

State of the Market Survey 2016

Local Authority Street Cleansing Services



Briefing Note 16-09

February 2016



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

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Local Authority Street Cleansing Services

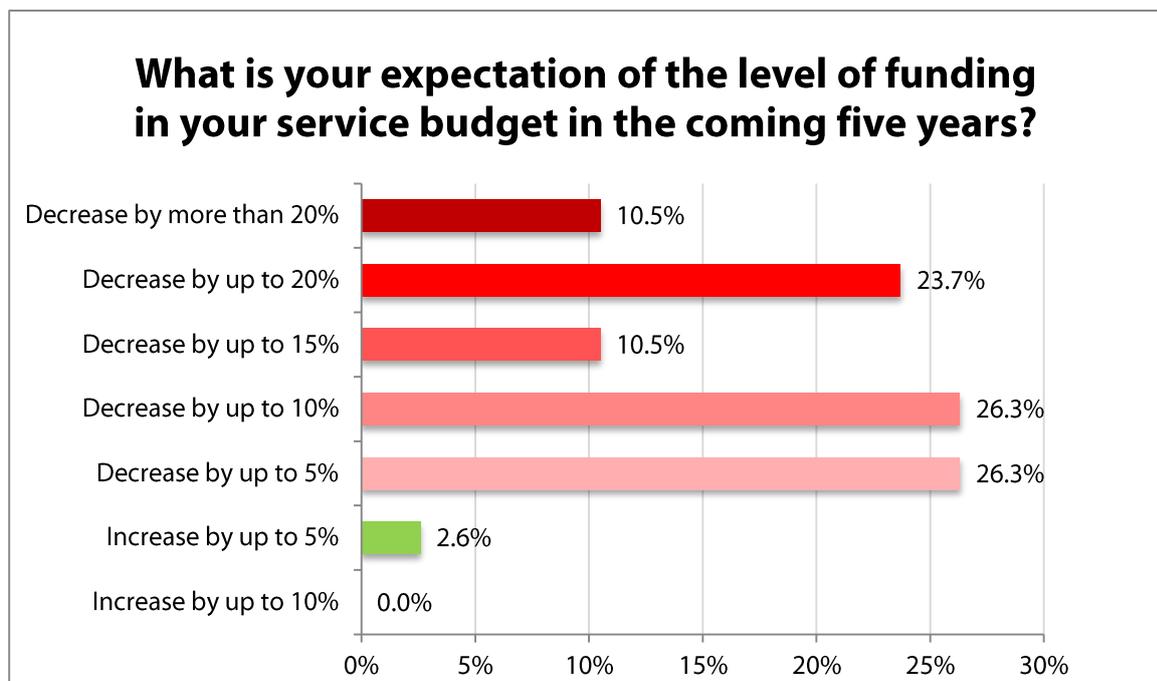
State of the Market 2016

APSE conducted an on-line survey during December 2015 and January 2016. This follows on from the 2009, 2011, 2012, 2014 and 2015 Street Cleansing State of the Market surveys where similar questions were asked to allow for trend comparisons. 41 responses were received from local authorities throughout the UK. This report identifies the key findings of the survey.

Results from the survey

a) Service Budgets

Members were asked if they thought that the street cleansing budget will change over the next year and 63.4% said yes (compared with 75.5% in 2015). Of these, 97.4% expect it to **decrease** over the next five years,



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

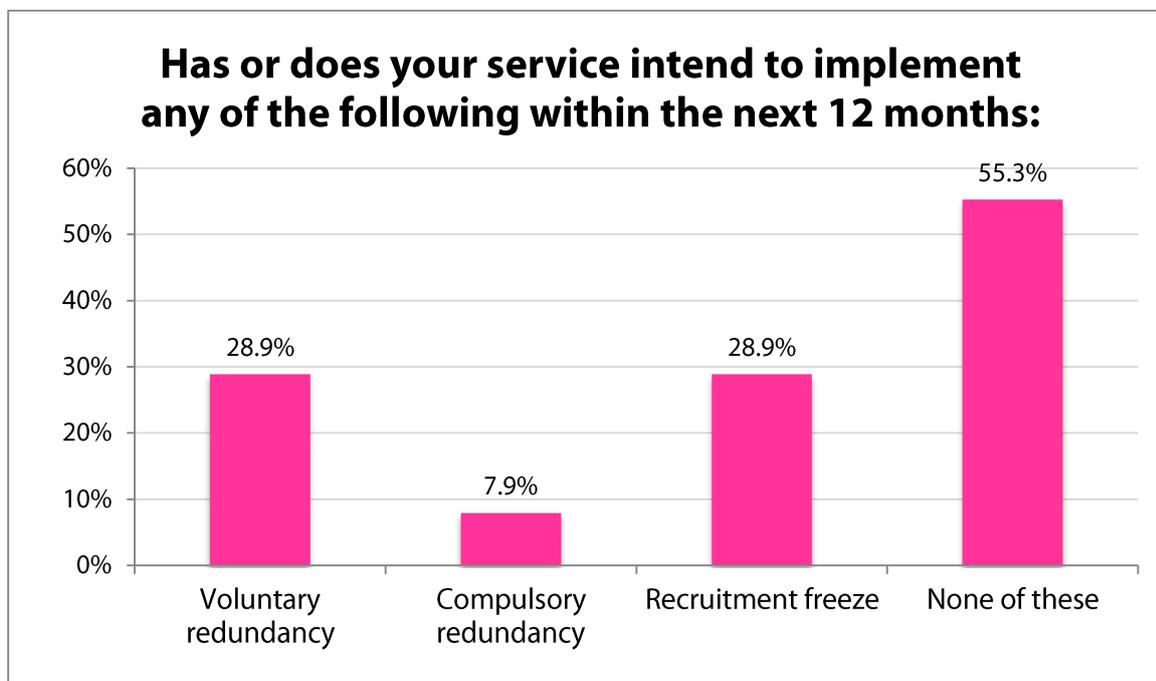
- New scheduling (e.g. a 4 on 4 off working week or a 7 day week work program)
- Route optimisation
- Area based working
- Amalgamation of services (e.g. street cleansing and grounds maintenance) and the multi-skilling of the workforce
- Changing street cleansing from output specification to input specification
- Reductions in the use of agency staff

- Demand management and subsequent reduced frequency
- Use of new and improved technology such as vehicle trackers and changes to patterns of use, such as double shifting mechanical sweepers
- Changing to a systems thinking approach (no route sheets)
- Increased use of solar powered compaction bins

The survey asked 'Do you have any income generation schemes' and 47.5% answered 'yes'. For those that answered yes, they indicated using the following ways of implementing their income generation strategy:

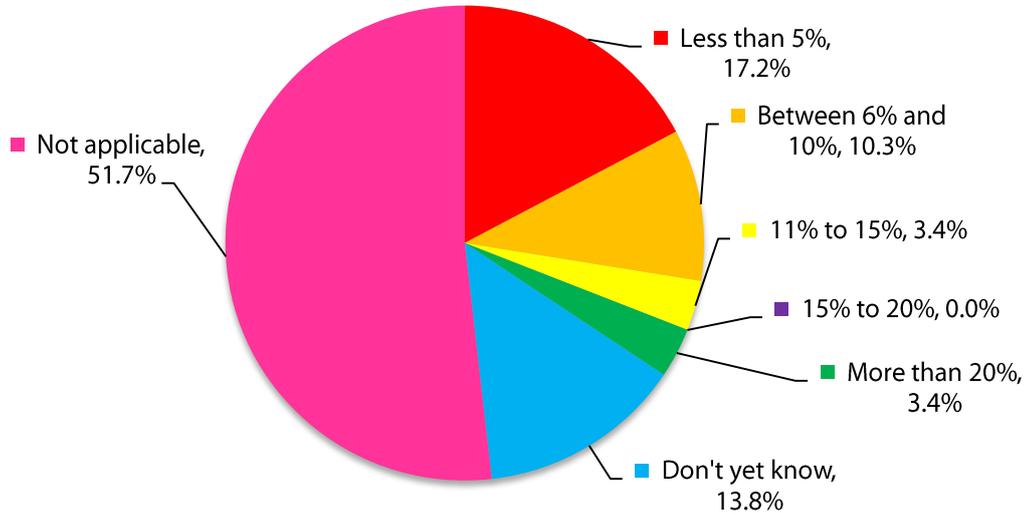
- Bulky waste disposal
- Cleaning of private car parks
- Delivering services for town/parish councils (e.g. dog/litter bins, cleansing)
- Weed spraying/weed killing for highways authority
- Gully emptying contracts
- Mechanical sweeping of cemeteries, parks and industrial estates, etc for public/private clients
- Clean up charging after events (rather than footing the bill themselves)
- Housing garden care, fencing and clean ups
- The recruitment of a commercial manager

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:



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?

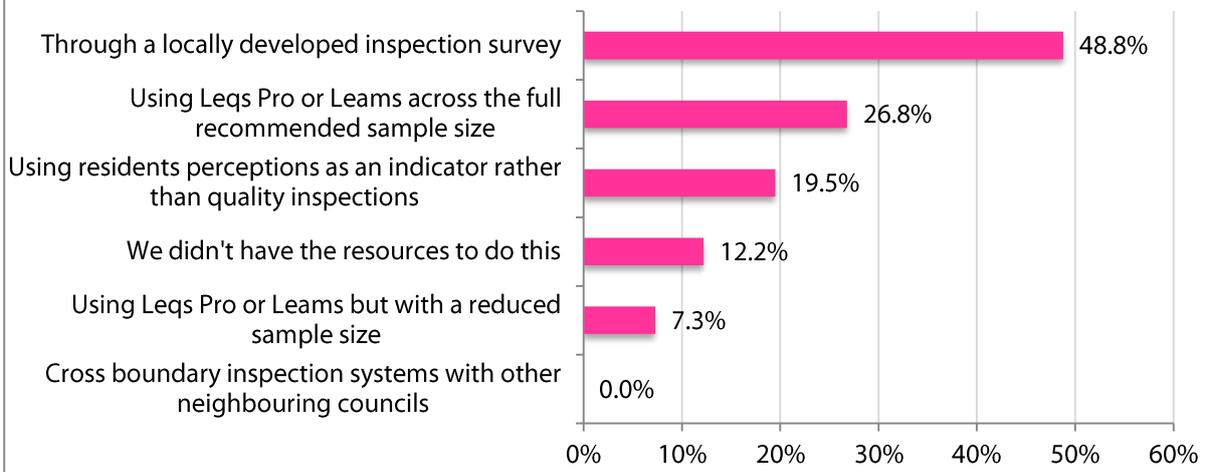


b) Standards of cleanliness

22.0% stated that standards of cleanliness have increased over the past year (compared with 15.7% in 2015 and 23% in 2014), with 53.7% stating that they have stayed the same and 24.4% stating that they have decreased. When asked what they expect over the next year, 26.8% expect them to decrease and 14.6% expect them to increase. Therefore, 85.3% expect standards of cleanliness to stay the same or decrease.

The survey asked how street cleanliness quality was measured in 2015 (respondents were allowed to choose more than one response) and the results were as follows:

How did you measure street cleanliness quality during 2015?



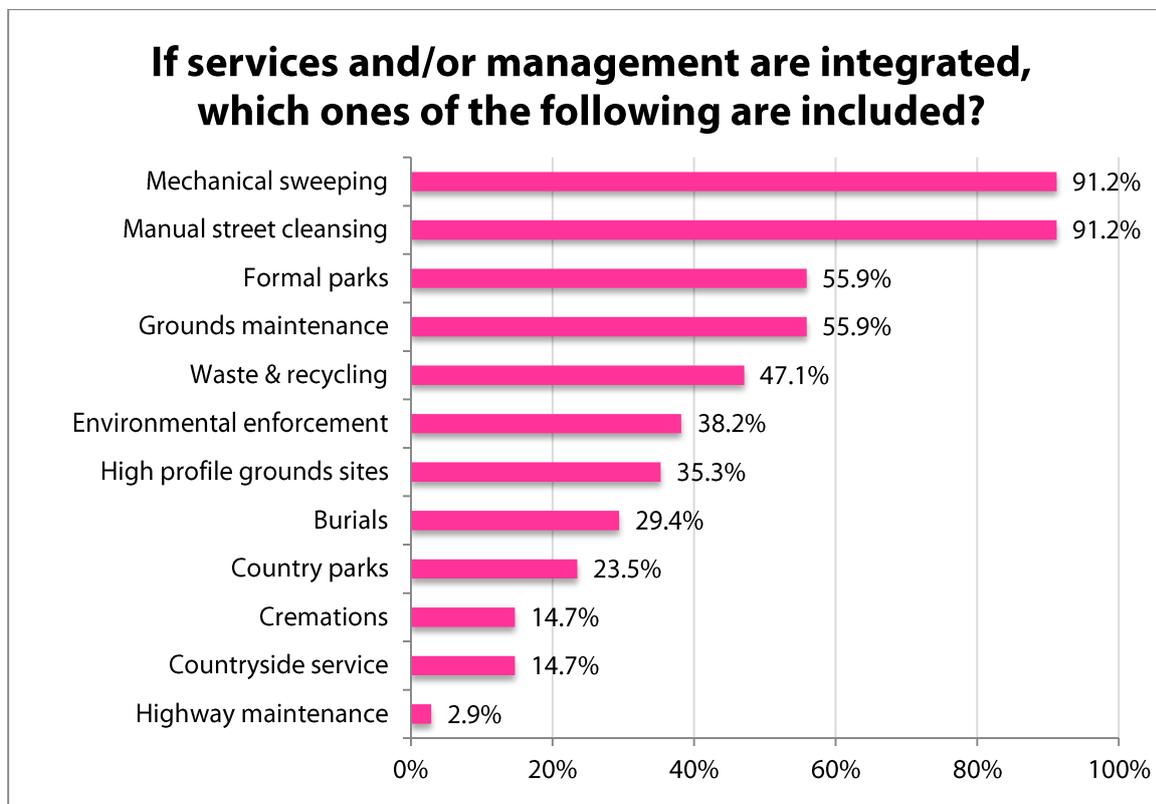
When asked who carried out the surveys, the majority of respondents (78.8%) indicated that this was done by officers within their service/department, with a further 21.2% from another service/department.

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 (43.9% to 48.8%), this could be attributed to the Land Audit Management System (LAMS) run by APSE's performance networks service which is a monitoring system for measuring grounds maintenance standards in terms of quality for parks, open space and horticultural services. As a less complex and more affordable way to measure street cleansing quality the LAMS system has proven to be extremely popular. **This system has now been adapted to include street cleansing.**

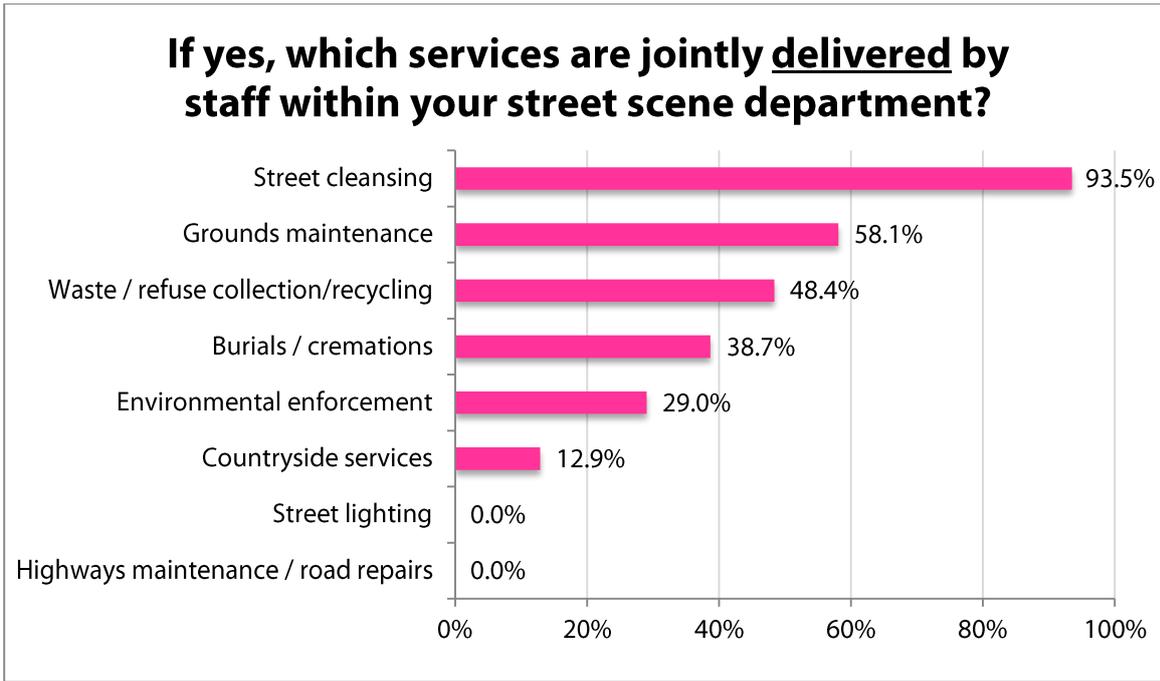
The only other change in the measuring of cleanliness standards was a decrease in using residents perceptions as an indicator rather than actual quality inspections, otherwise, the percentage of types of methods used has remained broadly static. In terms of who will carry out these surveys in 2016, increases are expected in officers from another service/department (from 21.2% to 24.2%) and local volunteers (from 3.0% to 9.1%).

Street scene

73.2% indicated that they are part of an integrated streetscene service and of those, the services that are jointly managed are shown in the following graph:



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

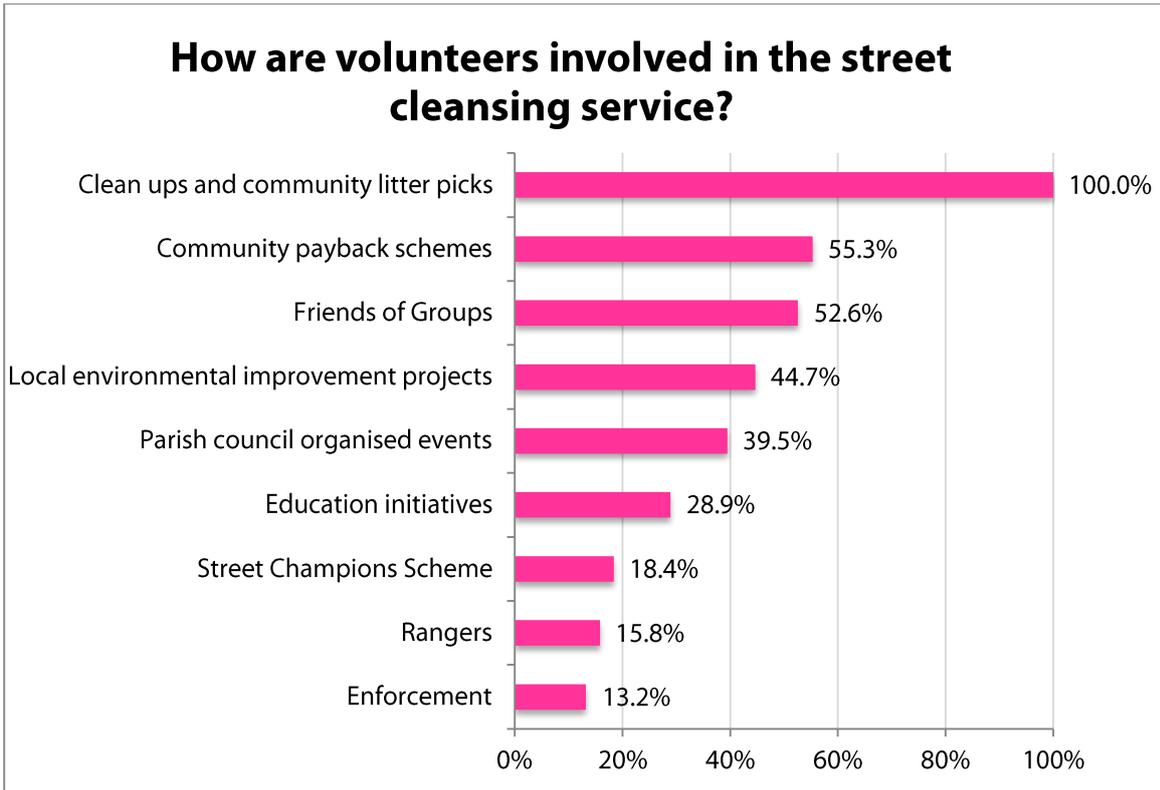


Of those who stated that they were not already part of an integrated streetscene service, 60.0% expected to become part of an integrated streetscene service in the near future.

d) Street cleansing operations

75.6% stated that they have area-based teams and most services operate over 7 days (90.2%), with some operating over 5 days (9.7%). 14.6% currently undertake night time street cleansing. The survey asked how the street cleansing service is currently managed and 80.5% stated that this is in-house and 19.5% external. 75.6% expect to be managed in-house within the next 2-3 years. For those where the service is currently managed externally, 44.4% of respondents stated that the contract length is mainly up to 5 years, whilst a further 33.3% of respondents stated that their contracts were over 10 years. 44.4% of respondents 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, community payback schemes and Friends of Groups. The full breakdown is as follows:

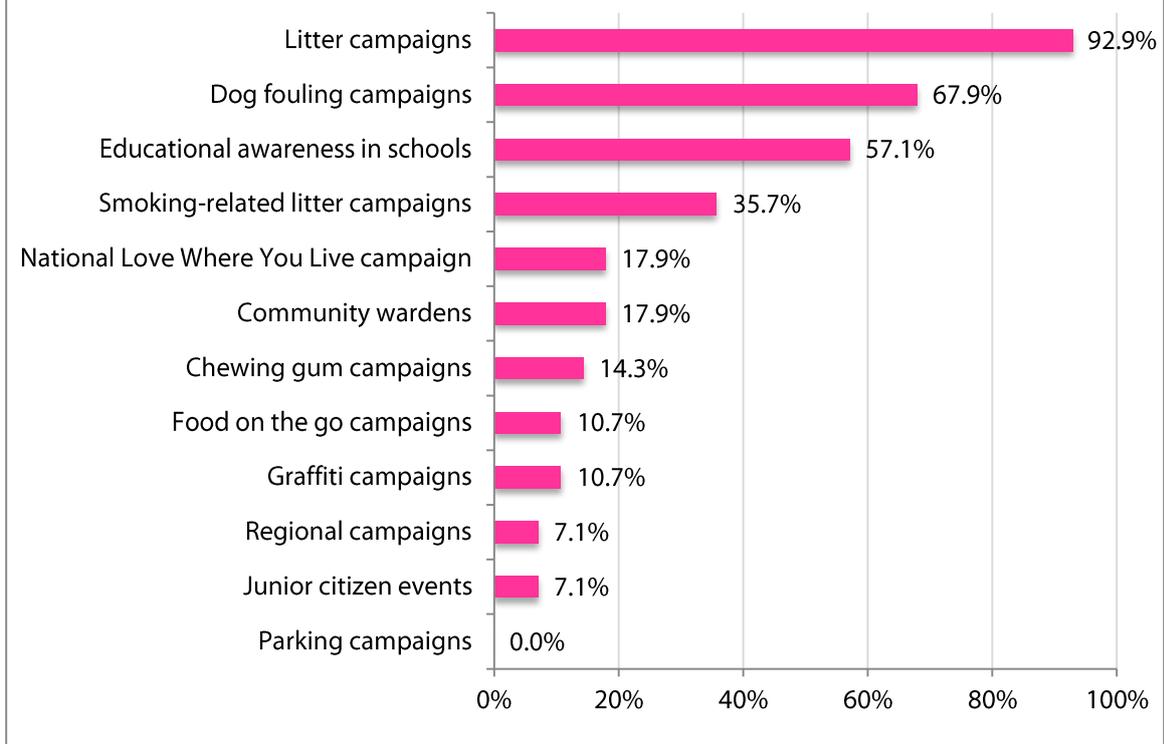


29.7% stated that they provide streetscene services as part of a Business Improvement District (BID). 18.4% have individual street cleansing agreements with supermarkets, retailers and other businesses. 26.3% indicated that they have a partnership with large supermarkets/retailers/businesses on community clear-ups/public realm improvements such as Community Champions schemes with organisations like ASDA, Tesco and McDonalds.

67.5% stated that community sector involvement in street cleansing is increasing in their service (an increase from 57.4% in 2015, 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 (96.3%), Friends of Groups (44.4%), local environmental improvement projects (33.3%), community payback schemes (29.6%), parish council organised events (25.9%) and education initiatives (22.2%).

In terms of education campaigns, 72.5% are planning these in the next 2 years. The main campaigns being planned are litter campaigns (92.9%), dog fouling campaigns (67.9%) and educational awareness in schools (57.1%). The full breakdown is as follows:

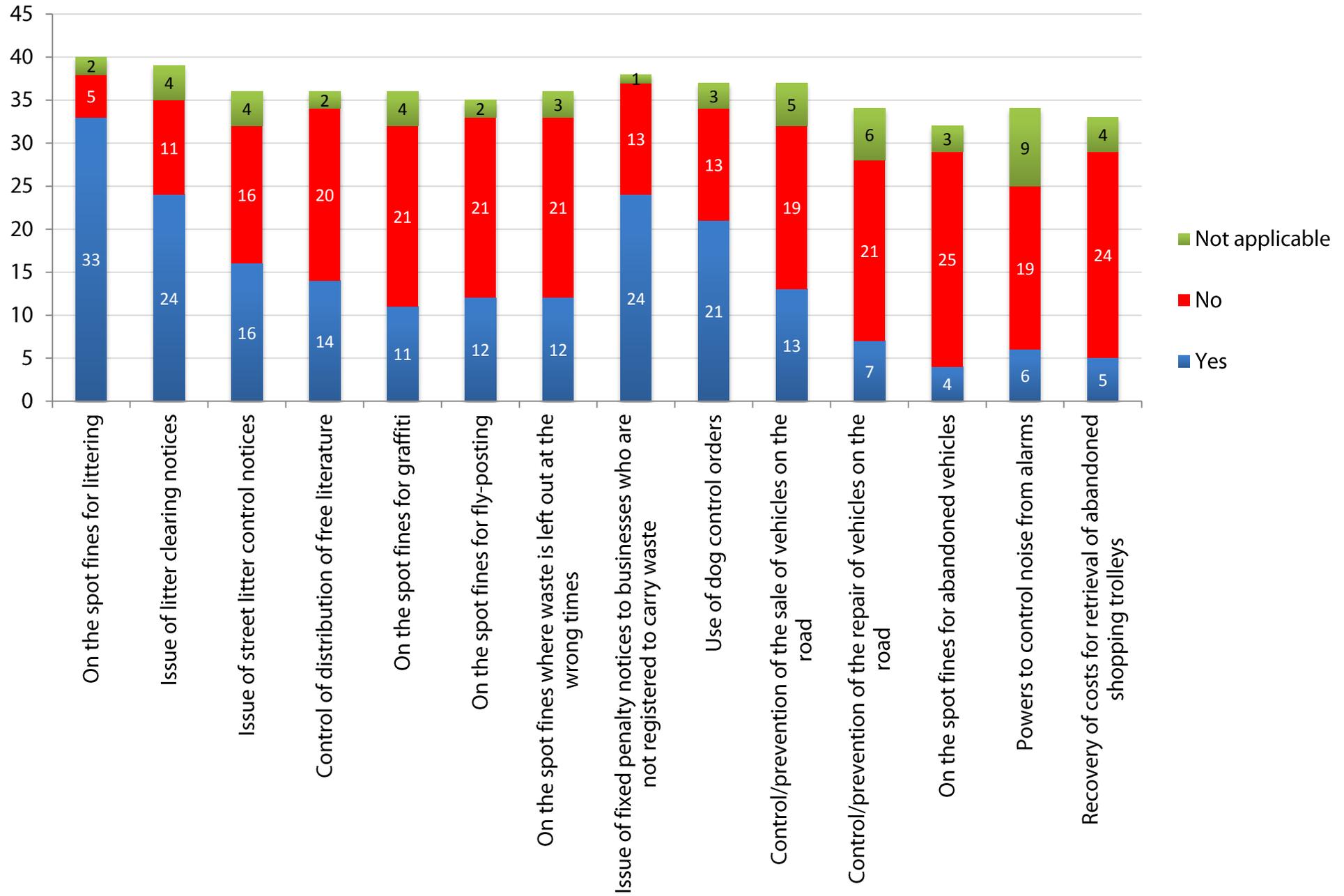
Are you planning any education campaigns in the next 2 years? If yes, what are these?



e) Enforcement

62.5% 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), the results are shown below. These are the powers defined by the Clean Neighbourhoods and Environment Acts 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.

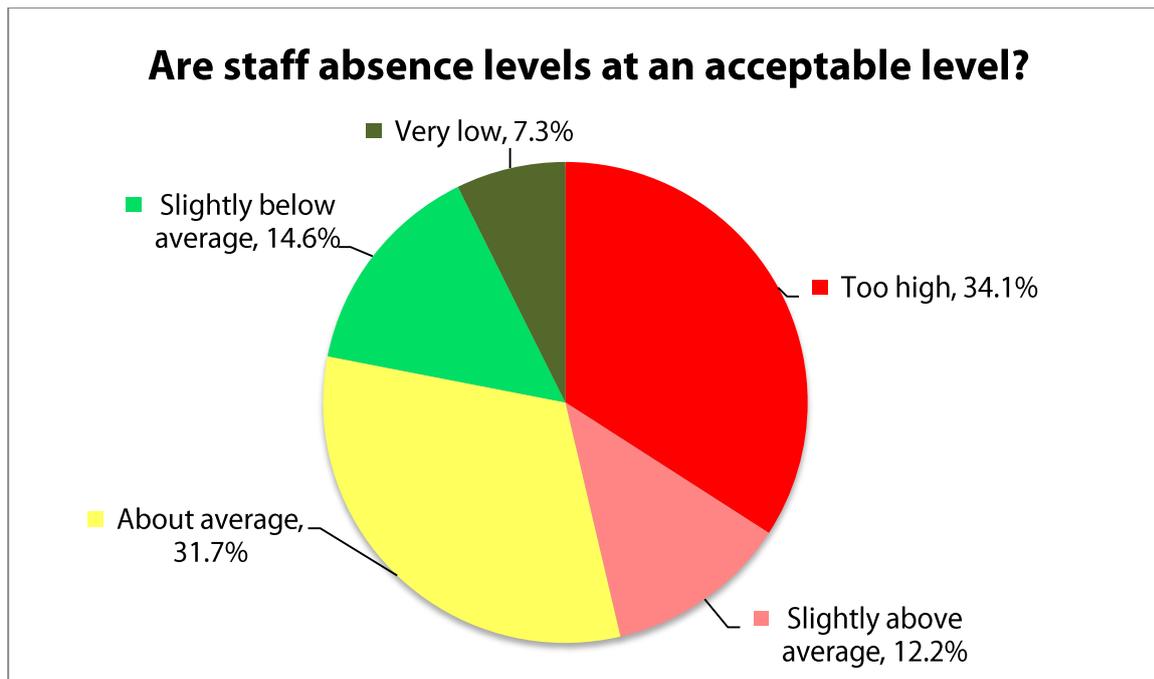
Which of the following powers are you currently using (where applicable)?



A further question was asked about why certain powers have not been used (where respondents answered 'no'. Reasons cited included, insufficient resources (54.3%), it is covered by other agencies/departments (42.9%), they're not problem areas/we have other priorities (37.1%) and political reasons (8.6%).

f) Staff absence

In terms of staff absence, the majority thought that this was too high (34.1%), although a similarly large proportion of respondents also thought this was about average (31.7%).



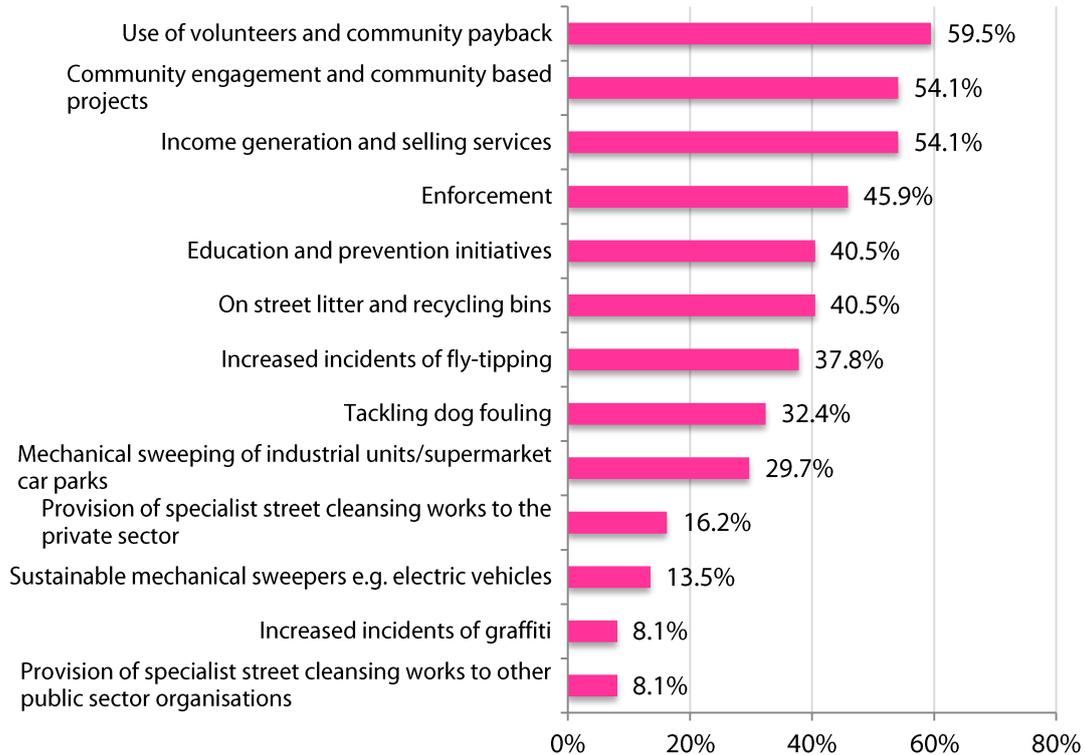
Staff absence levels from performance networks data appears to show that staff absence is well managed, however the survey data indicates that over a third of local managers believe absence is still too high.

Only 4.9% of respondents thought that the training budget is going to increase over the next 12 months (with 22.0% stating a decrease and 73.2% stating that this will stay the same). This is a particular concern when we look at the trend towards service integration. In these circumstances, and where there is an anticipation staff may need to be multi-skilled, staff training will be essential to ensure service quality is met.

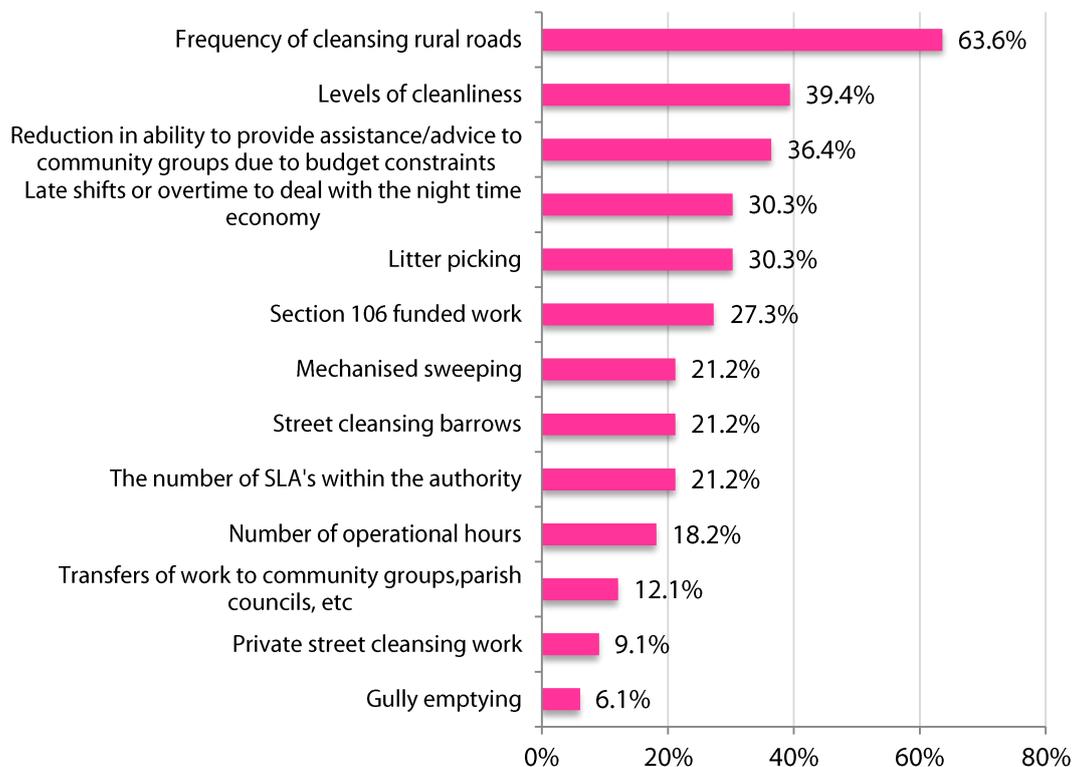
g) Future areas of work and service reviews

41.0% currently sell their services to the private sector and 12.8% sell their services to other public bodies. Respondents were asked where they expect to see growth over the next 12 months and where there may be future decreases in work for the service and the responses for both questions were as follows:

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

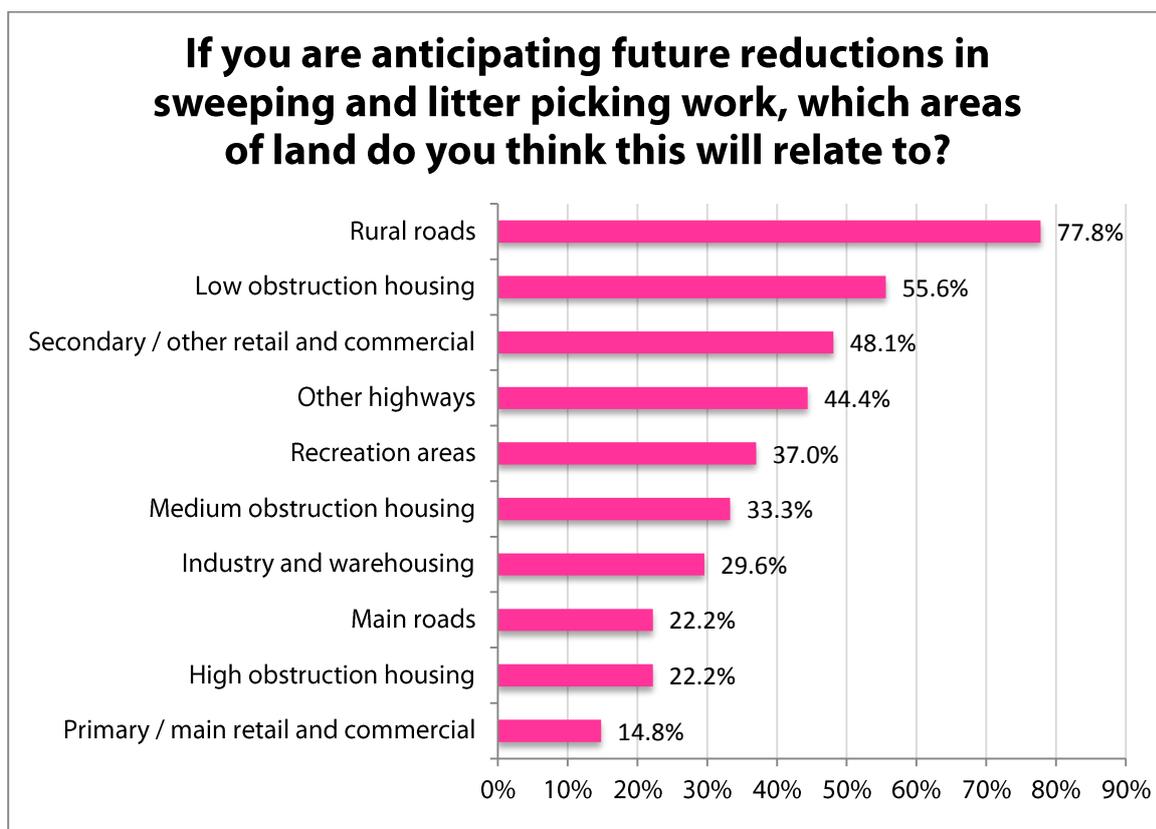


Where do you see future decreases in work for the service?



The overall trend to reducing street cleansing frequencies is of concern in the absence of other methods to ensure quality does not diminish. This is corroborated by APSE performance networks trends which show that whilst budgets and services have been cut the public are now beginning to notice a deterioration in the quality of the public realm. Whilst these findings suggest that local councils have so far managed to maintain service quality it would appear we are now at a tipping point where budgets dictate that previous levels of street cleansing quality can no longer be maintained with reduced budgets and resources.

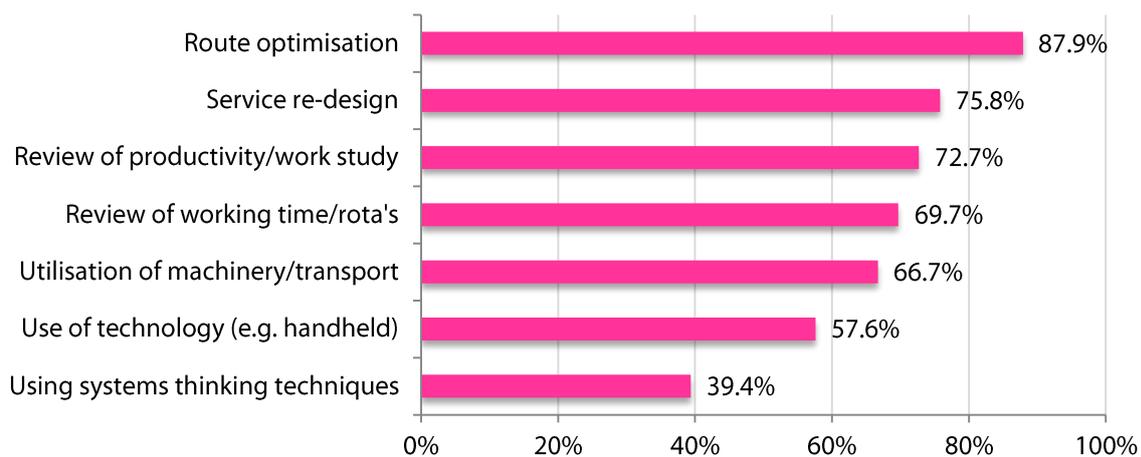
The survey then went on to ask 'if you are anticipating future reductions in sweeping and litter picking work, which areas of land do you think this will relate to' and the results were as follows:



When asked if respondents had undertaken a service review recently, 23.1% stated that they had completed this, 38.5% stated that they have a review which is underway and 33.3% stated that they will be doing so in the next 1-2 years. 5.1% 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:



APSE Comment

It is quite clear that despite ongoing service budget cuts, managers and staff are continuing to provide good street cleansing services. However there is a real risk that service quality will diminish as a result of the ongoing pressures on budgets, changes to cleansing frequencies and a need for investment. Local councils are making good progress through making efficiencies and looking for income generation opportunities to plug funding gaps but there is a growing need to recognise the value of these public realm services to local economies. As recent changes to local government finances indicate, councils will be increasingly reliant upon attracting businesses to their area, to benefit from business rates retention; the value of a quality street scene environment should not be underestimated. Ongoing cuts to these services could have much wider implications for local councils if this leads to areas being unattractive to businesses, as well as local residents

It is also apparent that the use of volunteers is growing in importance, however it has to be realised that these resources are often only available for localised projects and will not be enough to be a credible alternative to front-line local authority staff. Almost 40% of respondents expect to see reduced cleanliness standards as a result of ongoing budget cuts and it will therefore be critical that service resources are targeted more effectively in those areas where cleansing demands are highest. Route optimisation and service re-design are now being used across most services to try to dilute the impact of shrinking resources, but ultimately, residents may have to accept that the need to keep streets clean is as much their responsibility as the local authorities, and a change in public behaviour may be the only solution to ensuring the quality of our local environments is maintained. This is an area that APSE developed in recent research '[Park Life: Street Life: Managing demand in the public realm](#)' which can be downloaded using the link free of charge from the apse website.

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 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
- Cemeteries and crematoria
- Environmental Health