



membership resources

State of the Market Survey 2016

Local Authority Cleaning Services



**Briefing 16/23
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The state of the market survey was conducted by Rob Bailey, APSE Principal Advisor with assistance from Garry Lee, Research & Coordination Officer.

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

Tel: 0161 772 1810

Email: rbailey@apse.org.uk

LOCAL SERVICES
LOCAL SOLUTIONS



Association for Public Service Excellence

2nd floor Washbrook House

Lancastrian Office Centre

Talbot Road, Old Trafford

Manchester M32 0FP

telephone: 0161 772 1810

fax: 0161 772 1811

email: enquiries@apse.org.uk

web: www.apse.org.uk

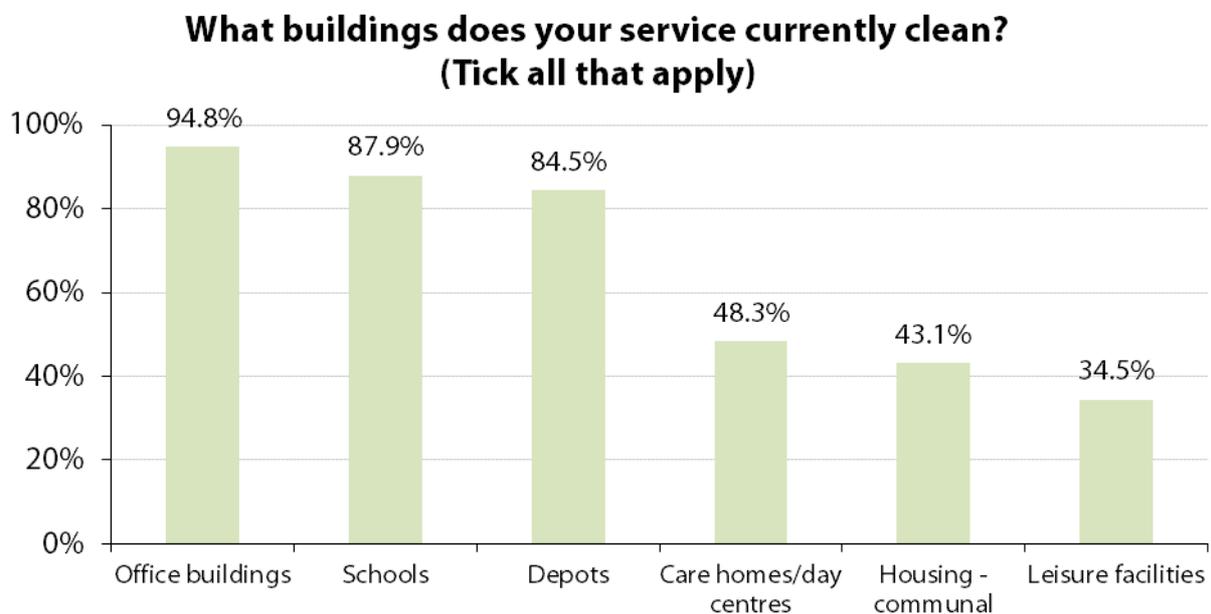
Local Authority Building Cleaning Services

State of the Market 2016

APSE conducted an online survey during April 2016. 58 responses were received with 55.2% from England, 29.3% from Scotland, 12.1% from Wales and 3.4% from Northern Ireland.

Results

Of those completing the survey, 87.9% were 'in-house service providers' of whom 62.7% expected to remain as in-house providers in 2 years time. 8.6% were 'Council owned, arms length wholly owned companies' and 5.2% were 'private contractors'. The mix of buildings cleaned by the respondents was also established:



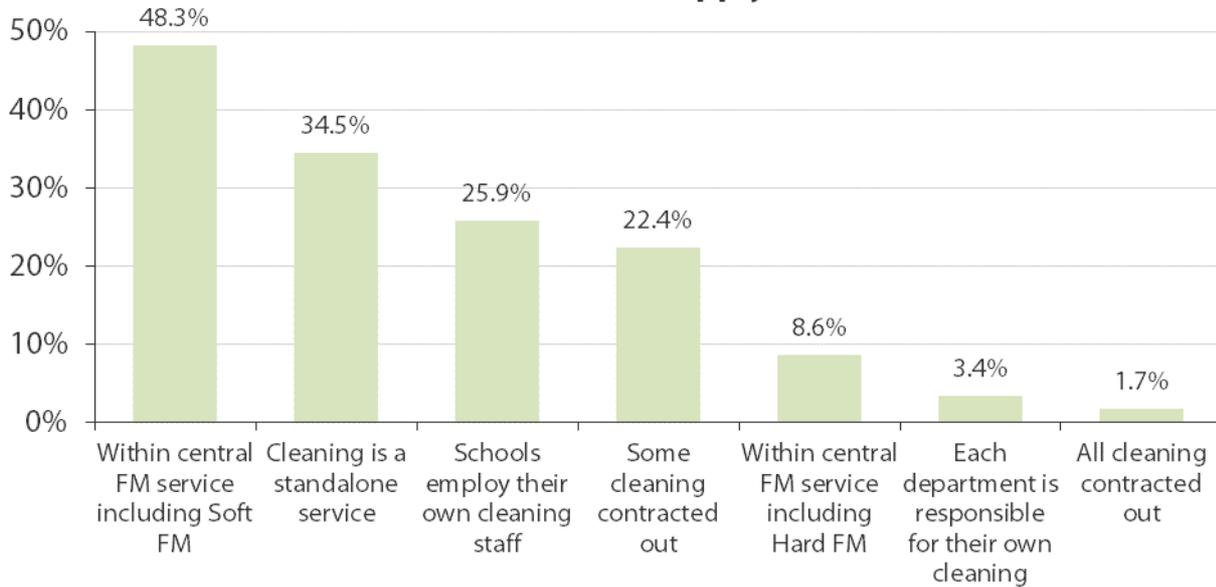
94.8% clean office buildings, whilst 87.9% clean school buildings and 84.5% clean depots. 48.3% also clean care homes/day centres, 43.1% clean communal housing and 34.5% clean leisure facilities. Other respondents also noted cleaning a range of different areas such as: public toilets, bus stations, libraries, museums, fire stations, community centres, youth centres, crematoria and the offices of external partners.

Structure

56.9% of those responding run cleaning together within a central FM service (including either Soft and/or Hard FM), with 34.5% running cleaning as a standalone service.

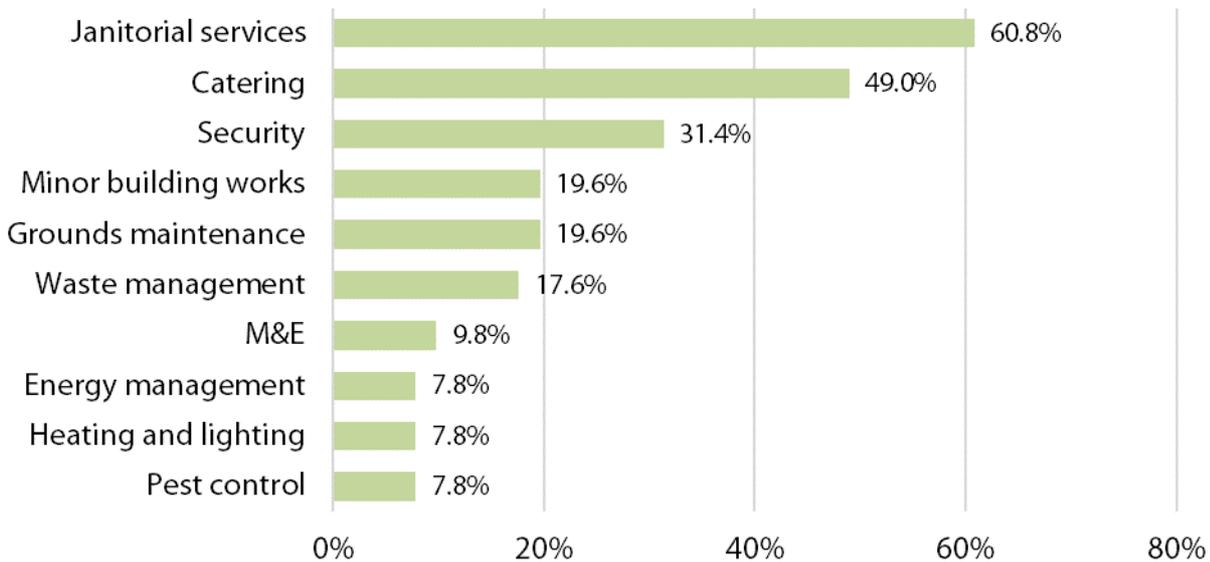
The number of frontline cleaners employed varied from 5 up to 1500, with an FTE range of 20.0% (400 staff, 80 FTE) to 92.6% (34 staff, 31.5 FTE).

Organisation of cleaning services within the Council (Tick all that apply)



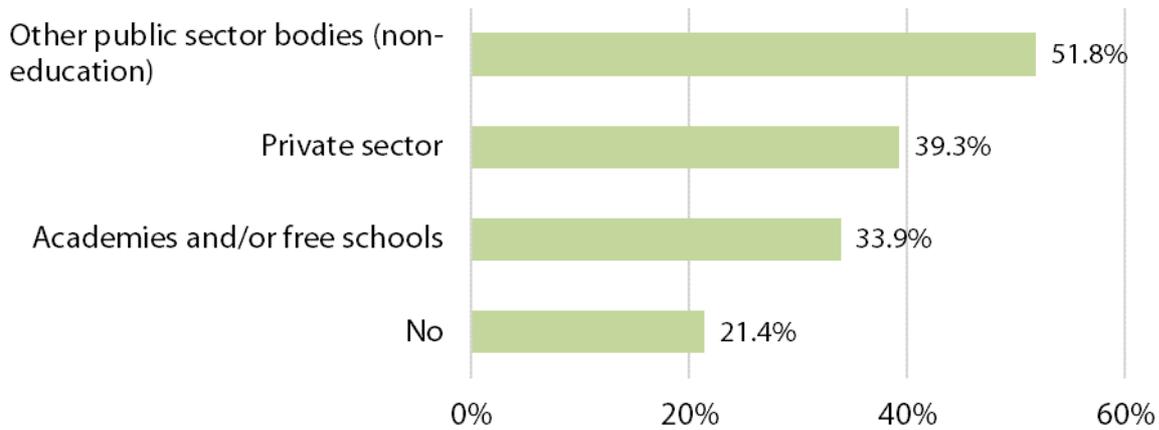
Respondents to the survey are responsible for a range of services other than building cleaning. These are detailed below:

Which other services are you responsible for?



Other services noted in the comments included: cleaning within social work care homes/respite centres, meals on wheels, public toilets, housing support, school crossing patrols, bereavement services, street cleansing, public space CCTV, building services and the procurement and maintenance of school catering equipment.

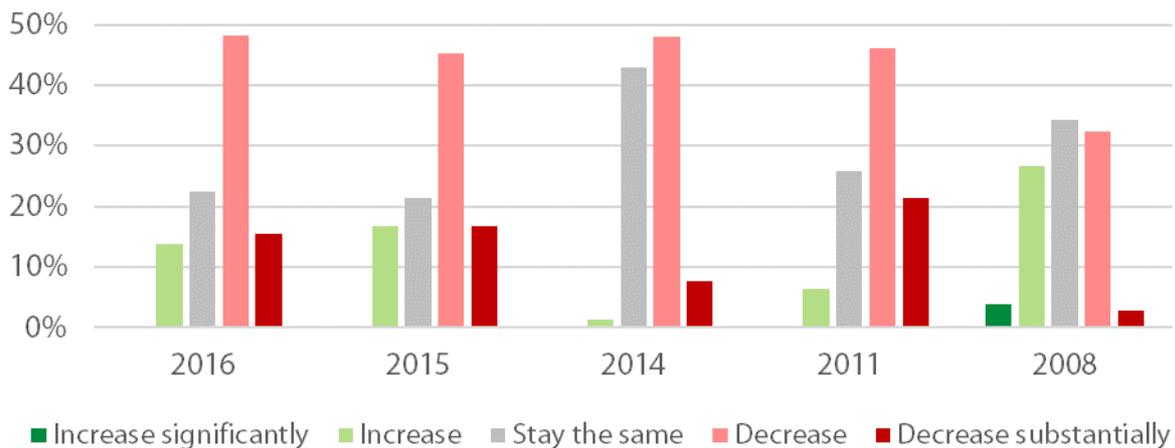
Do you sell your services outside of the local authority?



The majority of responding authorities operate commercially (78.6%) with 51.8% selling their services to other public sector bodies, 39.3% selling to the private sector and 33.9% selling to academies and/or free schools. Comments to this question noted that two authorities were moving into the private sector within the next 12 months, and one other authorities had tried but was unsuccessful in doing so. APSE recently launched a [local authorities commercialisation, income and trading network](#) and Scottish commercialisation advisory group for local authorities looking to share best practice and network with other trading authorities.

Expectations for budgets

How do you expect the cleaning budget to change next year?

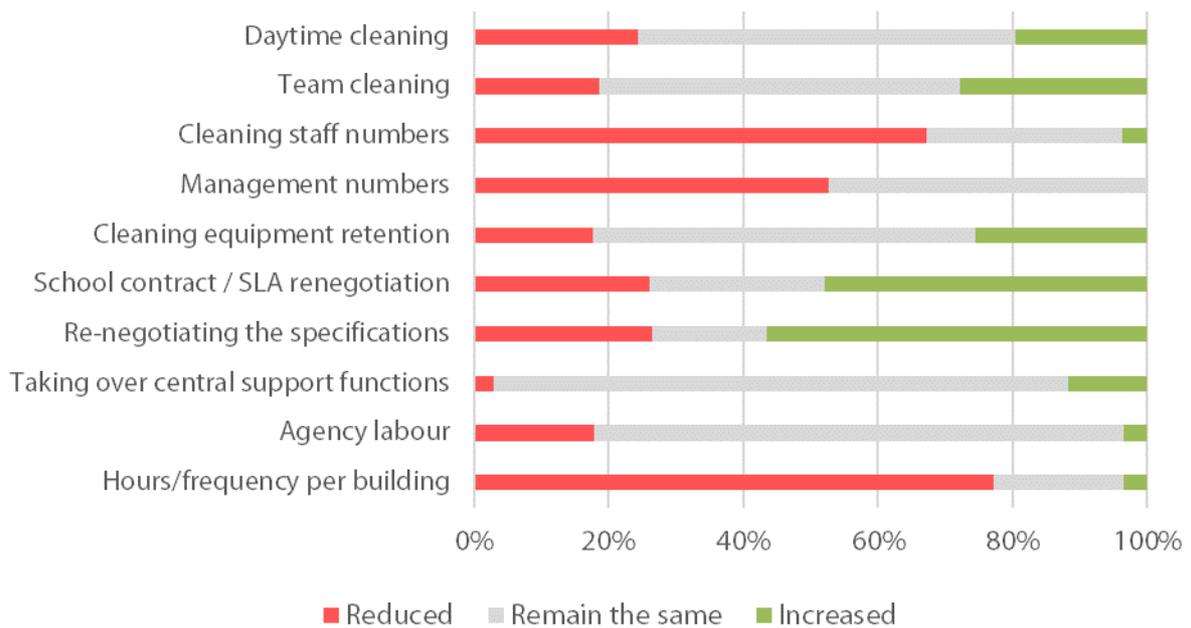


The majority of respondents this year expected the budget to either decrease (48.3% - up 3.1%) or decrease substantially (15.5% - down 1.2%); 22.4% (up 1.0%) expected budgets to stay the same, and the remaining 13.8% (down 2.9%) expected budgets to increase.

41.4% expect the cleaning section’s workload to increase over the next 12 months, while 27.6% expect it to decrease. The majority of respondents (76.8%) expected their own personal workload to increase regardless of this.

Due to the increased focus on value for money and productivity, 77.2% of respondent are expecting reduced hours/frequency per building over the next year, 56.6% are expecting to re-negotiate specifications, 67.3% are expecting reduced cleaning staff numbers and 52.7% are expecting reduced management numbers.

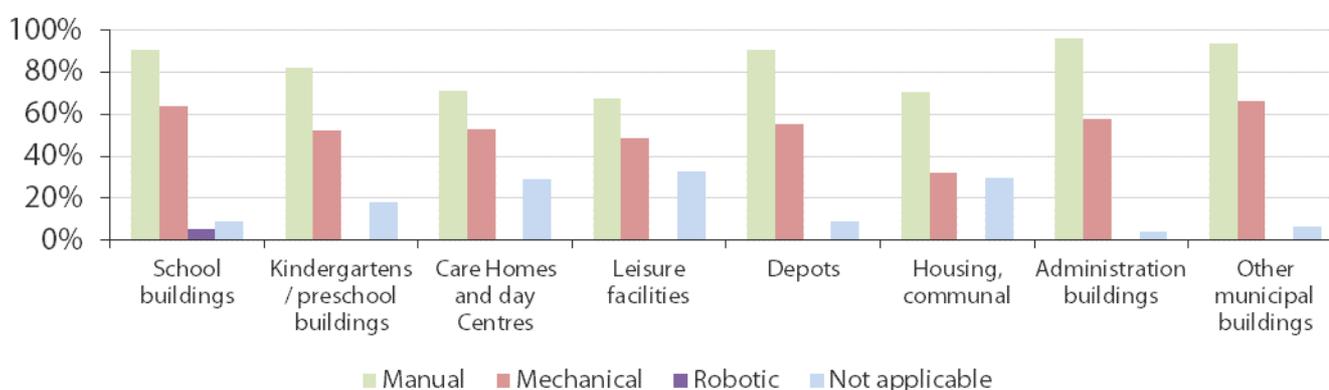
There is an increased focus on value for money and productivity as budgets are squeezed. How do you expect the service to change over the next year?



Cleaning methodology

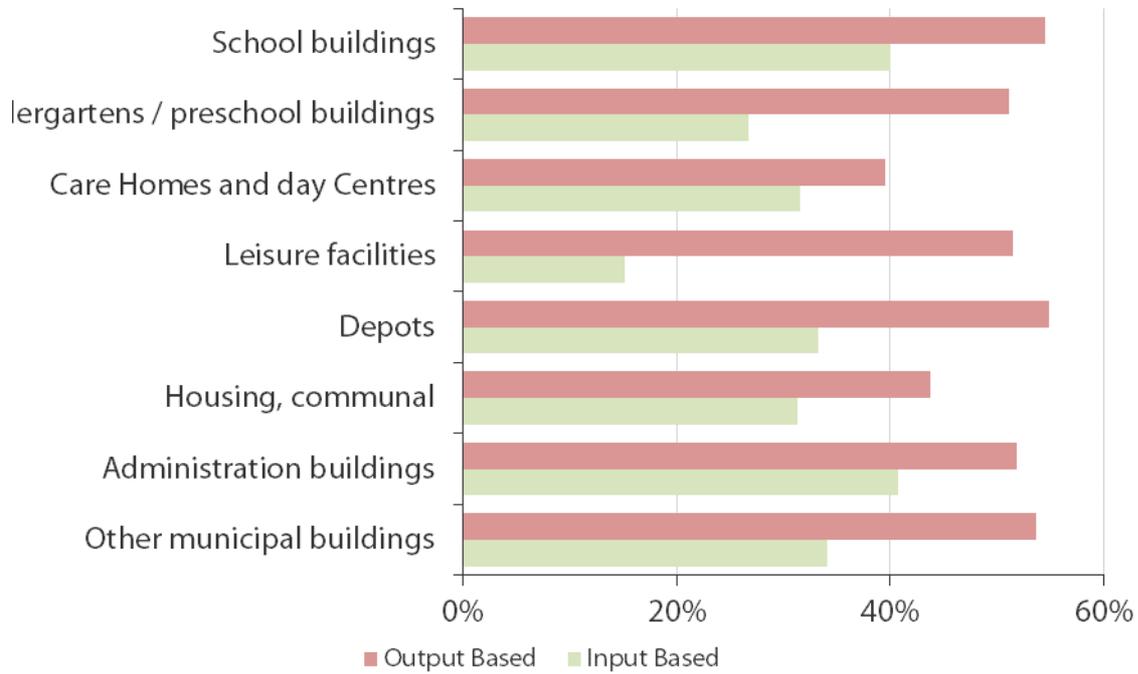
Robotic cleaning holds significant promise for unobstructed areas but has yet to gain a significant foothold with only 5.5% of respondents using these methods in school buildings (down by 2.1% since last year). The figures below show that manual methods of cleaning are still the most prominent, although the majority of respondents also use mechanical cleaning in a range of buildings (other municipal buildings -66.0%, school buildings – 63.6%, administration buildings - 57.7%, depots - 55.6%, care homes and day centres – 52.6%, kindergartens / preschool buildings – 52.3%).

What cleaning methods do you employ in the following buildings? (Tick all that apply)



Answer Options	Manual	Mechanical	Robotic	Not applicable
School buildings	90.9%	63.6%	5.5%	9.1%
Kindergartens / preschool buildings	81.8%	52.3%	0.0%	18.2%
Care homes and day centres	71.1%	52.6%	0.0%	28.9%
Leisure facilities	67.6%	48.6%	0.0%	32.4%
Depots	90.7%	55.6%	0.0%	9.3%
Housing, communal	70.6%	32.4%	0.0%	29.4%
Administration buildings	96.2%	57.7%	0.0%	3.8%
Other municipal buildings	93.6%	66.0%	0.0%	6.4%

What type of cleaning specification do you work to in the following buildings? (Tick all that apply)

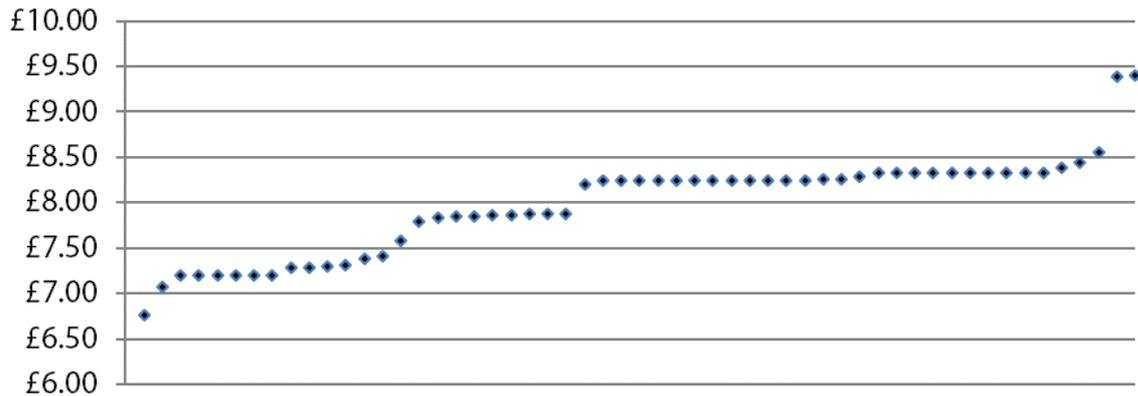


Answer Options	Input Based	Output Based	Not applicable
School buildings	40.0%	54.5%	12.7%
Kindergartens / preschool buildings	26.8%	51.2%	22.0%
Care Homes and day Centres	31.6%	39.5%	28.9%
Leisure facilities	15.2%	51.5%	36.4%
Depots	33.3%	54.9%	11.8%
Housing, communal	31.3%	43.8%	25.0%
Administration buildings	40.7%	51.9%	7.4%
Other municipal buildings	34.1%	53.7%	12.2%

62.5% of respondents used the BICS standard for cleaning (up 4.2% since 2015) throughout the building estate, 3.6% used the BIC standard on tendered work only and 32.1% used an alternative system, with the majority of those respondents reporting that they used an internally developed inspection and monitoring system based around BICS principles, Housemark Photobook, etc. One respondent to the survey did not currently measure quality.

In-house providers have no separate legal status to the rest of the authority so typically use service level agreements as a substitute for contracts with the departments and schools they supply. The increase in academies is seeing SLAs replaced with contracts, but despite this 96.5% have recently SLAs in place with only 3.5% having none at all. 32.7% reported having contracts with customers, and one respondent noted that they have an in-house recharge system for all internal customers.

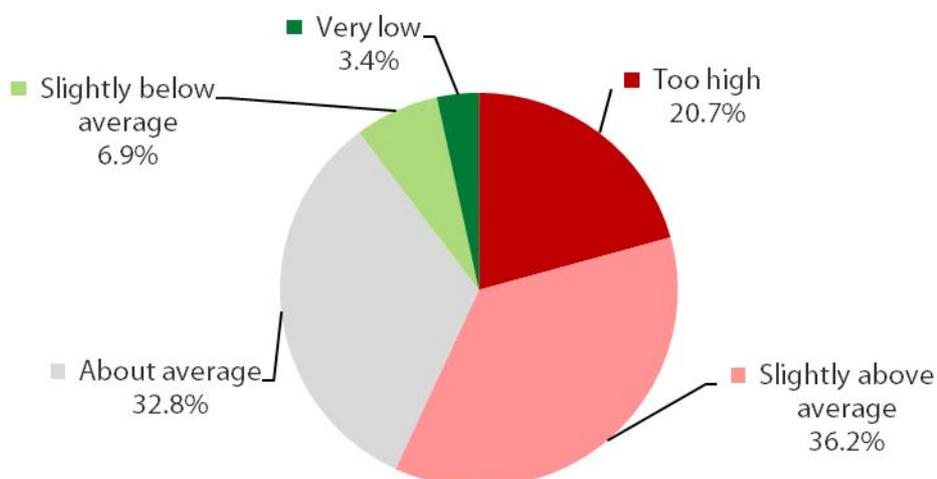
Wage costs



60.3% of respondents are currently subject to the Living Wage, with another 3.4% answering that it was imminent in their authority. The average hourly wage for a cleaning assistant was calculated as £7.98 (a 7.7% increase since 2015), with a range from £6.76 to a maximum of £9.40. The variance in scores is shown above, with 30 of 55 respondents paying above the minimum £8.25 threshold for the Living Wage (outside of London).

Attitudes to absence

Are staff absence levels at an acceptable level?



Attitudes to absence amongst respondents were mostly negative, with 56.9% reporting this to be above average, 32.8% reporting absence levels were about average and the remaining 10.3% reporting this was lower than average. The approximate sickness percentage was 5.6% (up from 4.2% in 2015). APSE Performance Networks reported the 2014/15 average staff absence rate to be 4.42%.

Local authorities remain active in supporting staff, however only 32.1% currently hold the Investors in People award with 80.4% undertaking regular staff training, 71.4% having regular appraisals and 42.9% releasing a regular cleaning section newsletter. The figures above are all broadly consistent with the results reported last year.

Comments on the future

Growth areas for the service over the next 12 months included:

- External contracting / more work for other services (e.g. housing voids, road sign cleaning, carpet cleaning, infection control cleaning)
- New opportunities on behalf of adult social care (e.g. resident house cleans and clears)
- Bringing previously external work in-house (e.g. window cleaning)
- Work in other authorities (mainly educational/training as a traded element)
- Increased usage in primary and secondary schools as a result of universal free school meals
- Forensic cleaning

Future decreases for the service over the next 12 months:

- Work lost as a result of council building and office closures
- Schools opting for private contractors or taking the service in-house
- Across the board decreases as a result of budget cuts
- Reductions in specification / frequency / Service Level Agreements
- Reductions in staff
- Community based projects
- Nurseries

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
- Cemeteries and Crematoria
- Environmental Health Advisory Group
- Housing, Construction and Building Maintenance
- Local Authorities Commercialisation, Income and Trading Network
- Parks, Horticulture and Grounds Maintenance
- Renewables and Climate Change
- Roads, Highways and Street Lighting
- 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 this State of the Market survey 2016 please contact Rob Bailey at rbailey@apse.org.uk or by phone at 0161 772 1810.