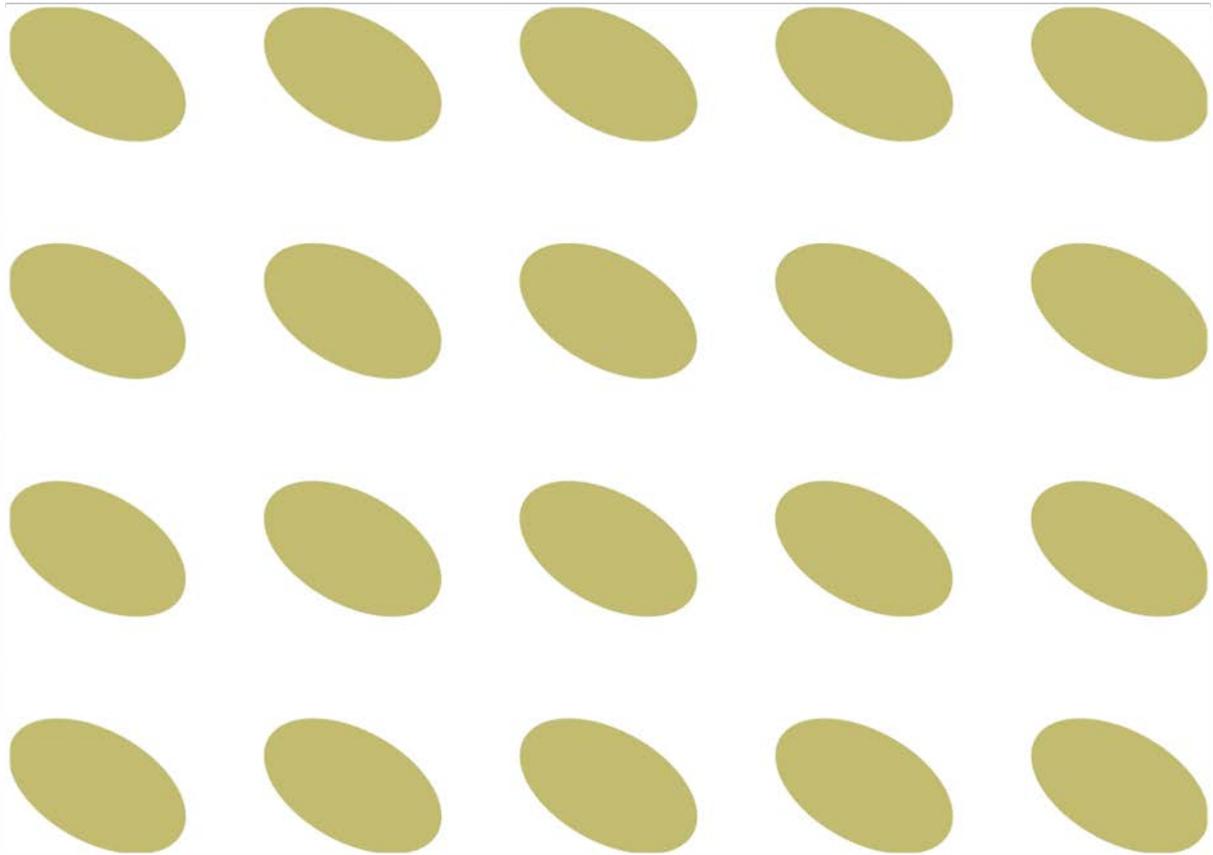


State of the Market Survey 2015

Local Authority Street Cleansing Services



The state of the market survey was conducted by Wayne Priestley, APSE Principal Advisor for Environmental services with assistance from Garry Lee, Research & Coordination Officer.

For any enquires in relation to the survey, Wayne may be contacted on:

Tel: 0161 772 1810

Email: wpriestley@apse.org.uk

Local Authority Street Cleansing Services

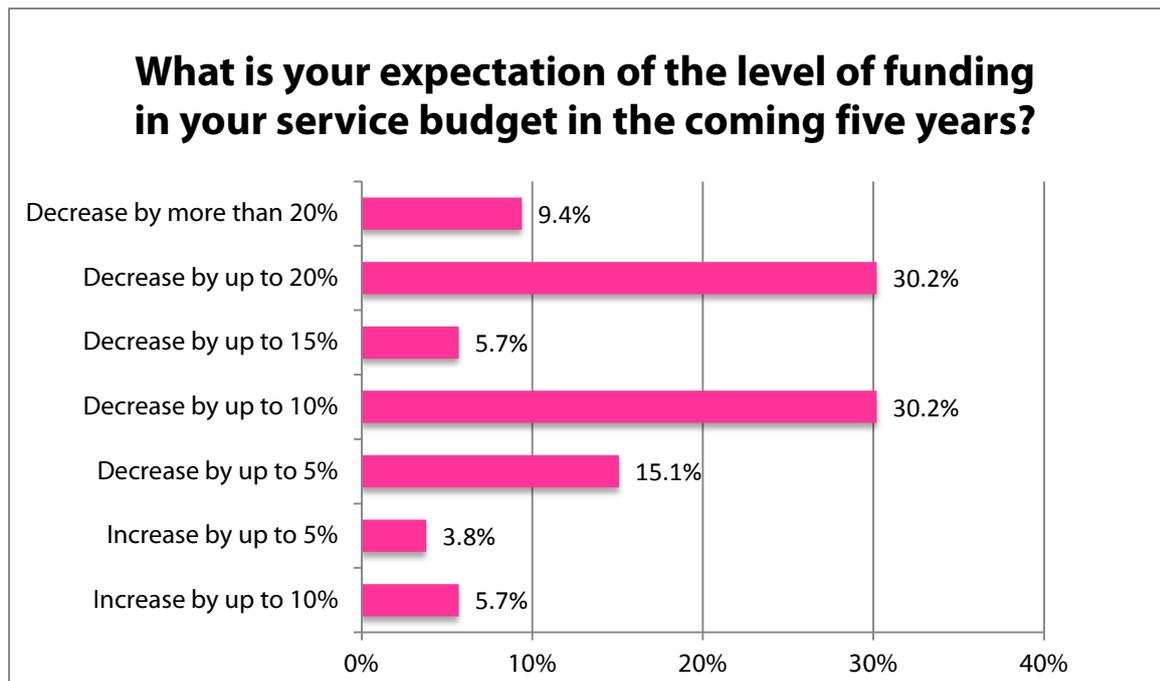
State of the Market 2015

APSE conducted an on-line survey during January and February 2015. This follows on from the 2009, 2011, 2012 and 2014 Street Cleansing State of the Market surveys where similar questions were asked to allow for trend comparisons. 54 responses were received from local authorities throughout the UK. This report identifies the key findings of the survey.

Results from the survey

a) The economy

Members were asked if they thought that the street cleansing budget will change over the next year and 75.5% said yes (compared with 68% in 2014) and of these 87.5% expect it to decrease. Over the next five years, the majority of respondents expect this to decrease by up to 10 or 20%. Those authorities where increases in funding are expected are as a result of significant housing developments associated with expected population increases.



The survey asked 'What efficiencies are you currently working towards or proposing' and the main responses to this question are as follows:

- Improved route optimisation
- More effective use of plant and fleet
- Reduced frequency of sweeping, particularly in residential areas whilst ensuring high profile areas are kept to a high standard
- No increases in litter bin numbers, reducing frequency of emptying
- Reductions in both contractual and non-contractual overtime

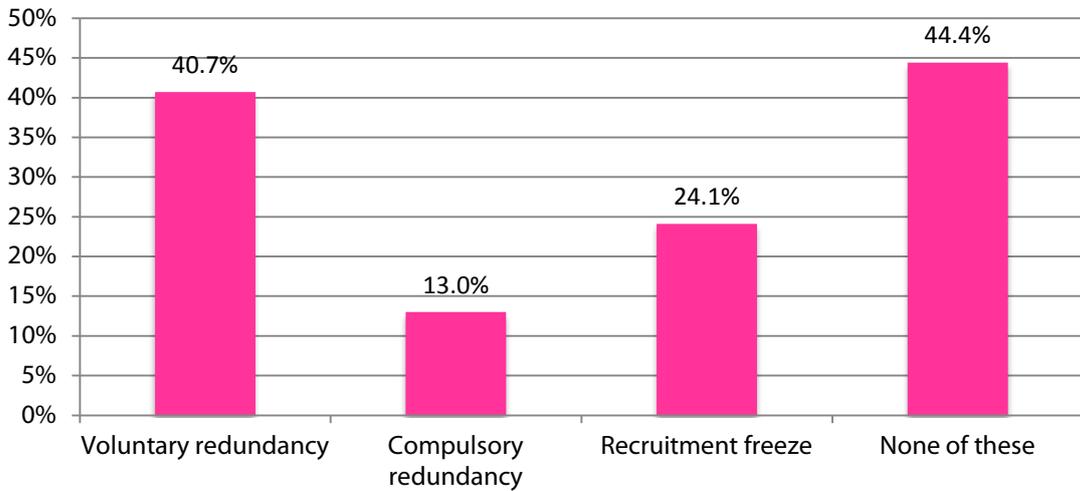
- Introduction of annualised hours and shift working patterns
- Reduction in sweeping teams and pedestrian sweepers linked to increased mechanised sweeping
- Reduction in supervisory staff and amalgamating of client and contracting staff
- Challenging contractors to deliver service efficiencies and financial savings
- Service integration and joint working with others services
- Bringing services back in-house to ensure greater flexibility
- Undertaking private work to raise income as well as increasing current charging levels.
- Greater reliance on volunteers
- Move towards reactive sweeping service

The survey asked 'Do you have any income generation schemes' and 46.3% answered 'yes' and the main responses to this question are as follows:

- Private sector work e.g. litter picking, sweeping, gritting , weed killing in car parks, shopping centres, private housing, and on highways.
- Events cleaning
- Litter bin sponsorship
- Charging for services to other council service providers e.g. cemeteries
- Actively marketing services outside council
- New service provision such as garden care.
- Offering services to Parish Councils
- Increasing existing fees and charges

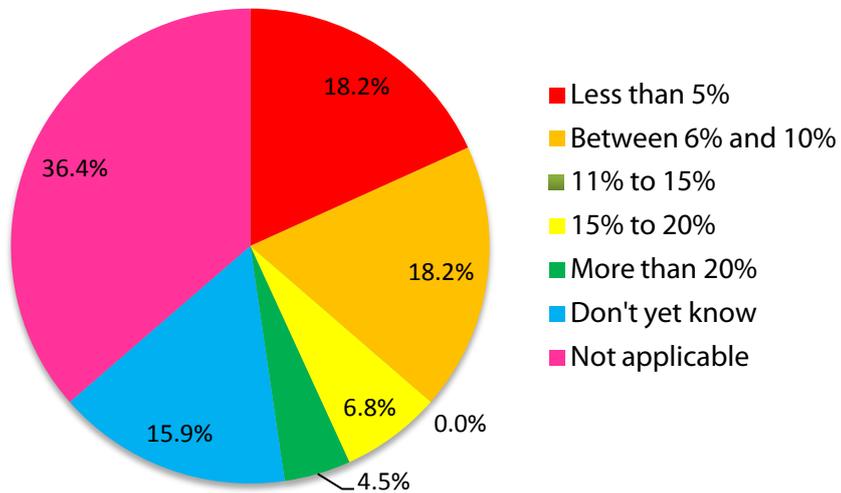
On employment related matters, the survey asked 'has or does your service intend to implement any of the following within the next 12 months and the responses were as follows:

Has or does your service intend to implement any of the following within the next 12 months:



Of those services who expect to be subject to redundancy measures, they expect to lose the following percentage of staff from the service:

If your service area is subject to redundancy measures what percentage of staff do you expect to lose from the service?

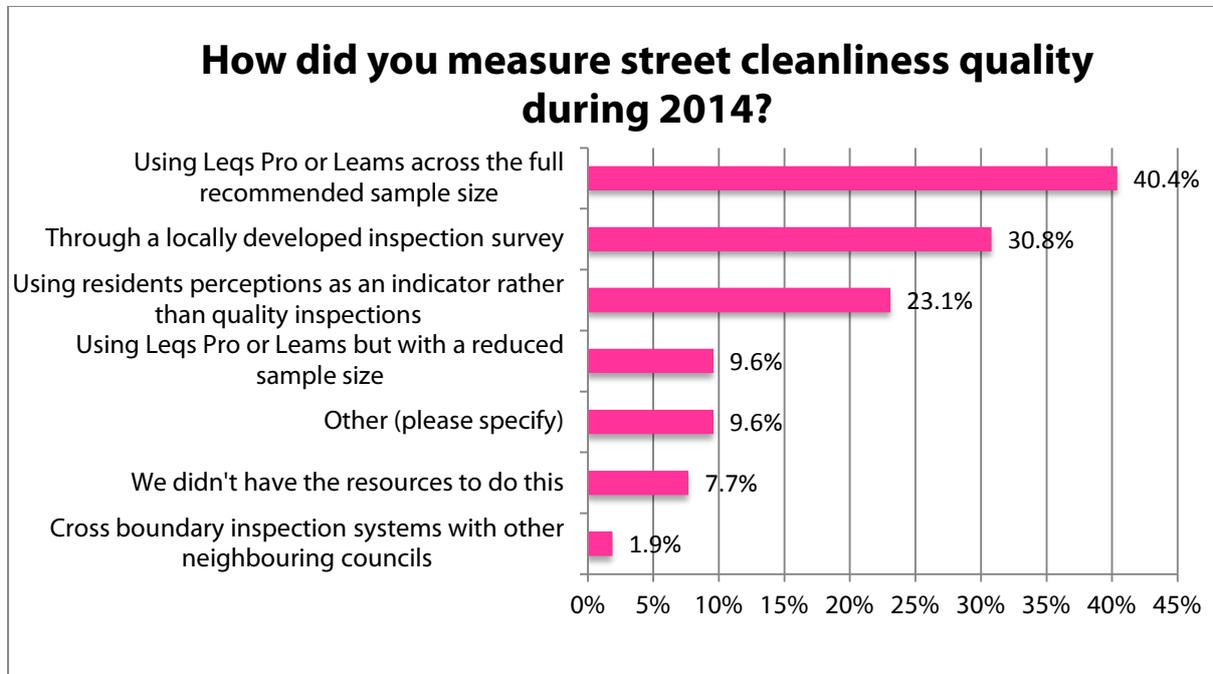


b) Standards of cleanliness

Only 15.7% stated that standards of cleanliness have increased over the past year (compared with 23% in 2014 and 40% in 2012), with 58.8% stating that they have stayed the same and 25.5% stating that they have decreased. This represents a slight decrease in respondents who think that standards of cleanliness have stayed the same since the survey was conducted in 2014 from 58.8% to 60%. When asked what they expect over the

next year, 32.7% expect them to decrease and 15.4% expect them to increase. Therefore, 84.6% expect standards of cleanliness to stay the same or decrease.

The survey asked how street cleanliness quality was measured in 2013 (respondents were allowed to choose more than one response) and the results were as follows:



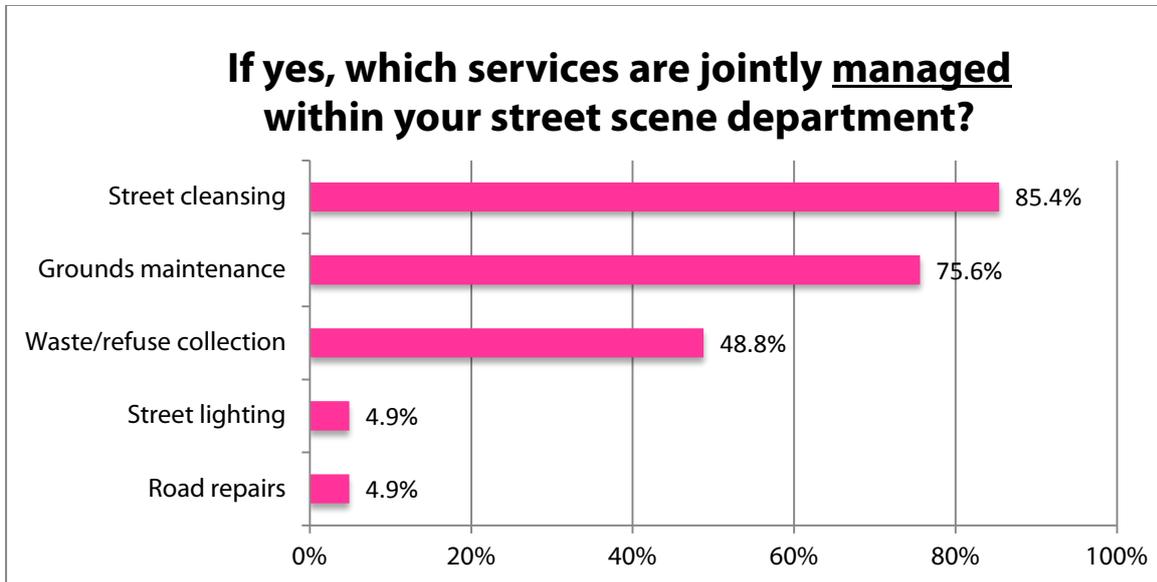
When asked who carried out the surveys, the majority of respondents (85.7%) indicated that this was done by officers within their own local authority within their service/department.

The same questions were asked about how councils intend to measure street cleanliness quality next year and the main difference was an increase in those using a locally developed inspection survey (30.8% to 37.3%). APSE has been working with local authorities in England and Scotland to develop a simple to use land audit management system (LAMS) which allows local authority officers or their representatives, to survey the quality of the local environment. It can be used to measure ground maintenance standards, or can be used more widely to measure grounds maintenance and street cleansing standards. A successful pilot study has just been completed and APSE propose to publicise its wide-ranging value amongst local authority members. Further details can be found by [clicking here](#).

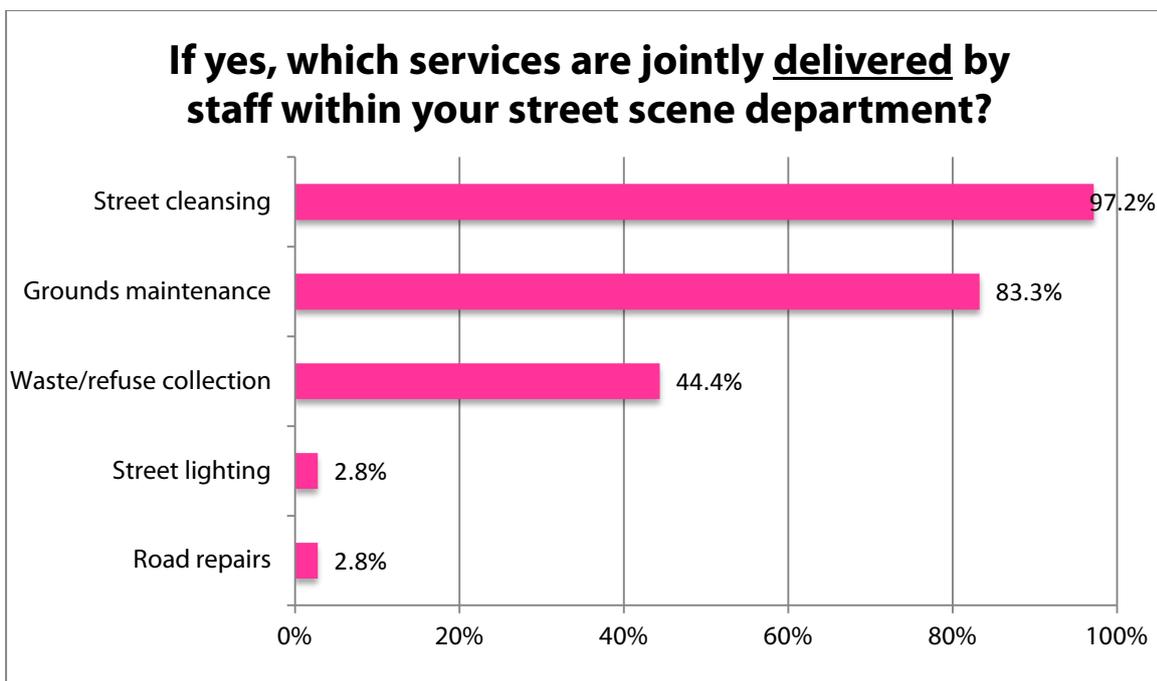
Other changes regarding surveys include: an increase in local authorities using Leqs Pro or LEAMS across the full recommended sample size (40.4% to 41.2%). There has also been an increase in those using residents' perceptions as an indicator rather than quality inspections (23.1% to 25.5%); finally, a few authorities are still using the BVPI 199 as the basis for their inspections. There has been a reduction in those using Leqs Pro or LEAMS but with a reduced sample size (9.6% to 7.8%). There is also a slight increase in those who intend to use officers from their own local authority within their own service/department to carry out these surveys (85.7% to 88.1%).

c) Street scene

74.5% indicated that they are part of an integrated streetscene service and of those, the services that are jointly managed are shown in the graph below:



These respondents also indicated that the following services are jointly delivered by staff within their streetscene department:



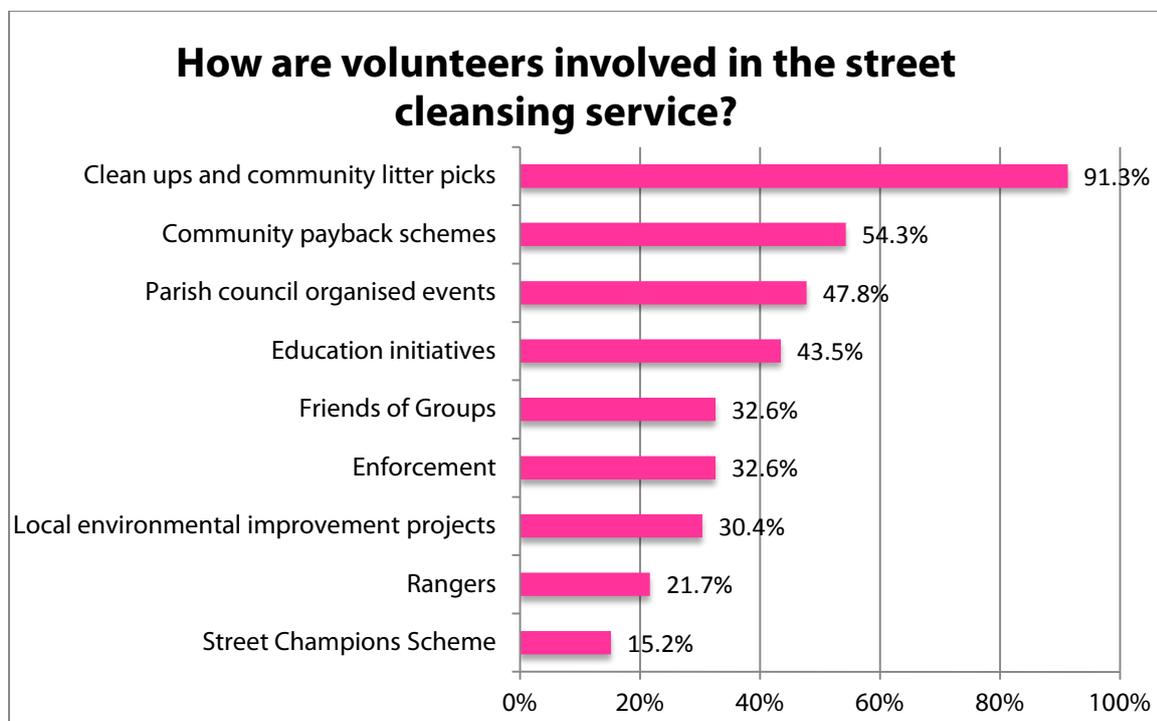
Of those who answered 'no', that they were not already part of an integrated streetscene service, 42.9% expect to become part of an integrated streetscene service in the near future. This is a slight decline from 2014 when 50% expected to be part of an integrated streetscene service.

d) Street cleansing operations

86.3% stated that they have area-based teams and most services operate over 7 days (81.6%), with some operating over 5 days (14.3%) and 6 days (4.1%). 7.8% currently undertake night time street cleansing, this is opposed to 2014 when 14.5 % undertook night-time sweeping. This suggests very few local authorities are now operating a night-time sweeping service.

The survey asked how the street cleansing service is currently managed and 78.4% stated that this is in-house, 19.6% external and 2.0% mixed. 76.0% expect to be managed in-house within the next 2-3 years. For those where the service is currently managed externally, the contract length is mainly over 7 years (63.6% of respondents indicated this was between 7 and 10 years and 18.2% of respondents stated that this is over 10 years) and 83.3% indicated that there is an option to extend the contract.

When asked how volunteers are involved in the service, the majority of respondents said this was through clean ups and community litter picks, and community payback schemes. The full breakdown is as follows:

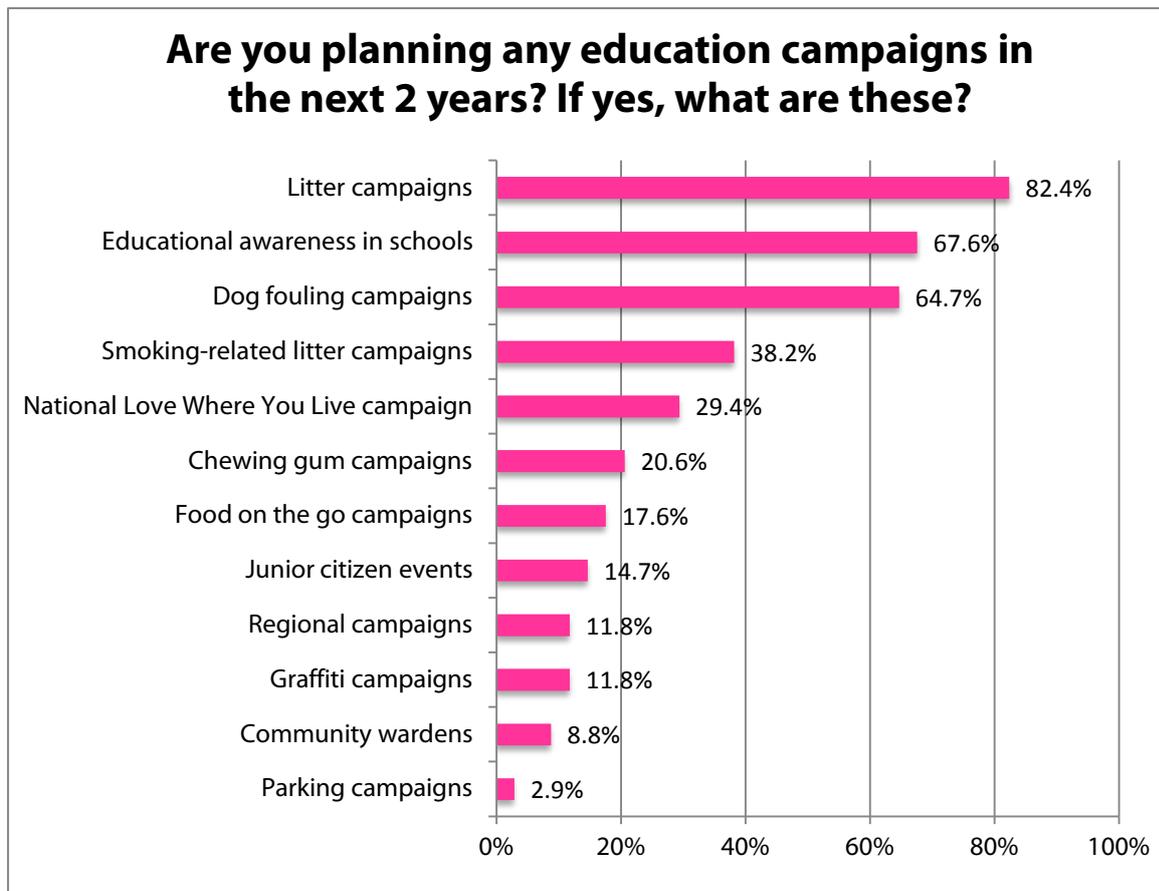


29.8% indicated that they have a partnership with large supermarkets/retailers/businesses on community clear-ups/public realm improvements such as Community Champions schemes. This compares favourably with 2014 when only 21% had such agreements.

57.4% stated that community sector involvement in street cleansing is increasing in their service (an increase from 52% in 2014, but a reduction from 71% in the 2012 survey). The main areas which respondents thought this was increasing was clean ups and community litter picks (92.9%), Friends of Groups (35.7%) and Parish council organised events (35.7%).

In terms of education campaigns, 73.9% are planning these in the next 2 years (a slight reduction from 75% in 2014). The main campaigns being planned are litter campaigns

(82.4%), educational awareness in schools (67.6%) and dog fouling campaigns (64.7%). The full breakdown is as follows:

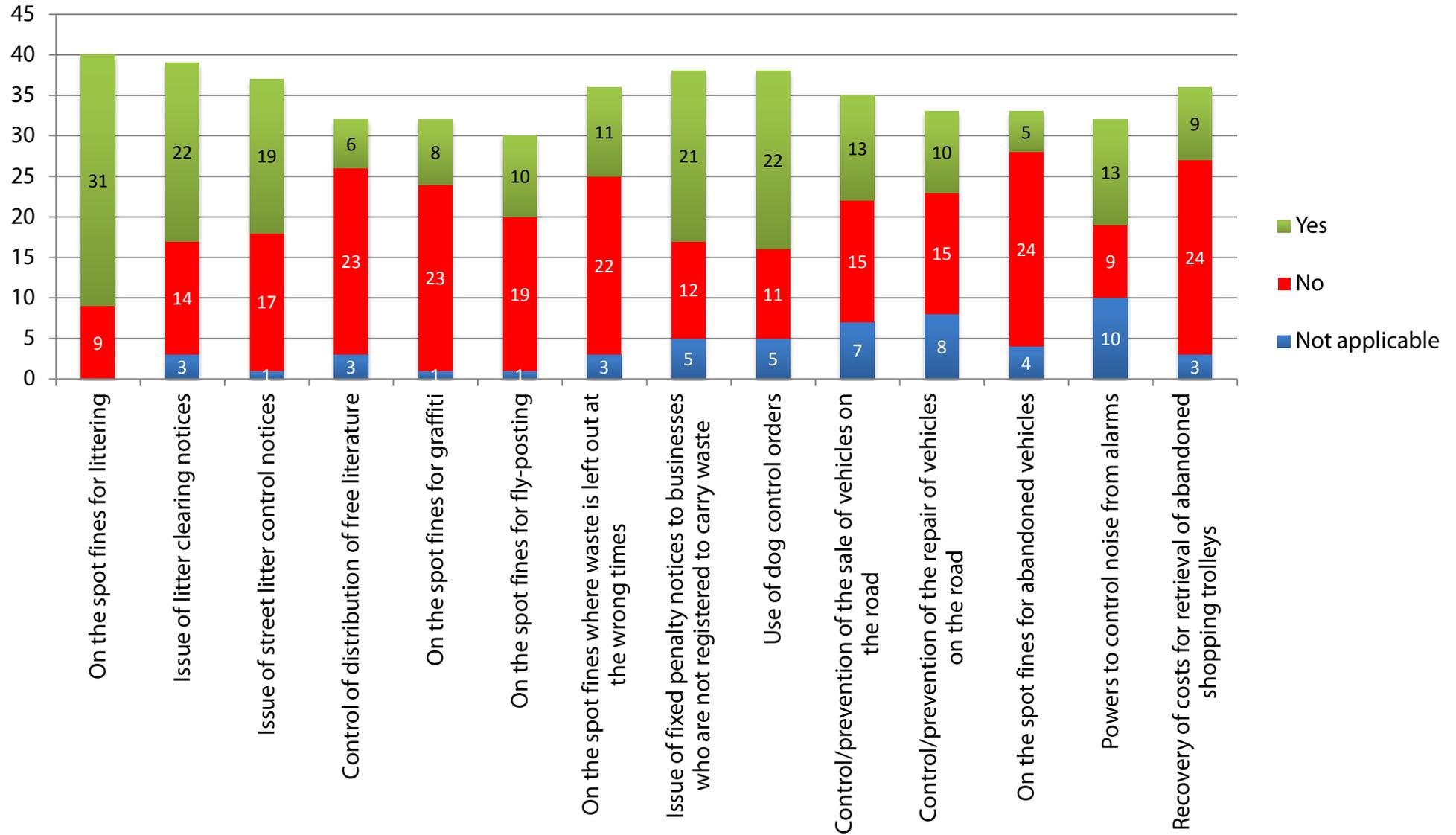


When looking at these figures, the most noticeable change is the decline in graffiti campaigns, which have fallen from 22.4% in 2014, to just 11.8% in 2015.

e) Enforcement

55.8% of respondents thought that there will be an increase in enforcement/notices issued in the next 2-3 years. The survey asked which of the following powers were being used currently (where applicable) and the results are shown below. These are the powers defined by the Environmental Protection Act (1990), The Clean Neighbourhoods and Environment Act 2000/2005) and DEFRA's Code of Practice on Litter and Refuse (1990/2006) for England, Wales and Northern Ireland (respondents were asked to tick 'not applicable' where the powers do not apply) and Councils in Scotland only answered these where they were relevant.

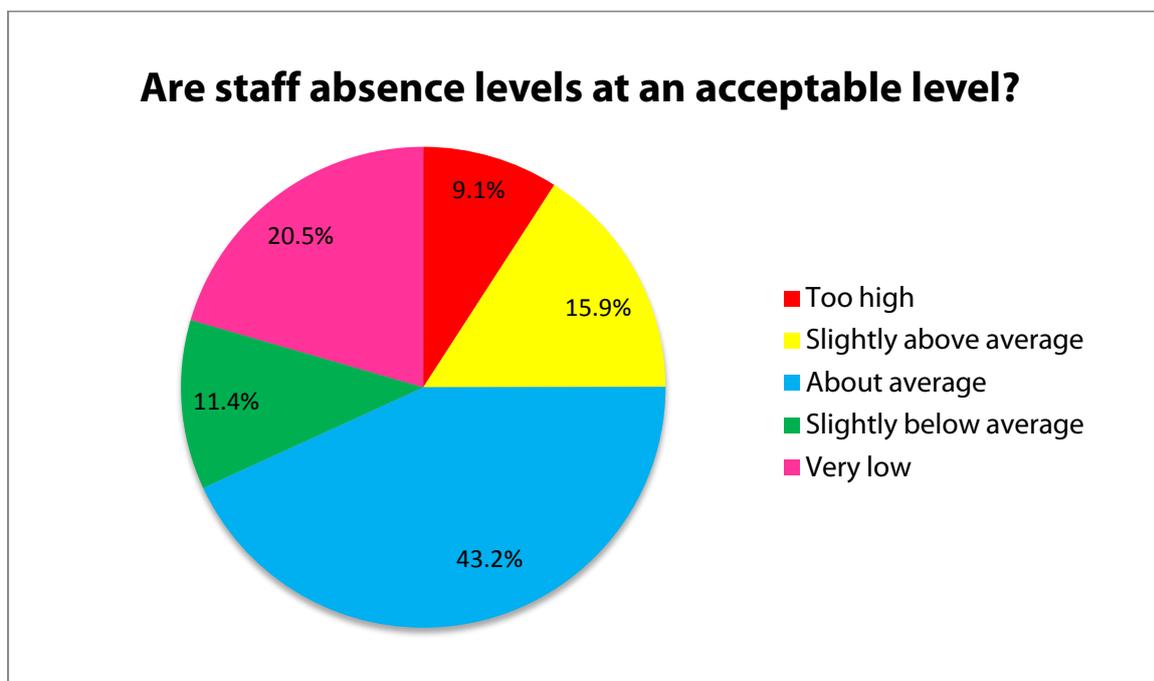
Which of the following powers are you currently using (where applicable)?



A further question was asked about why certain powers have not been used (where respondents answered 'no') and reasons cited included insufficient resources (55.3%), they're not problem areas/we have other priorities (50.0%), it is covered by other agencies/departments (34.2%) and political reasons (26.3%).

f) Staff absence

In terms of staff absence, the majority thought that this was about average (43.2%).



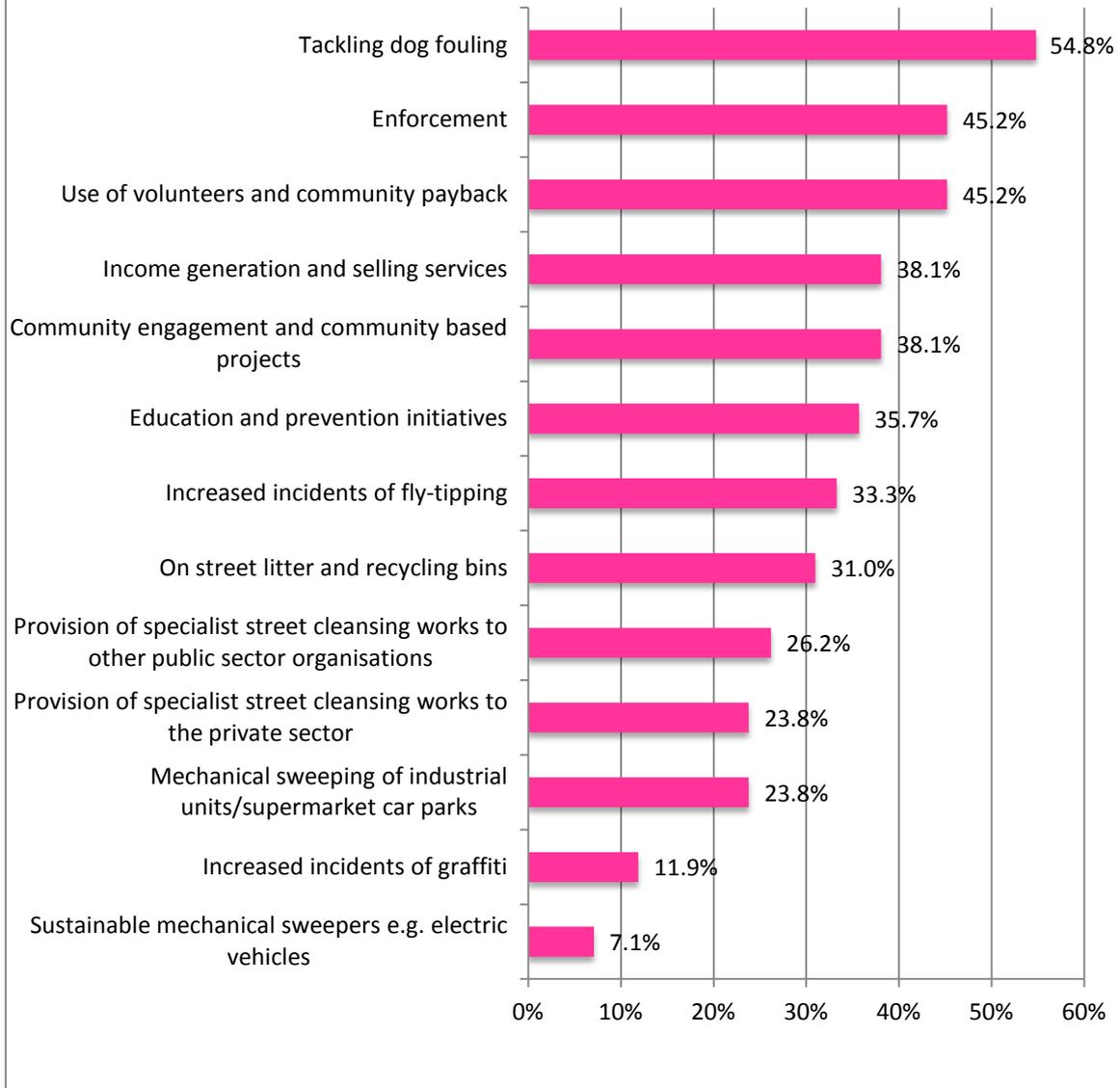
[APSE performance networks](#) collects data on staff absence for street cleansing. The average staff absence data across councils throughout the UK for 2013-14 relating to street cleansing staff was 5.2%

Only 4.4% of respondents thought that the training budget was going to increase over the next 12 months (with 20.0% stating a decrease and 75.6% stating that this will stay the same).

g) Future areas of work and service reviews

45.5% currently sell their services to the private sector and 29.5% sell their services to other public bodies. Respondents were asked where they see growth over the next 12 months and future decreases in work for the service and the responses were as follows:

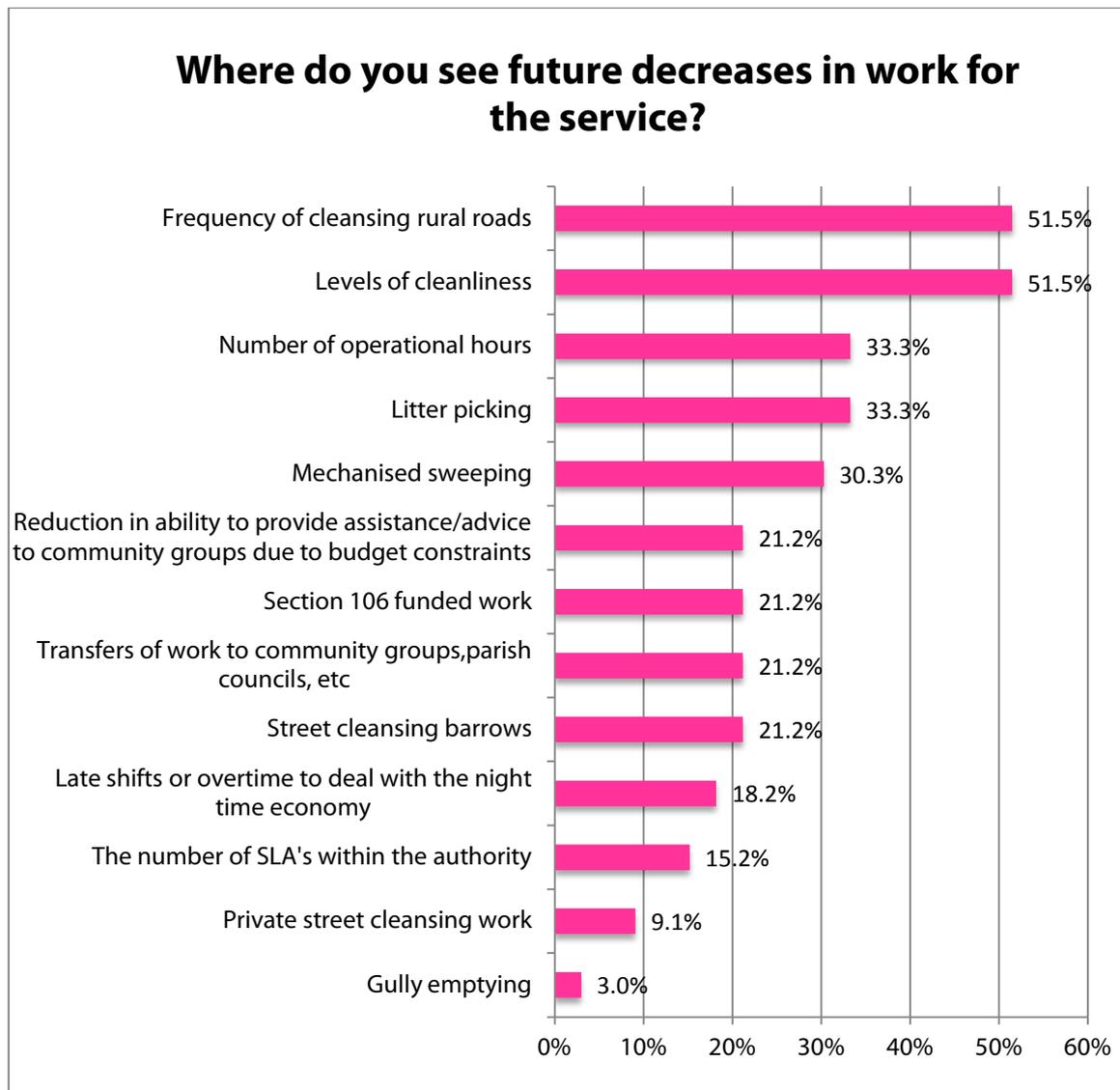
Where do you see growth for the service over the next 12 months?



The results for 2015 show a shift in emphasis, with considerable falls in the view that community groups and community payback, together with community engagement and associated projects, will be areas for growth in 2015. In particular, responses show the use of community volunteers as an area of growth in the next 12 months, has fallen from over 65% in 2014 to less than 45% in 2015. A similar fall has occurred in community engagement and community projects growing as an area of work over the next 12 months. This change has been mirrored by a fall in education and preventative initiatives as areas for growth, falling from 45% to less than 36% in 2015. The main area of growth for

2015 is tackling dog fouling which is supported by the continuing importance being placed on carrying out enforcement activities.

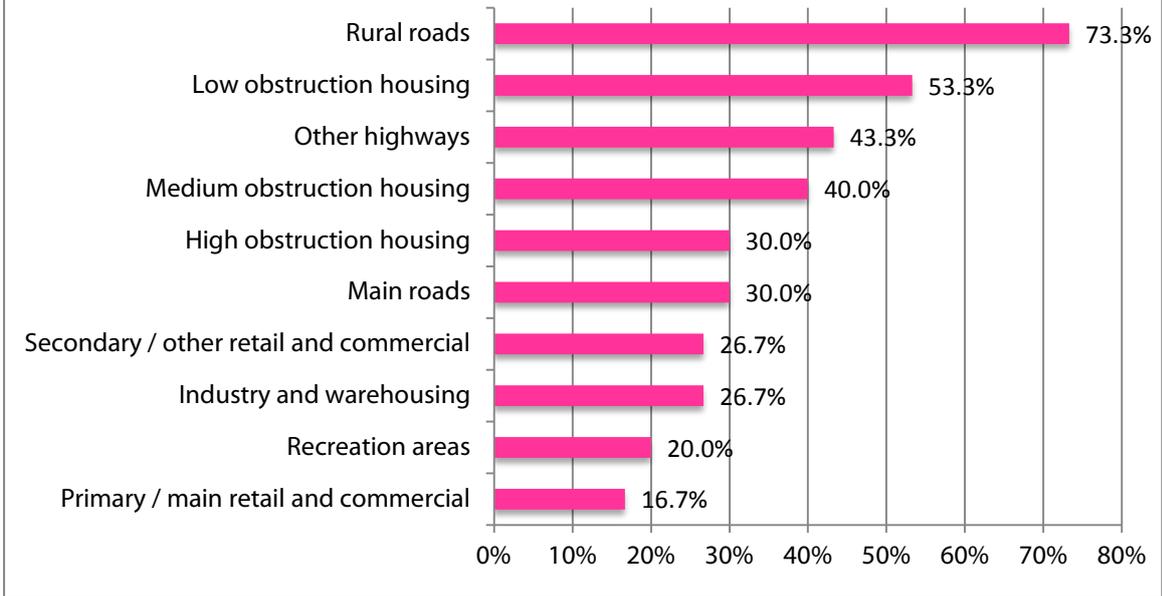
Of note is the fall in work for the private sector which has fallen from 32% in 2014 to less than 24% in 2015. In particular mechanical sweeping for industrial units/supermarket car parks has seen a significant fall from 40% to less than 24% in 2015. However, work for the public sector still seems to be an area for development.



The main areas of change have been that far more respondents feel there will be cuts to rural road sweeping, increasing from 35% in 2014 to 51.5% in 2015. On a more positive note worries about cuts to night time economy sweeping and reductions in level of cleanliness have reduced from those recorded in the 2014 responses.

The survey then went on to ask 'if you are anticipating future reductions in sweeping and litter picking work, which areas of land do you think this will relate to' and the results were as follows:

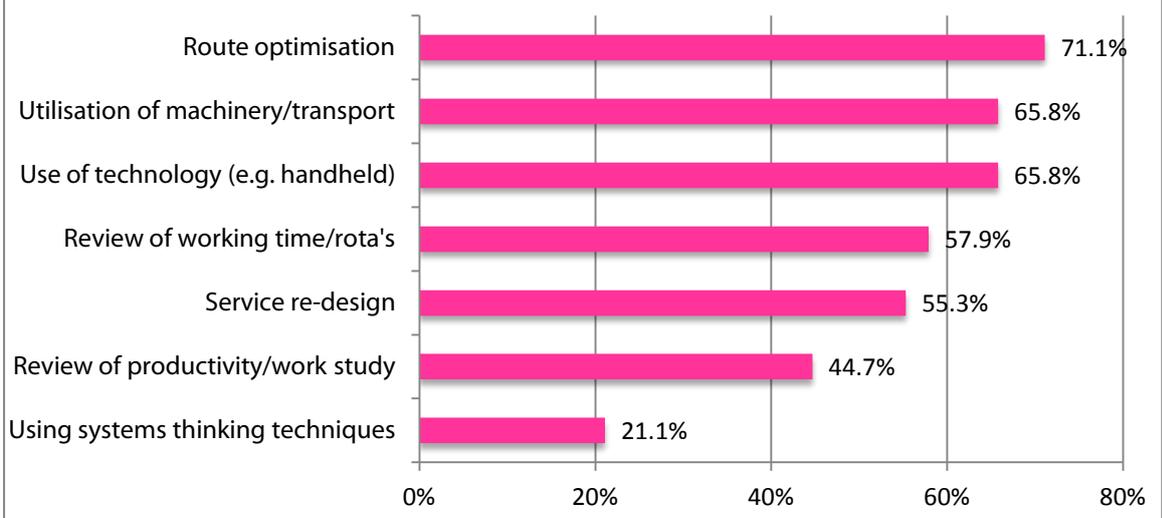
If you are anticipating future reductions in sweeping and litter picking work, which areas of land do you think this will relate to?



When asked if respondents had undertaken a service review recently, 29.5% stated that they had completed this, 54.5% stated that they have a review which is underway and 9.1% stated that they will be doing so in the next 1-2 years. 6.8% said 'no' and they won't be undertaking a review in the next 1-2 years.

The clear emphasis on undertaking service reviews reflects the efficiency drive in local government and the need to review services to try and meet these challenges. Respondents stated that the reviews will involve the following:

Will this service review involve any of the following:



The areas where most changes have occurred are in relation to an increase in productivity reviews and work study, rising from 31.5% in 2014 to 44.7% in 2015. This has been

reflected in a similar rise in the use of technology such as handhelds to improve productivity by reducing the time spent in the office.

The Association for Public Service Excellence

APSE member authorities have access to a wide range of membership resources to assist in delivering council services. This includes our regular advisory groups, specifically designed to bring together elected members, directors, managers and heads of service, together with trade union representatives to discuss service specific issues, innovation and new ways of delivering continuous improvement. The advisory groups are an excellent forum for sharing ideas and discussing topical service issues with colleagues from other councils throughout the UK.

Advisory groups are a free service included as part of your authority's membership of APSE and all end with an informal lunch to facilitate networking with peers in other councils. If you do not currently receive details about APSE advisory group meetings and would like to be added to our list of contacts for your service area please email enquiries@apse.org.uk.

Our national advisory groups include:-

- Building cleaning
- Catering
- Housing, construction and building maintenance
- Parks, horticultural and ground maintenance
- Renewables and climate change
- Roads, highways and street lighting
- Service delivery models
- Service transformation and performance management
- Sports and leisure management
- Vehicle maintenance and transport
- Waste management, refuse collection and street cleansing

If you require any further information on the findings of the State of the Market survey 2015 please contact Wayne Priestley Principal Advisor for Environmental Services at wpriestley@apse.org.uk