apse membership resources

State of the Market Survey 2016

Local Authority Winter Maintenance Services

Briefing 16/19
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Local Authority Winter Maintenance Services

State of the Market 2016

APSE conducted an online survey during April and May 2016. A series of questions were asked covering a range of issues of interest to those officers and councillors responsible for highways issues in general and winter maintenance specifically. 46 responses were received from local authorities throughout the UK. This report identifies the key findings of the survey.

75 responses were received to the highways survey and a further 55 responses were received to the street lighting survey making a total of 176 responses to all 3 surveys.

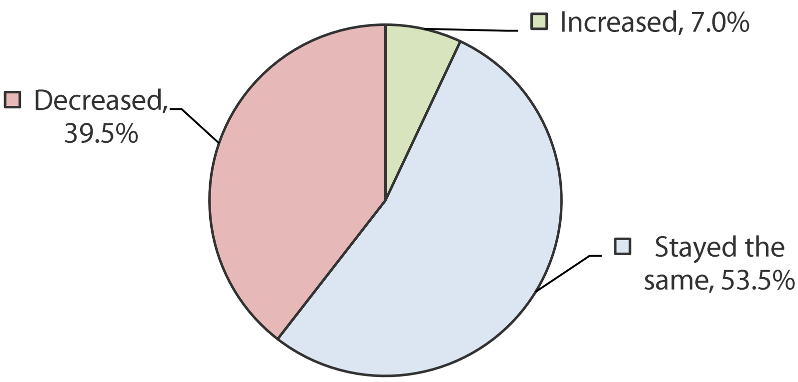
The surveys are an attempt to understand perceptions of the market amongst people directly involved in delivering services rather than a survey of the same individuals from year to year.

Note

The tables below show figures for 4 or 5 years but the questions were asked of the winter maintenance service only in this year's and 2014's survey, whereas in previous years questions had been asked of the highways, street lighting and winter maintenance services combined. Therefore the tabular data provides contextual information for the winter maintenance service.

Results from the survey

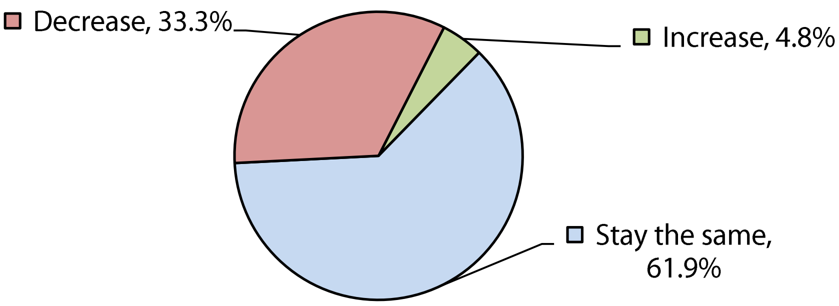
1. How has the budget for the winter maintenance service changed from 2015-16 to 2016-17? If your budget has decreased from 2015-16 to 2016-17, how much has it decreased by?



Less than 5%	5%	10%	15%	20%	More than 20%
3 (16.7%)	4 (22.2%)	5 (27.8%)	2 (11.1%)	2 (11.1%)	2 (11.1%)

Over the past year, 23 of the 43 respondents to this question stated that their budget had roughly stayed the same since 2015-16, with a small number (3) reporting their budget had increased and the remaining 17 stating that it had decreased. For those whose budgets had decreased, the majority had experienced between a 5% and 10% decrease (50.0%), although several respondents did report having even larger decreases.

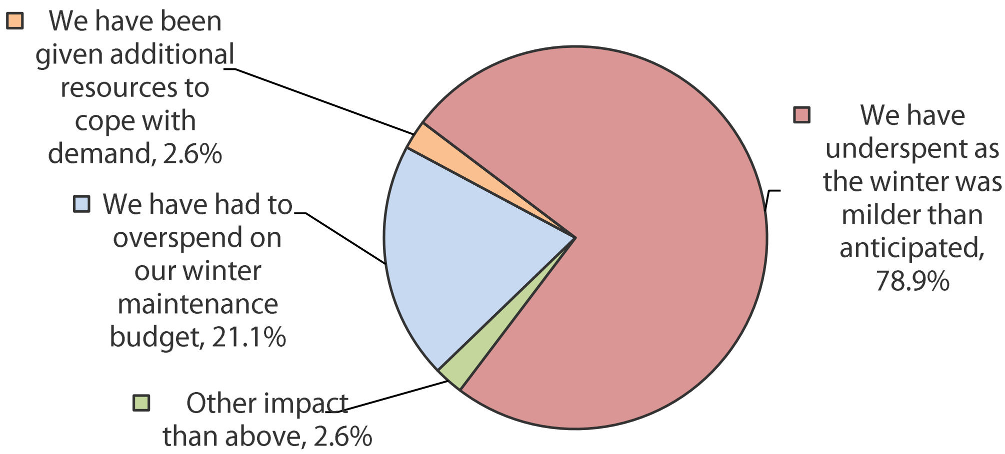
2. How do you expect the budget for the winter maintenance service to change over the next 12 months?



Answer Options	2016 Number (%)	2014 Number (%)	2012 Number (%)	2011 Number (%)	2010 Number (%)	2009 Number (%)
Increase	2 (4.8%)	4 (10%)	4 (20%)	10 (24.4%)	10 (13.9%)	5 (7.6%)
Stay the same	26 (61.9%)	29 (70%)	14 (70%)	23 (56.1%)	58 (80.6%)	55 (83.3%)
Decrease	14 (33.3%)	8 (20%)	2 (10%)	8 (19.5%)	4 (5.6%)	6 (9.1%)
Total	46	41	20	41	72	66

46 Councils responded to this question and of those only 2 responded that their budgets had increased whilst the majority (26 – 61.9%) had their budgets roughly stay the same, while the remaining 14 (33.3%) saw their budgets decrease; this result shows the largest shift to 'decrease' in the history of the survey (up by 13.3% since 2014 and up by 23.3% on 2013). This expected decrease in budgets has likely been influenced by the shift in trend from overspending to underspending that has taken place recently due to milder winters (this is covered in more detail in question 3).

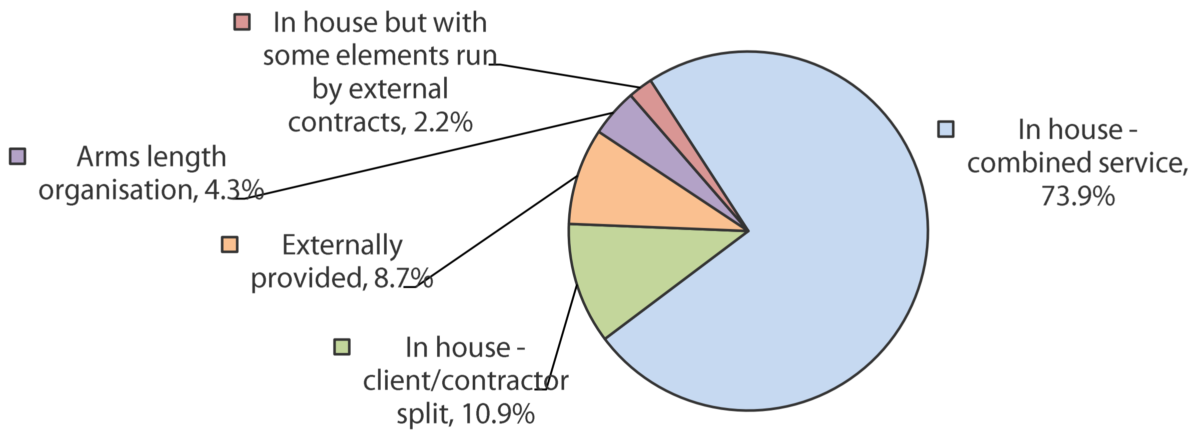
3. What has been the impact on your budget?



Answer Options	2016 Number (%)	2014 Number (%)	2012 Number (%)	2011 Number (%)	2010 Number (%)
Underspent	30 (78.9%)	11 (28.2%)	0 (0%)	0 (0%)	0 (0%)
On budget	0 (0.0%)	10 (25.6%)	0 (0%)	0 (0%)	0 (0%)
Overspent on our budget	8 (21.1%)	8 (20.5%)	11 (68.9%)	22 (61.1%)	27 (69.2%)
Worked within existing budgets and limit the service provided	0 (0.0%)	7 (17.9%)	3 (18.8%)	5 (13.9%)	1 (2.6%)
Given additional resources to cope with demand	1 (2.6%)	2 (5.1%)	2 (12.5%)	18 (50%)	10 (25.6%)
Overspent budget, must recover costs within financial year	0 (0.0%)	1 (2.6%)	0 (0%)	4 (11.1%)	7 (17.9%)
Overspent budget, must recover these costs within next 2 - 3 years	0 (0.0%)	0 (0%)	0 (0%)	0 (0%)	3 (7.7%)

The results above has seen a significant shift over the course of the last 5 surveys from the majority of respondents overspending on their budgets with some being under pressure to recover the costs within 1 to 3 years (2010 – 94.8%, 2011 – 72.2%, 2012 – 71.5%) combined with many being given additional resources to cope with the demand, to the majority (25.6%) being on budget in 2014, to the majority (78.9%) underspending on their budget in 2016.

4. How are your winter maintenance services currently delivered?



Answer options	2016 Number (%)	2014 Number (%)	2012 Number (%)	2011 Number (%)	2010 Number (%)	2009 Number (%)
In-house (combined service)	34 (73.9%)	25 (59.5%)	10 (50.0%)	34 (82.9%)	35 (72.9%)	26 (61.9%)
In-house (client/contractor split)	5 (10.9%)	11 (26.2%)	4 (20.0%)	3 (7.3%)	8 (16.7%)	11 (26.2%)
Externally provided	4 (8.7%)	5 (11.9%)	5 (25.0%)	3 (7.3%)	4 (8.3%)	4 (9.5%)
Arms length organisation	2 (4.3%)	1 (2.4%)	0 (0.0%)	1 (2.4%)	0 (0.0%)	0 (0.0%)
Joint venture company	0 (0.0%)	0 (0.0%)	1 (5.0%)	0 (0.0%)	1 (2.1%)	1 (2.4%)
In-house but with some elements run by external contracts	1 (2.2%)	New answer option for 2016's survey				
Total	46	42	20	41	48	42

The majority of respondents to the survey reported that their service is delivered in-house (87.0%) with most of these being combined services (with a 15.3% drop in those with a client/contractor split since the last survey). Otherwise, this sample shows minor changes with externally provided services continuing its downward trend since 2012's peak figure and an additional Council reporting the use of an 'arms length organisation' since 2014's survey. Comments to this question included that while their service is "99% in-house", they have "access to a specialist sub contract or framework contract in snow conditions"; another authority reported having a "gritting contractor to spread salt [and a] consultant for decision making".

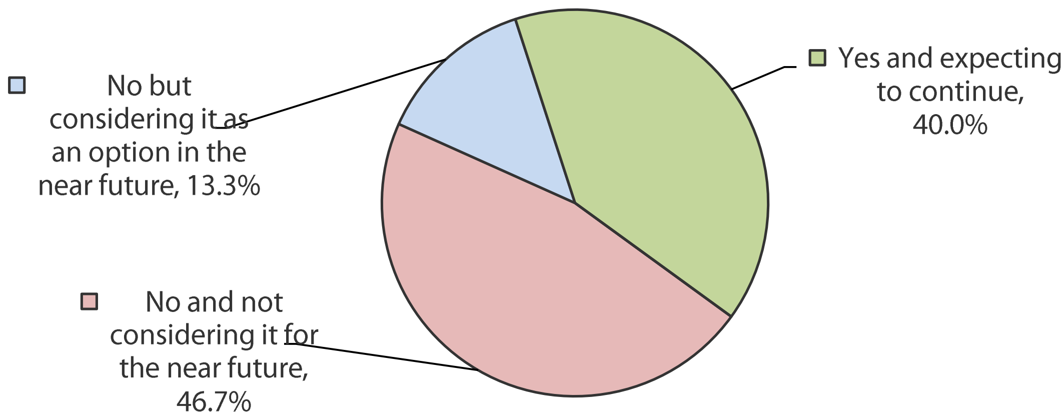
5. Do you expect the service to remain in-house over the next 12 months?

The majority of respondents whose service is currently provided in-house expected this to remain the same over the next 12 months. 1 respondent will be retendering their winter service for October 2016.

6. Do you have a dedicated training budget for winter maintenance? If so, what has happened to it over the past 12 months?

Of the 40 respondents, 26 have no dedicated training budget for winter maintenance; several respondents noted that this was contained within their overall winter budget and that "winter training comes out of the main pot if required". Of the 14 Councils that do have a dedicated budget for training, 13 stated that this has 'stayed the same' and 1 stated that this has 'increased'.

7. Do you currently sell your services to organisations external to the Council?



Answer options	2016 Number (%)	2014 Number (%)	2012 Number (%)	2011 Number (%)	2010 Number (%)	2009 Number (%)	% change 09-16
No and not considering for the near future	21 (46.7%)	25 (61.0%)	10 (50.0%)	18 (53.0%)	33 (72.0%)	26 (65.0%)	- 18.3%
No, considering as option in near future	6 (13.3%)	8 (20.0%)	4 (20.0%)	8 (24.5%)	1 (2.0%)	2 (5.0%)	+ 8.3%
No, likely to start doing it in the near future	0 (0.0%)	0 (0.0%)	1 (5.0%)	0 (0.0%)	0 (0.0%)	1 (2.5%)	- 2.5%
Yes and expecting to continue	18 (40.0%)	7 (17.0%)	5 (25.0%)	8 (24.5%)	11 (24.0%)	9 (22.5%)	+ 17.5%
Yes, not expecting to	0 (0.0%)	1 (2.0%)	0 (0.0%)	0 (0.0%)	1 (2.0%)	2 (5.0%)	- 5.0%

continue long term							
Total	45	41	20	34	46	40	

The answers to this question highlight an almost even split between those not selling their services and not considering for the near future (21 – 46.7%) and those that do sell their services and expect to continue (18 – 40.0%). Those that are providing that service provide salt and gritting for schools, hospitals, bus stations and shopping centre car parks, with others operating trunk road salting alongside private salting arrangements and gritting on behalf of a large housing developer. Of those considering selling their services in the near future (6 – 13.3%), one respondent noted that the only challenge they currently face is a lack of resources.

For the Councils above experiencing budget cuts and expecting more to come, the option to sell services to make up for shortfalls is an enticing proposition, but it is vital to ensure that this does not come at the expense of delivering your own services, and that you have the appropriate capacity and resources in place to enter the marketplace. APSE recently started a local authority commercialisation, income and trading network that may be of interest if you are considering a more commercialised future for your department.

8. Where do you see growth areas over the next 12 months?

Obviously there will be differing opinions in relation to growth areas for Councils which are dependent upon local priorities and opportunities. Many respondents noted that they felt there were no growth areas available for their service, and one person stated that "budget saving requirements will require [their] council to review the level of service provided". Those that felt there were growth areas included the following:

- Footway treatments (particularly cycleways) and increases in the salting network – tying into healthy living priorities for Councils
- Route optimisation of gritting
- Commercial work in general
- Alternative de-icers (e.g. liquid de-icers)
- Improved forecasting

9. Where do you see areas where work may decrease over the next 12 months?

Again, there were many differing responses to this question on areas of decrease, with around half of respondents noting that they did not anticipate any decreases in work over the next 12 months. Those that did anticipate decreases identified the following potential changes:

- Reducing footway treatments
- Reducing coverage in primary and secondary routes (either as a result of budget constraints or as part of a review process to prioritise service delivery)
- Reducing resilient networks
- Reduction in grit bins

- Private sales
- All areas of winter service delivery

10. Have the orders you placed for salt to cover winter maintenance over 2015-16 been met by your suppliers?

Answer options	2016 Number (%)	2014 Number (%)	2012 Number (%)	2011 Number (%)	2010 Number (%)	2009 Number (%)	% change 09-16
Orders met in full	38 (100.0%)	36 (95.0%)	18 (90.0%)	11 (31.0%)	8 (19.0%)	15 (41.0%)	+ 59.0%
Order partially met with our full knowledge of shortfall	0 (0.0%)	0 (0.0%)	0 (0.0%)	12 (33.0%)	7 (17.0%)	17 (46.0%)	- 46.0%
Order partially met without our full knowledge of shortfall	0 (0.0%)	0 (0.0%)	1 (5.0%)	2 (6.0%)	6 (14.0%)	1 (3.0%)	- 3.0%
Significantly less delivered than ordered without our full knowledge of shortfall	0 (0.0%)	1 (3.0%)	1 (5.0%)	5 (14.9%)	13 (31.0%)	3 (8.0%)	- 8.0%
Total	38	38	20	36	42	37	

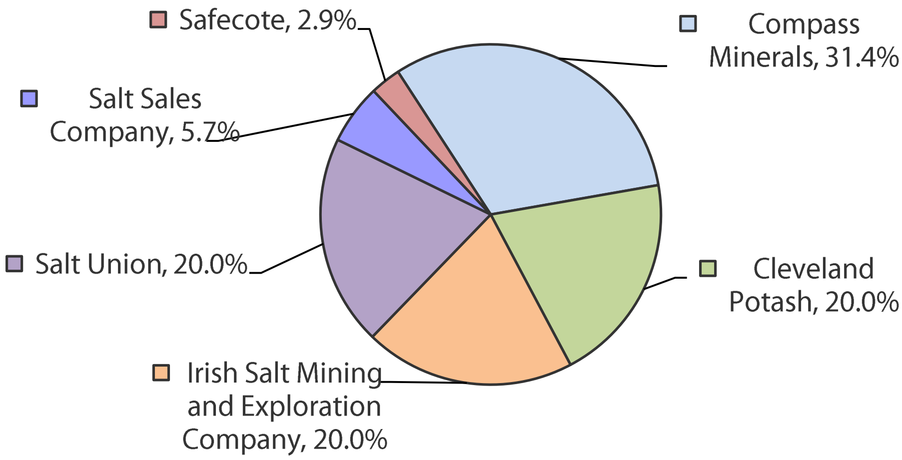
The proportion of councils who have had shortfalls in salt orders has fallen dramatically since the difficulties identified in the surveys between 2009 and 2011, with 100% of orders met in full this year, so it appears that suppliers are improving the provision of salt.

The majority of respondents reported that they have increased their salt stocks over recent years as a result of the severe weather (with some reporting storing as much as double the previous amounts) and generally being prepared for winter than has previously been the case.

11. How do you purchase salt supplies (jointly with other authorities, via Highways Agency, independently, via consortium such as YPO or other)?

12 of the 38 responding Councils reported purchasing their salt independently whilst the remainder purchase it jointly with other authorities or through consortia which include Scotland Excel, YPO, NPS, AGMA, ESPO, Midlands Highways Alliance. 1 council has their salt provided by their contractor.

12. Which company supplies your salt?



Of the 35 responses to this question, 11 were supplied by Compass Minerals, 7 by Cleveland Potash, 7 by Irish Salt Mining Company, 7 by Salt Union, 2 by Salt Sales Company and 1 by Safecote.

13. Do you have any suggestions for how councils or suppliers can act to avoid salt shortages in times of very bad weather in future?

Responses to this question included:

- Better planning and stock control (e.g. one local authority has a policy of maintaining salt levels at 1.5 times the 6 yearly average)
- Adequate storage facilities to store increased reserve stocks (e.g. using dry storage so salt can be delivered in the summer)
- Have a salt resilience plan in place
- Improved collaboration and liaise with adjacent authorities
- Using less salt through better calibration of vehicles

14. With regard to your road network, which of the following are salted?

The majority of the 38 respondents to this question stated that they salted all primary routes and some extra routes, whilst 3 respondents salted 'some primary routes and some other routes', 'some primary routes by region dependent on weather' and 'some primary routes by region based on geographical domains'.

15. Do you salt footways?

Answer options	2016 Number

	(%)
Yes, as a precautionary measure following forecast	13 (34.2%)
Yes, after ice has formed	17 (44.7%)
No, we do not salt footways	8 (21.1%)
Total	38

Of the 38 respondents, the majority (30 – 78.9%) do salt footways, but this is split between those that do this as a precautionary measure following forecast (13 – 34.2%) and those that do so after ice has formed (17 – 44.7%).

The salting of footways has become a higher profile issue over the past few years and has led the Met Office/Department for Transport to issue 'The Snow Code' offering best practice for residents on clearing footpaths and to many local authorities to put snow warden schemes in place.

16. If you do salt footways, approximately what percentage of the footway network do you salt? Which areas do you salt?

8 respondents stated that they salt less than 5% of footways, 5 salt between 5 and 10%, 4 salt between 10% and 20% and 1 respondent salt more than 20% of the network.

When asked which facilities are salted, responses included town/city centre streets (76.7%), shopping centres (70.0%), 'Council premises such as town halls, offices and leisure centres' (33.3%), 'police stations, medical centres and hospitals' (26.7%). Other responses included: safe routes to schools, outside school buildings and pedestrian routes serving public transport hubs. Some authorities noted that they either only salt footways on a reactive basis or in response to specific requests only.

17. Do you have a snow warden scheme in place?

Answer options	2016 Number (%)
Yes	10 (27.0%)
No	26 (70.3%)
We are planning to establish a scheme in the near future	1 (2.7%)
Total	37

10 of the 37 respondents to this question currently have a snow warden scheme in place, with a further 1 planning to establish a scheme in the near future. There are mixed opinions on the value and necessity of snow wardens, which are covered in the comments from respondents below:

- the authority have set up a 'Snow Champion' scheme where individuals are trained to grit outside their immediate property
- the authority have a weather controller on standby throughout the winter on a rota basis
- they have Parish Council grit bins supported by the authority

- the authority has a few Town Councils which operate Snow Warden Schemes
- the authority has not taken up snow wardens due to the very limited effect they believe this would have on the ground

18. What changes did you make to service arrangements as a result of poor weather over the last 4 years?

There were many differing responses to this question, but all showed that local authorities are attempting to improve their resilience to poor and unexpected weather conditions:

- Increased salt stock
- Increased forecasts
- Treatment decisions posted on website
- Put any budget underspend into a contingency budget for future use during severe weather
- Introduced more regular service reviews
- Reviewed rates of spread
- Route optimisation and prioritisation during extreme conditions
- Hired additional vehicles and improved fleet (e.g. quad bikes with towed spreaders)
- Requested assistance from other Council services
- Worked with adjoining authorities on a common winter policy and resilience

19. Has the severe weather over the recent years led to any of the following (you may answer more than one)?

Answer options	2016 Number (%)	2014 Number (%)	2012 Number (%)	2011 Number (%)	2010 Number (%)	% change 10-16
Increase in legal claims for slips, trips and falls	7 (19.4%)	8 (19.0%)	11 (55.0%)	23 (67.6%)	35 (92.1%)	- 72.7%
Review of gritting / salt routes	27 (75.0%)	32 (76.0%)	13 (65.0%)	28 (82.4%)	29 (76.3%)	- 1.3%
Review of clearing / gritting pavements outside schools / key public buildings / civic centres / residential homes	13 (36.1%)	23 (55.0%)	14 (70.0%)	30 (88.2%)	27 (71.1%)	- 35.0%
Review of clearing / gritting pavements outside of shops and in town centres	12 (33.3%)	21 (50.0%)	13 (65.0%)	26 (76.5%)	28 (73.7%)	- 40.4%
Encouragement of others to help clear snow e.g. local people, parish councils, farmers, others	24 (66.7%)	28 (67.0%)	18 (90.0%)	27 (79.4%)	N/A	- 12.7% (from 2011-2016)

The reduction in the percentage of authorities reporting ‘increased legal claims for slips, trips and falls’ has remained low in comparison to the results from 2010 to 2012’s surveys. The reviews of clearing/gritting pavements outside public buildings, shops and in town centres have fallen quite noticeably, but this is likely due to the fact that these reviews have already taken place after the periods which had the most extreme weather conditions.

One comment on the ‘encouragement of others to help clear snow’ that offers some food for thought noted that while a number of parish councils in their area have been proactive in wanting to help locally (and they have helped them to put arrangements in place), it was important to make sure both parties are legally and contractually protected.

Conclusions

The survey covers a range of questions and provides a lot of information, with many diverging opinions and strategies on the future of winter maintenance service delivery. There have been a lot of changes to the winter maintenance services in local authorities over recent years, with many trying to utilise their budget underspend gained from the temporary reprieve of a milder than expected winter. The common theme emerging from the results of this survey is the focus on building resilience: through increasing stocks, through better stock utilisation, through the reviews of service provision, through the establishment of a commercial arm to minimise the effects of dwindling budgets, and through the building of relationships and agreements with adjacent authorities.

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
- Local authorities commercialisation, income and trading network
- 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