membership resources

State of the Market Survey 2015

Local Authority Cleaning Services

Briefing 15/51
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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.

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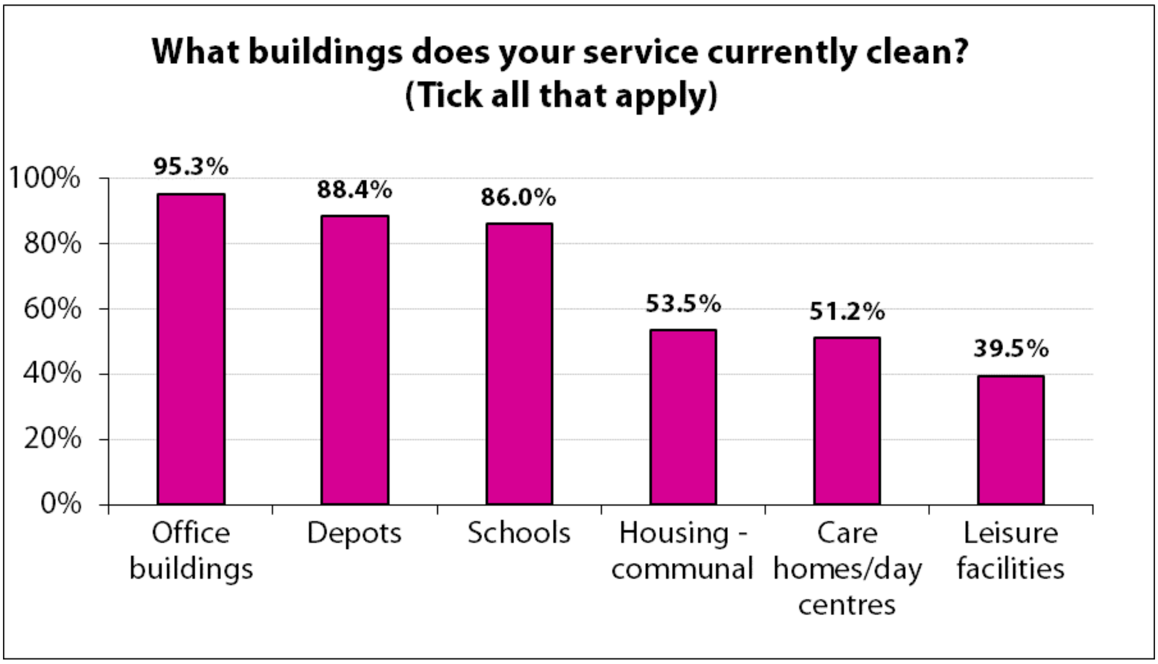
Local Authority Building Cleaning Services

State of the Market 2015

APSE conducted an online survey during May 2015. 42 responses were received with 53.3% from England, 32.6% from Scotland and 14.0% from Wales.

Results

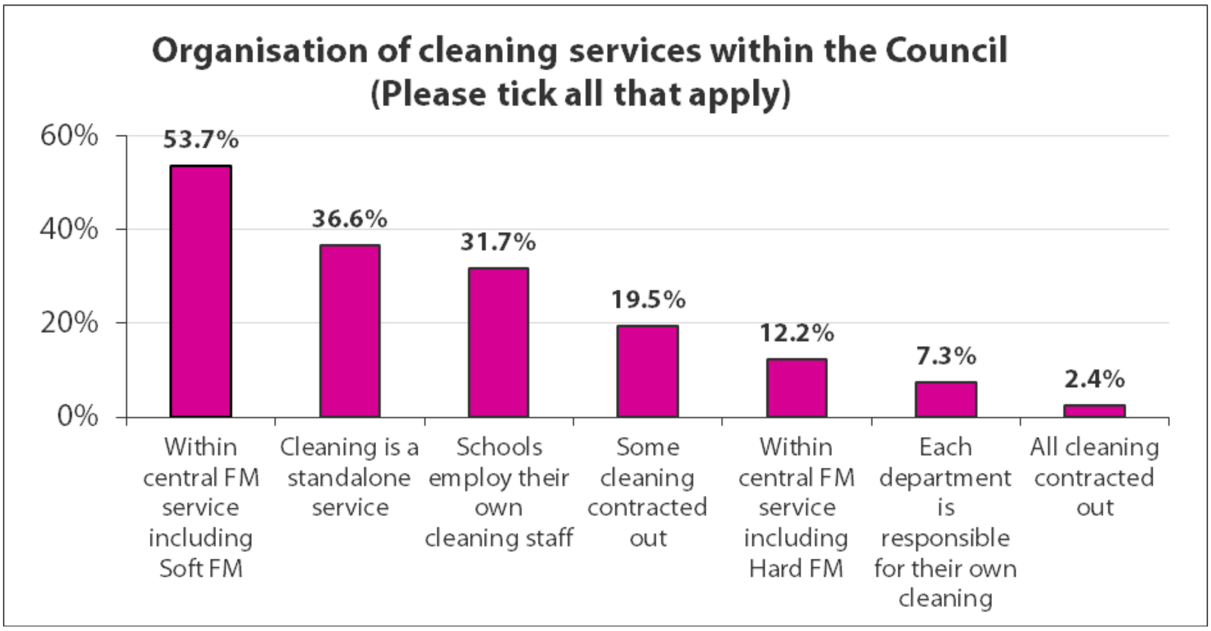
Of those completing the survey, 92.7% were in-house service providers of whom 42.1% expected to move to either a joint service with another Council, a joint venture with a private provider or to a Council owned, arms length wholly owned company in 2 years time. The mix of buildings cleaned by the respondents was also established:



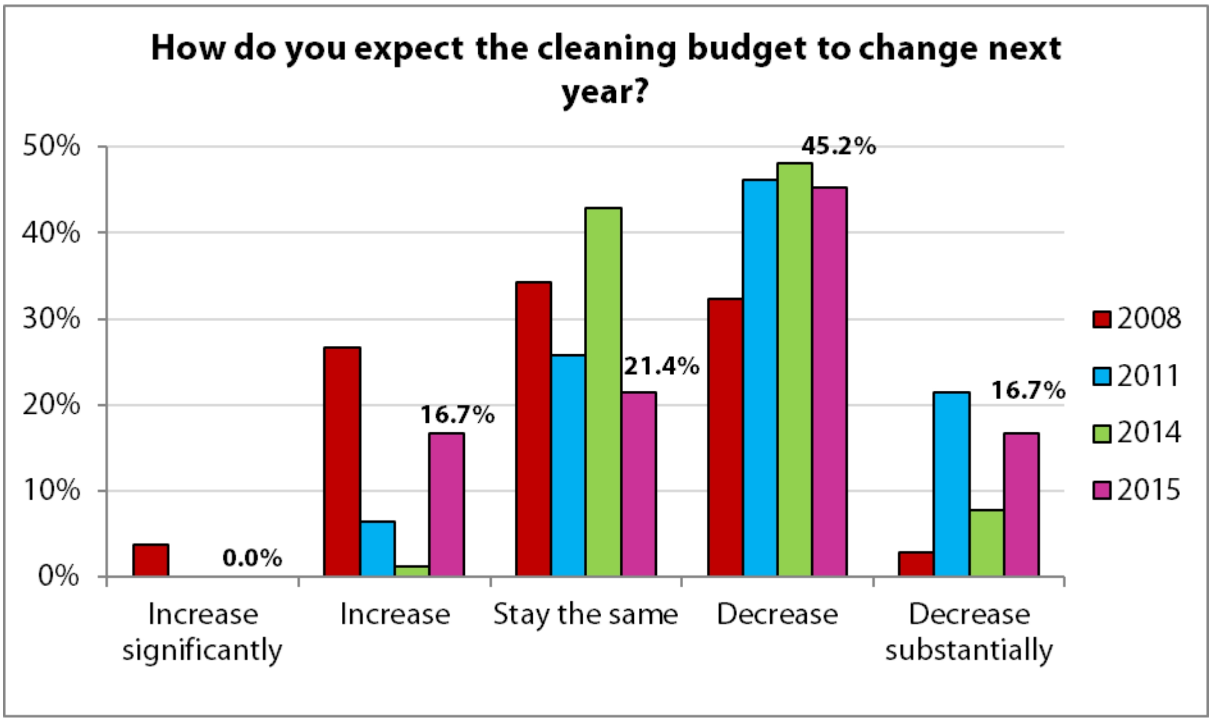
95.3% clean office buildings, whilst 86.0% clean school buildings, 51.2% clean care homes and 39.5% clean leisure facilities. In addition 41.7% also clean private sector buildings and 58.3% clean the premises of other public sector bodies such as health organisations and police authorities.

Structure

Almost 54% of those responding run cleaning together with out services within a central FM service, with 36.6% running cleaning as a standalone service. Only one respondent reported sharing a cleaning service with another authority, although six anticipated moving towards this model in 2 years time.



Expectations for budgets

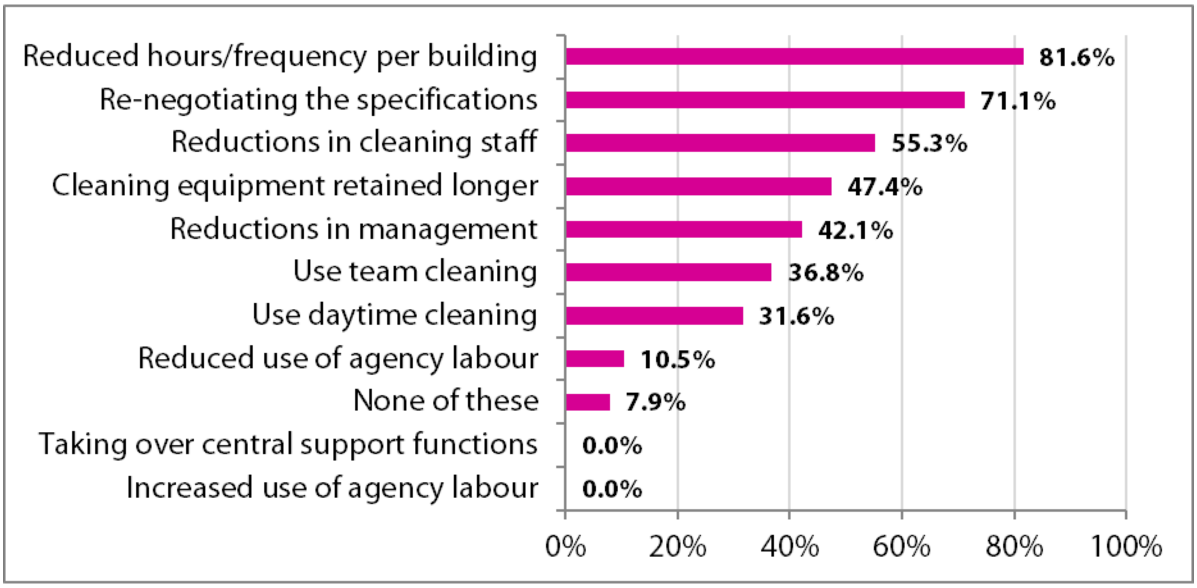


The 2011 State of the Market survey saw a jump to a far more pessimistic outlook for cleaning budgets which has continued to sit at around 45% for those expecting budgets to decrease; in 2015 the picture is a bit more complex, as there has also been another jump in those expecting the budget to decrease substantially over the next year to 16.7%, but also a rise in those expecting the cleaning budget to increase (also 16.7%).

This has been reflected in the split between those expecting the cleaning section workload to increase over the next 12 months (45.2%) and those expecting it to decrease

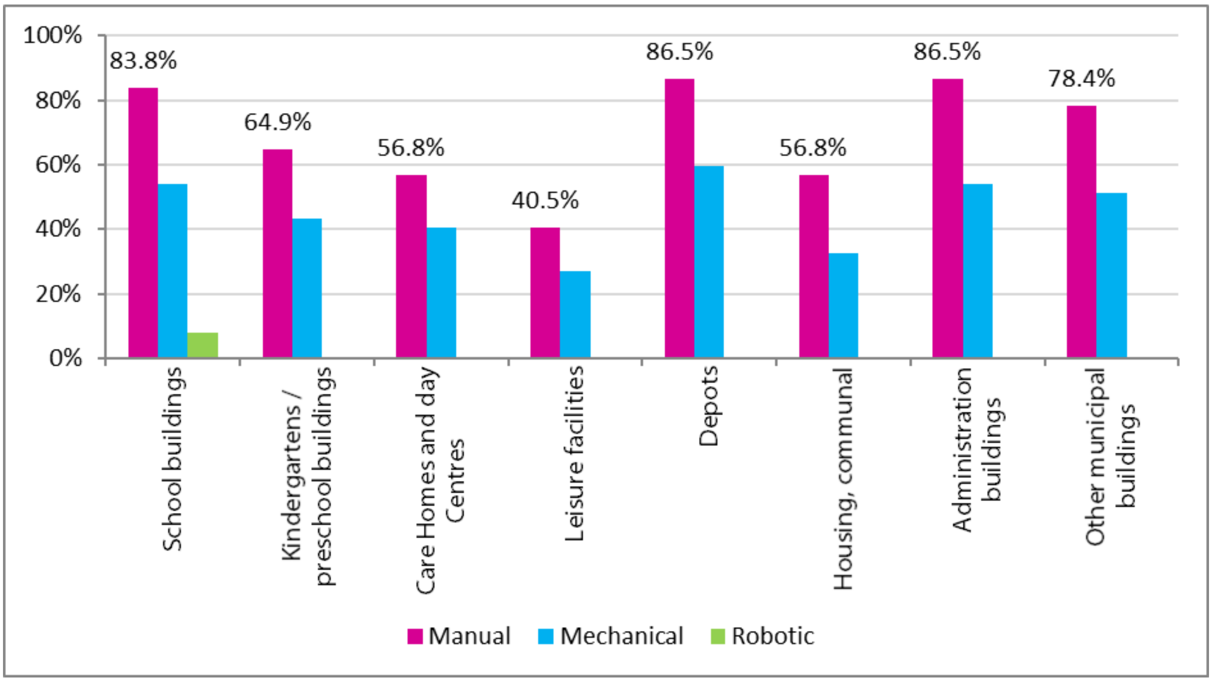
(35.7%), but the majority of respondents (78.6%) expected their own personal workload to increase regardless of this.

Due to the increased focus on value for money and productivity, 81.6% of respondents are expecting reduced hours/frequency per building, 71.1% expect to re-negotiate the specifications, 55.3% expect reductions in cleaning staff and 42.1% are expecting reductions in management.



Cleaning Methodology

Robotic cleaning holds significant promise for unobstructed areas but has yet to gain a significant foothold with only 8.1% of respondents using these methods in school buildings. Figures show that manual methods of cleaning remain predominant.



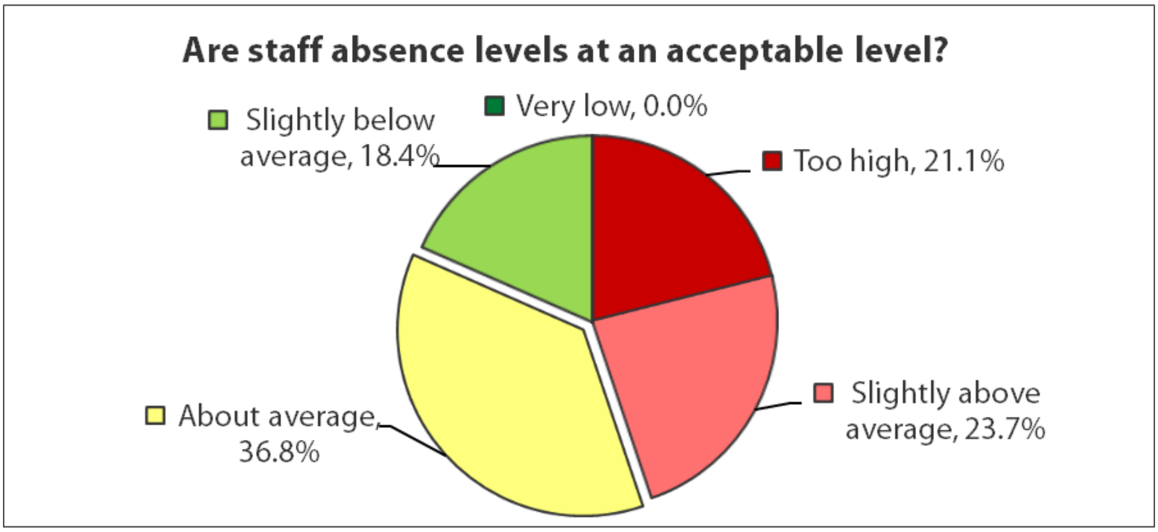
The BICS standard for cleaning was used by 58.3% of respondents (up from 54% but overall still down from 70%) throughout the building estate and 36.1% used an alternative system or combined the two. Only one respondent didn't currently measure quality at all.

In-house providers have no separate legal status to the rest of the authority so typically use service level agreements as a substitute to contracts with the departments and schools they supply. The increase in academies is seeing SLAs replaced with contracts, but despite this 92.3% of respondents have recent SLAs in place with only 7.7% having none at all.

Wage costs

64.1% of respondents are currently subject to the Living Wage, with another 5.1% answering that it was imminent in their authority. The average hourly wage for a cleaning assistant was calculated as £7.41 (a 3.2% increase since 2014) with a range from £6.48 to a maximum of £8.20.

Attitude to absence



Attitudes to absence amongst respondents tend to be negative with 44.8% reporting this to be above average compared to 18.4% reporting this as being lower than the average; the approximate sickness percentage was 4.2%. APSE Performance Networks reported the 2013/14 average staff absence rate to be 3.2% which has continued to fall year-on-year from 13.0% in 2011/12.

Local authorities remain active in supporting staff, however only 30.6% now report holding the Investors in People award with 75.0% undertaking regular staff training, 72.2% having regular staff appraisals and 55.6% releasing a regular cleaning section newsletter. Other than the newsletter, all other figures are the lowest reported for several years.

Comments on the future

Growth for the service over the next 12 months:

- Selling services externally, gaining work from other public sector agencies and private sector agencies
- Mobile and specialist cleaning services (e.g. providing cover for schools not with the Council)
- Expanding to include remaining schools in the area
- Advisory work
- Amalgamating with other services

Future decreases for the service over the next 12 months:

- Cleaning service reduction in areas where possible (e.g. administrative offices through the introduction of self clean areas)
- Closure of buildings meaning a reduction in demand for services

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 2015 please contact Rob Bailey at rbailey@apse.org.uk or by phone at 0161 772 1810.