

# State of the Market Survey 2017

## Local Authority Cleaning Services



The state of the market survey was conducted by Vickie Hacking, APSE Principal Advisor.

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## Local Authority Building Cleaning Services

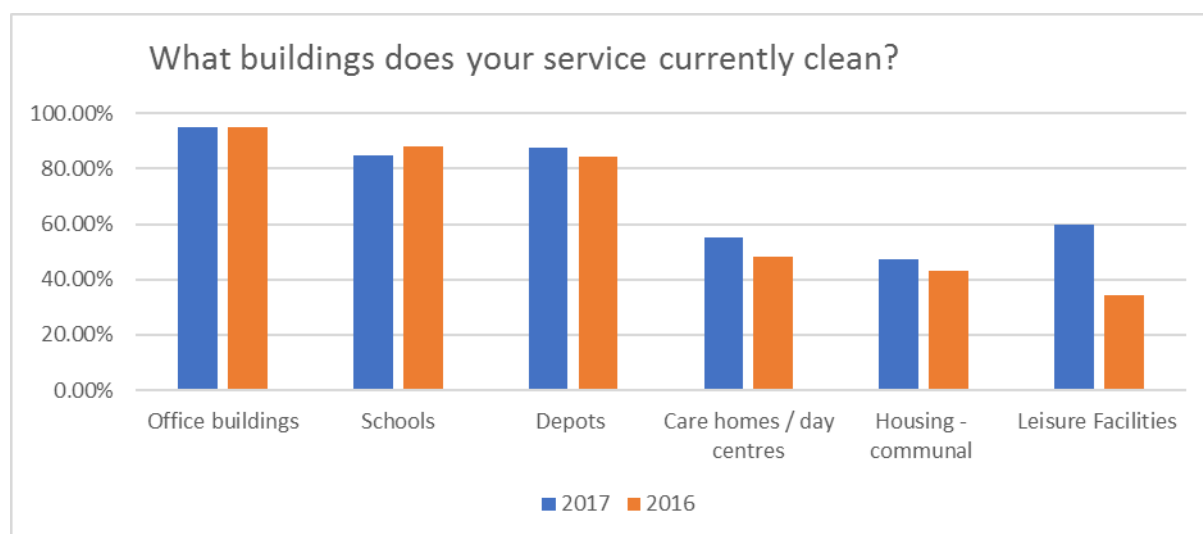
### State of the Market 2017

APSE conducted an online survey during May 2017. There was a total of 40 responses received with 60% from England, 32.5% from Scotland, 5.0% from Wales and 2.5% from Northern Ireland.

### Results

Of those completing the survey, 82.5% were 'in-house service providers' of whom 75.75% expected to remain as in-house providers in 2 years' time. 7.5% were 'Council wholly owned Council arm's length companies' and 2.5% were 'private contractors'.

The mix of buildings cleaned by the respondents was also established:



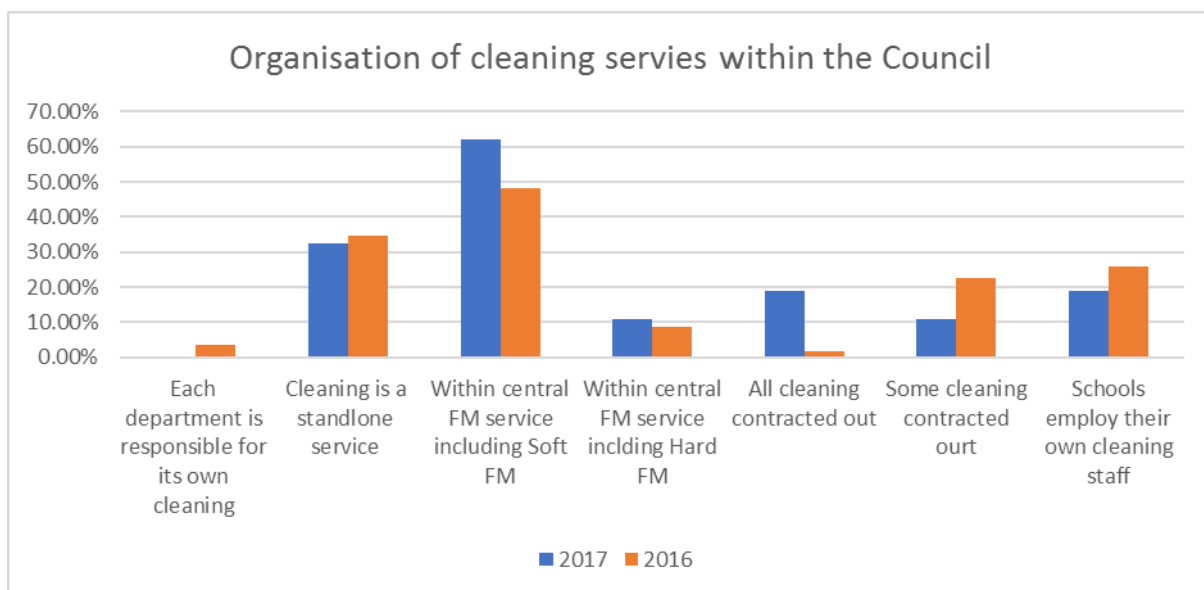
The vast majority of respondents, 95.0% reported cleaning office buildings which is comparable with 2016 (94.8%), whilst 85.0% clean school buildings which shows a slight reduction from 2016 (87.9%) and 87.5% clean depots compared with 84.5% in 2016. 60.0% of respondents reported cleaning care homes/day centres which has seen a 11.7% increase from 2016 which was reported at 48.3%. Communal housing cleaning has seen a slight increase from 2016 to 47.5%. Leisure facilities cleaning has seen the greatest reported increase of 55% from 2016. Respondents also advised that they cleaned a range of different areas such as: public toilets, bus stations,

libraries, museums, fire stations, community centres, youth centres, NHS properties, crematoria and the offices of external partners.

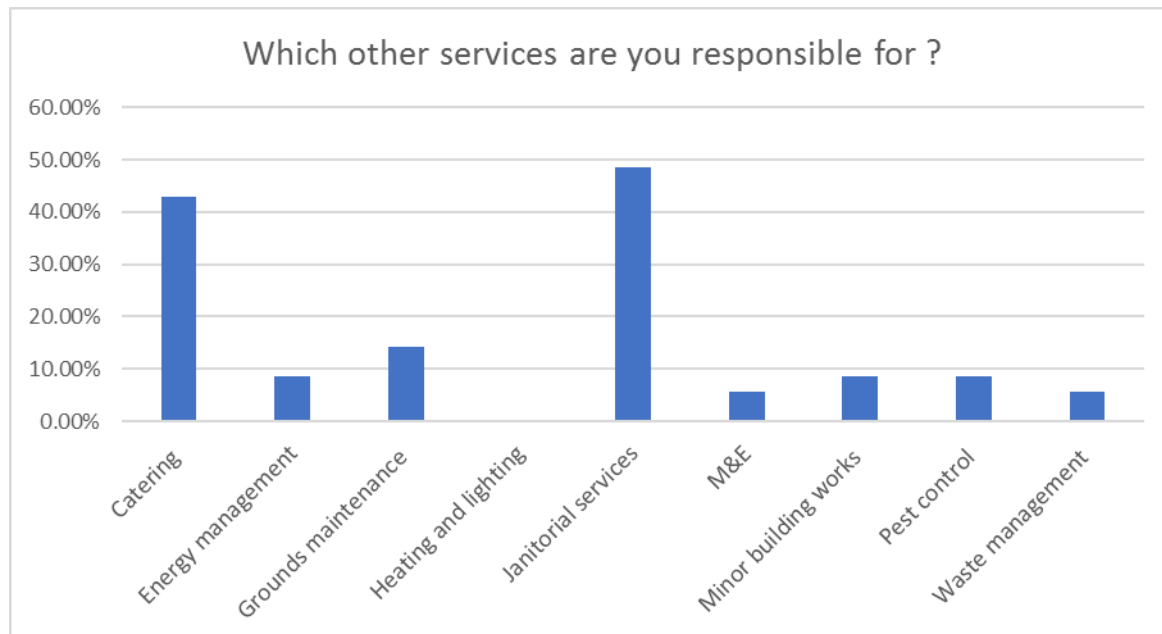
## Structure

73.0% of those responding run cleaning together within a central FM service (including either Soft and/or Hard FM), with 32.4% running cleaning as a standalone service.

The number of frontline cleaners employed varied from 11 up to 1284, with an FTE range of 27.25% (11 staff, 3 FTE) to 99.33% (150 staff, 149 FTE).

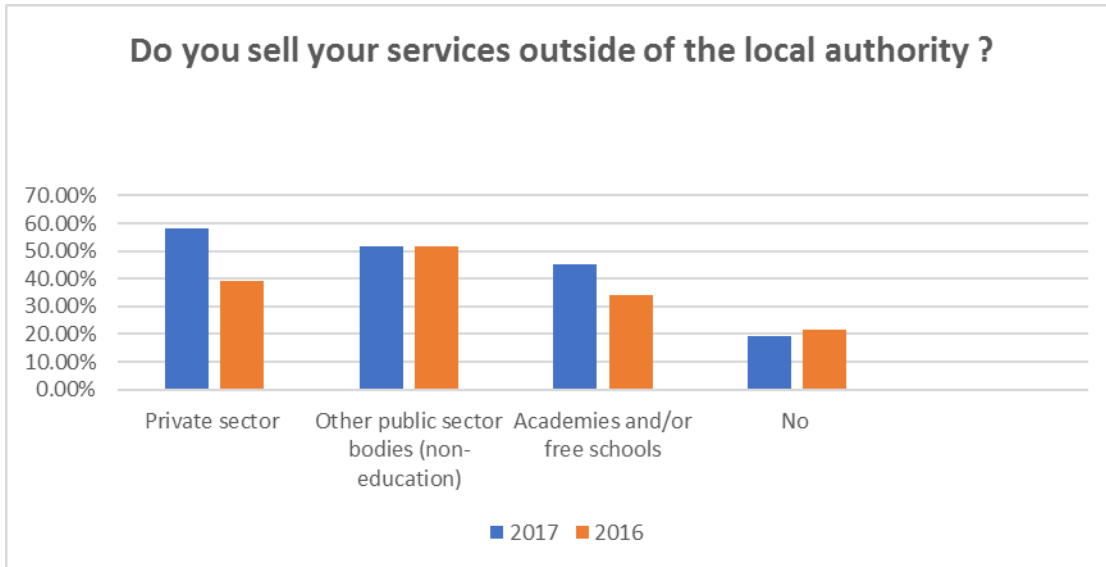


Respondents to the survey are responsible for a range of services other than building cleaning. These are detailed below:



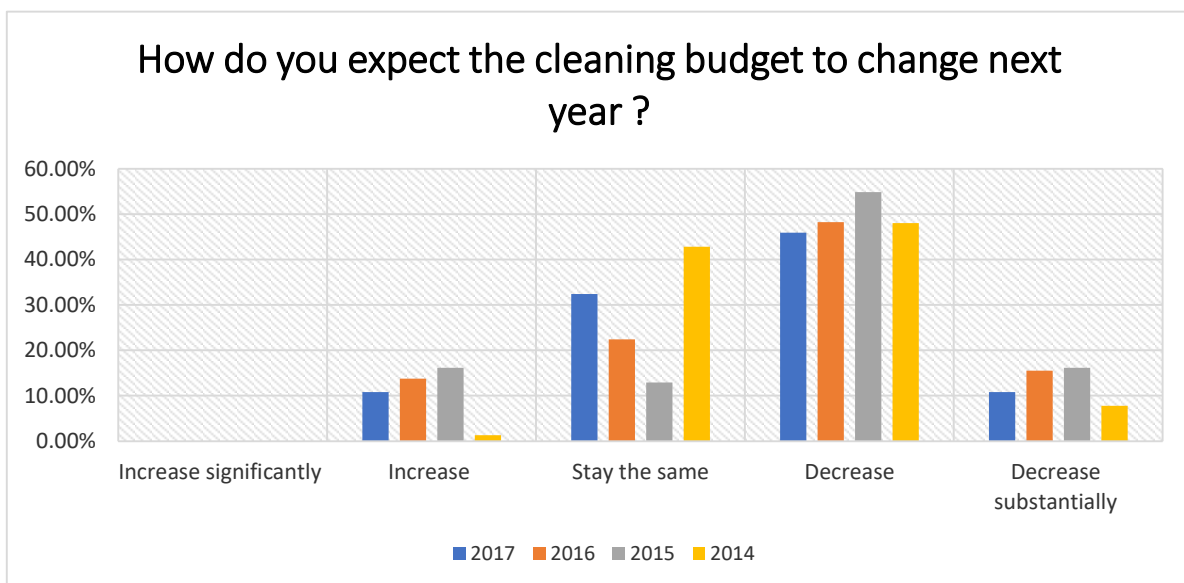
Other services noted in the comments included:

- Cleaning within social work care homes/respice centres.
- Meals on wheels.
- Public toilets.
- Housing support.
- School crossing patrols.
- Bereavement services.
- Street cleansing.
- Public space CCTV.
- Building services.
- Procurement and maintenance of school catering equipment.
- School crossing patrols.



The majority of responding authorities operate commercially with 58.1% selling their services to the private sector which has increased by 18.8% since 2016, 51.6% are selling services to other public sector bodies, a comparable percentage to 2016 (51.8%) and 45.2% are selling to academies and/or free schools which has also seen an increase from 33.9% reported in 2016. APSE has 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.

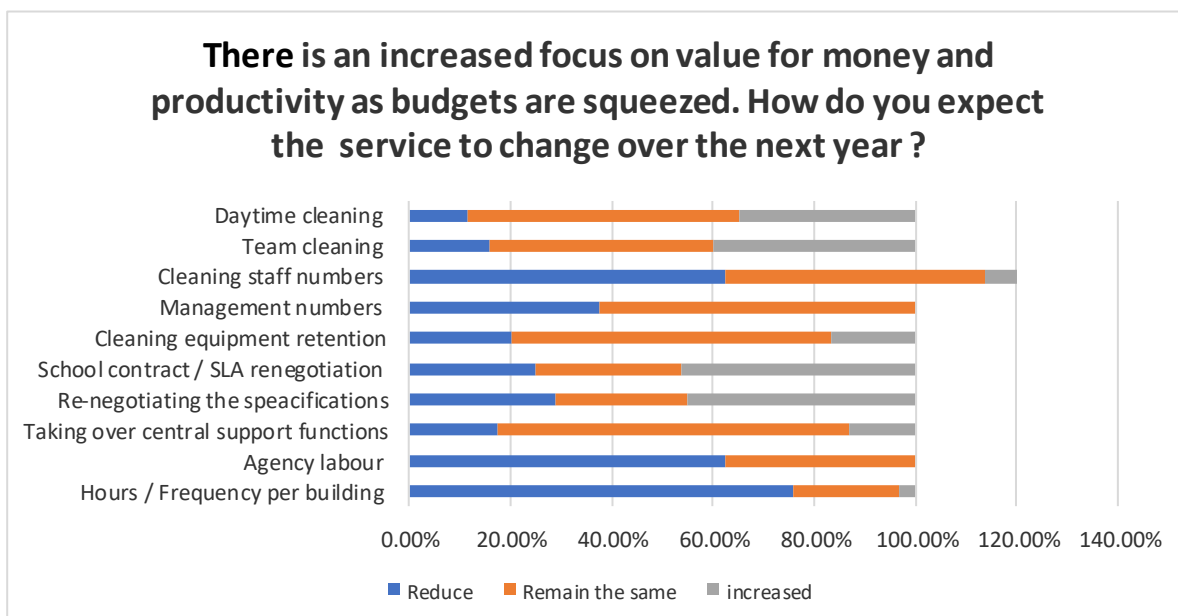
## Expectations for budgets



The majority of respondents this year expected the budget to either stay the same (32.4% - up 9.99%) or decrease (45.9% - down 2.38%); 10.8% (down 2.99%) expected budgets to increase, and the remaining 10.8% (down 4.72%) expected budgets to decrease substantially.

51.35% expect the cleaning section's workload to increase over the next 12 months, while 24.32% expect it to decrease. The majority of respondents (73.53%) expected their own personal workload to increase regardless of this.

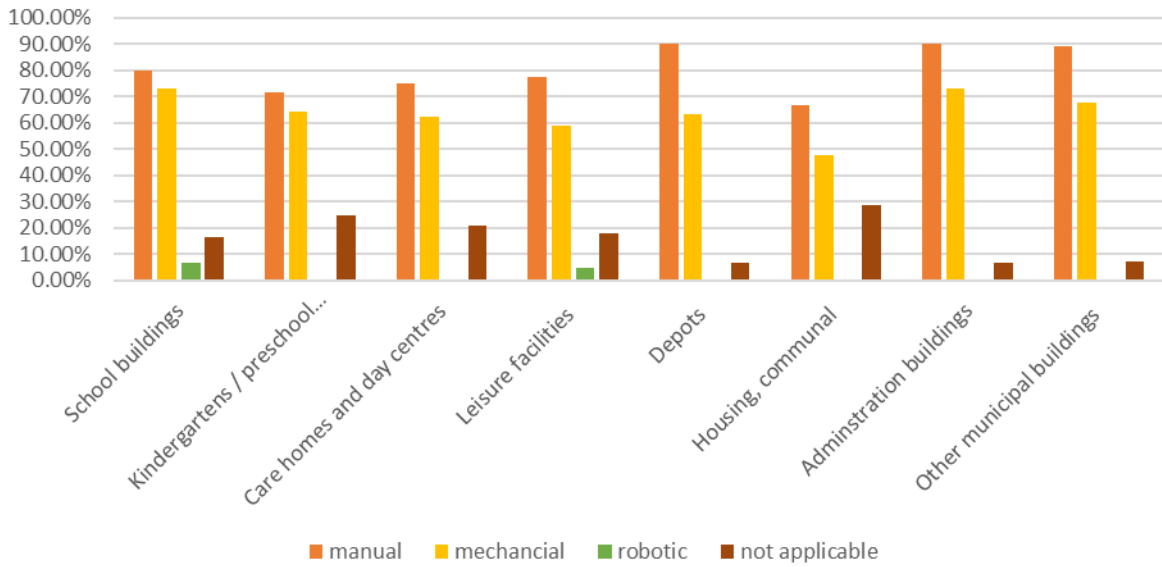
Due to the increased focus on value for money and productivity, 75.76% of respondent are expecting reduced hours/frequency per building over the next year, 62.5% are expecting to reduce cleaning staff numbers, 37.5% are expecting reduced management numbers and 62.5% are expecting reduced agency labour.



## Cleaning methodology

Robotic cleaning holds significant promise for unobstructed areas but has yet to gain a significant foothold with only 6.67% of respondents using these methods in school buildings (down by 1.17% 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 (73.33%, school buildings; 73.33%, administration buildings; 63.33%, depots; 64.29% kindergartens / preschool buildings; 64.50% care homes and day centres).

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

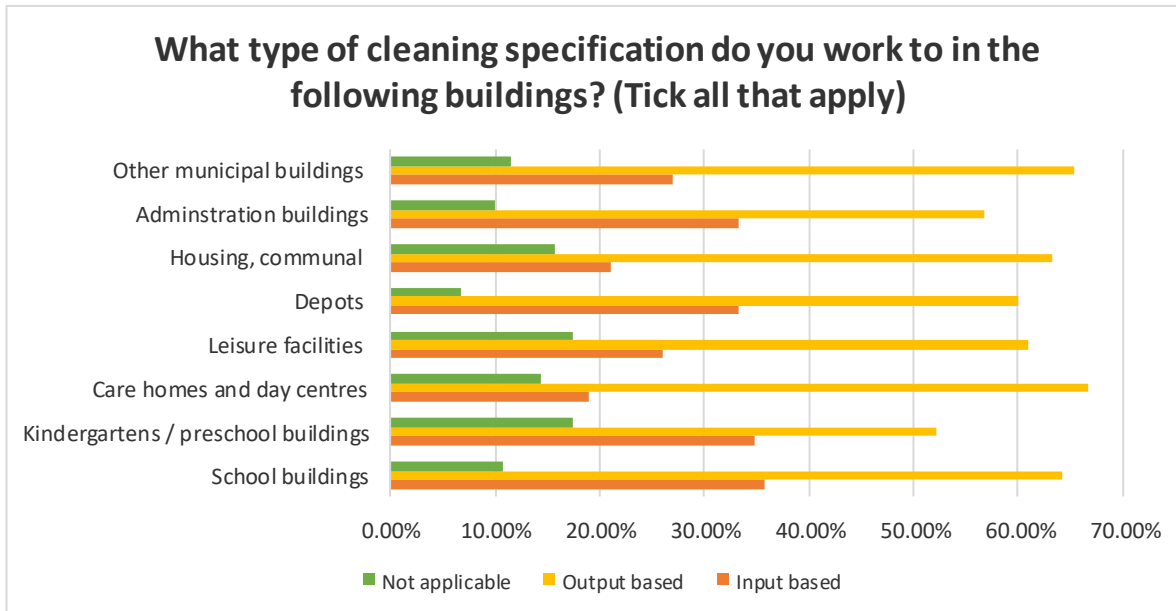


Answer Options	Manual	Mechanical	Robotic	Not applicable
School buildings	80.00%	73.33%	6.67%	16.67%
Kindergartens / preschool buildings	71.43%	64.29%	0.00%	25.00%
Care homes and day centres	75.00%	62.50%	0.00%	20.83%
Leisure facilities	77.27%	59.09%	4.55%	18.18%
Depots	90.00%	63.33%	0.00%	6.67%
Housing, communal	66.67%	47.62%	0.00%	28.57%
Administration buildings	90.00%	73.33%	0.00%	6.67%
Other municipal buildings	89.29%	67.86%	0.00%	7.14%



## Cleaning Specification

The majority of respondent are reporting that the cleaning specifications are output based for all the buildings that they clean.



Answer Options	Input Based	Output Based	Not applicable
School buildings	35.71%	64.29%	10.71%
Kindergartens / preschool buildings	34.78%	52.17%	17.39%
Care Homes and day Centres	19.05%	66.67%	14.29%
Leisure facilities	26.09%	60.87%	17.39%
Depots	33.33%	60.00%	6.67%
Housing, communal	21.05%	63.16%	15.79%
Administration buildings	33.33%	56.67%	10.00%
Other municipal buildings	26.92%	65.38%	11.54%

## Standards and staffing

45.2% of respondents used the BICS standard for cleaning (down by 17.30% since 2016) throughout the building estate, 3.2% used the BIC standard on tendered work only and 45.2% used an alternative system with the majority of those respondents reporting that they used an internally developed inspection and monitoring system.

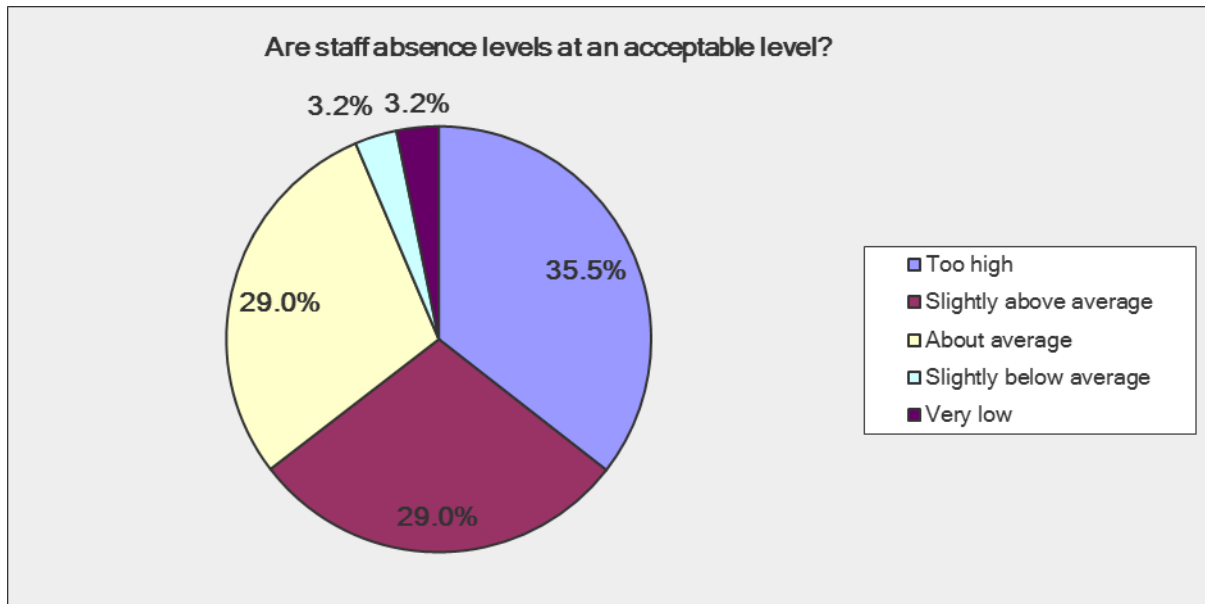
In-house providers have no separate legal status to the rest of the authority so typically use service level agreements as a substitute for contracts with the departments and schools they supply. The increase in academies is seeing SLAs replaced with contracts, but despite this 75.76% have recently put SLAs in place with only 9% having none at all and a total of 38.10% reported having contracts with customers.

## Wage costs



70.6% of respondents are currently subject to the Living Wage. The average hourly wage for a cleaning assistant was calculated as £8.35 (a 4.44% increase since 2016), with a range from £7.52 to a maximum of £9.85. The variance in scores is shown above, with 78.12% of respondents paying above the minimum £8.25 threshold for the Living Wage (outside of London).

## Attitudes to absence



Attitudes to absence amongst respondents were mostly negative, with 93.5% reporting this to be too high, slightly above average or above average. Only a small minority, a total of 6.4% reporting that the level of absence was slightly below average or very low. The approximate average sickness percentage was 6.24% (up from 5.6% in 2016 and 4.2% in 2015). APSE Performance Networks reported the 2015/16 average staff absence rate for front line staff to be 5.09%.

Local authorities remain active in supporting staff. However, only 38.7% currently hold the Investors in People award with 80.6% undertaking regular staff training, 87.1% having regular appraisals and 45.2% 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)
- In the private sector

- 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

## **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](mailto: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 2017 please contact Vickie Hacking at [vhacking@apse.org.uk](mailto:vhacking@apse.org.uk) or by phone at 0161 772 1810.