

State of the Market Survey 2014

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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Local Authority Street Cleansing Services

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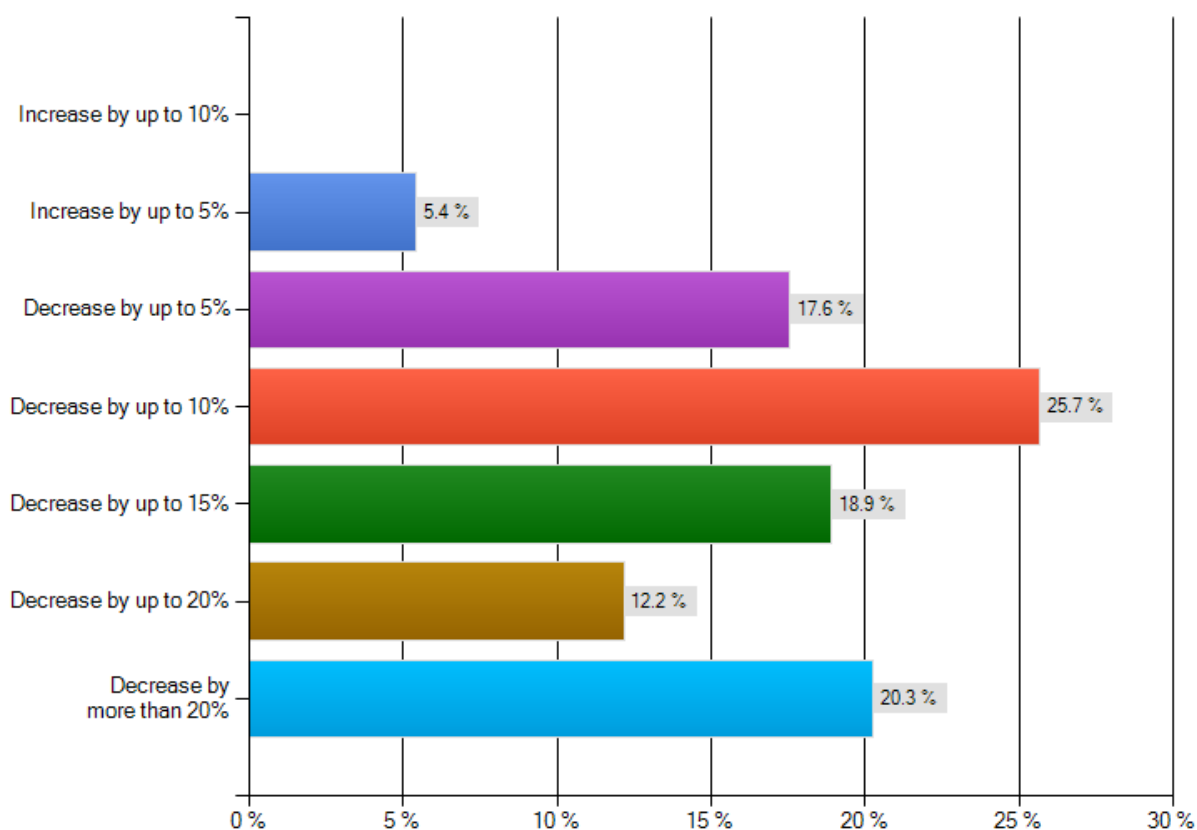
APSE conducted an on-line survey during January and February 2014. This follows on from the 2009, 2011 and 2012 Street Cleansing State of the Market surveys where similar questions were asked to allow for trend comparisons. 79 responses were received from local authorities throughout the UK. This report 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 68% answered 'yes' (compared with 83% in 2012) and of these, 95% expect it to decrease. 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?



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

- Changing working days, night working, shift patterns, overtime, evaluation of roles and staff reductions
- Review of mobile teams/zonal working and a reduction in barrow staff
- Review of mechanical sweeping
- More reactive working
- Scheduling service based on need rather than frequency
- Reduction in frequency

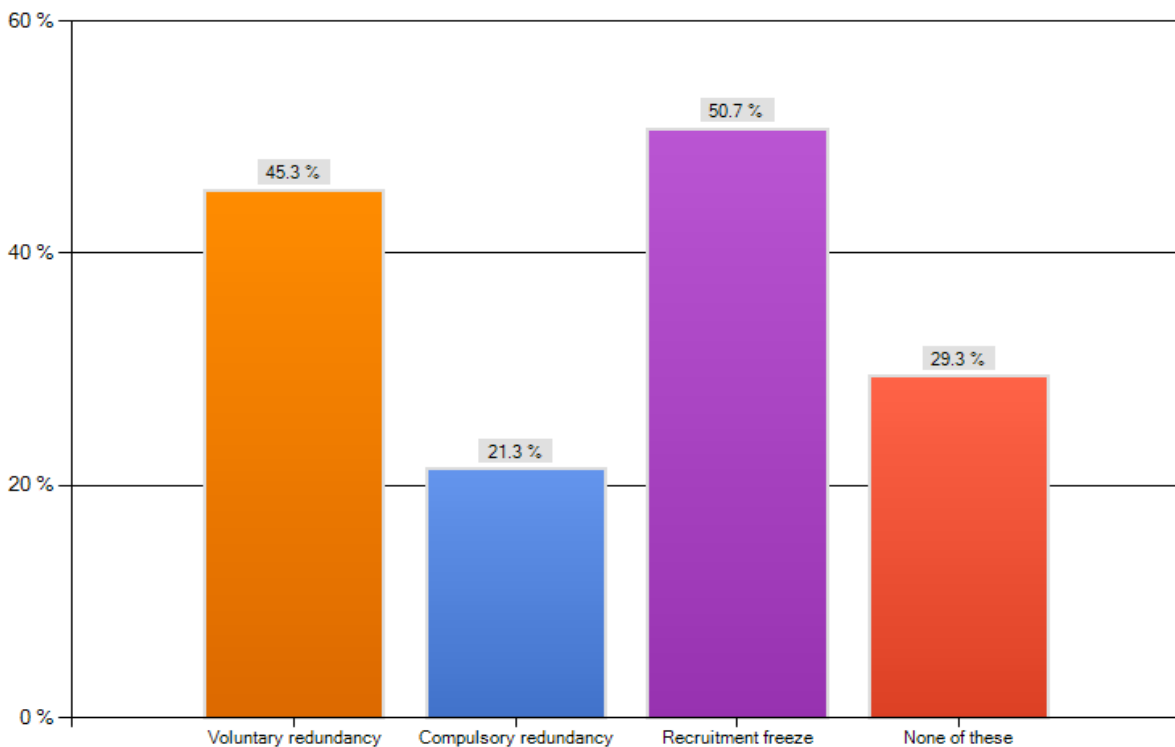
- Review of cleansing routes/ route optimisation
- Review of plant, vehicles and equipment and double shifting vehicles
- Alternative service delivery models and shared services/merging services e.g. with grounds maintenance
- Systems thinking and lean working
- Stopping certain services e.g. graffiti removal, cleanliness inspections

The survey asked 'Do you have any income generation schemes?' and 43% answered 'yes' and the main responses to this question were as follows:

- Providing property clearance and cleaning services to the ALMO
- Private sector cleansing e.g. car parks, road sweeping, weed killing, removal of syringes and dead animals from commercial land, house clearances etc.
- Mechanical sweeping for businesses
- Cleanse on behalf of developers for unadopted highway
- Renting available space within our depots to local businesses
- Sponsorship and advertising panels in litter bins
- Events e.g. sporting events
- Care of garden charging
- Charging to other in-house sections e.g. parks and cemeteries
- Offering services to Parish Councils
- Provide services to other public services e.g. NHS, educational establishments, Fire services and Military

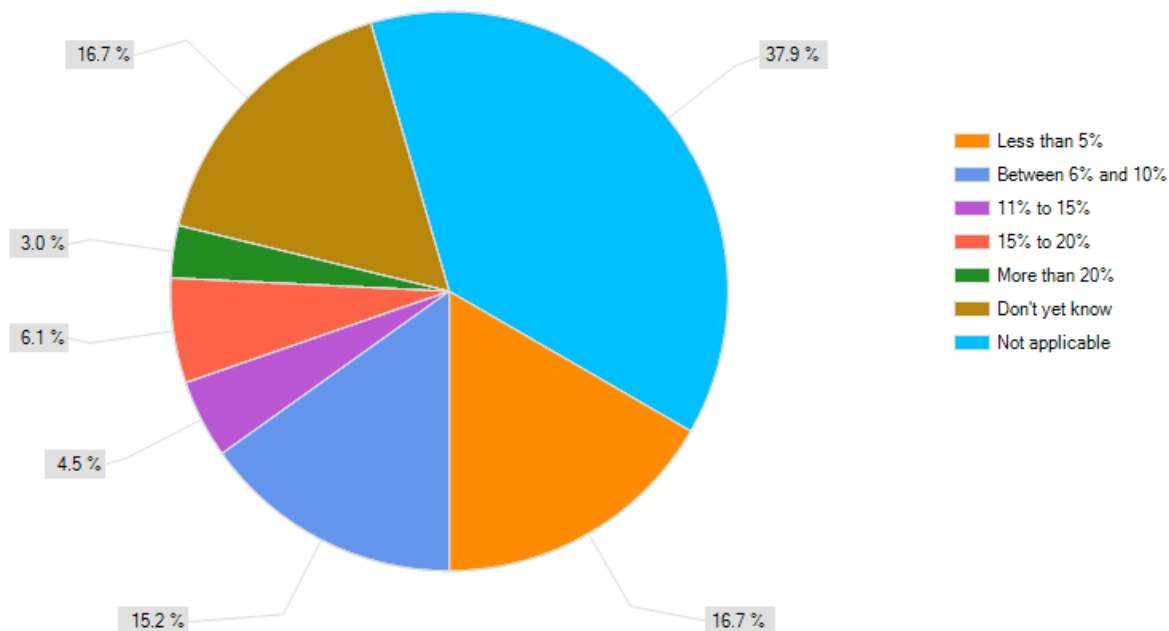
On employment related matters, the survey asked 'Has or does your service intend to implement any of the following within the next 12 months and the responses were as follows:

Has or does your service intend to implement any of the following within the next 12 months:



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?

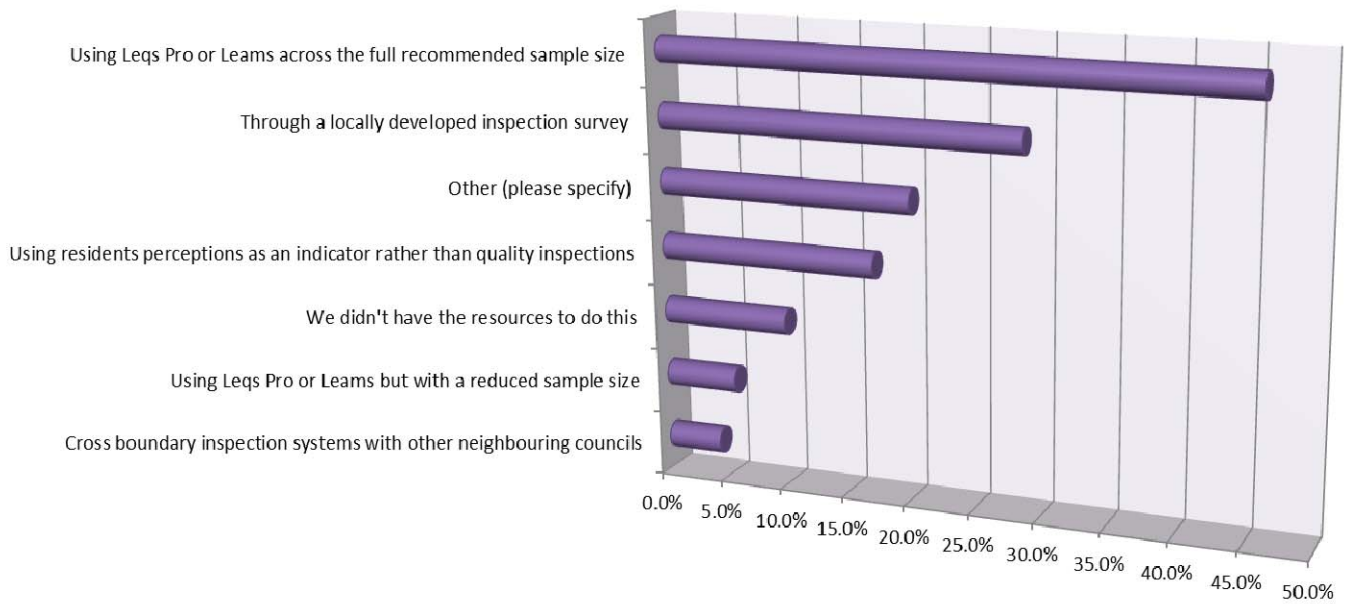


b) Standards of cleanliness

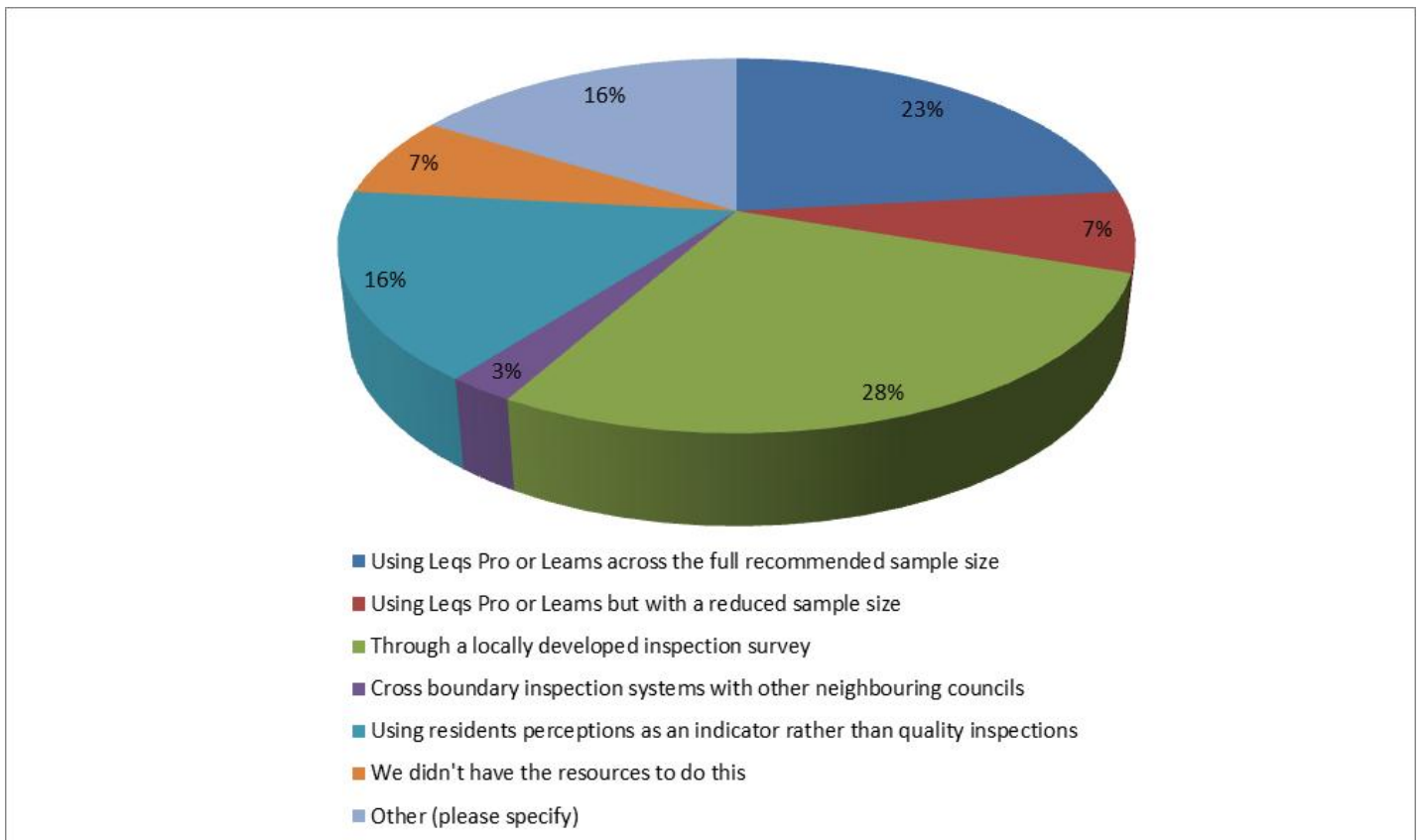
Only 23% stated that standards of cleanliness have increased over the past year (compared with 40% in 2012), with 60% stating that they have stayed the same and 17% stating that they have decreased. This represents an increase in respondents who think that standards of cleanliness have stayed the same since the survey was conducted in 2012 from 41% to 60%. When asked what they expect over the next year, 39% expect these to stay the same, 44% expect them to decrease and 17% expect them to increase. Therefore, 83% expect standards of cleanliness to stay the same or decrease. This trend may be linked to budget reductions.

The survey asked how street cleanliness quality was measured in 2013 (respondents were allowed to choose more than one response) and the results were as follows:

How did you measure street cleanliness quality during 2013?



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 (87%) indicated that this was done by officers within their own local authority and within their service/department.

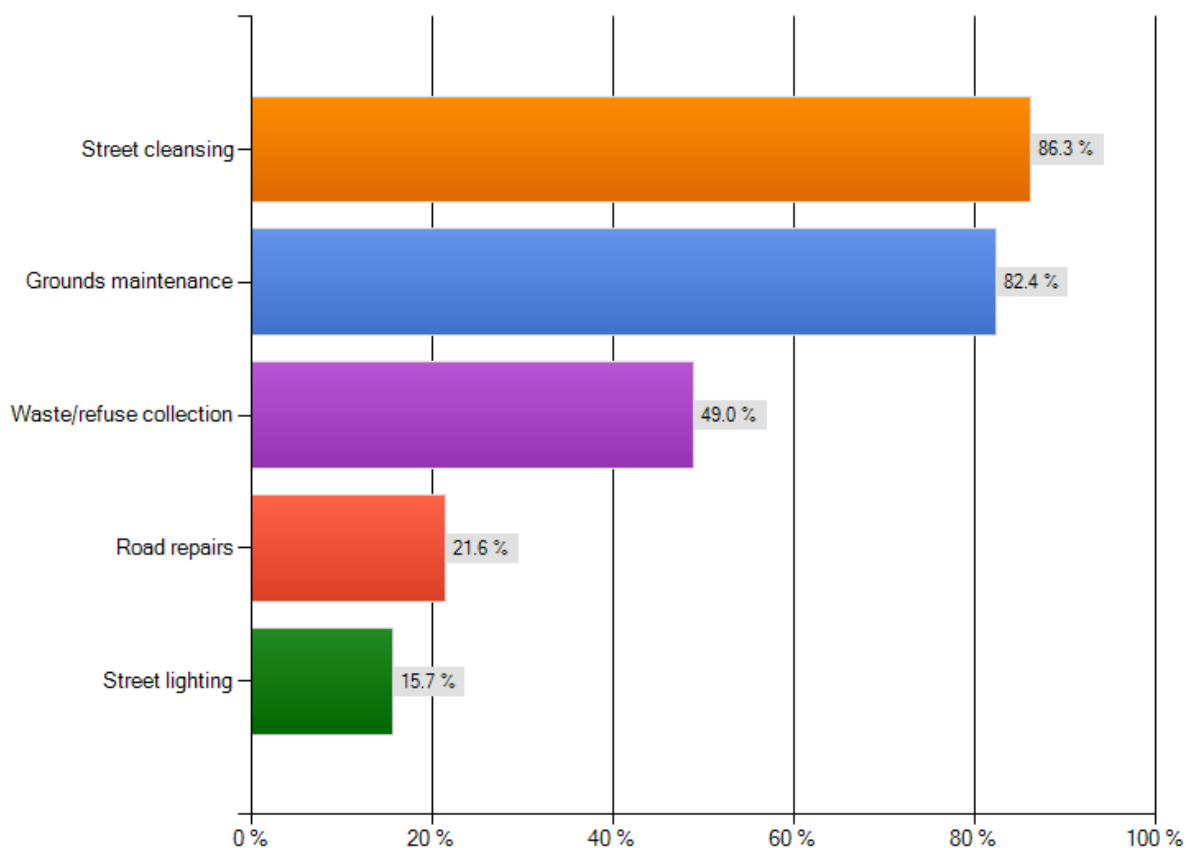
The same questions were asked about how councils intend to measure street cleanliness quality next year and the main difference was a reduction in councils intending to use Leqs Pro or Leams across the full recommended

sample size (from 46% to 43%), a reduction in those using a locally developed inspection survey (29% to 26%) and a reduction in those using residents perceptions as an indicator rather than quality inspections (from 17% to 11%). There was an increase in those intending to use Leqs Pro or Leams but with a reduced sample size (6% to 7%), an increase in those using cross boundary inspection systems with other neighbouring councils (4% to 6%) and an increase in the number of respondents who stated 'we don't have the resources to do this', from 10% to 11%. There is also an increase in the number of respondents intending to use 'other' measures (from 20% to 26%) and these included using a streamlined version of the old NI 195 methodology, review of service standards/complaints, use of competitions such as Clean Britain Awards and Bloom, and through a neighbourhood elected member surgery. There is also an increase in those who intend to use local volunteers to carry out these surveys (from 2% to 4%).

c) Street scene

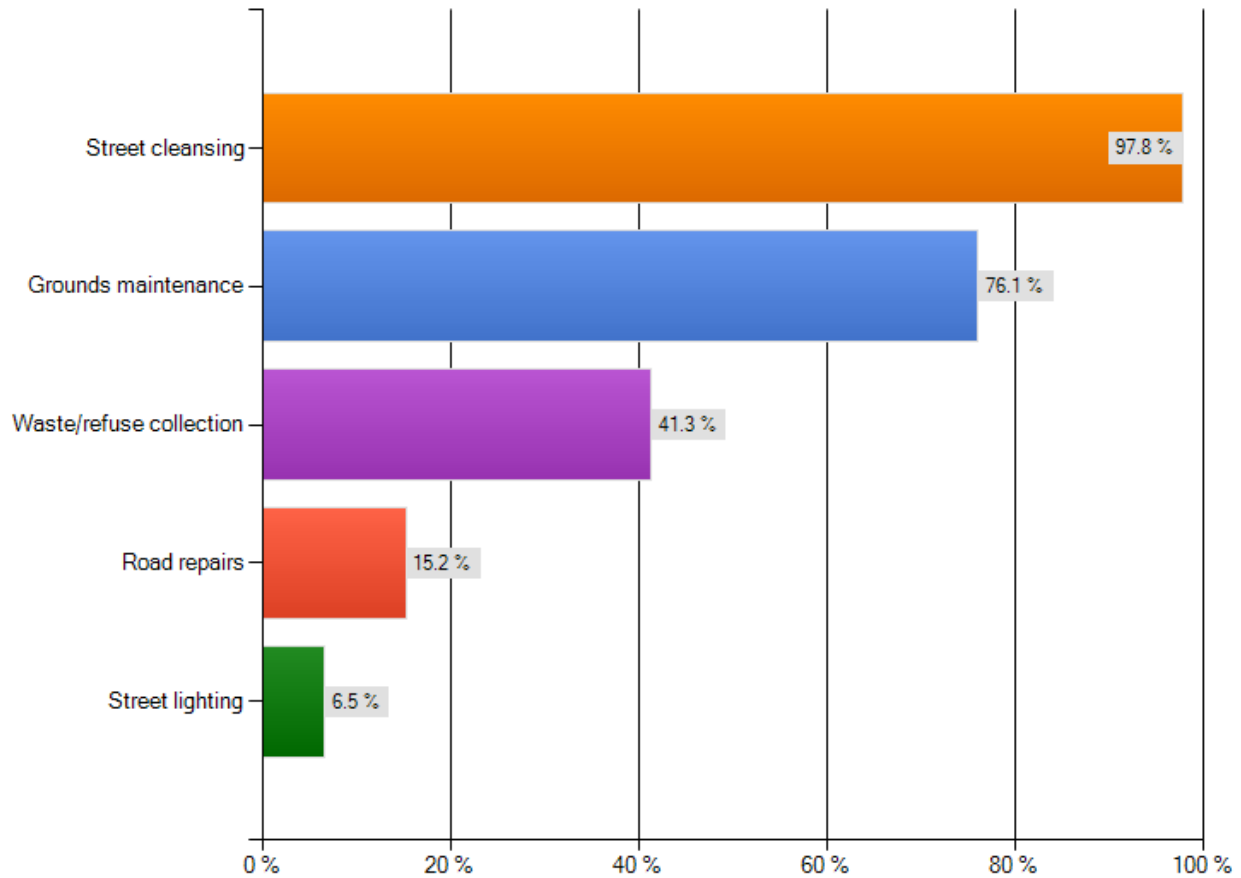
69% indicated that they are part of an integrated streetscene service and of those, the services that are jointly managed are shown in the graph below:

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?



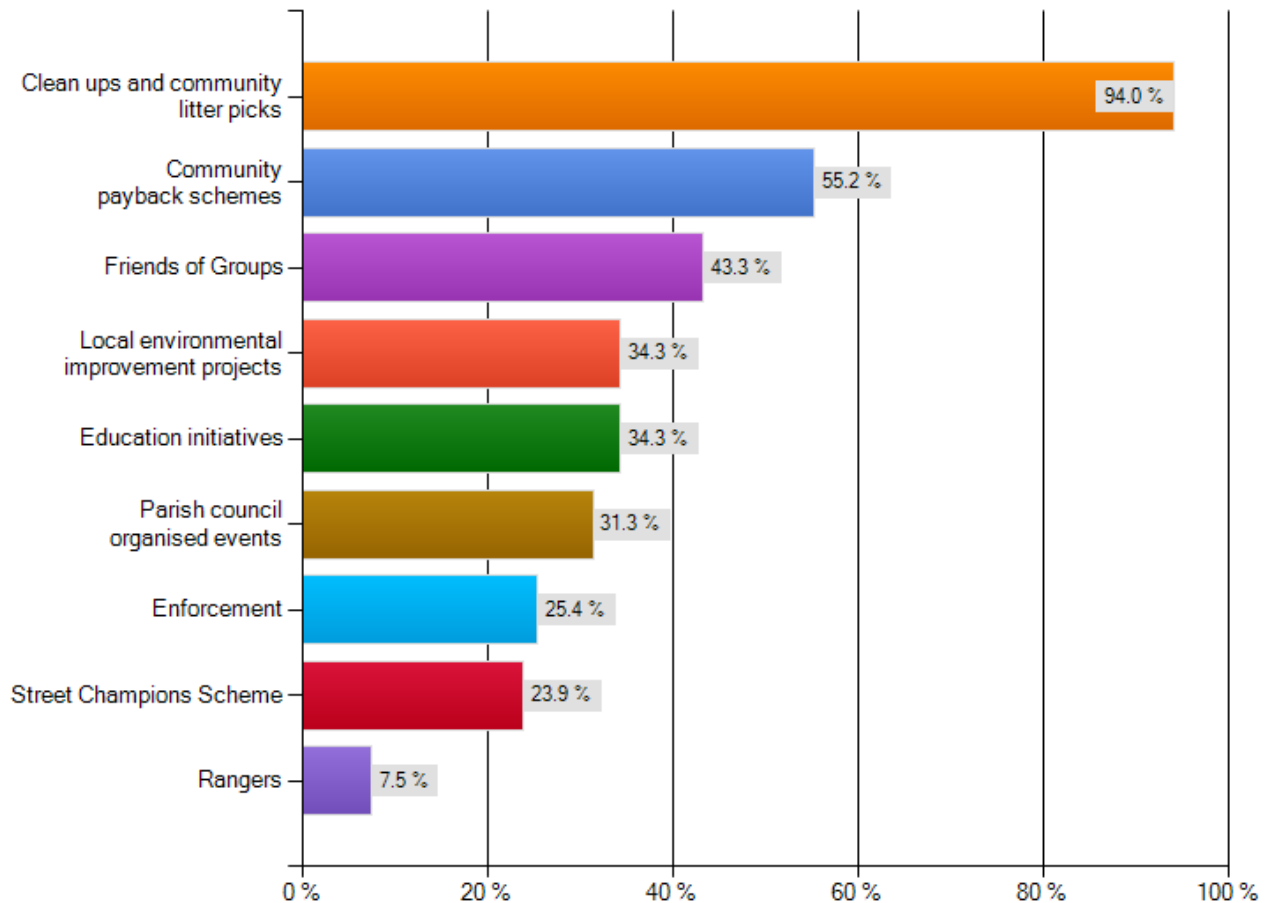
Of those who answered 'no', that they were not already part of an integrated street scene service, 50% expect to become part of an integrated street scene service in the near future.

d) Street cleansing operations

81% stated that they have area-based teams and most services operate over 7 days (87%), with some operating over 5 days (10%) and 6 days (3%). 14.5% currently undertake night time street cleansing. The survey asked how the street cleansing service is currently managed and 85.5% stated that this is in-house, 11.5% external and 3% mixed. 82% expect to be managed in-house within the next 2-3 years. For those where the service is currently managed externally, the contract length is mainly over 7 years (27% of respondents indicated that this was between 7 and 10 years and 36% respondents stated that this is over 10 years) and 75% 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, and community pay back schemes. The full breakdown is as follows:

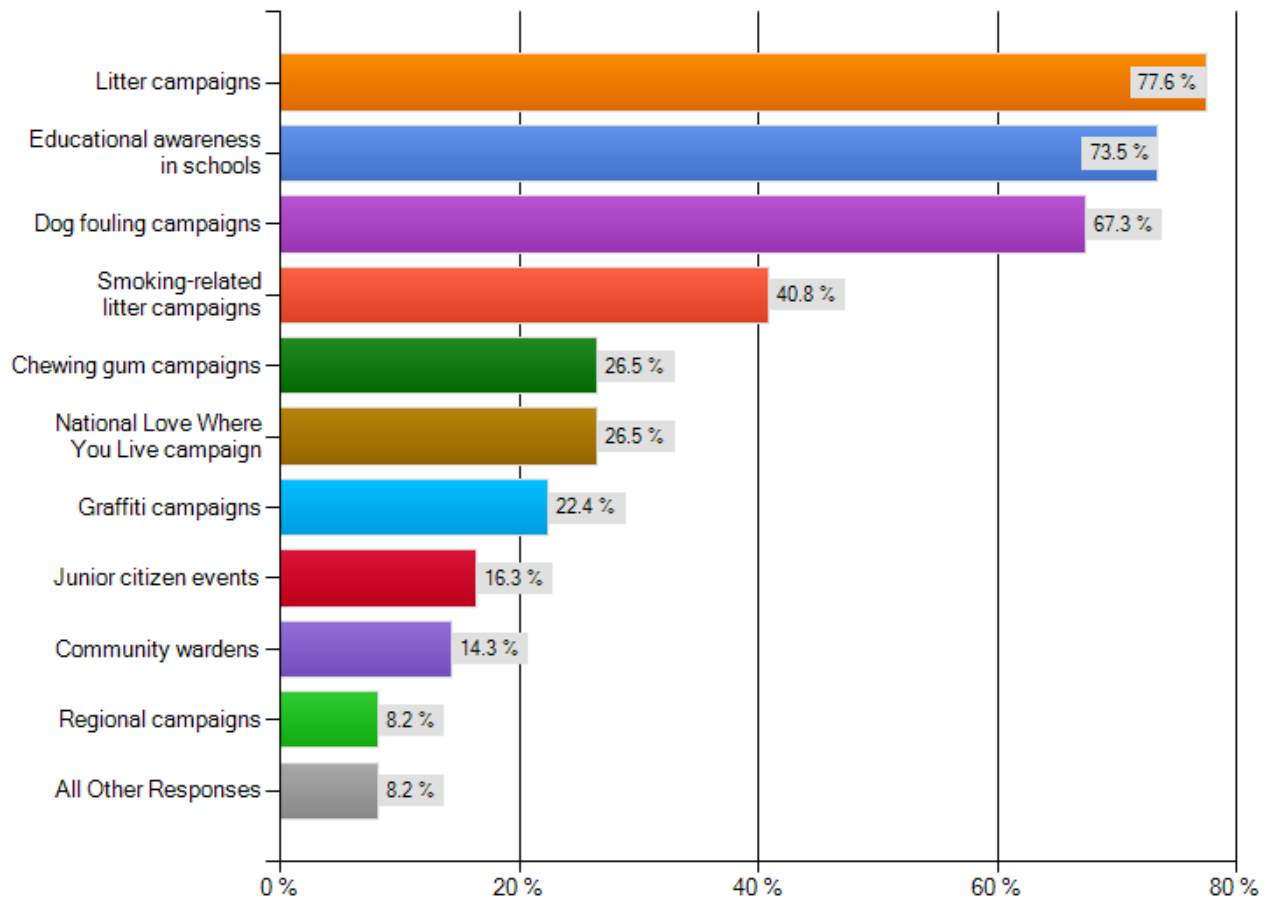
How are volunteers involved in the street cleansing service?



21% indicated that they have a partnership with large supermarkets/retailers/businesses on community clear-ups/public realm improvements such as Community Champions schemes.

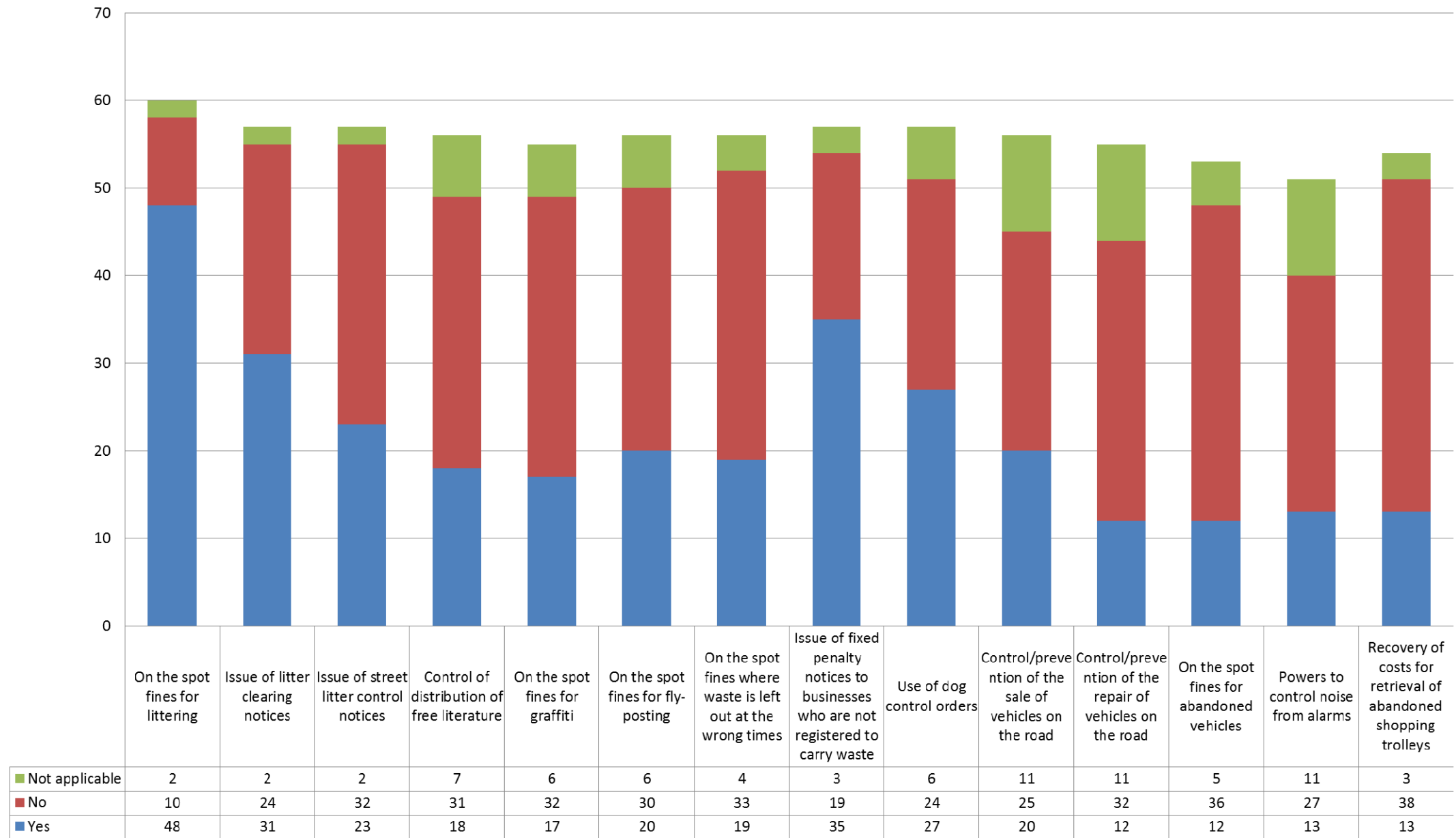
52% stated that community sector involvement in street cleansing is increasing in their service (a reduction from 71% in the 2012 survey). The main areas which respondents thought this was increasing in was clean ups and community litter picks (91%), local environmental improvement projects (43%) and friends of groups (40%).

In terms of education campaigns, 75% are planning these in the next 2 years (a reduction from 82% in 2012). The main campaigns being planned are litter campaigns (78%), educational awareness in schools (74%) and dog fouling campaigns (67%). The full breakdown is as follows:



e) Enforcement

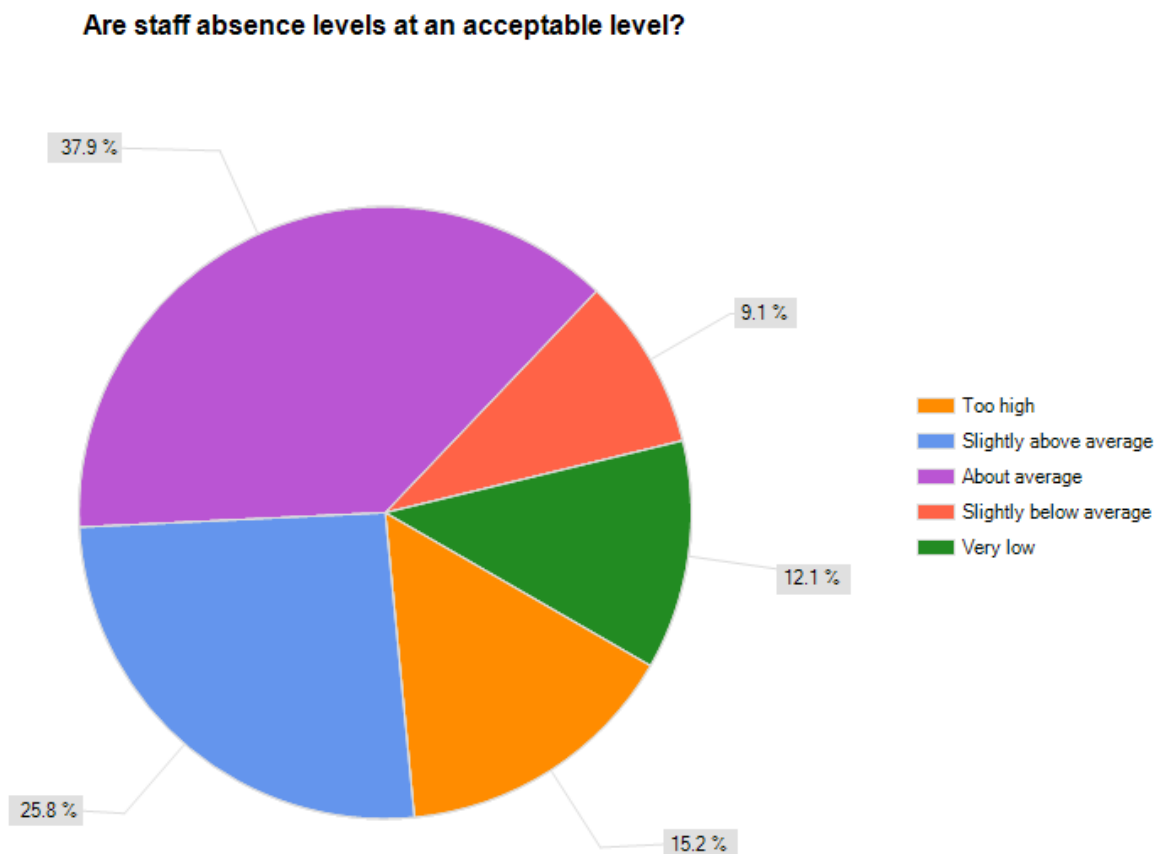
55% of respondents thought that there will be an increase in enforcement/notices issued in the next 2-3 years, a decrease from 65% in 2012. The survey asked which of the following powers were being used currently (where applicable) and the results are shown below. These are the powers as defined by the Clean Neighbourhoods and Environment 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.



A further question was asked about why certain powers have not been used (where respondents answered 'no') and reasons cited included insufficient resources (49%), they're not problem areas/we have other priorities (49%), it is covered by other agencies/departments (43%) and political reasons (28%).

f) Staff absence

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



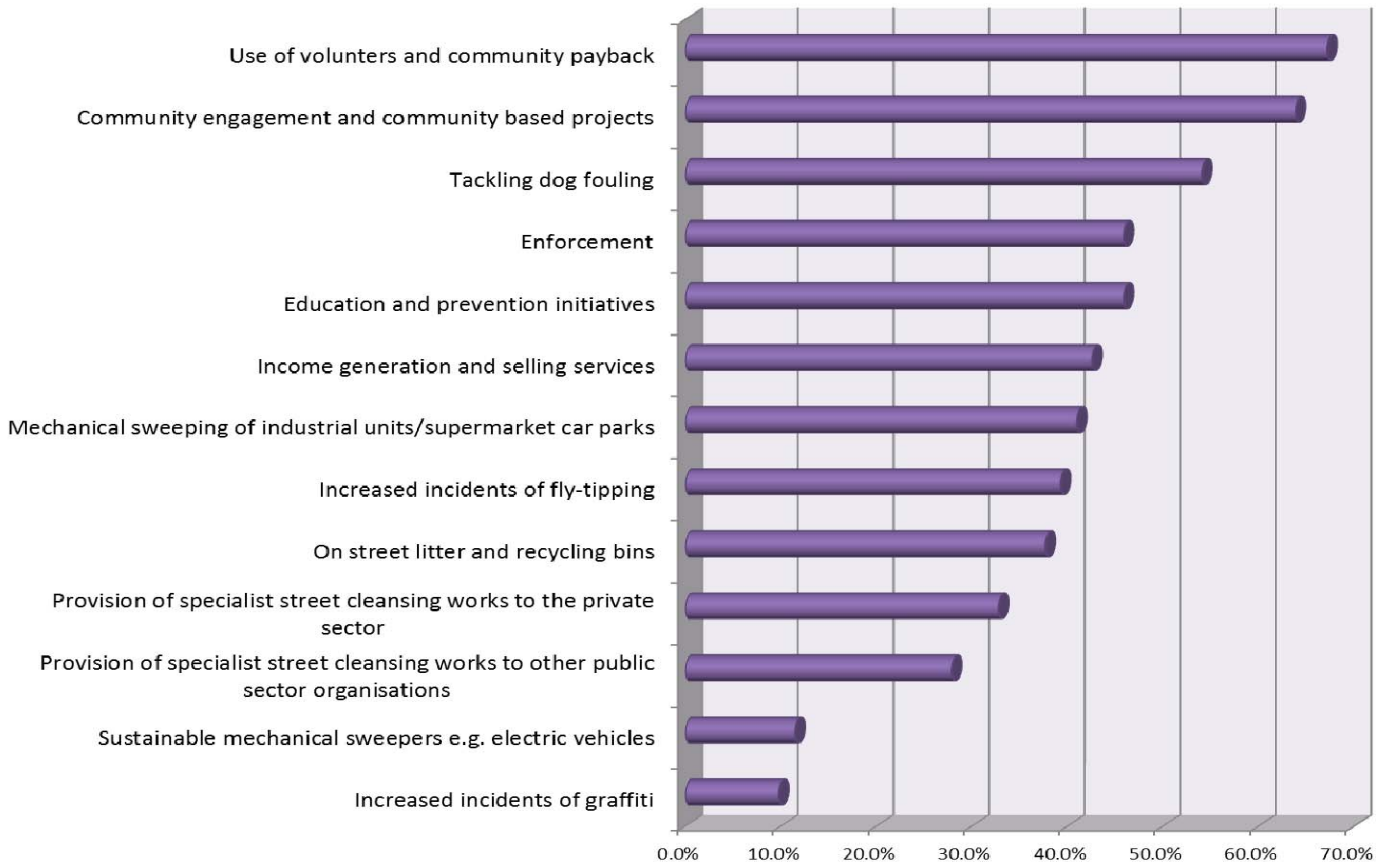
[APSE performance networks](#) collects data on staff absence for street cleansing. Average staff absence data across councils throughout the UK for 2012-13 reduced to a new low level of 4.62%.

Only 6% of respondents thought that the training budget is going to increase over the next 12 months (with 18% stating a decrease and 76% stating that this will stay the same).

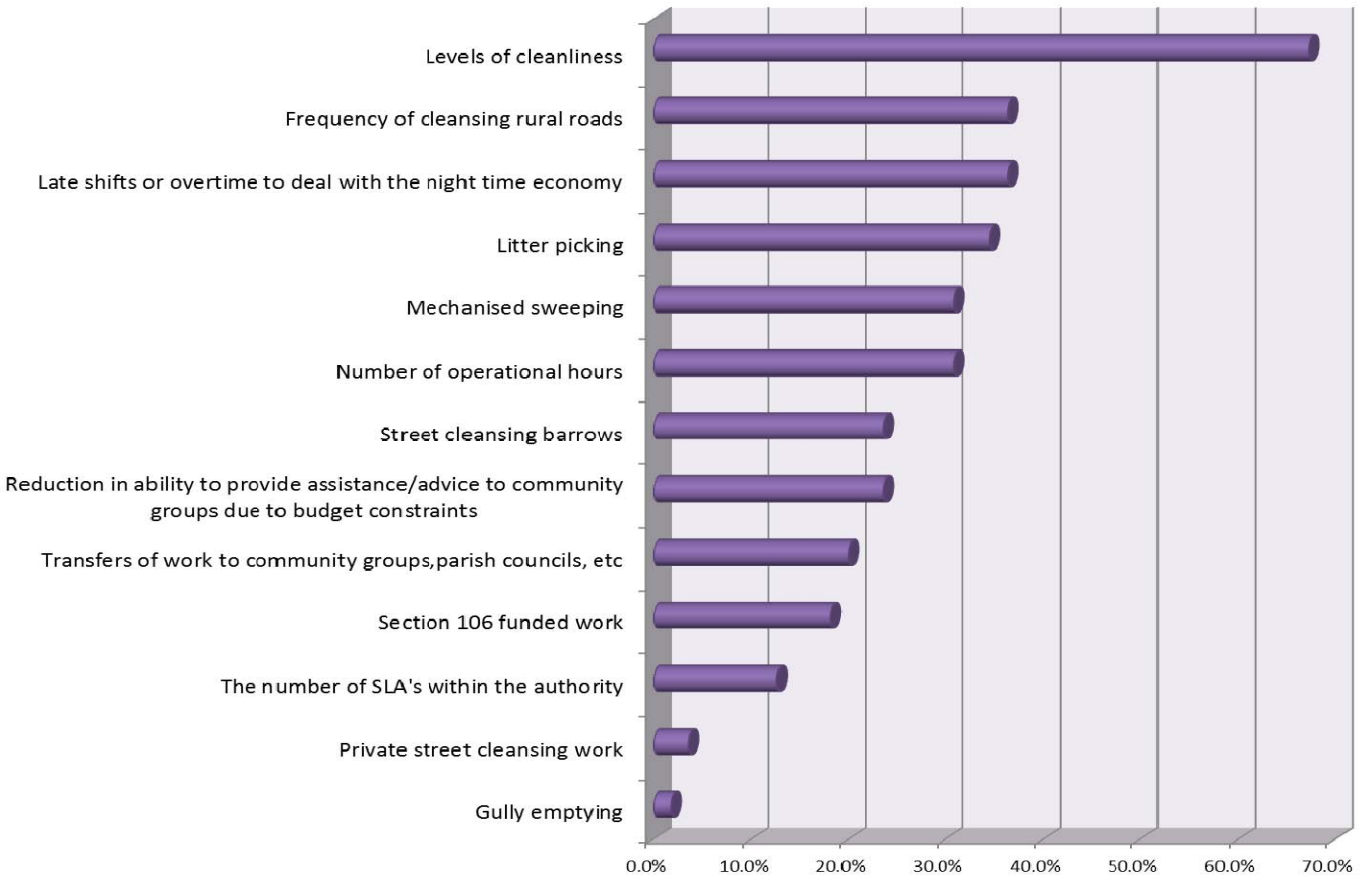
g) Future areas of work and service reviews

41% currently sell their services to the private sector and 31% sell their services to other public bodies. Respondents were asked where they see growth over the next 12 months and future decreases in work for the service and the responses were as follows:

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

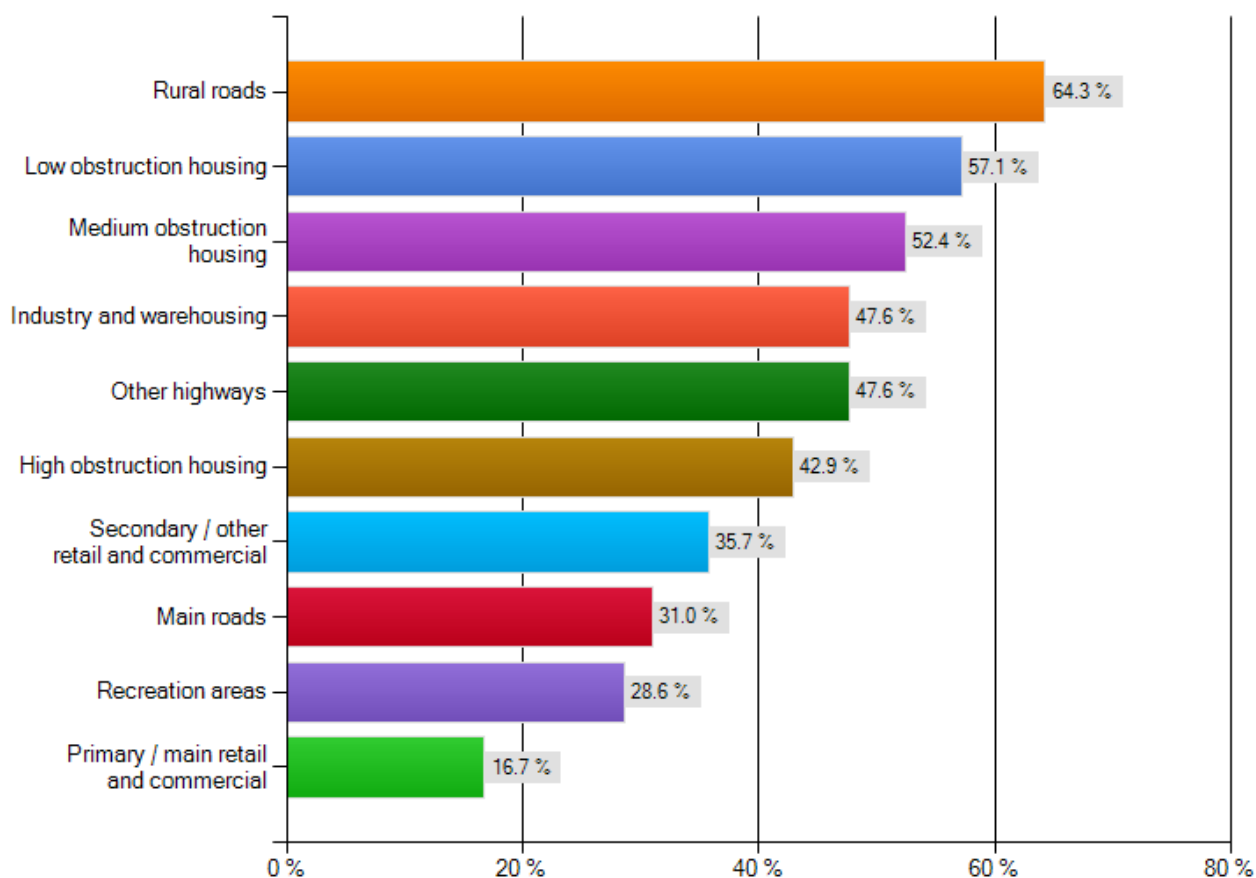


Where do you see future decreases in work for the service?



The 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:

If you are anticipating future reductions in sweeping and litter picking work, which areas of land do you think this will relate to?



When asked if respondents had undertaken a service review recently, 36.5% stated that they have completed this, 43% stated that they have a review which is underway and 17.5% 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
Review of working time/rota's	70.4%
Route optimisation	68.5%
Utilisation of machinery/transport	63.0%
Service re-design	55.6%
Use of technology (e.g. handheld)	53.7%
Review of productivity/work study	31.5%
Using systems thinking techniques	18.5%
Other (please specify)	7.4%

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