apse membership resources

State of the Market Survey 2021

Local Authority Cleaning Services

Briefing 21 -12
February 2021

The State of the Market survey was conducted by Vickie Hacking, APSE Principal Advisor.

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

Tel: 0161 772 1810
Email: vhacking@apse.org.uk

LOCAL SERVICES LOCAL SOLUTIONS

INVESTOR IN PEOPLE
ISO 14001 REGISTERED FIRM GB 11409
ISO 9001 REGISTERED FIRM GB 11132
ISO 27001 REGISTERED FIRM GB 14074

Association for Public Service Excellence

3rd Floor, Trafford House

Chester Road

Manchester

M32 0RS

telephone: 0161 772 1810

fax: 0161 772 1811

email: enquiries@apse.org.uk

web: www.apse.org.uk

Local Authority Building Cleaning Services

APSE conducted an online survey in December 2020 and January 2021, which was sent out to local authority building cleaning contacts throughout the UK and 24 responses were received.

A series of questions were asked covering attitudes to the issues currently facing building cleaning, the operation of the cleaning service and challenges for the future. The majority of the questions have been surveyed since 2008 and trends are now apparent.

In addition, included in this briefing is an overview of the responses received to a survey conducted in November 2020 regarding the impact of COVID-19 on the delivery of local authority cleaning services.

The data collected through these surveys is intended to provide a snapshot of the perception of local authority cleaning services. For detailed and verifiable comparison of both financial and performance data, authorities should consider joining APSE performance networks that covers building cleaning.

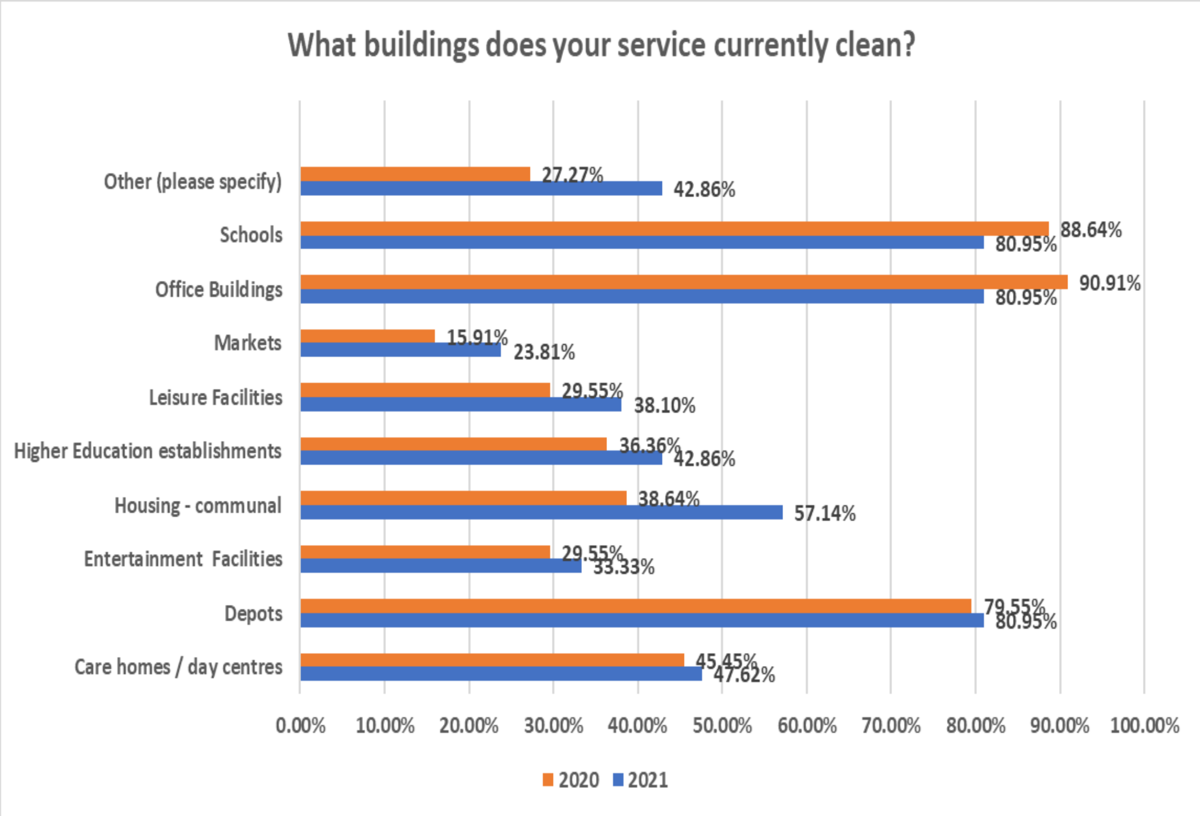
1. Results

Respondents were UK wide with 70.83% from England, 25% from Scotland, 4.17% from Wales. The survey, therefore reflects APSE's UK-wide membership and provides a national reflection of opinion.

2. Scope

What buildings does your service currently clean?

The survey sought to establish what mix of buildings the service currently cleaned. The graph below provides an overview of the responses for 2021 and provides a comparison with the responses received to the 2020 State of the Market survey.



The highest proportion of respondents (80.95%) report that they clean office buildings, schools and depots. Although office building is one of the highest reported buildings to be cleaned by the service, it has seen the greatest decrease from 2020, with a decrease of 9.96%.

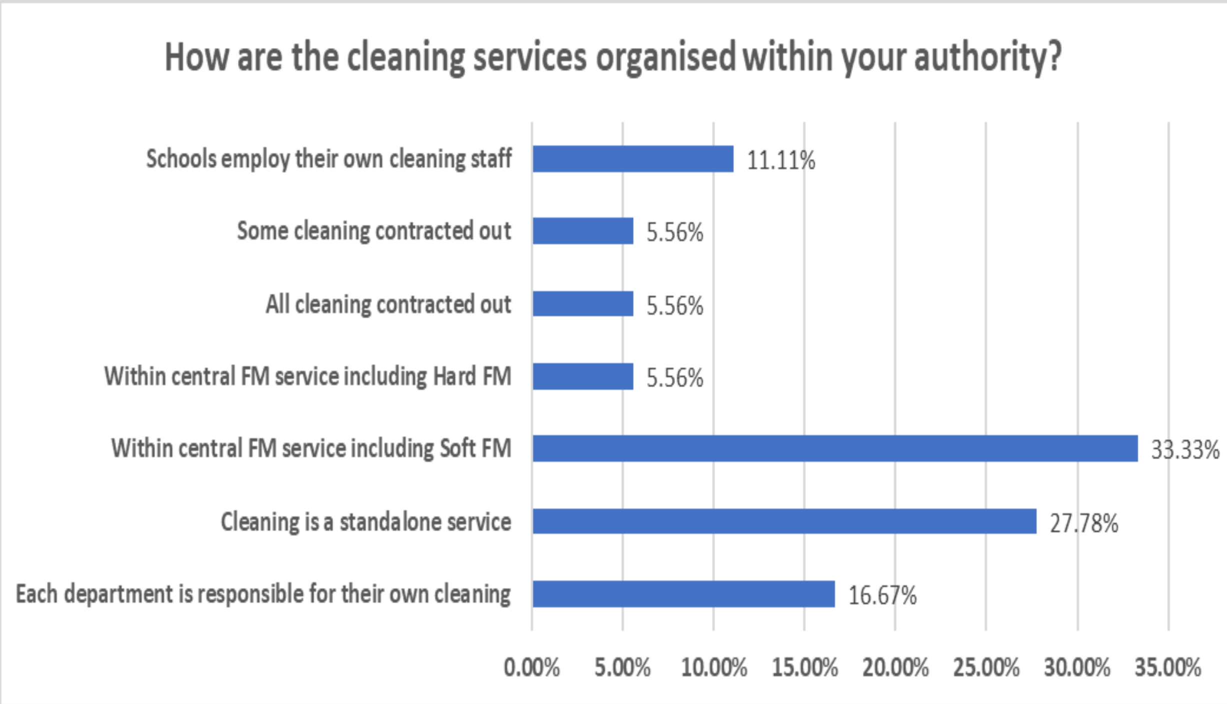
The greatest increase from 2020 can be seen in the area of Housing – communal, with an 18.50% increase to 57.14%. This could be attributed to the number of local authorities who are bringing the control of the housing stock back in-house.

In addition to the buildings cleaned referred to in the graph, for the 2021 survey respondents also confirmed that the service cleaned the following: -

- Libraries
- Further education establishments
- Public toilets
- Housing voids
- Crematorium
- Parish council buildings
- Social care units

How are the cleaning services organised within your authority?

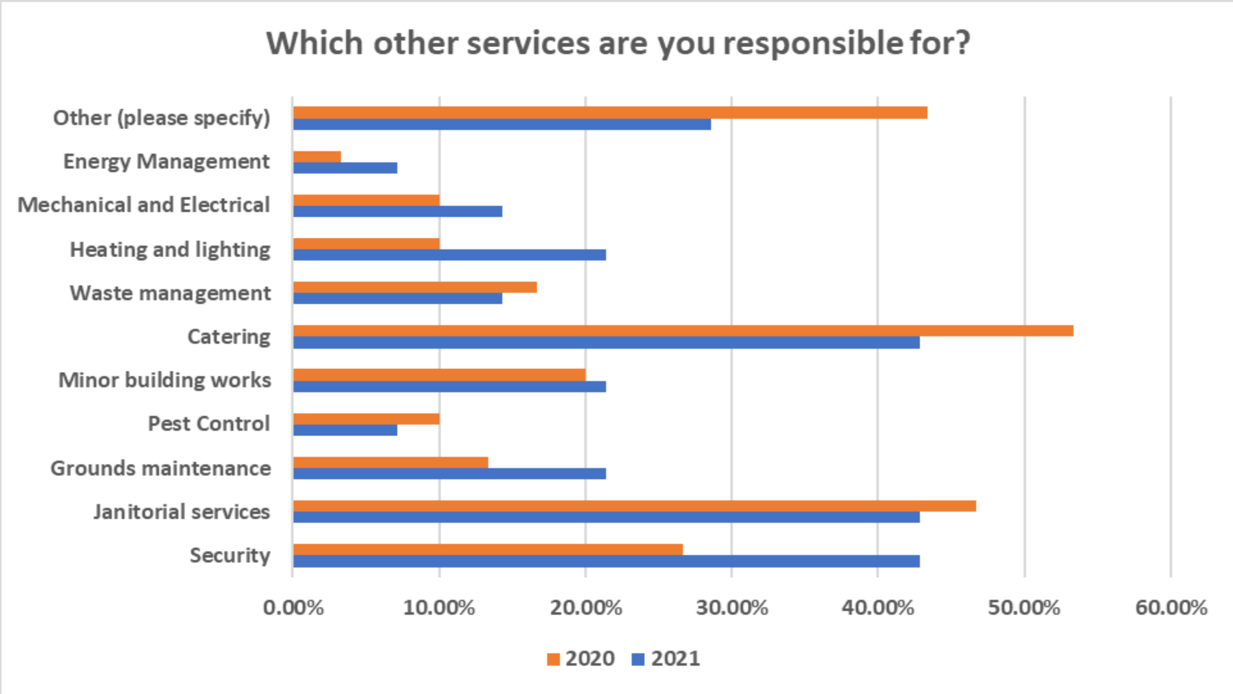
To gain an understanding of how the service is organised in the authority the respondents were asked to select from a range of options. The graph below provides an overview of the responses received.



The largest portion of respondents report that the cleaning service sits within a central FM service that includes Soft FM (33.33%), with a further 27.78% reporting that cleaning is a standalone service.

Which other services are you responsible for?

Respondents to the survey reported that in addition to building cleaning they also had responsibility for a range of other services. The following graph provides details of these services and a comparison between the responses received in the 2020 State of the Market survey.



Although there has been a decline from the 2020 survey of 10.47% of respondents reporting that the service also provided catering, it remains one the most common of the services provided, along with janitorial services and security with 42.86% of respondents advising they provide these services.

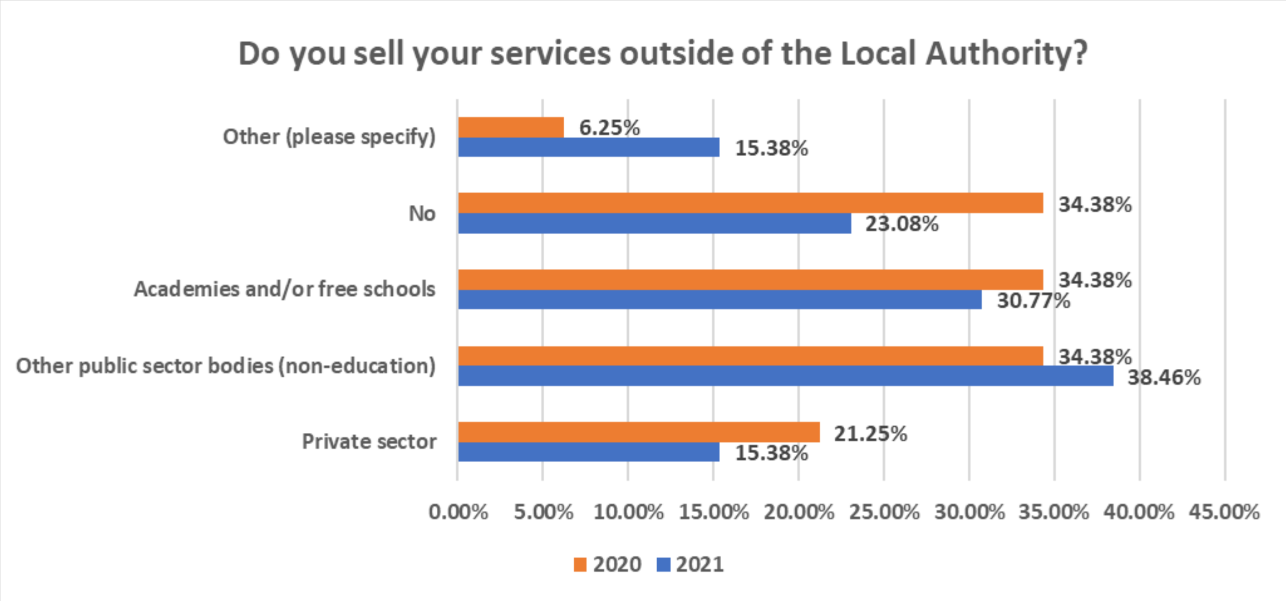
In addition to the list of services provided in the above graph, there were also a range of other services that respondents reported offering and these include: -

- Cleaning at events
- PAT testing
- Window cleaning
- School crossing patrols
- Cleaning to support independent living

The survey highlights that the role of building cleaning manager is wide and varied and that the remit encompasses a range of other facilities management responsibilities.

Do you sell your services outside of the Local Authority?

With the increasing requirement to generate an income from the service, the State of the Market survey sought to understand if councils were selling services outside the Local Authority. The graph below details the responses received.



The highest percentage of responding authorities (38.46%) report that they sell services to the other public sector bodies. There has been an 11.30% reduction in the number of respondents when compared to 2020, reporting that they do not sell services outside of the local authority. This indicates that more councils are seeking opportunities to sell their services outside the local authority.

In addition, 15.38% reported that they provided services to others, the majority of these respondents advised that they provided services for other local authorities.

APSE has a national local authorities commercialisation income and trading network and Scottish and Southern commercialisation advisory groups for local authorities looking to share best practice and network with other trading authorities.

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

The majority of respondents to the 2021 survey (61.12%), expect that the budget will increase or significantly increase in the next year, compared with 26.83% of respondents in the previous year.

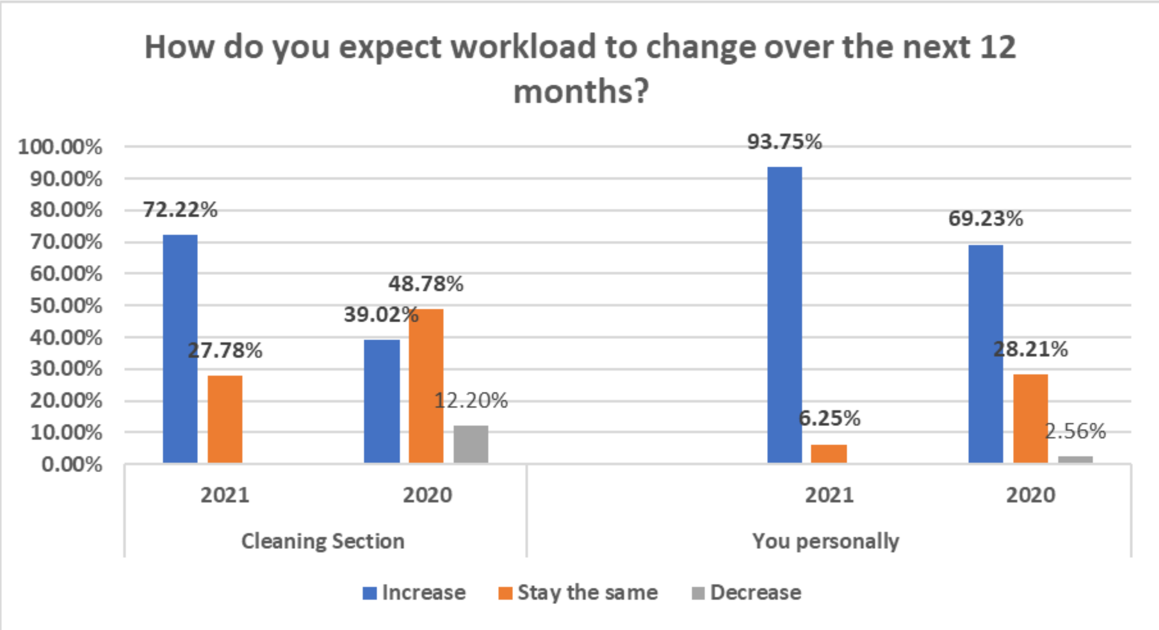
16.67% of the 2021 respondents believed that the budget would decrease or significantly decreased. This compares with 43.86% of respondents stating this to be their prediction in 2020.

The change in perception can be linked to the increased demand for cleaning as a result of COVID-19.

3. Staffing and workload

How do you expect workload to change over the next 12 months?

To survey asked how respondents anticipated the services and their personal workload would change over the next twelve months. The graph below provides an overview of the responses received:



The majority of respondents (72.22%) anticipated that the workload of the cleaning section would increase, which is 33.20% higher than what the respondents believed in 2020. Likewise, the vast number of respondents, 93.75% thought that their personal workload would increase, compared with 28.21% of respondents reporting this in 2020.

It is also noted that in 2021 that none of the respondents felt that the workload would decrease either within the cleaning section or personally. Again, a direct response to the demand place on the service from the pandemic.

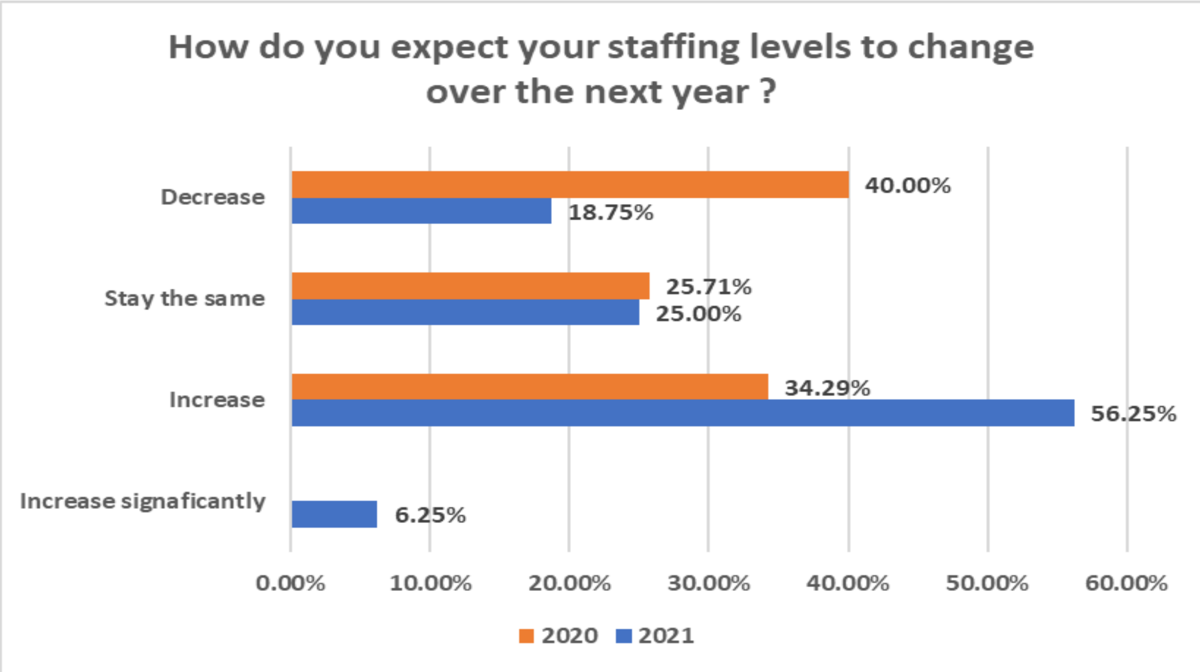
Which of the following applies to your staff training?

The majority of expenditure for the cleaning service is attributed to the workforce. Therefore, the survey sought to understand what staff training local authorities were providing for the cleaning service. 66.67% of respondents reported that they held regular appraisal, 60% provided regular staff training, 53.33% circulate a regular cleaning section newsletter and 26.67% of respondents reported that the organisation holds the Investors in People accreditation.

How do you expect your staffing levels to change over the next year?

The survey asked what the expectation was for staffing levels over the next year. When comparing with the responses from 2020, 62.50% of respondents predicted that staffing levels would increase or significantly increase in the next 12 months, which is 28.21% more than the percentage of respondents reporting this in 2020.

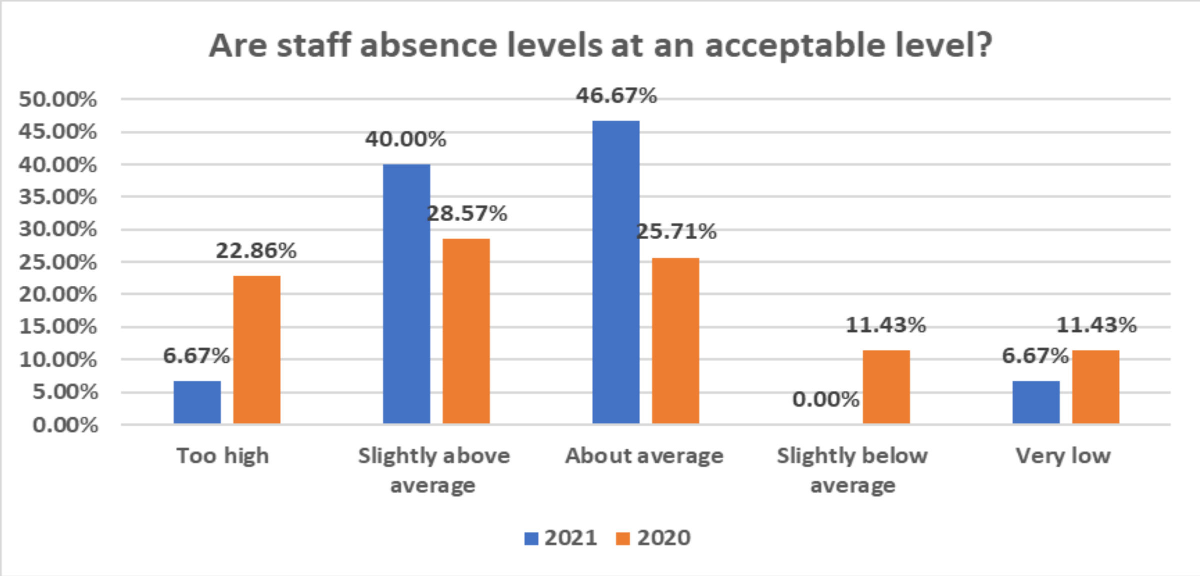
There were 40% of the 2020 respondents believing that staffing levels would decrease or significantly decrease in the next year and this has reduced to 18.75% in 2021.



There is a direct correlation between the expectations for staffing levels and the workload of the service over the next 12 months. It is anticipated that an increase in workload, will result in an increase in the number of staff to allow demand to be meet.

Attitudes to absence

The State of the Market survey sought to gain an understanding of the respondents' attitudes to absence. Below is a comparison with the responses received in the 2020 State of the Market Survey.

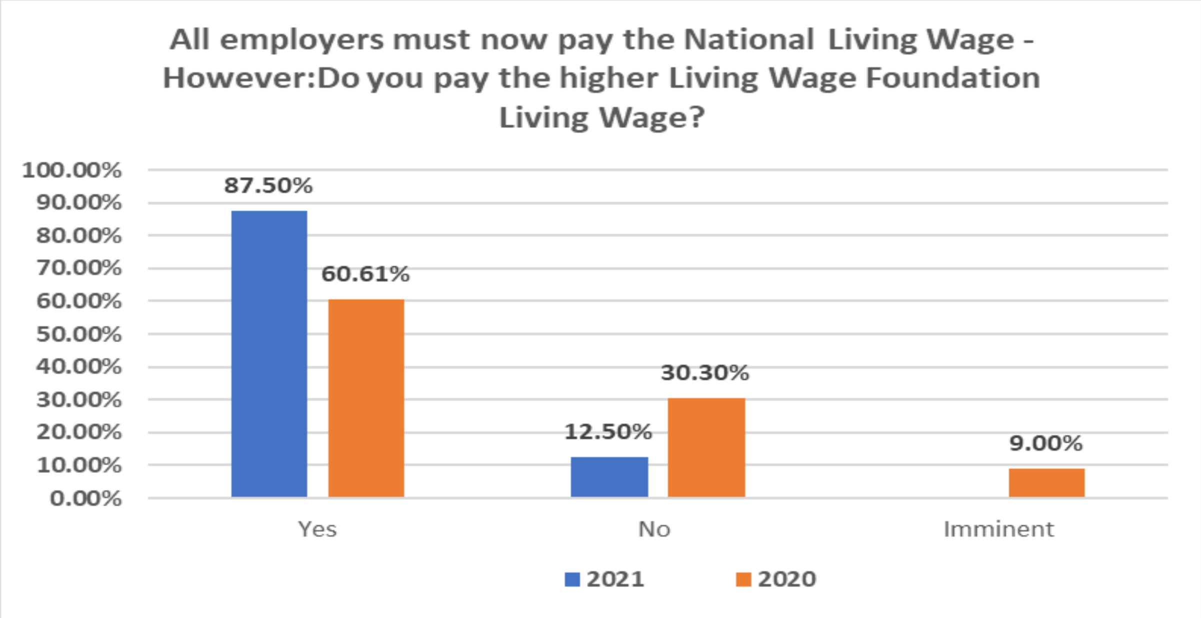


For 2021, the perception regarding staff absence is broadly comparable with 2020. 46.67% of the 2021 respondents stated that the absence level was too high or slightly above average compared with 51.43% in 2020.

However, there has been a 16.19% decrease in the number of respondents advising that the staff absence level was either very low or slightly below average.

All employers must now pay the National Living Wage - However: Do you pay the higher Living Wage Foundation Living Wage?

In response to this question, the vast majority of respondents 87.50% report that their service pays the higher Living Wage Foundation Living Wage, 12.50% advised the higher rate was not paid which is a decrease of 17.80% from 2020 and no authorities advised that the higher rate of pay was going to be introduced imminently.



The lowest current basic hourly rate of pay for cleaning staff in the 2021 survey was reported as being £9.25 and the highest amount was £9.80. The average rate amongst respondents was £9.42 This is a £0.20 increase on the average reported in 2020.

4. Cleaning methodology, standards and sustainability

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

The survey sought to gain an understanding of the type of specification that the cleaning service used in a specific building type.

The table below provides an overview of the range of responses received and it is clear that the majority of respondent's report using an output-based specification except when cleaning leisure facilities and housing, communal: -

	Input based	Output based	Not applicable
School buildings	41.67%	50.00%	8.33%
Kindergartens / preschool buildings	36.36%	54.55%	9.09%
Care Homes and day Centres	33.33%	33.33%	33.33%
Leisure facilities	50.00%	25.00%	25.00%
Depots	36.36%	63.64%	0.00%
Housing, communal	50.00%	30.00%	20.00%
Administration buildings	36.36%	63.64%	0.00%
Other municipal buildings	40.00%	60.00%	0.00%

Which of the following Cleaning Standards, and quality measures does your authority use?

To gain a picture of the cleaning standards that the service worked to it was asked which of the specified standards the council used to measure quality. The majority of respondents 61.54%, advised they used an internally agreed standard, a further 46.15% reported that BICS standards were used with all their cleaning work and 7.69% have an alternative cleaning standard in place.

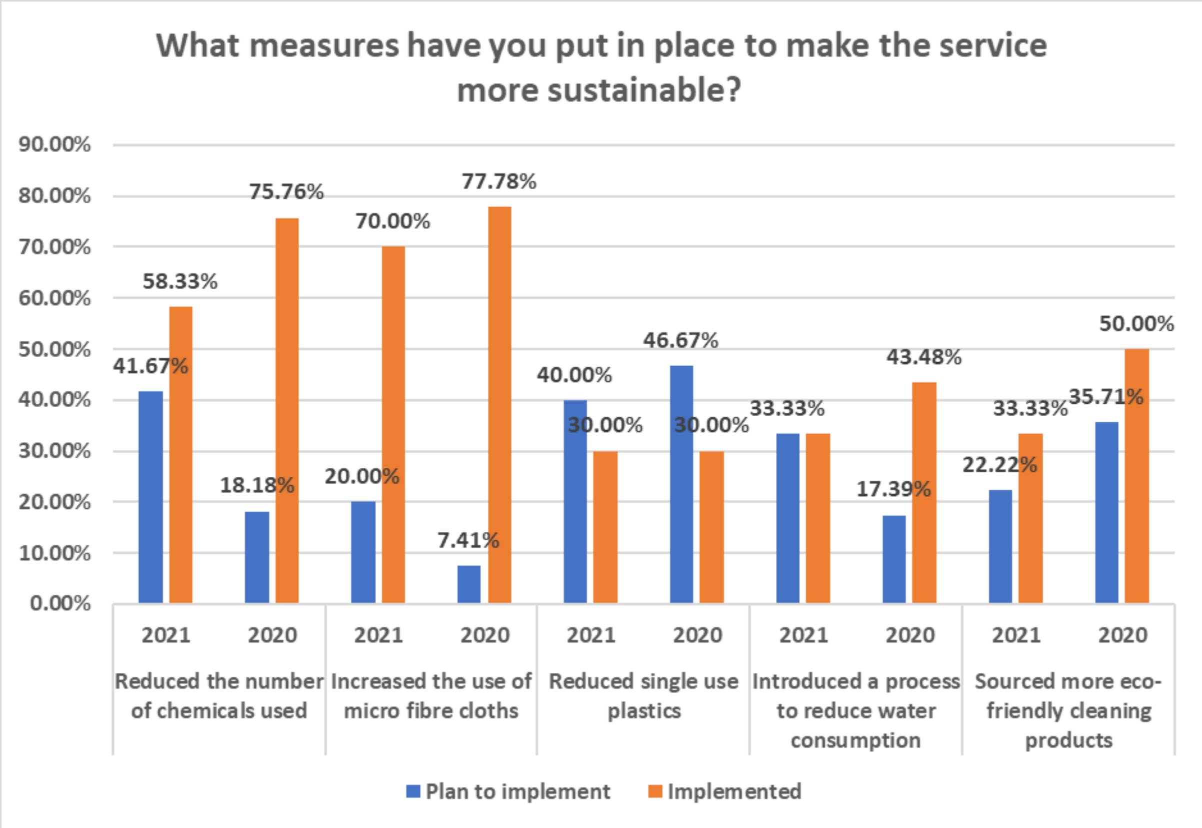
Building Cleaning Inspection App – APSE Performance Networks have developed a new app to support councils when carrying out building cleaning inspections and audits. The app will be showcased at the Building Cleaning Advisory Group scheduled to be held on Tuesday 23 March at 10.30 am. Further details can be found via the following link: -

APSE FM and Building Cleaning Advisory Group

Alternatively, for further information regarding the app, please contact Performance Networks directly on: - performance.networks@apse.org.uk

What measures have you put in place to make the service more sustainable?

With the increased focus on sustainability, the 2021 and the 2020 survey asked respondents to report on the measures that they have put in place or were considering implementing to make their service more sustainable. The graph below provides an outline of the responses received.



5. Comments on the future

Respondents to the survey reported that the growth area for the service are as follows: -

- Extending the range of services - 50%
- New public sector clients – 50%
- Expanding existing contacts – 33.33%
- New private sector clients – 8.33%

Over the past year, local authorities have demonstrated that they have the ability and expertise to respond flexibly, maintain high standards and service continuity in unprecedented times. Therefore, there has been an increase in opportunities to offer a wider range of services to schools and other clients and this is reflected in the response to comments on future areas of growth.

Future decreases for the service over the next 12 months include:

- Rationalisation of councils' estate – 61.54%
- Loss of school contracts – 30.77%
- Loss of academies – 30.77%

- Reduction in cleaning specification/frequency – 15.38%

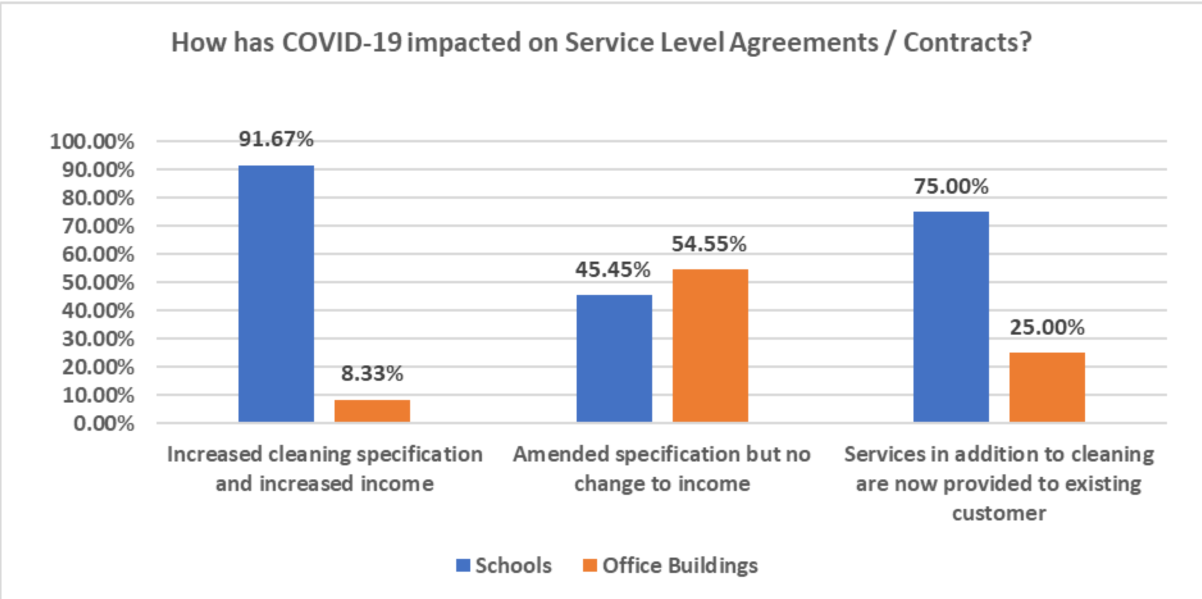
The decrease in the service anticipated from the rationalisation of the council estate is linked to the changing working practices and the rapid mobilisation to home working.

6. Impact of COVID-19

The State of the Market survey for 2021 has been conducted against the backdrop of the COVID-19 pandemic and associated restrictions. Therefore, this will have undoubtedly had an impact on how respondents answered the survey. In addition, the standard questions asked in previous years, there were two further questions added to the State of the Market survey for 2021.

How has COVID-19 impacted on Service Level Agreements (SLA)/ Contracts?

The graph below provides an overview of how COVID-19 has impacted on SLA's / contracts.



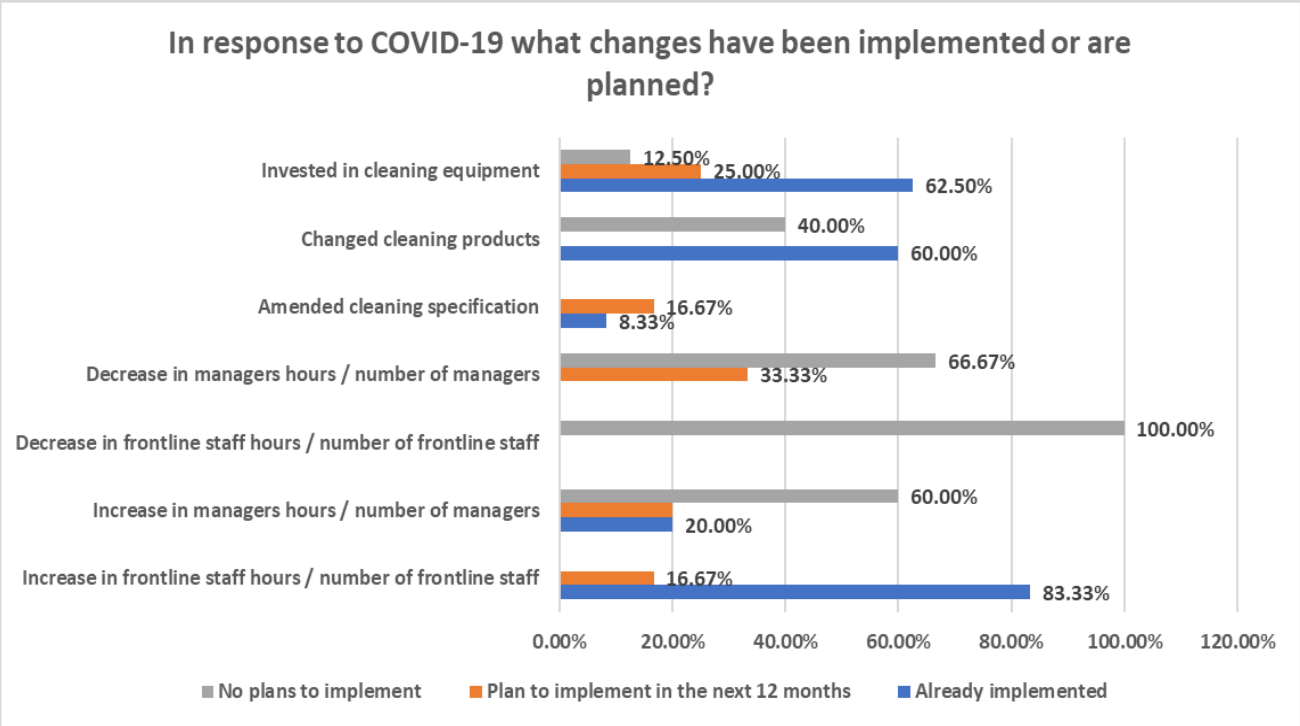
The vast majority of respondents 91.67%, report that they have increased cleaning specification and increased income from school contracts. Prior to the pandemic, the cleaning of schools and office buildings was primarily conducted outside working hours or when the building was closed and tenders had focused heavily on price. However, it is now reported by local authorities that the focus is on increased cleaning frequencies carried out during the working day.

In response to COVID-19 what changes have been implemented or are planned?

The survey sought to gain an understanding of what changes cleaning services have implemented in response to COVID-19.

The vast majority of respondents, 83.33% report that they have increased frontline staff hours or the number of frontline staff, 62.50% have invested in cleaning equipment and 60% have changed the cleaning products that are used.

It is evident from the response received to this question that there is no intention at the current time to decrease frontline staff hours or the number of frontline staff as 100% of the respondents reported that there were no plans to do this. The graph below provides an outline of all the responses received.



In November 2020, APSE conducted a survey to gain a snapshot into the impact of COVID-19 on service delivery for 3 key areas finances; staffing and recovery of service delivery levels. The tables below outline the responses received to the survey:-

Impact on finances

We have seen further cost pressures on the service	100.00%
We have not noticed any difference in our financial position	0.00%
Our service may not financially survive the impact of further restrictions	0.00%

Impact on staffing

We have more staff now self-isolating / unable to work	20.00%
We have noticed an increase in staff absence	60.00%
Staffing levels have stayed at a reasonable level and are manageable	40.00%

Recovery of service delivery levels

We managed to recover our services to pre-pandemic levels and the further restrictions have had no impact on this	60.00%
We are still trying to recover our service levels and the further restrictions have hindered our recovery	0.00%
Our services were not impacted too severely by either the first or second wave of restrictions	20.00%
Other	20.00%

N.B. The respondents that reported other commented that additional staff had been brought into the service to meet the demand.

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 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 Network
- 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 2021 please contact Vickie Hacking at vhacking@apse.org.uk or by phone at 0161 772 1810.