

State of the Market Survey 2012

Local Authority Street Cleansing Services





The state of the market survey was conducted by Debbie Johns, APSE Principal Advisor for Environmental services

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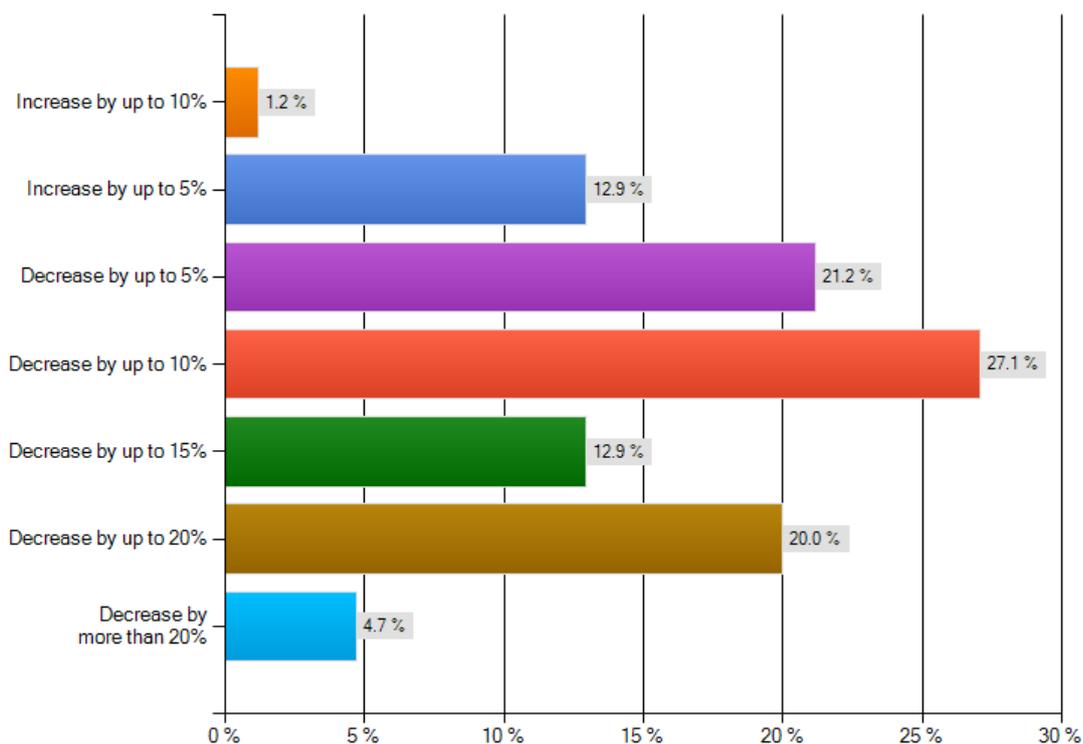
APSE conducted an on-line survey during January and February 2012. This follows on from the 2009 and 2011 Street Cleansing State of the Market surveys where similar questions were asked to allow for trend comparisons. The 2009 results can be accessed by [clicking here](#) and the 2011 results can be accessed by [clicking here](#). 87 responses were received from local authorities throughout the UK. This report identifies the key findings of the survey.

Results from the survey

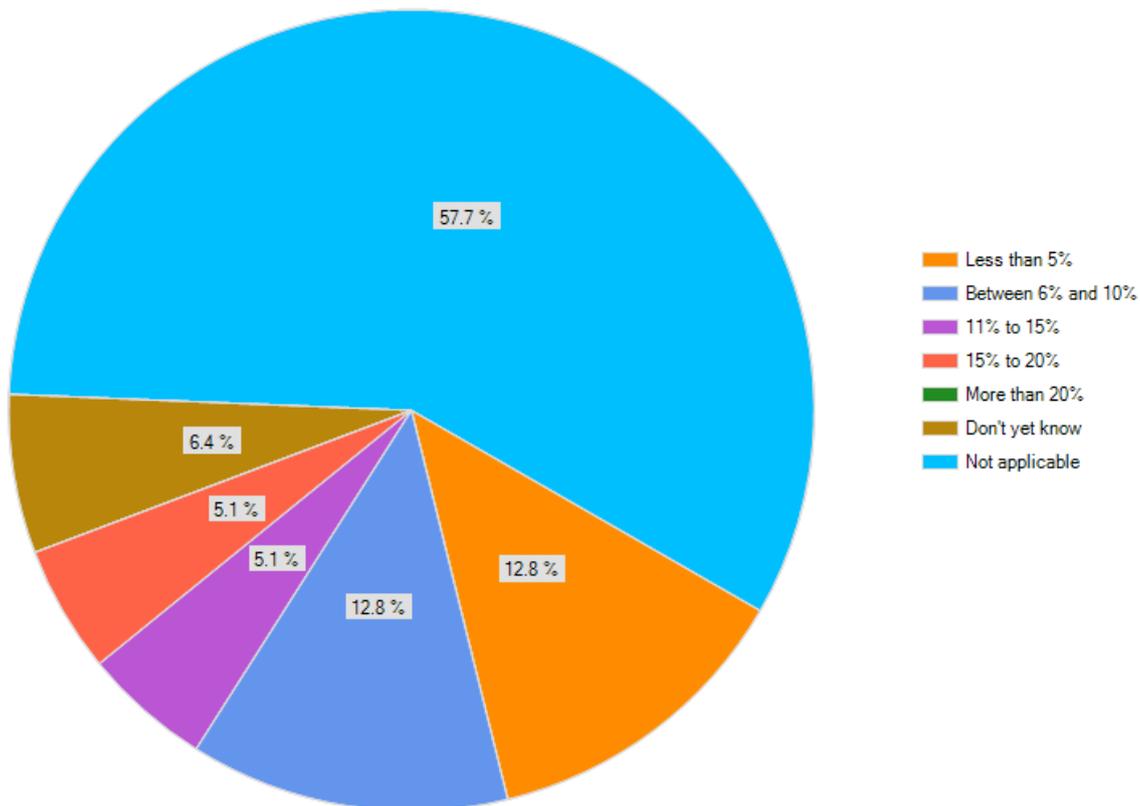
a) The economy

Members were asked if they thought that the street cleansing budget will change over the next year and 83% answered 'yes'. 66% of respondents had answered 'yes' in 2009 and 77% of respondents answered 'yes' in 2011, representing a growing trend. This will be a reflection of the changes in the economic climate and recent budget settlements affecting front line services. Of these 83% of respondents, 89% expect it to decrease in the next year. The main reasons cited in the responses were service efficiencies, although some respondents commented on organisational changes such as bringing the service back in-house and mergers with other services such as parks. Other respondents indicated that they were seeking income generating opportunities to offset these budget reductions. Over the next 5 years, the majority of respondents expect this to decrease by over 5%:

What is your expectation of the level of funding in your service budget in the coming five years?



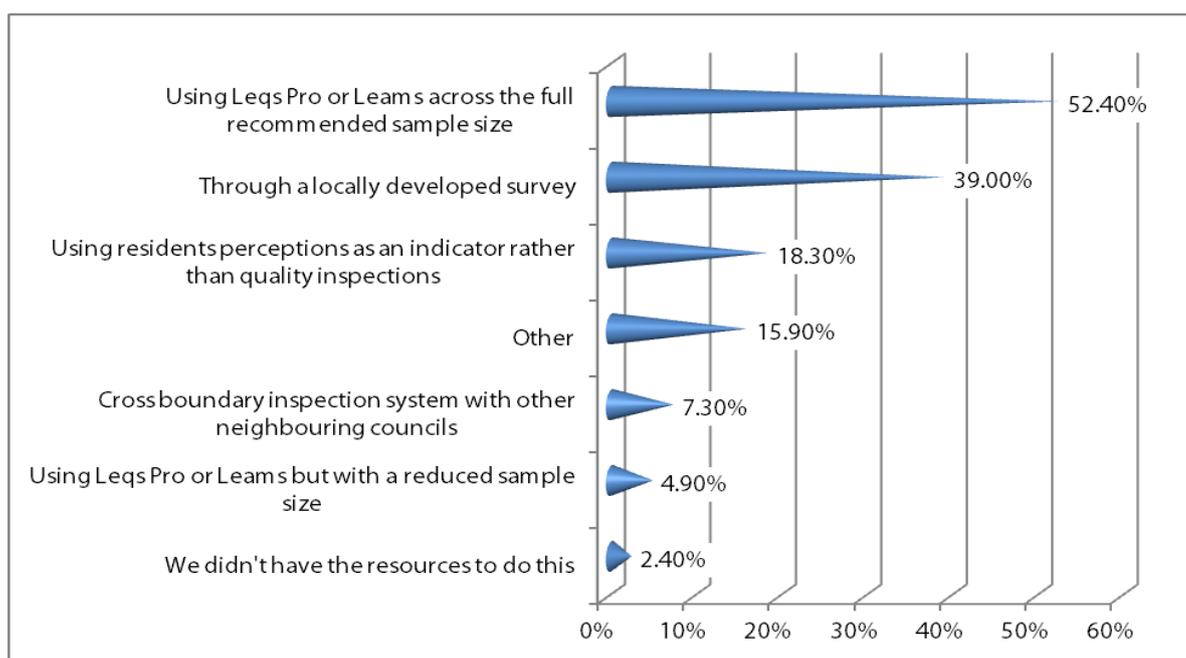
On employment related matters within the next 12 months, 37% expect to implement a recruitment freeze, 37% voluntary redundancy and 14% compulsory redundancy. These figures have decreased since the last survey was conducted in 2011, perhaps suggesting some of these measures have already been implemented. Of those services who expect to be subject to redundancy measures, they expect to lose the following percentage of staff from the service:



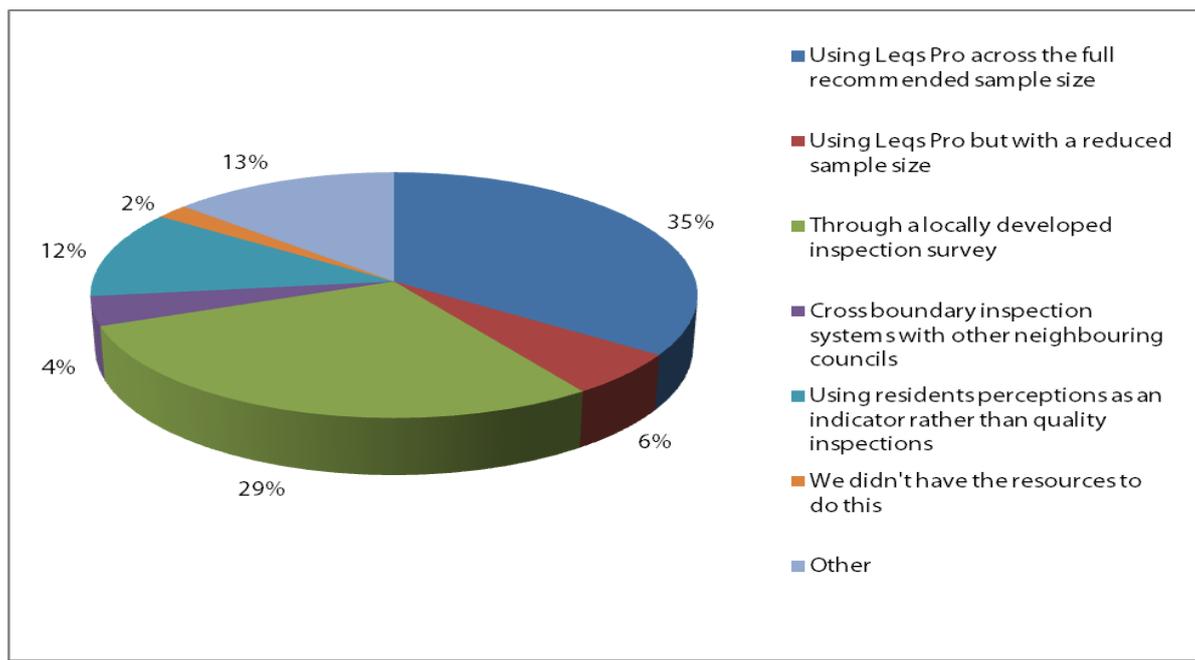
b) Standards of cleanliness

40% stated that standards of cleanliness have increased over the past year, with 41% stating that they have stayed the same and 19% stating that they have decreased. This represents an increase in respondents who think that standards of cleanliness have decreased since the survey was conducted in 2011 from 9% to 19% and an increase in those who think they have stayed the same (from 34% to 41%). When asked what they expect over the next year, 44% expect these to stay the same, 26% expect them to decrease and 30% expect them to increase. Therefore, 70% expect standards of cleanliness to stay the same or decrease, and by comparing this to the figures above, this represents a 10% increase from the past year. This trend may be linked to budget reductions.

The survey asked how street cleanliness quality was measured in 2011-12 (respondents were allowed to choose more than one response) and the results were as follows:



With the demise of NI 195 in England, further analysis was conducted to isolate the methods used by English authorities and the breakdown was as follows:



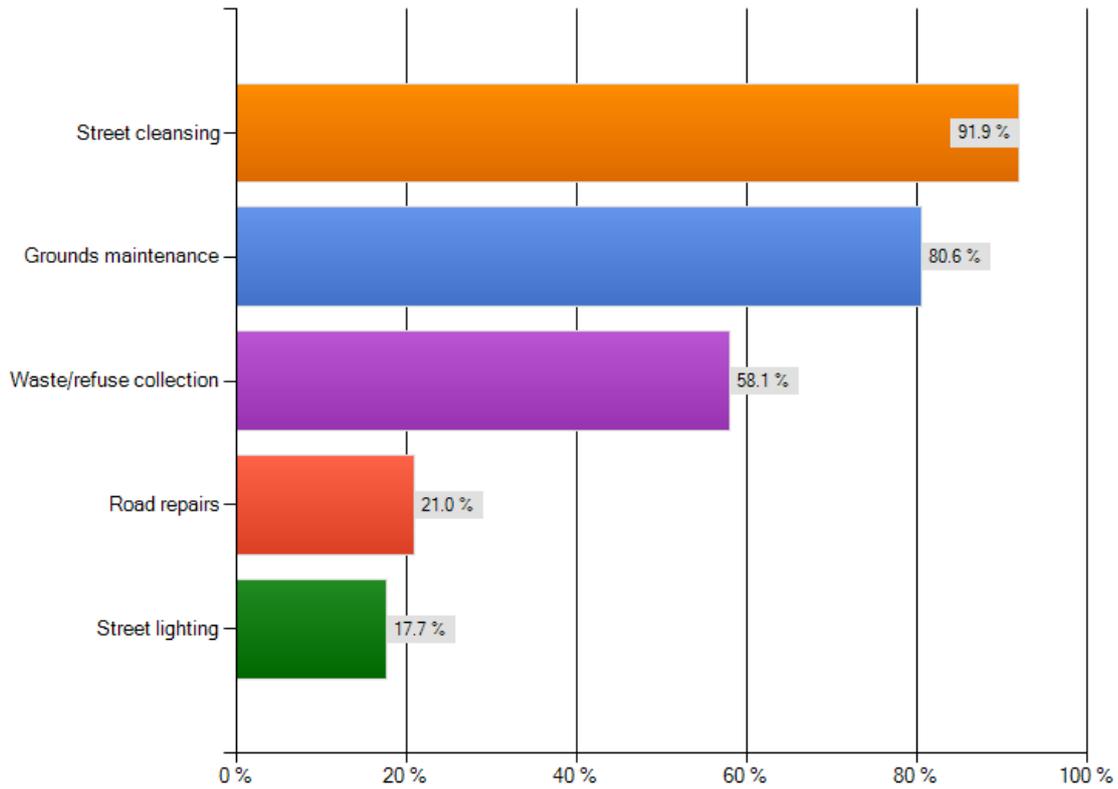
When asked who carried out the surveys, the majority of respondents (76%) indicated that this was done by officers within their own local authority and within their service/department.

The same questions were asked about how councils intend to measure street cleanliness quality next year and the main difference was a reduction in councils intending to use Leqs Pro or Leams across the full recommended sample size (from 52% to 46%) and an increase in those using a locally developed survey (from 39% to 45%) and residents perceptions (from 18% to 22%). There was also an increase in the number of respondents intending to use 'other' measures (from 16% to 22%) and these included independent surveys by another organisation and a mixture of methods including using the old NI 195 methodology alongside other measures. There is also an increase in those who intend to use officers from their own local authority and within their own service/department to carry out these surveys (84%).

c) Street scene

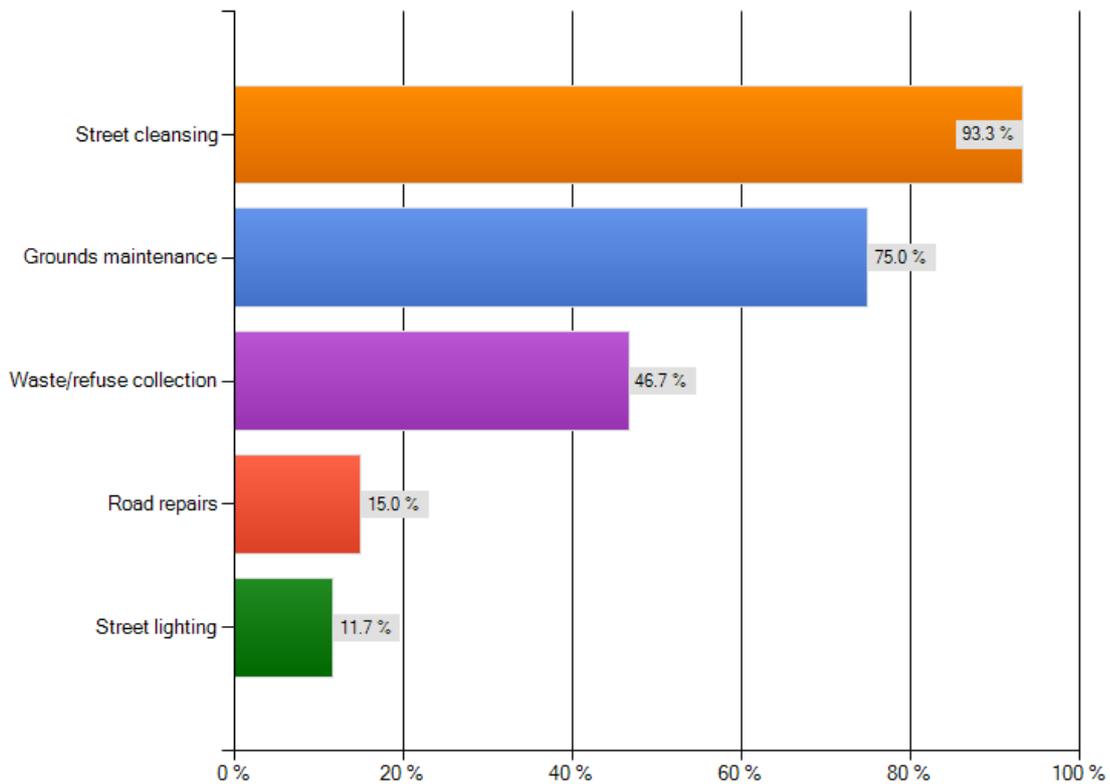
77% indicated that they are part of an integrated streetscene service (an increase from 74% in 2011's survey and 66% in 2009's survey) and of those, the services that are jointly managed are shown in the graph below:

If yes, which services are jointly managed within your street scene department?



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

If yes, which services are jointly delivered by staff within your street scene department?

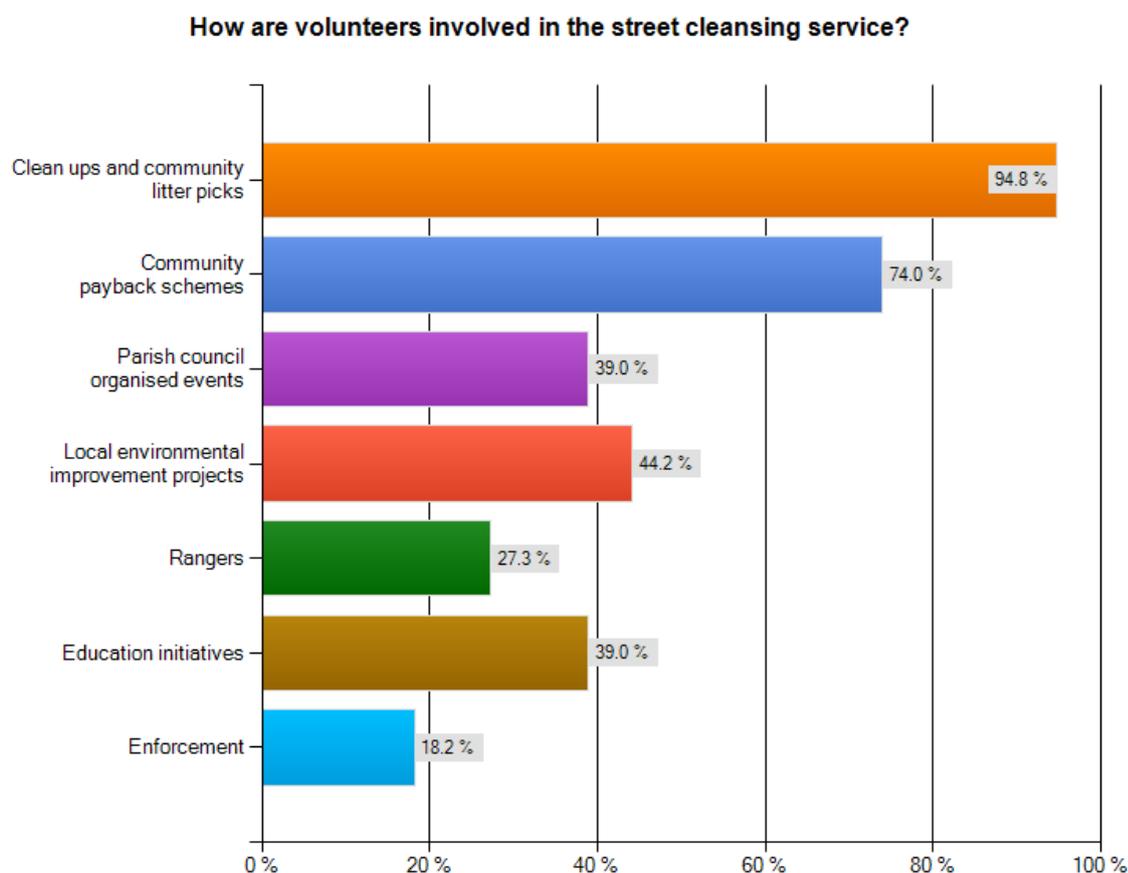


Of those who answered 'no', that they were not already part of an integrated street scene service, 52% expect to become part of an integrated street scene service in the near future (an increase from 37.5% in the 2011 survey).

d) Street cleansing operations

85% stated that they have area-based teams and 88.5% managed their street cleansing services in-house. When asked how they expect their service to be managed in the next 2-3 years, 83% stated in-house, which represents a slight increase in mix provision since 2011 (from 4% to 12%) and a decrease in external provision (from 8% to 5%). APSE's research on *'Insourcing: a guide to bringing local authority services back in-house'* found that there is mounting evidence that councils have been bringing services back in-house and are continuing to do so. Case studies on in-sourcing street cleansing services are available in this publication by clicking [here](#).

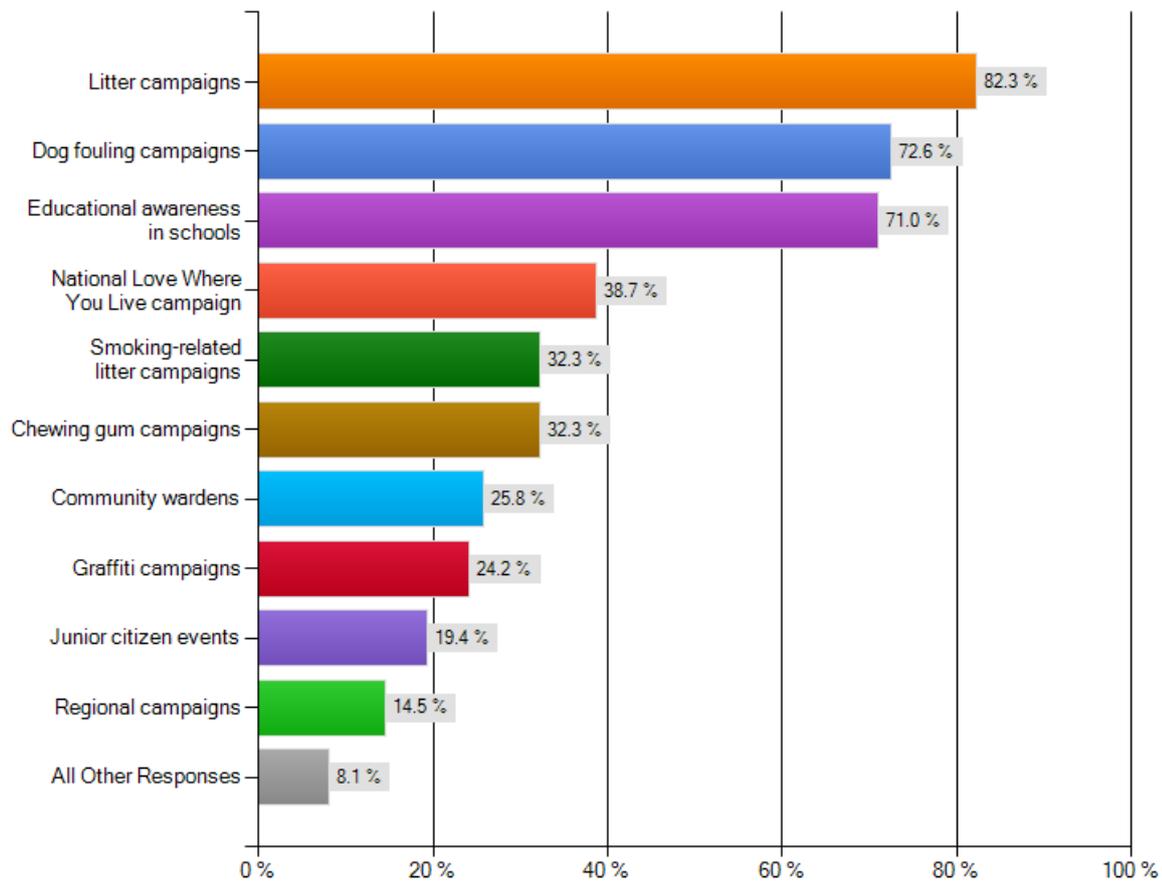
When asked how volunteers are involved in the service, the majority of respondents said this was through clean ups and community litter picks, and community pay back schemes. The full breakdown is as follows:



Therefore, many street cleansing managers already work with the community and volunteers in community clean sweeps and other initiatives. This work existed before the current impetus on 'Big Society' by current government policy and the use of volunteer's spans throughout the UK.

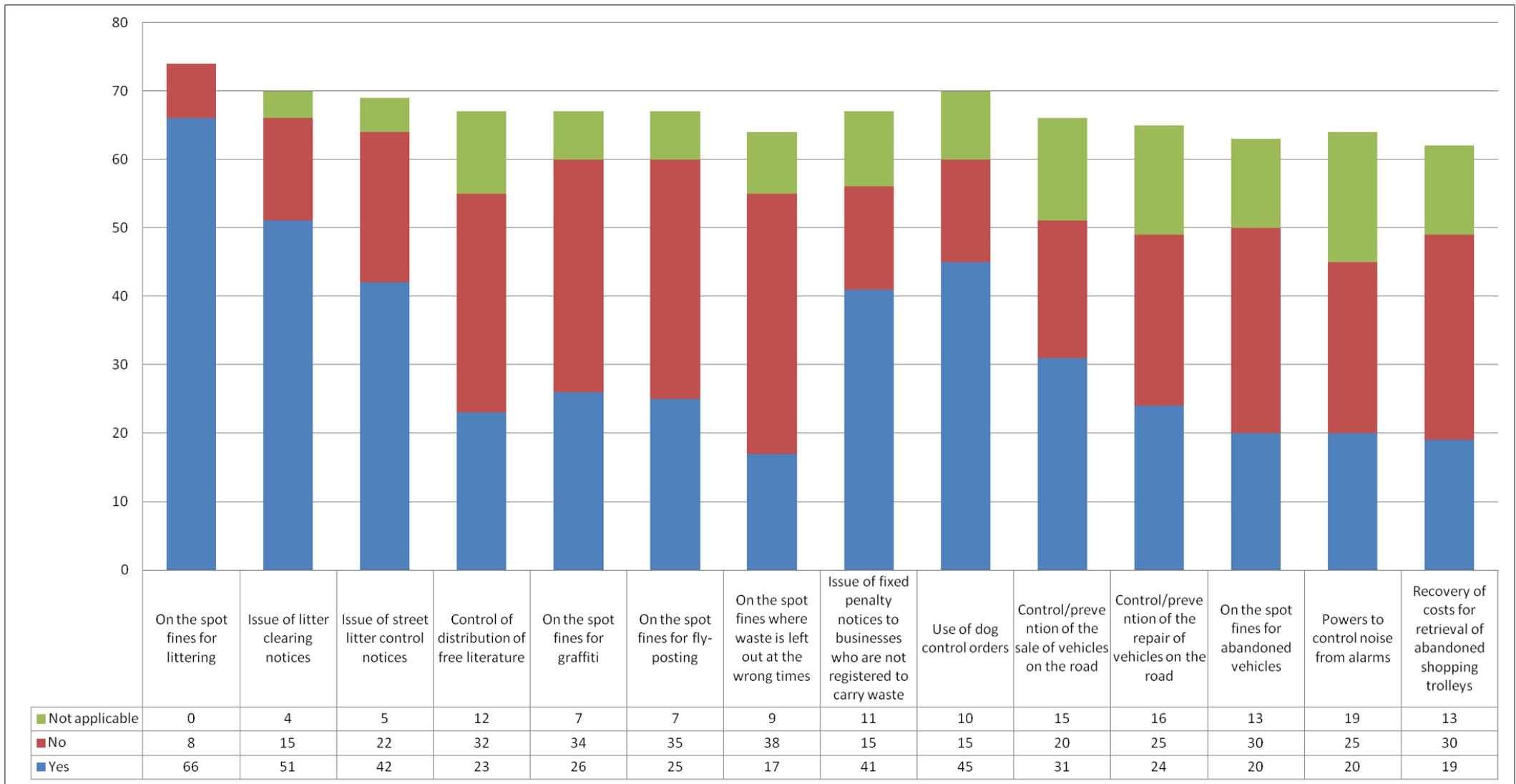
71% stated that community sector involvement in street cleansing is increasing in their service (an increase from 52% in the 2011 survey). The main areas which respondents thought this was increasing in was clean ups and community litter picks (92.5%) and community payback schemes (57%).

In terms of education campaigns, 82% are planning these in the next 2 years (which following a decrease in this figure in the 2011 survey, has returned to levels indicated in the 2009 survey). The main campaigns being planned are litter campaigns (82%), dog fouling campaigns (73%) and educational awareness in schools (71%). The full breakdown is as follows:



e) Enforcement

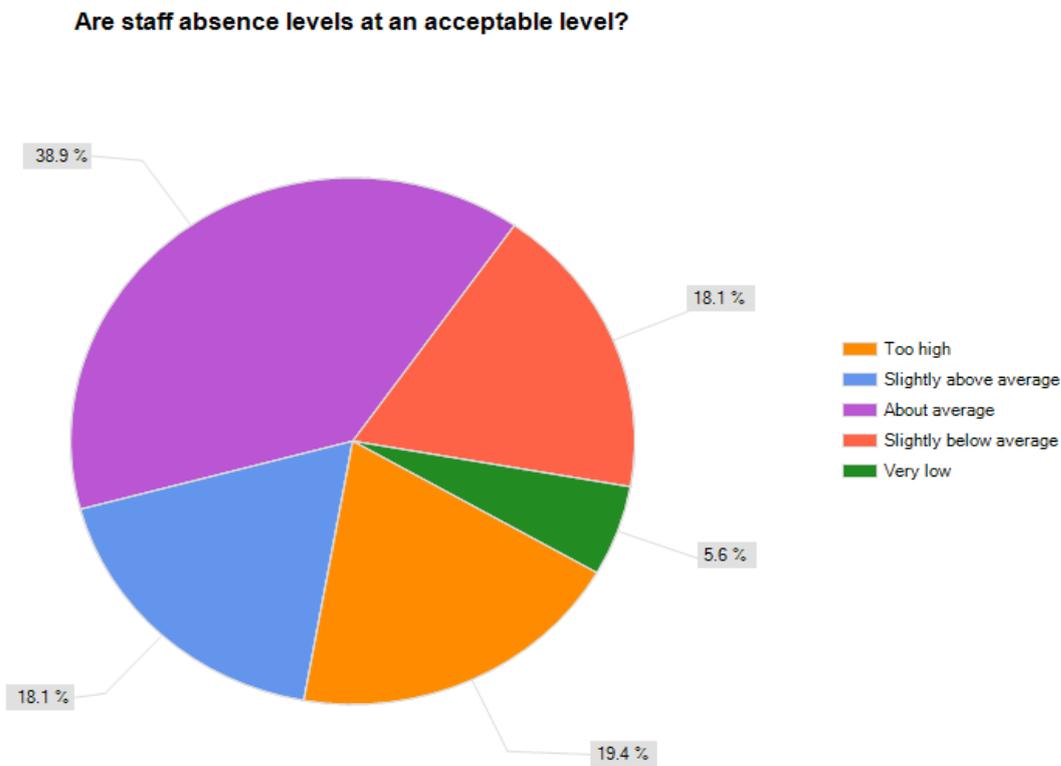
65% of respondents thought that there will be an increase in enforcement/notices issued in the next 2-3 years, a sharp increase from 51% in 2011. The survey asked which of the following powers were being used currently (where applicable) and the results are shown below. These are the powers as defined by the Clean Neighbourhoods and Environment Act for England and Wales and Councils in Scotland and Northern Ireland only answered these where they were relevant.



A further question was asked about why certain powers have not been used (where respondents answered 'no') and reasons cited included insufficient resources, other priorities, political reasons/appetite for enforcement, not a problem area or that it is covered by other agencies/departments.

f) Staff absence

In terms of staff absence, the majority thought that this was about average, slightly above average or slightly below average.



[APSE performance networks](#) collects data on staff absence for street cleansing. Actual staff absence data for 2010-11 has shown a sharp decrease of over 12% from the previous year, to an average across councils of 4.75%.

Only 3% of respondents thought that the training budget is going to increase over the next 12 months (with 29% stating a decrease and 68% stating that this will stay the same).

g) Future areas of work and service reviews

46% currently sell their services to the private sector and 35% sell their services to other public bodies. Comments on areas of growth for the service in the next 12 months included:

- Income generation, private work and selling services
- Increase in provision of specialist street cleansing works to private sector and other public institutions
- Allotments, parks and open space
- Graffiti and gum removal
- On street litter and recycling bins
- Pest control
- Cemeteries
- Gritting services
- Trade waste contracts including recycling and food collections
- Mechanical sweeping of larger industrial units and the larger supermarkets car parks

- Grounds maintenance & street cleansing contracts
- Enhanced town centre service
- Channel sweeping
- More sustainably friendly mechanical sweepers, e.g. electric vehicles
- Community engagement and community based projects
- Community budgets
- Partnership working with health, schools and the private sector
- Use of volunteers and community payback
- Education and prevention initiatives
- Enforcement
- New property build putting additional costs on container provision
- Increasing incidences of fly tipping

Comments on future decreases in work include:

- Transfers through neighbourhood agendas including devolution of services to lowest denominator, community groups, parish councils etc
- Private street cleansing works and section 106 funded work
- Reduction in assistance and advice to community based groups due to reduced financial support
- External funding
- Reduction in SLAs within the authority
- Street cleansing and grounds maintenance work and routine schedules
- Levels of cleanliness
- Mechanised sweeping
- Reduction in street cleaning barrows, with more emphasis on mechanical sweeping
- Litter picking and clearing of detritus
- Number of operational hours
- Resources - further cuts and rationalisation of budgets
- Scheduled zonal cleaning - diminishing resources dictate a more reactive approach
- Late shift or voluntary overtime to deal with the night time economy
- Seasonal maintenance
- Gully emptying
- Less frequent cleansing of rural roads
- Commercial waste
- Non statutory work

When asked if respondents had undertaken a service review recently, 36.5% stated that they have completed this, 46.5% stated that they have a review which is underway and 14% stated that they will be doing so in the next 1-2 years. Only 3% 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:

Answer Options	Response Percent
Route optimisation	86.4%
Utilisation of machinery/transport	84.8%
Review of working time/rota's	83.3%
Review of productivity/work study	69.7%
Service re-design	63.6%
Use of technology (e.g. handheld)	53.0%
Using systems thinking techniques	28.8%
Other (please specify)	4.5%

The Association for Public Service Excellence

APSE member authorities have access to a 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 authorities 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