important and often essential phase in the design and development of more comprehensive, national product stewardship schemes and initiatives. They generate data, insights and real-world experience that can inform, test, confirm and/or reject a range of issues and objectives.

Clarity in purpose as well as clear problem/opportunity identification are critical starting points and should reflect a genuine approach to long-term solutioning. Pilots and trials announced and conducted without sense of 'next steps' can be perceived as stop-gaps or opportunistic activities that lack direction and ongoing investment to deliver a meaningful solution with measurable benefit.

While the checklist above provides a starting point of key questions and considerations, there may be additional factors you need to explore and address given the specifics on an industry, a product, a market, a community, or a geography.

Finally, contact the Centre if you have additional suggestions that can help improve or build-out this checklist.

MORE INFORMATION

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