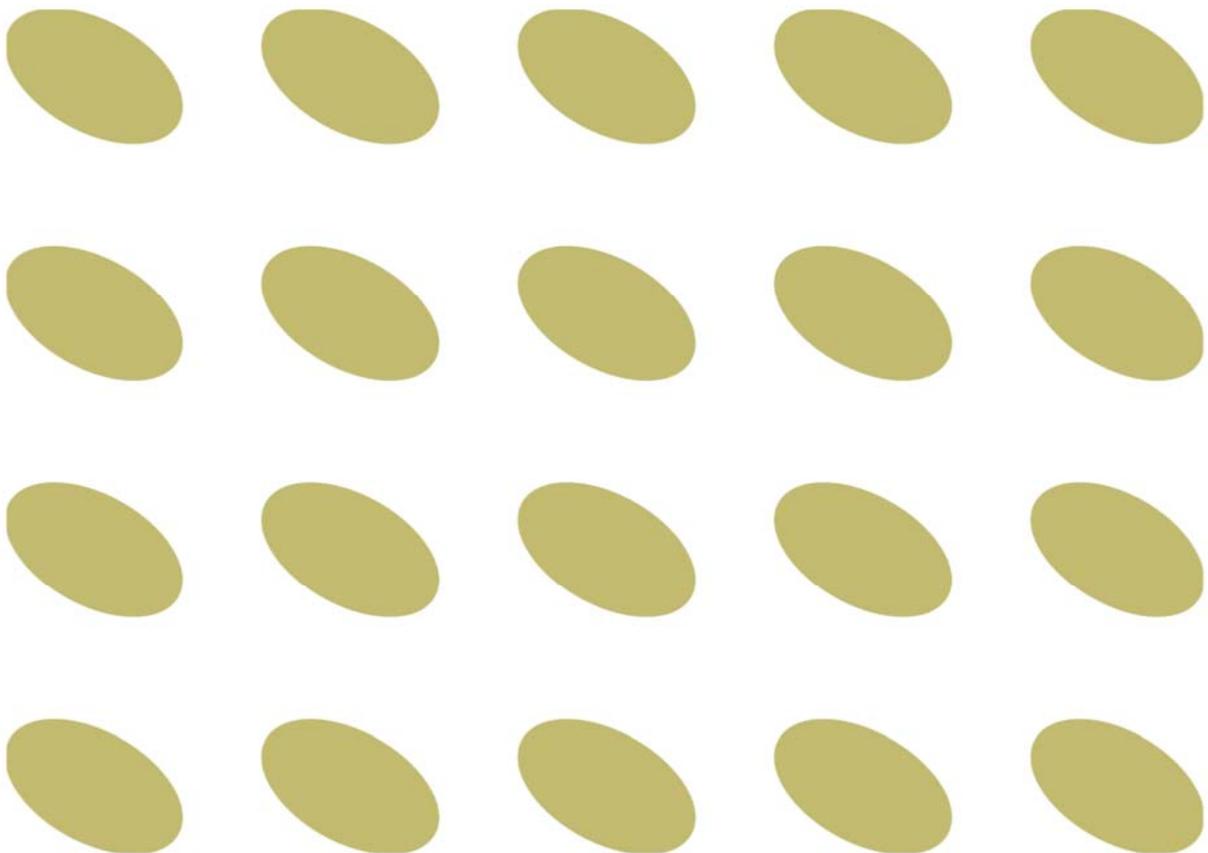


State of the Market Survey 2017

Local Authority Street Cleansing Services



Briefing Note 17-14

February 2017



The state of the market survey was conducted by Wayne Priestley, APSE Principal Advisor for Environmental services.

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Local Authority Street Cleansing Services

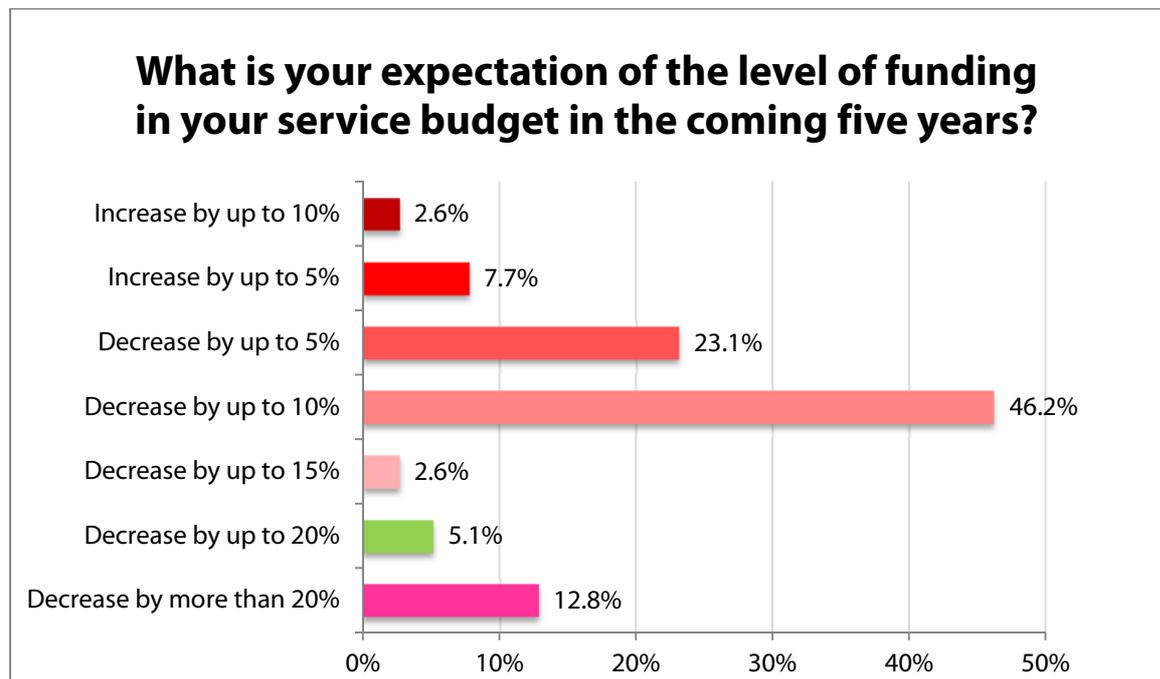
State of the Market 2017

APSE conducted an on-line survey during December 2016 and January 2017. This follows on from the 2009, 2011, 2012, 2014, 2015 and 2016 Street Cleansing State of the Market surveys where similar questions were asked to allow for trend comparisons. 49 local authority 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 57.45% said yes (compared with 63.4% in 2016). Of these, 93.33% expect budgets to **decrease** over the next five years. However when compared to 2016 results, there has been a noticeable reduction in this authorities who were expecting cuts of up to 20%. Over 23% of respondents in 2016 expected reductions in budgets of up to 20%, this has now fallen to 5.1% in 2017. Most authorities are now expecting budget cuts of up to 10% over the next 5 years.



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

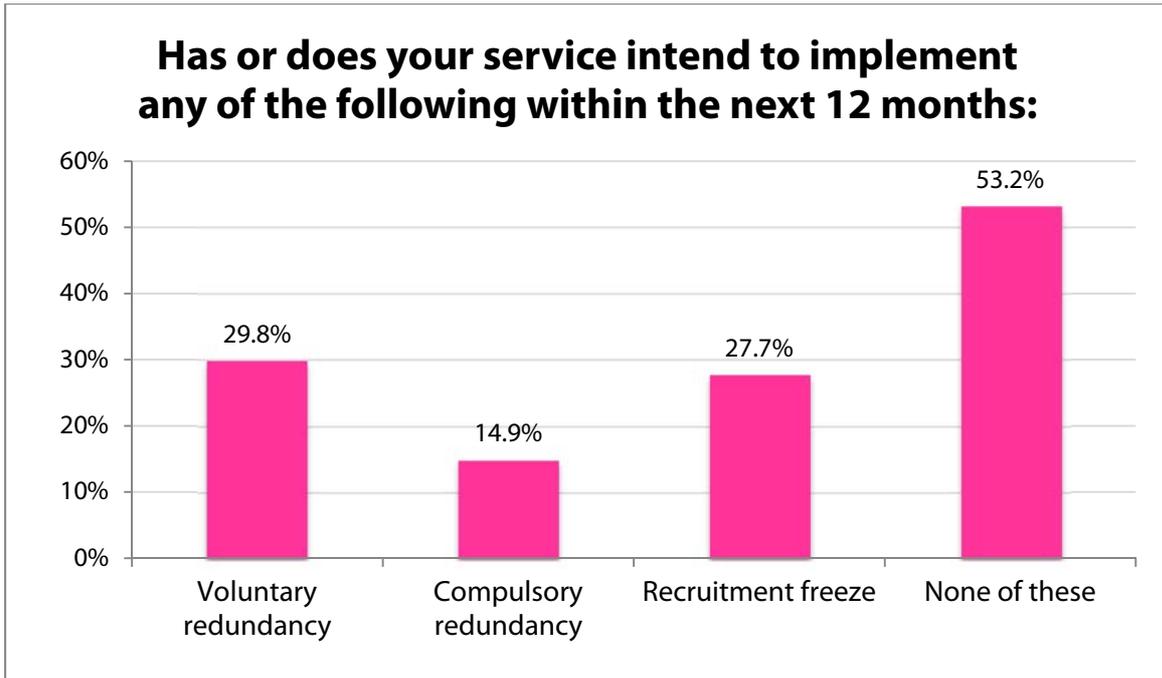
- New scheduling (e.g. a 4 on 4 off working week or a 7 day week work program)
- Reduction in working hours – 30 hour contracts for new starters
- Route optimisation

- Area based working
- Amalgamation of services (e.g. street cleansing and grounds maintenance) and the multi-skilling of the workforce
- Sharing client management staff with neighbouring authority
- Reductions in management provision
- Changing street cleansing from output specification to input specification
- Reductions in the use of agency staff, more redeployment of displaced 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
- Greater emphasis on income generation

The survey asked 'Do you have any income generation schemes' and 44.68% answered 'yes', which is a slight fall on the 2016 survey results which showed almost 50% had income generation schemes. For those that answered yes, they indicated using the following ways of implementing their income generation strategy:

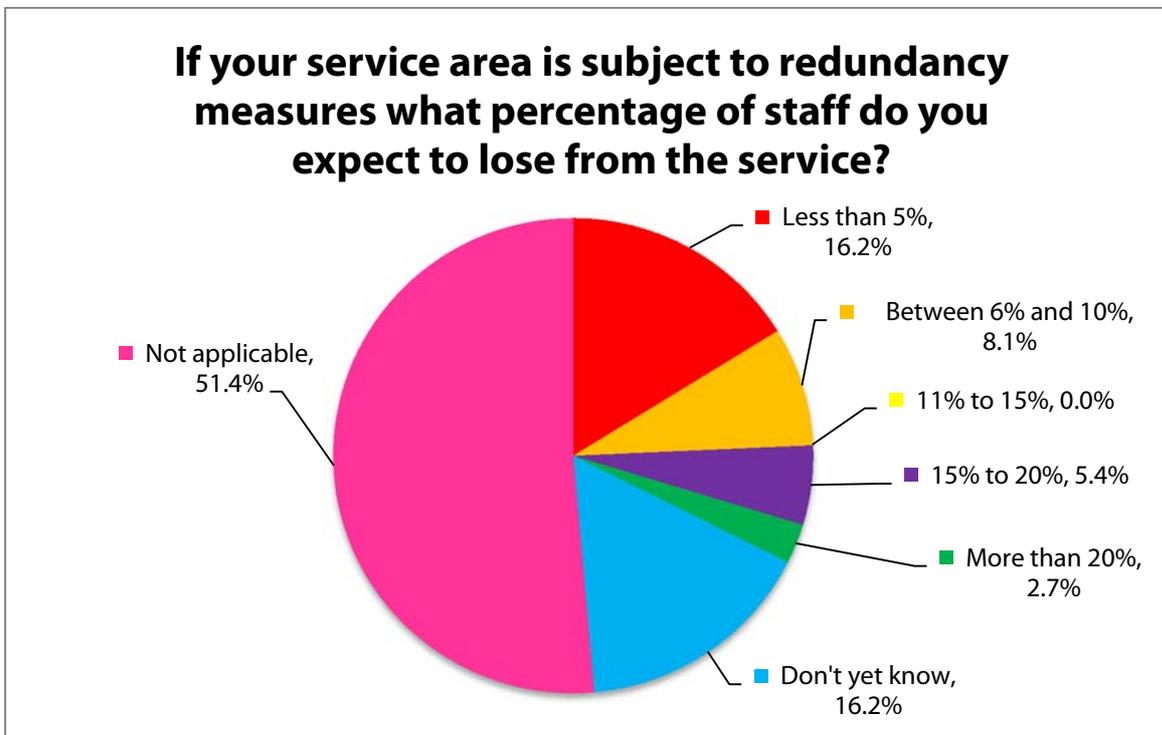
- Bulky waste disposal
- Cleaning of private car parks
- Delivering services for town/parish councils (e.g. dog/litter bins, cleansing)
- Weed spraying/weed killing for highways authority
- Gully emptying contracts
- Mechanical sweeping of cemeteries, parks and industrial estates, etc for public/private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



The most noticeable change has been the increase in the number of respondents who have stated compulsory redundancy will be pursued. This has risen to 14.9% in 2017 as opposed to 7.9% in 2016.

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

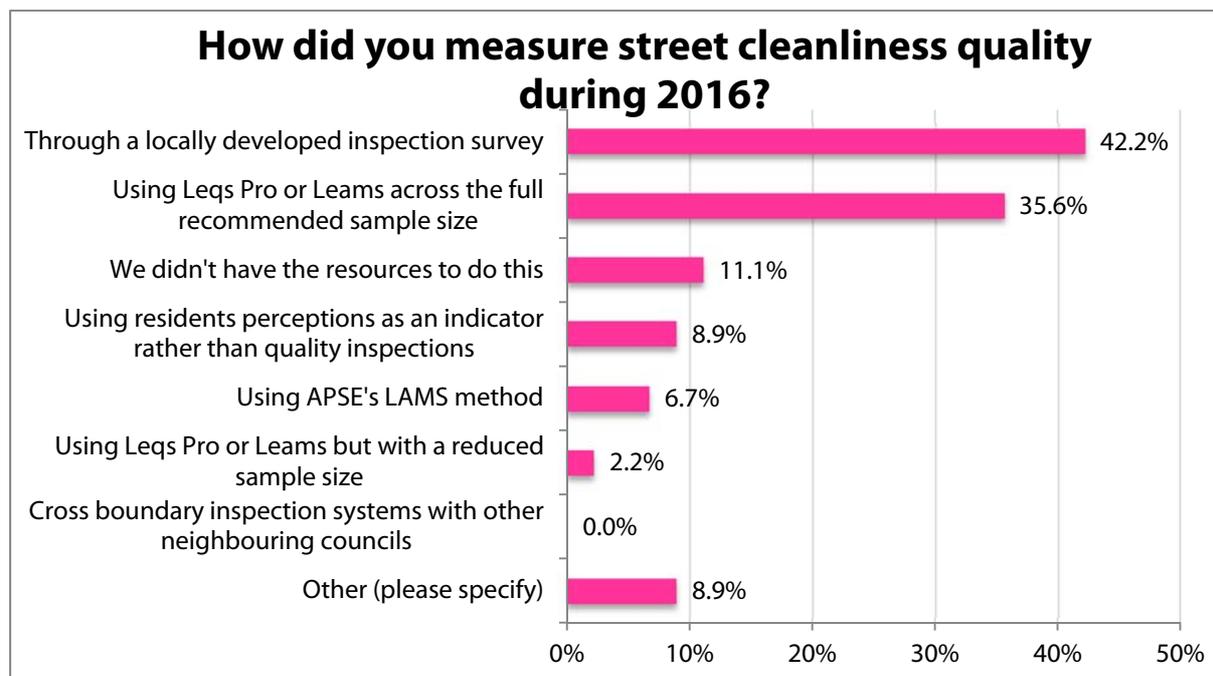


b) Standards of cleanliness

When asked how cleanliness levels had changed over the current year, 71.11% said they had stayed the same as compared to 53.7% in 2016. 4.44% said they had improved compared to 22.2% in 2016. 24% said cleanliness levels had fallen which was the same as 2016.

When asked how they expect cleanliness levels to change over the coming year 13.3% expected standards to improve, compared to 22% in 2016. 53.3% stated that cleanliness levels will stay the same. 33.3% expect cleanliness levels to fall as compared with 26.8% in 2016. Therefore, 86.61% expect standards of cleanliness to stay the same or decrease, which is roughly in line with projections made in 2016.

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:



When asked who carried out the surveys, the majority of respondents (80.56%) indicated that this was done by officers within their service/department, with the remainder stating that officers from another service/department carried out surveys.

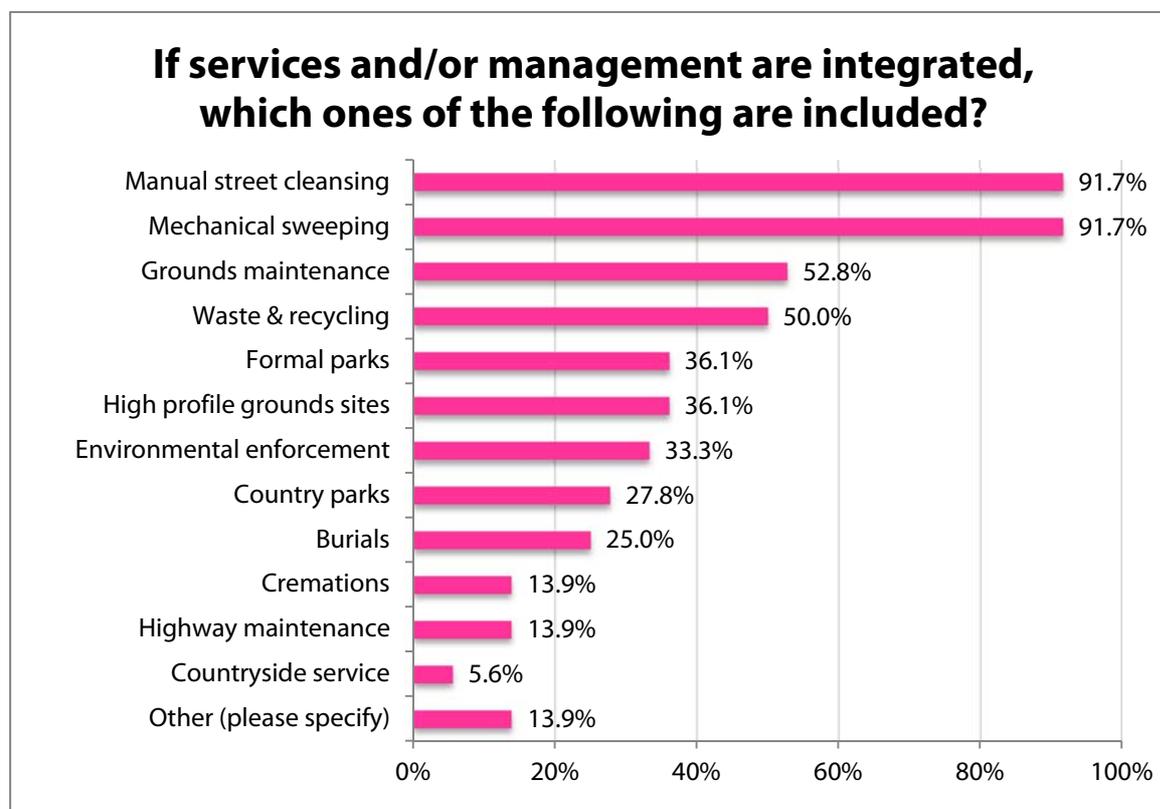
The same questions were asked about how councils intend to measure street cleanliness quality next year. 46.67% stated that they would be using a locally developed inspection survey. Others included LEQS PRO or LEAMS, residents' perception surveys and APSE's Land Audit Management System (LAMS) which is run by APSE's performance networks service. The LAMS monitoring system, allows the simple measurement of grounds maintenance quality standards for parks, open space and horticultural services. This system provides a

less complex and more affordable way to measure street cleansing quality. The LAMS system has proven to be extremely popular and **has now been adapted to include street cleansing.**

The only other change in the measuring of cleanliness standards was a significant decrease in using residents perceptions as an indicator rather than actual quality inspections, otherwise, the percentage of types of methods used has remained broadly the same.

Street scene

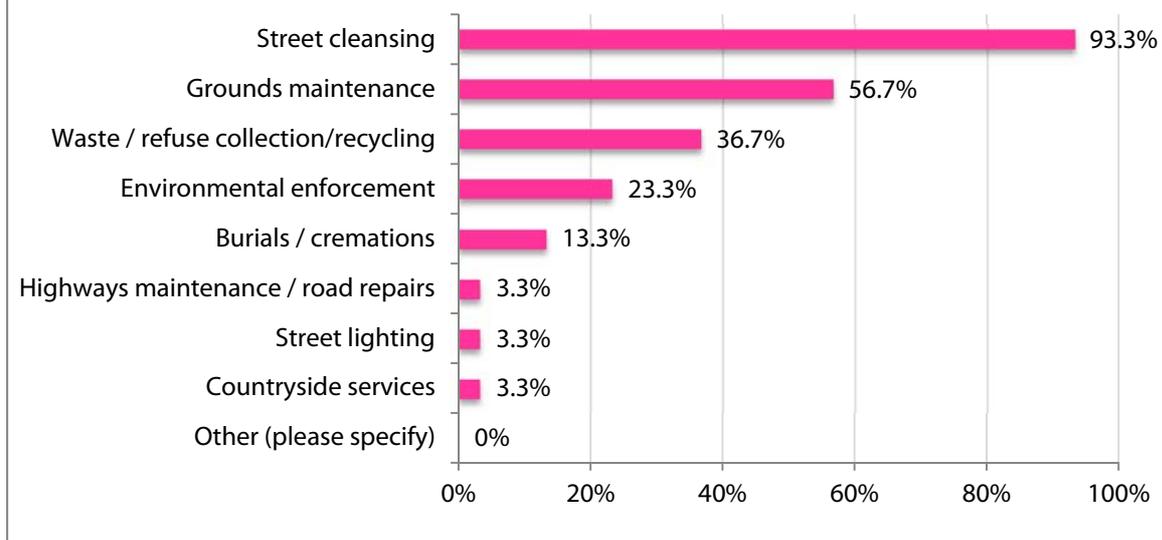
65.12% of respondents indicated that they are part of an integrated streetscene service as compared to 73.2% in 2016. Of those who replied, they stated that the services that are jointly managed are shown in the following graph:



The most noticeable changes in services included in street scene since 2016, is that the inclusion of highway maintenance has increased from 2.9% in 2016 to 13.9% in 2017. But perhaps most surprising, is the fact the inclusion of formal parks has fallen from 55.9% in 2016 to 36.1% in 2017.

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?



Two areas where there has been significant falls in being jointly delivered by staff are waste/refuse collection/recycling which has fallen from 48.4% in 2016 to 36.7% in 2017 and burials/cremations which has fallen from 38.7% in 2016 to 13.3% in 2017.

Of those who stated that they were not already part of an integrated streetscene service, 85.0% expected to become part of an integrated streetscene service in the near future, this is a significant rise from 2016 when 60% stated they expected to be part of an integrated streetscene service in the future.

d) Street cleansing operations

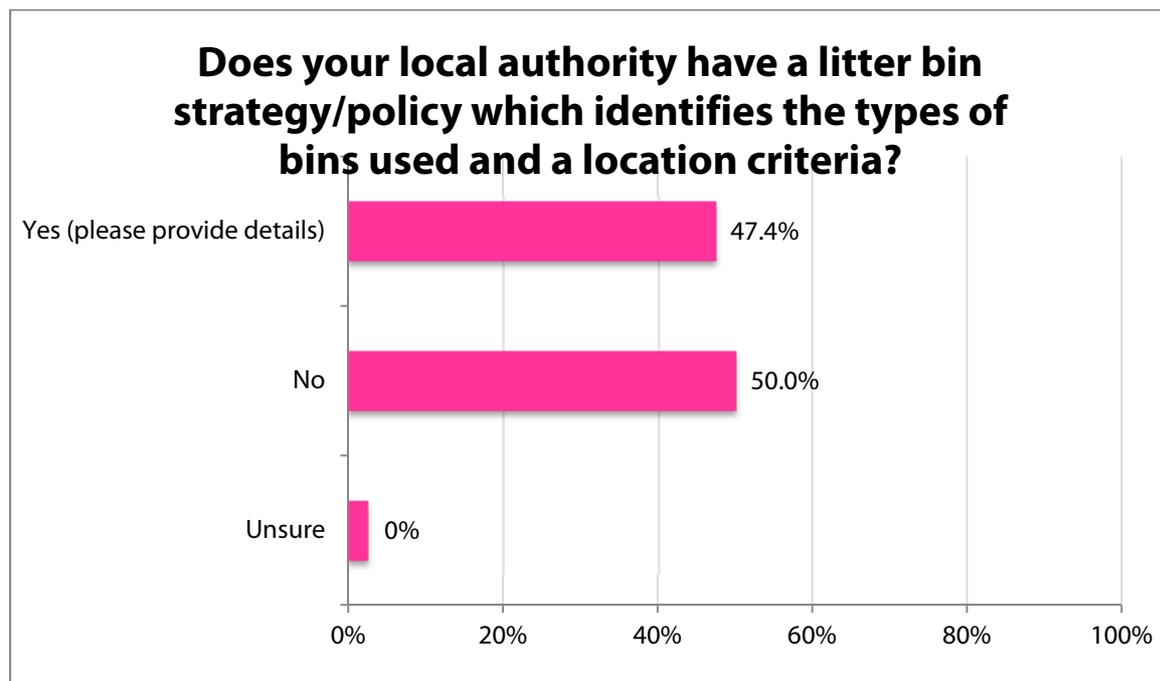
76.4% stated that they have area-based teams and most services operate over 7 days (83.33%), with some operating over 5 days (7.14%). 13.95% currently undertake night time street cleansing.

The survey asked how the street cleansing service is currently managed and 81.40% stated that this is in-house and 16.28% external. 74.42% expect to be managed in-house within the next 2-3 years. For those where the service is currently managed externally, 28.57% of respondents stated that the contract length is mainly up to 5 years, whilst a further 28.57% of respondents stated that their contracts were over 10 years. 42.86% of respondents indicated that there is an option to extend the contract.

e) 'Binrastructure'

APSE has been working with the Department for Environment, Food and Rural Affairs (DEFRA) and the Department for Communities and Local Government (DCLG) on a National Litter Strategy for England. As part of this work we have been tasked with discovering how local authorities address the issue of litter bin provision, recording locations, typology of bins and initiatives to promote greater use.

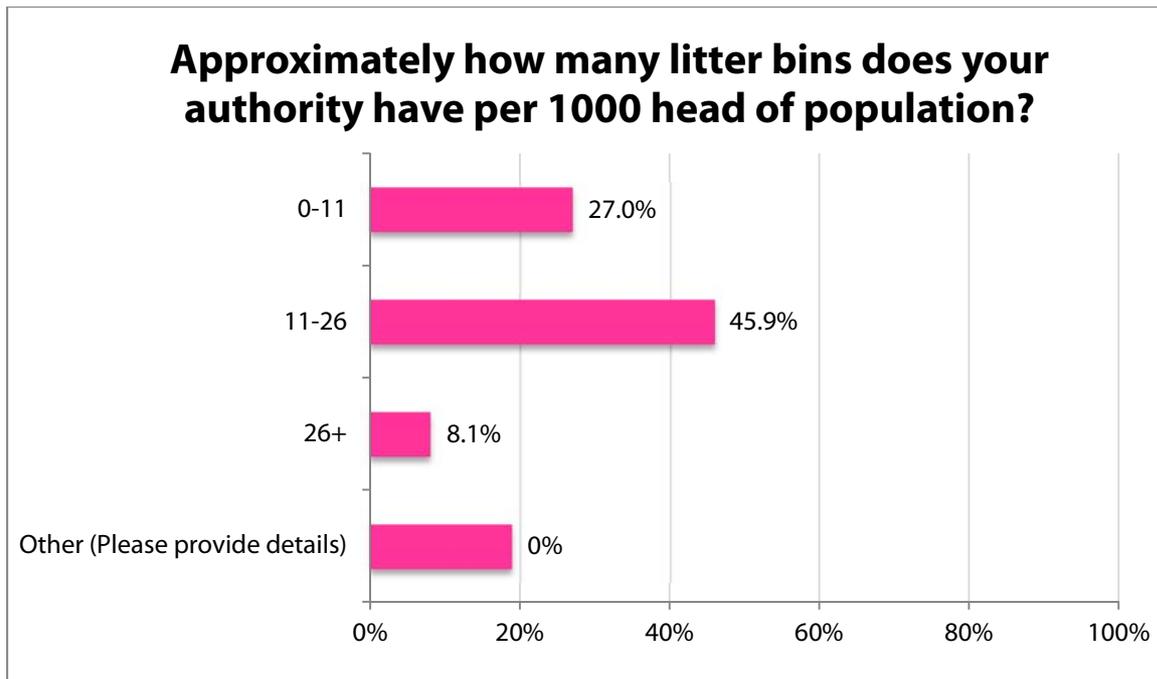
Therefore for this year we have included several questions which will help this process. It may be that members would wish to see these questions included in future State of the Market reports.



It is clear that almost half (47.37%) of respondents do have some form of litter bin strategy/policy, although even here, many say that not all litter bin providers in their area subscribe to it, leading to confusion regarding litterbin styles, emptying techniques, locations and responsibility for emptying. It is hoped that the work undertaken by APSE towards guidance on litter bins will prove useful to those authorities which have still to set out a policy.

The question was posed as to whether a single department is responsible for providing litter bins. 76.92% responded that a single department was responsible for litter bin provision.

The number of litter bins provided by a local authority is often a question which is asked by members to get a view as to whether they provide sufficient coverage.



The graph shows at 45.95% the provision of 11-26 litter bins per 1000 head of population seems to be the most common level of provision.

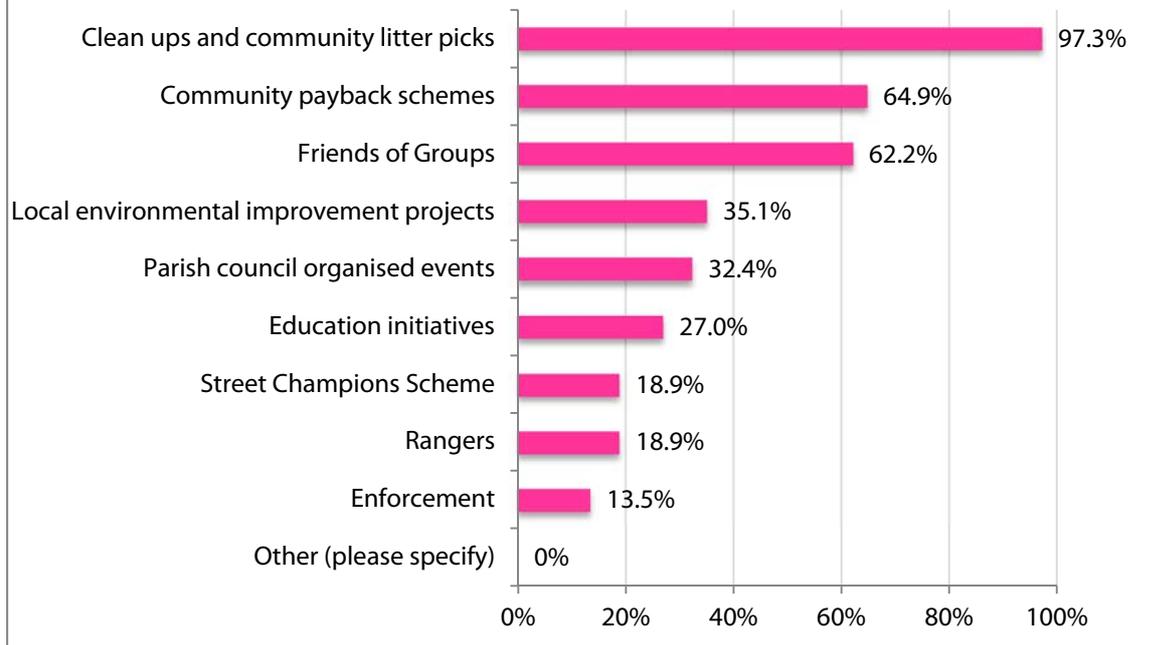
Regarding the accurate mapping of litter bin assets, only 65.79% of respondents had an accurate map of where their litter bin stock was located. This means that they may have problems with ensuring regular emptying, repair and maintenance and also whether litter bins are even needed in their current location. Most of those local authorities which did have accurate litter bin locations used GIS systems to record their locations.

The final question in this section asked what proportion of litter bins were replaced annually. The most frequent response at 76.32%, stated that up to 5% of bins were replaced annually

f) Volunteering and partnership working.

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:

How are volunteers involved in the street cleansing service?



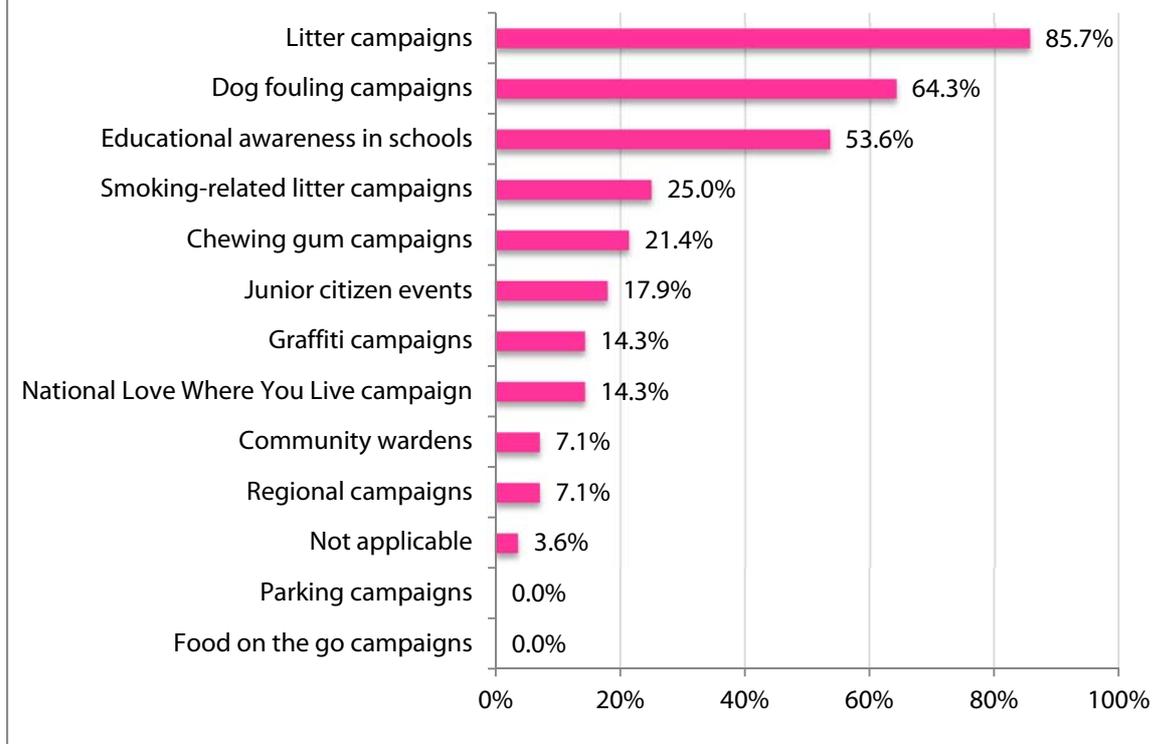
When questioned about working with partners to provide streetscene services, 34.21% stated that they provide streetscene services as part of a Business Improvement District (BID) as compared to 29.7% in 2016. 17.95% have individual street cleansing agreements with supermarkets, retailers and other businesses. 10.53% 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, This latest figure shows a significant fall since 2016 when the figure stood at 26.3%.

In 2016, 67.5% respondents stated that community sector involvement in street cleansing was increasing in their service. This has fallen to 50.0% in the 2017 figures. This reduction seems to be a year on year reduction as in 2012 the figure stood at 71%.

The main areas which respondents thought this was increasing was clean ups and community litter picks (90%), Friends of Groups (45%), local environmental improvement projects (35%), community payback schemes (20%), education initiatives (15%) and parish council organised events (5%)

In terms of education campaigns, 76.32% are planning these in the next 2 years, which is an increase from 2016 when 72.5% were planning campaigns. The main campaigns being planned are litter campaigns (85.7%), dog fouling campaigns (64.3%) and educational awareness in schools (53.6%). The full breakdown is as follows:

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



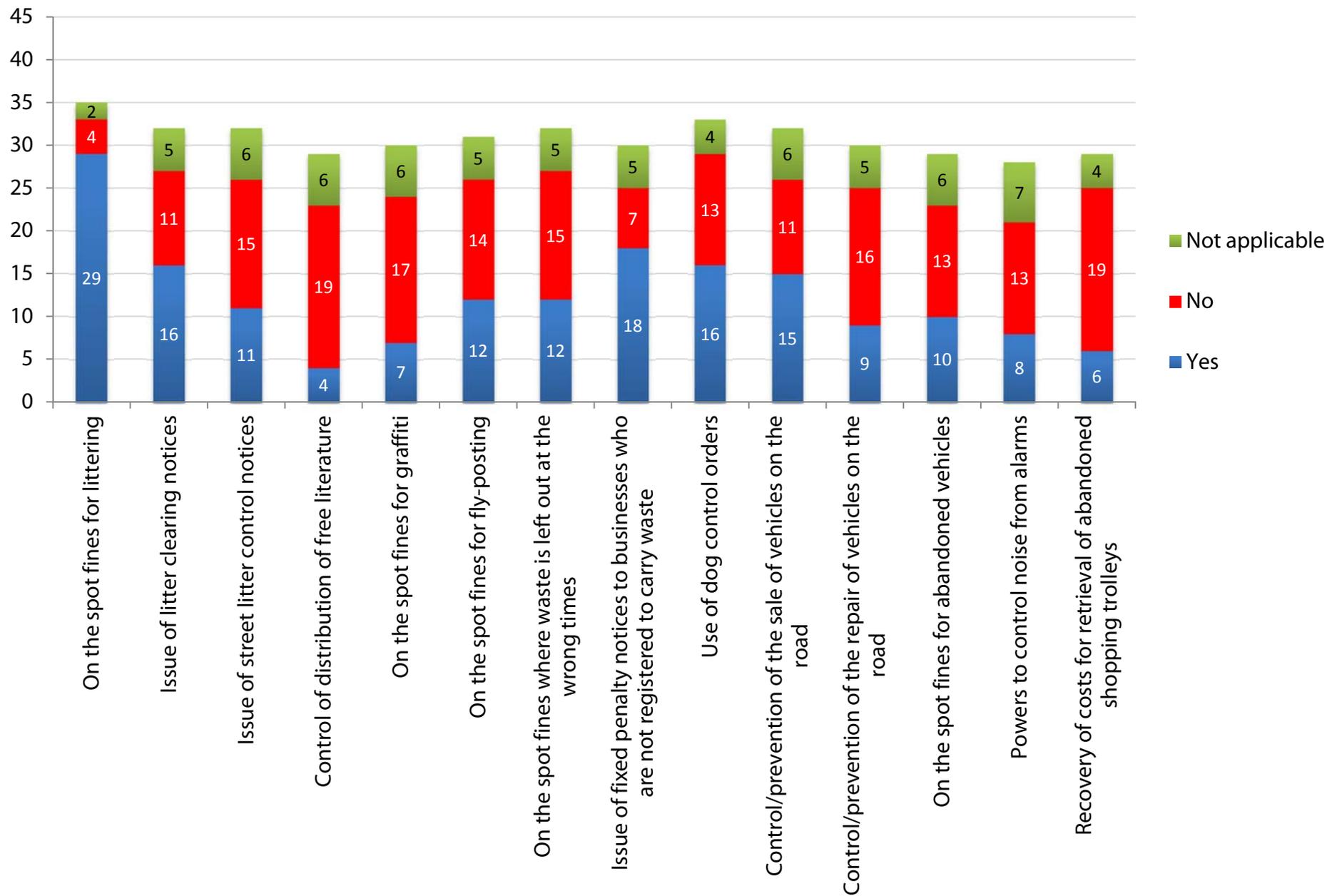
Other educational initiatives included: fly-tipping campaigns, litter thrown from cars and business engagement.

g) Enforcement

75.68 of respondents thought that there will be an increase in enforcement/notices issued in the next 2-3 years, which is a significant rise from 2016 when 62.5% felt enforcement notice issuing would increase.

The survey asked which of the following powers were being used currently (where applicable), the results are shown overleaf. These are the powers defined by the Clean Neighbourhoods and Environment Acts for England, Wales and Northern Ireland and the Anti- Social Behaviour, Crime and Policing Act 2014 (respondents were asked to tick 'not applicable' where the powers do not apply) and Councils in Scotland only answered these where they were relevant.

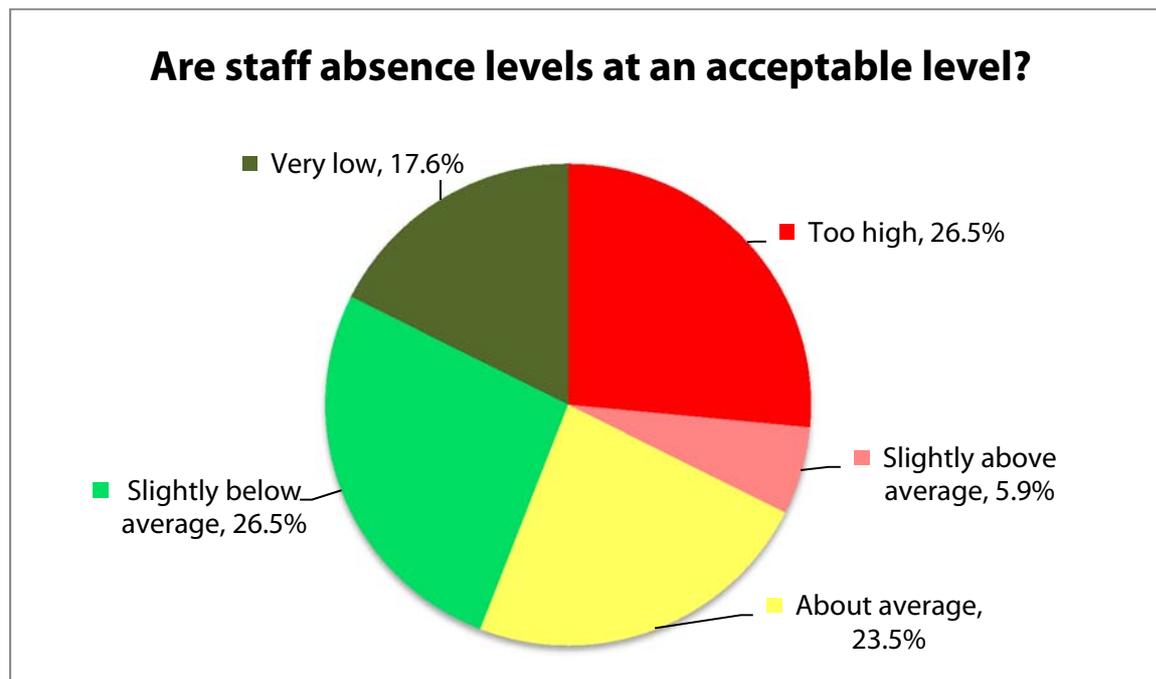
Which of the following powers are you currently using (where applicable)?



A further question was asked about why certain powers have not been used (where respondents answered 'no'. Reasons cited included, 'insufficient resources' (67.86%, this stood at 54.3% in 2016), 'it is covered by other agencies/departments' (17.86%, this stood at 42.9% in 2016) 'they're not problem areas/we have other priorities' (35.71%, this stood at 37.1% in 2016) and 'political reasons' (14.29%, this stood at 8.6% in 2016).

h) Staff absence

In terms of staff absence, the majority thought that this was too high (26.47%), although a similarly large proportion of respondents also thought this was about average (23.53%).



Staff absence levels from performance networks data appears to show that staff absence is well managed, however the survey data indicates that over a quarter of local managers believe absence is still too high. This data is better than 2016, when over a third of managers felt absences were too high.

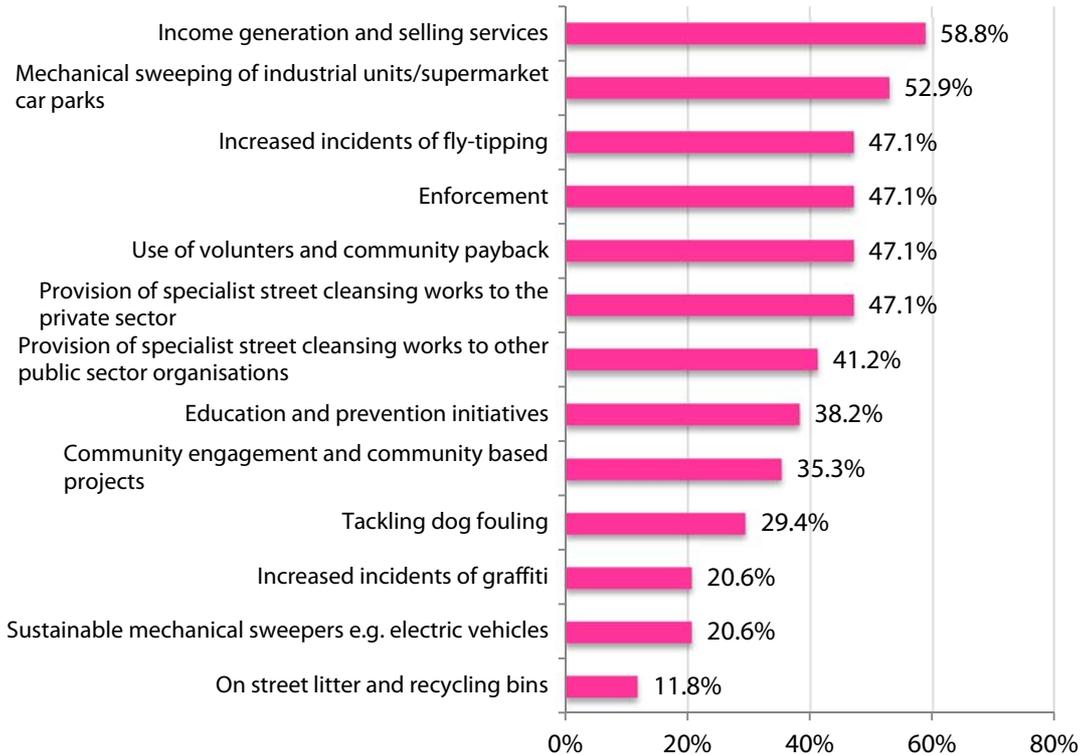
Only 8.33% of respondents thought that the training budget is going to increase over the next 12 months, with 25% stating a decrease and 66.67% stating that this will stay the same. This is a particular concern when we look at the trend towards service integration. In these circumstances, and where there is an anticipation staff may need to be multi-skilled, staff training will be essential to ensure service quality is met.

i) Future areas of work and service reviews

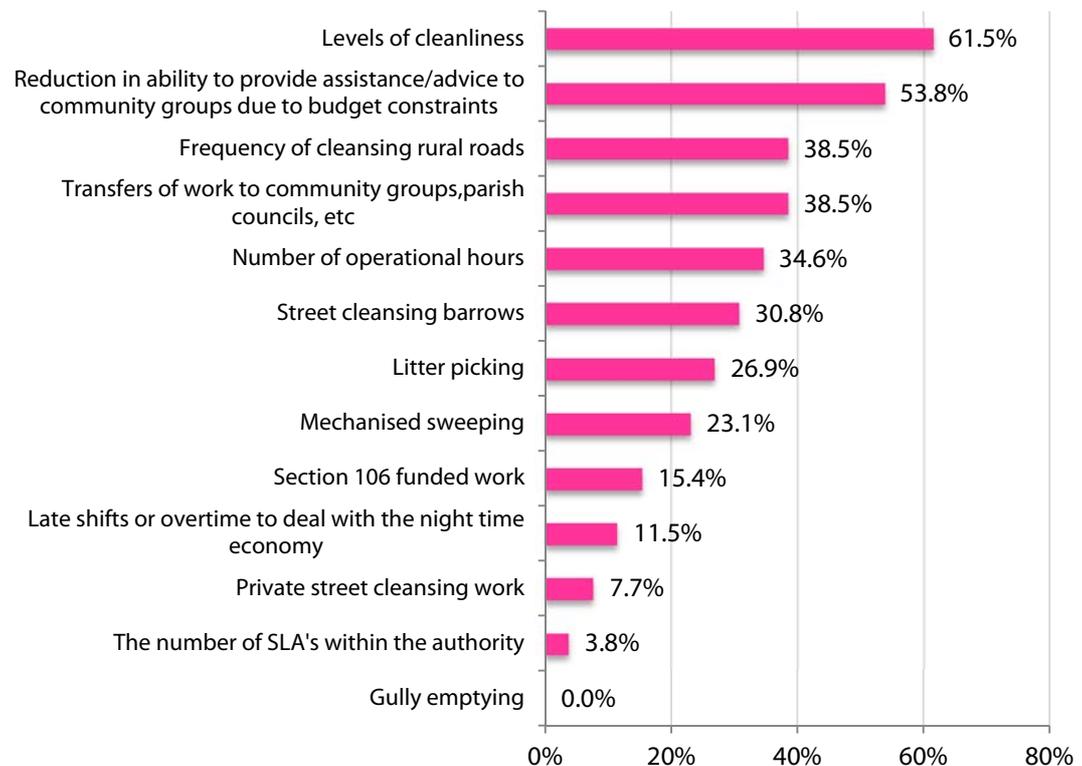
45.7% currently sell their services to the private sector and 28.57% sell their services to other public bodies. This latter figure is a significant increase as in 2016 only 12.8% sold services to other public bodies.

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?

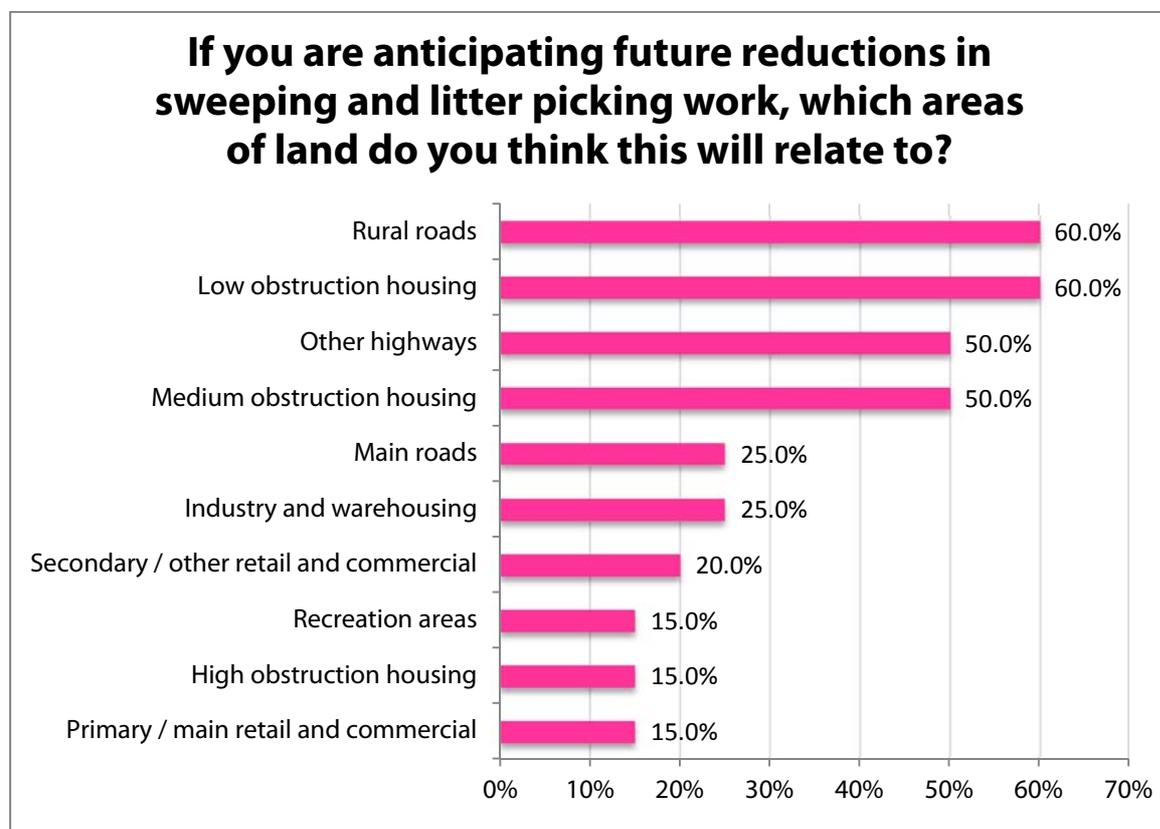


Where do you see future decreases in work for the service?



The overall trend to reducing street cleansing frequencies and anticipated declines in street cleanliness is of concern in the absence of other methods to ensure quality does not diminish. However what is noticeable is the growth in income generating services which may bring some ease to the problems being caused by budget reductions. This is corroborated by APSE performance networks trends which show that as budgets and services are continuing to be cut or reduced 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.

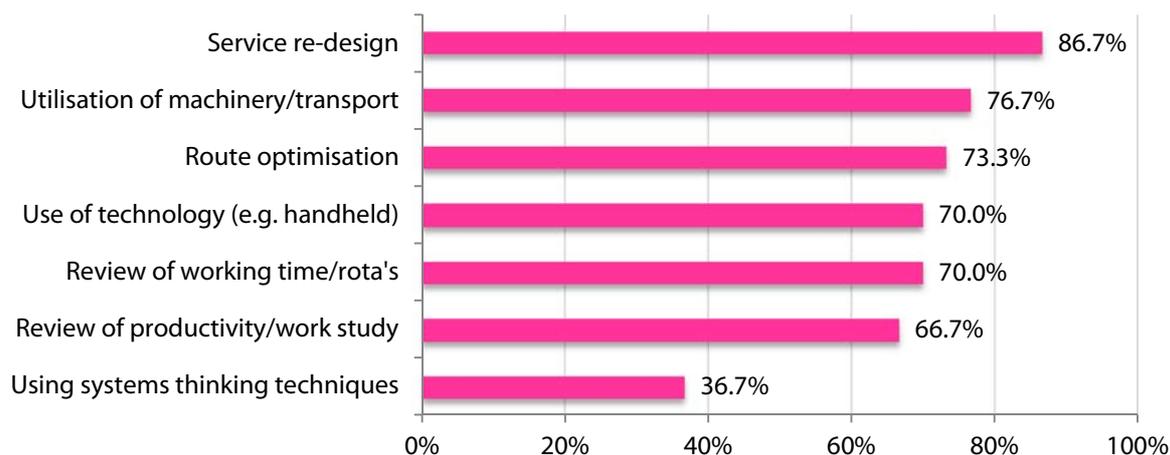
The survey then went on to ask 'if you are anticipating future reductions in sweeping and litter picking work, which areas of land do you think this will relate to' and the results were as follows:



When asked if respondents had undertaken a service review recently, 34.29% stated that they had completed this, 31.43% stated that they have a review which is underway and 22.86% stated that they will be doing so in the next 1-2 years. 11.43% 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 front-line 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 working hard to meet these challenges 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 business rates retention and local housing taxation; the value of a quality street scene environment should not be underestimated in its ability to attract commercial investment and new housing developments. Therefore, 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 area-wide front-line local authority staff. Over 33% 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.

Despite many negative aspects contained within this report, these are far outweighed by the positive and innovative work local authorities are continuing to deliver in their desire to create cleaner, greener and safer local environments.

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