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Cover photo

by Mark Harvey,
Cleveland, Ohio



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Lawn & Landscape's survey of contractors providing irrigation found that landscaping isn't the only growing business.

40 Fertilization: It's for Contractors Too

Fertilization systems have long been valued for agriculture and sports turf arenas, and are now options for contractors as well.

44 Healthy Soils Make for Healthy Plants

Fertilizers and pesticides are certainly important products for producing a healthy turfstand, but contractors shouldn't overlook other keys like oxygen.

52 Cashing in on Cutting Crews

Contractors increase their profits when they take the right steps managing their mowing jobs.

76 Par for the Course

Drought conditions certainly cause problems, but the rains of this spring meant intense weed, disease and insect problems for many parts of the country.



84 Defensive Designing

Creating a feeling of safety in a customer's landscape can be done without compromising its appearance.

96 Motivating Your Service Staff

Facing an increasingly competitive environment and challenging labor market, attendees at the second Lawn & Landscape School of Management were interested in motivating the people doing the work for them.

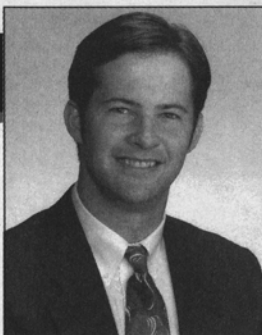
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At first glance, it's nothing but jumbled numbers, but to the discerning eye the income statement can be the road map to profitability.

104 Trucks for Contractors

While truck fleets differ greatly between big and small companies, the key concepts for acquiring vehicles and maintaining an efficient fleet are still the same no matter how big or small the company is.





Bob West
Editor

EDITORIAL

Cindy Code Group Publisher
e-mail: ccode@gie.net

Bob West Editor
e-mail: bwest@gie.net

Nicole Wisniewski Assistant Editor
e-mail: wisniewski@gie.net

GRAPHICS/PRODUCTION

Mark Rook Creative Director
Charlotte Turcotte Art Director
Helen Duerr Production Manager
Lori Skala Advertising Production Coordinator

ADVERTISING/MARKETING

Maureen Mertz Eastern Sales Manager
1723 South Hill
Milford, Michigan 48381
248/685-2065
Fax: 248/685-2136
e-mail: mmertz@flash.net

Kevin Gilbride Account Manager, Midwest
e-mail: kgilbride@gie.net

Vincent Ricci Account Manager,
e-mail: vricci@gie.net West Coast

Carl Hammer Account Manager, Northeast
e-mail: chammer@gie.net

Susan Lopriore Market Coordinator

INTERNET

Bill Cox Webmaster
e-mail: bcox@gie.net

Carolyn Antl Internet Editor
e-mail: cantl@gie.net

CORPORATE STAFF

Richard J. W. Foster President and CEO
Cindy Code Group Publisher
Christopher W. Foster Director, MIS Department & Internet Communications
Jami Childs Director, Business Resources and Operational Systems
Jeff Fenner Director, Conferences and Seminars
Cheryl Thomas Manager, Accounting
Fran Franzak Manager, Books & Directories
Pam Morales Manager, Circulation

EDITORIAL & SALES OFFICES

4012 Bridge Avenue, Cleveland, Ohio 44113
Phone: 216/961-4130
Fax: 216/961-0364
Internet: <http://www.lawnandlandscape.com>
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"Two roads
diverged in a wood,
and I – I took the
one less traveled
by, and that has
made all the
difference."

— Robert Frost

Well, you can call the green industry a lot of things in 1998, but not boring.

The year started off simply enough with contractors riding the wave of success that has propelled the industry to new heights in the last few years.

Then came February and two announcements in one weekend – the formation of LandCare USA and TruGreen-ChemLawn's new foray into landscape maintenance. Soon after, the industry learned that The Brickman Group also had aggressive expansion plans, and contractors suddenly found themselves at the industry's first mergers and acquisitions institute.

In the spring and early summer, many of the contractors we talked to professed a concern for their futures in this new world with national companies and wondered how they would compete. Many companies still have this concern now as the year winds down, but many others have come to realize they know exactly how they will compete – and they plan on continuing to succeed as well.

The answer for these companies is knowing who they are as a company and doing what they do best. The fact that some other organization acquires two dozen companies to offer more services to different markets doesn't mean other companies have to. In fact, the best strategy may be to go the opposite route – pare down the services you offer and focus on the work that you do best, the work that is most profitable for your company.

As of press time, the three aforementioned companies had acquired approximately \$345 million in landscape revenues. But what many contractors have come to appreciate this year is the very important distinction between sales and profits.

Now that's not to say these consolidating companies will or won't be profitable – that remains to be seen. What's important for the rest of the industry to remember, though, is that there are companies selling \$500,000 in business a year that end the year with more profit than some companies selling \$5 million in business a year.

How can they do this? Simple: let go of contracts that are too time consuming, require too much driving to get to and just aren't as profitable as other jobs. Some companies can let enough of these jobs go that the labor shortage is no longer a problem either, and financing new equipment purchases isn't as difficult. Sounds pretty good, doesn't it?

Of course, going this route is no guarantee for increased profits, and it's natural to want to build the biggest and best company. But biggest and best don't always go hand in hand.

Bob West

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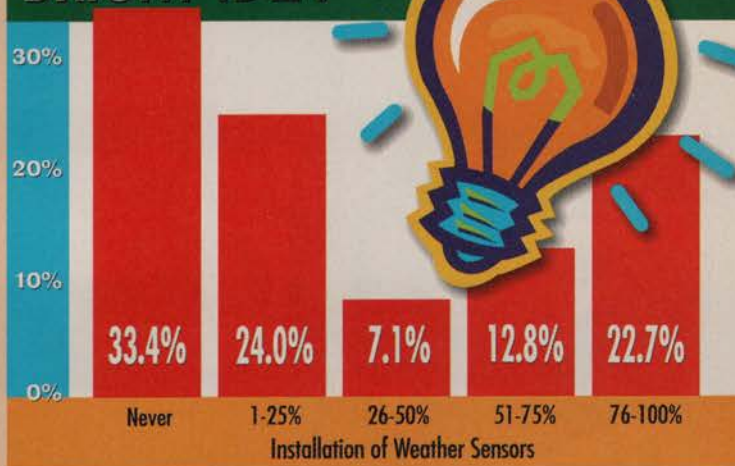
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The landscape contractors providing irrigation services appear to be much more interested in weather sensors than irrigation contractors, with 52.4 percent of irrigation contractors never using weather sensors, compared to 25.3 percent of landscape contractors.

BRIGHT IDEA



(Source: Lawn & Landscape Reader Survey)

RUPPERT OFFERS INSIGHT INTO FUTURE

ASHTON, Md. — As the announcements continued to flow from LandCare USA, The Brickman Group and TruGreen-ChemLawn, speculation grew as to what path Ruppert Landscape Co. would take in the industry to maintain its leadership position.

Rumors had the company



Craig Ruppert

close to deals with a couple of different contractors or perhaps a financial institution.

In the end, Craig Ruppert and his managers decided to sell the \$45-million company, and TruGreen-ChemLawn landed one of the industry's largest operations.

"We began examining the situation back in January, and we felt we had three options," recalled Ruppert. "We could stay the course, continuing to be a privately held company and maybe be a little more aggressive pursuing acquisitions; we could also take on a financial partner by selling a portion of the ownership in the business to acquire additional capital; or we could enter into a strategic merger."

While Ruppert acknowledged that the com-

pany had conversations with a number of different groups, two factors ultimately led it to TruGreen-ChemLawn.

"Financially, TruGreen-ChemLawn has a very strong base," Ruppert noted. "In addition, this represents an opportunity for us to join an organization where there is room for us to play a significant role in the management of this exciting, new venture."

Ruppert said another part of the decision-making process was his belief that such a move would have to be made at some point.

"We think we could've competed for at least another five years, but eventually we would have faced the same

type of pressure to do what we're doing," he predicted.

Ruppert will serve as a senior vice president for TruGreen-ChemLawn and will be responsible for its new landscape management division.

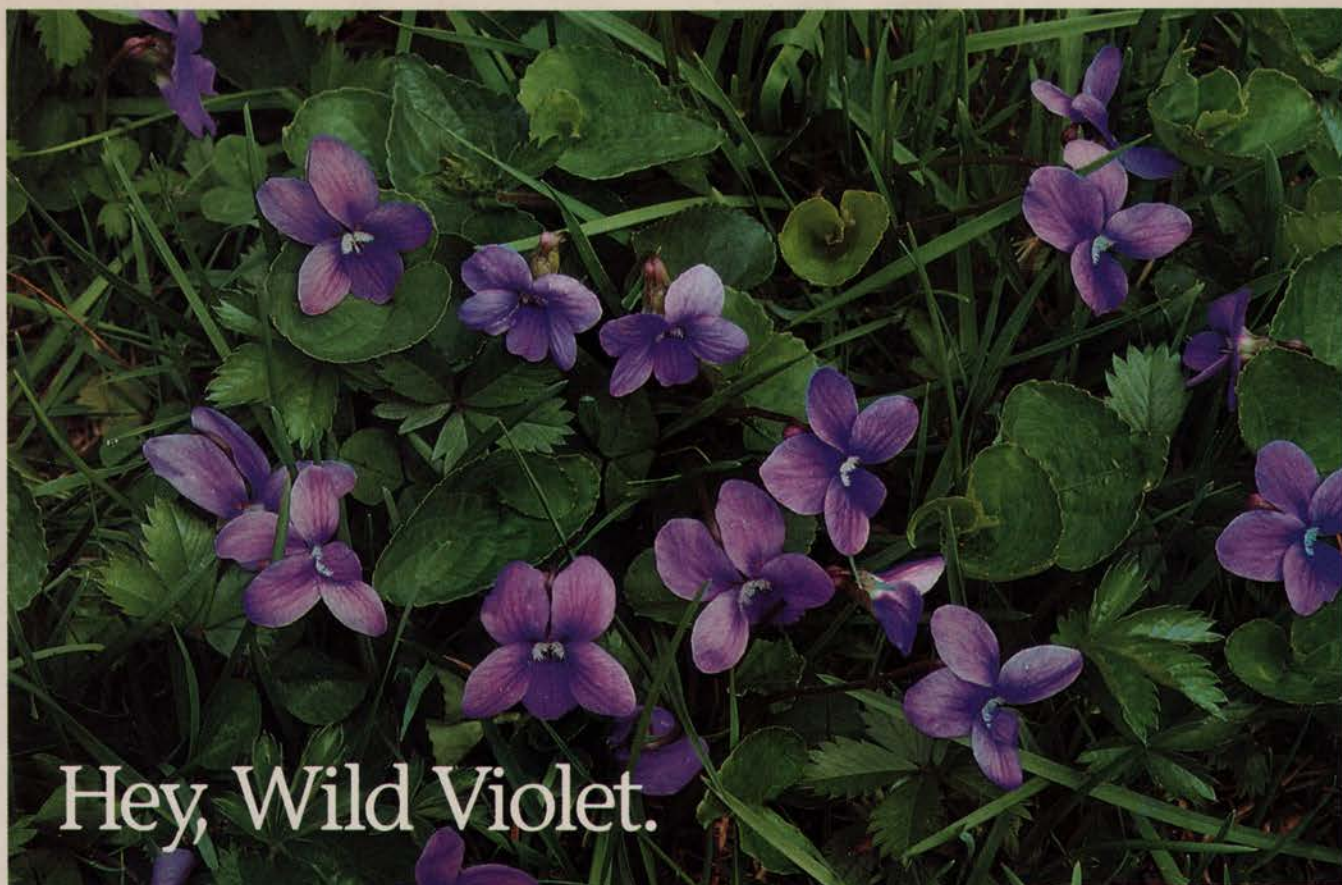
Other opportunities should be present for many other Ruppert employees. "Our employees are genuinely excited about the opportunities our combined resources will bring to them as well as to our customers.

"Time will tell whether or not

this is good for the industry," he noted. "The reality is that it will be the customers and employees who decide based on whether or not it is good for them."

(continued on page 8)

'We think we could've competed for at least another five years, but eventually we would have faced the same type of pressure.' — Ruppert



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MARKET TRENDS

(continued from page 6)

DAVEY TREE MAKES ACQUISITIONS

KENT, OHIO – The Davey Tree Expert Company announced the acquisition of two Tampa, Fla.-based landscape maintenance operations: Raintree Landscape Services Inc., and Prolawn.

"We are actively growing our grounds maintenance business, and these acquisitions mark our entrée into another market area," noted George Gaumer, national sales and operations manager for the commercial service line at Davey Tree.

Gaumer also noted that only Prolawn's commercial

(continued on page 8)

PEOPLE

Bayer Corporation's Agriculture Division announced the following employee transitions and promotions: **Trevor Thorley** to senior vice president, sales and marketing, in the company's crop protection business group; **Rich Burns** to director, Garden and Professional Care sales and marketing; **Michael Ruizzo** to central area sales manager, GPC professional sales and marketing; **Jorge Moreno** to marketing product specialist, GPC professional sales and marketing and Byron Reid to research product manager for the Bayer GPC pest control market.

John Rector joined Turf-Seed as national sales manager/agronomist.

Weather-matic and Telsco Industries named **Michael Mason** president and chief executive officer, succeeding **L.O. Snoddy**, who became chairman of the board. In addition, Weathermatic announced the following moves: **Brodie Bruner** to sales and marketing manager; **Lloyd Darling** to plant operations manager; **Matthew Piper** to product and service manager.

Swingle Tree Co. appointed **Tom Tolkacz** president and **Dave Dickson** as chairman/chief executive officer.

Ball Seed added **Matthew Freeman** and **Coy Butner** to its sales force. Freeman is the sales representative for the central and northern Illinois territory and Butner is the sales representative for the Midwest territory, including northern and western Iowa, eastern Nebraska and northwestern Missouri.



John Rector



Rich Burns

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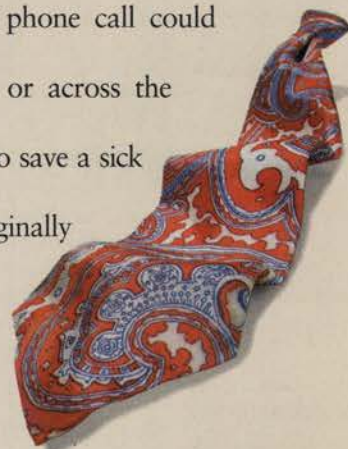
nation. Allowing you to save a sick

day for what it was originally

intended. You know,

like a baseball game

or something.



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MARKET TRENDS

(continued from page 8)

grounds maintenance business has been acquired, and it was combined with Raintree's operations to represent the Tampa commercial branch of Davey's U.S. commercial services division. "With our expertise in tree care, we can now offer total one-stop shopping to our clients in this area," he explained. Fill this out thanks

LA's ENJOY SALARY BOOSTS

WASHINGTON, D.C. — It pays to design landscapes and, apparently it pays better than it does to design buildings, according to a survey published

CALENDAR

To ensure that your meeting date is published, send an announcement at least 10 to 12 weeks in advance to *Lawn & Landscape*, 4012 Bridge Ave., Cleveland, OH 44113.

OCT. 20-22 Landscape Design Short Course for Residential Properties, Course IV — Design Detailing, Hudson, Ohio. Contact: 440/717-0002.

OCT. 25-28 National Institute on Park and Grounds Management Educational Conference, Las Vegas. Contact: 920/733-2301.

OCT. 29-30 WALP Conference and WALP Environmental Awards Banquet, Bellevue, Wash. Contact: 800/833-2186.

NOV. 1-3 International Irrigation Expo, San Diego. Contact: 703/573-3551.

NOV. 1-5 North Carolina State University Supervisor's Management School, Wheeling, W.Va. Contact: 919/515-2261.

NOV. 3-5 New England Regional Turfgrass Conference, Providence, R.I. Contact: 401/848-0004.

NOV. 4-6 Eastern Regional Nurserymen's Association trade show, Atlantic City. Contact: 800/376-2463.

NOV. 5-7 Tree Care Industry Expo., Baltimore. Contact: 800/733-2622.

NOV. 6-7 Florida Certified Landscape Contractor and Technician Exam, Orlando, Fla. Contact: 800/375-3642.

NOV. 13-17 Professional Lawn Care Association of America, Associated Landscape Contractors Association and Professional Grounds Management Society's Gree Industry Expo, Nashville, Tenn. Contact: 800/458-3466.

DEC. 7-10 Ohio Turfgrass Foundation Conference and Trade Show, Columbus. Contact: 614/760-5442.

DEC. 8-10 Georgia Turfgrass Conference, Atlanta. Contact: 770/975-4123.

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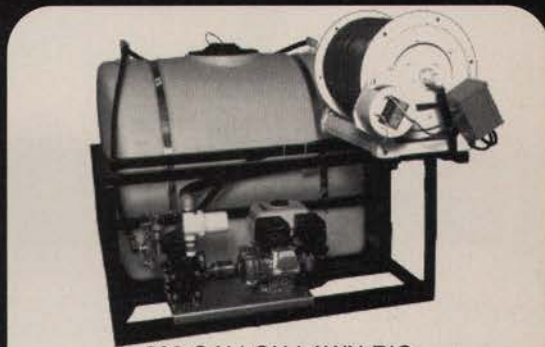
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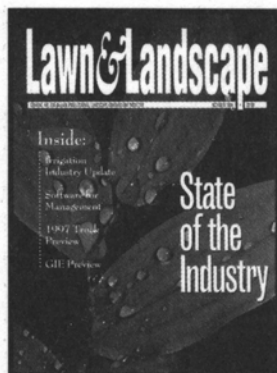
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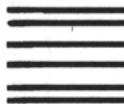
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MARKET TRENDS

by the American Society of Landscape Architects.

The ASLA survey data, when compared to information gathered in a survey by the American Institute of Architects and adjusted to compensate for the 10-month difference in time between the issuing of the two surveys, found that landscape architects reported a higher annual income than their counterparts by about \$6,000.

Specifically, respondents to the ASLA survey reported an average annual salary of \$52,886 with an average of 15.9 years of experience. This salary level represents a 6 percent improvement when compared to the ASLA's salary survey of 1981 when the 1981 figures are adjusted to current day dollars, which is in contrast with the 1994 survey that showed salaries at that

point below the adjusted 1981 level.

The news is also good for new landscape architects, as nearly 20 percent of respondents indicated they are looking to hire additional landscape architects. New hires will receive average offers from the private sector of \$22,775 and \$25,730 from the public sector. The compensation advantage for private sector employees kicks in after 10 years employment in the industry.

The Pacific region continues to lead for highest salaries, followed by the Southeast. The survey also found that freelance income for landscape architects has fallen from an average of \$7,000 in 1988 to \$5,000 in 1997, which may be attributable to employers' concerns about liability exposure for employees' freelancing work.

(continued on page 16)

ASSOCIATION NEWS

The American Nursery and Landscape Association announced a new executive forum-style convention format beginning in the year 2000 in Vancouver, British Columbia. The new program will offer an owner-focused program, a variety of formal and informal networking opportunities, programming for the whole family and speakers that will discuss strategic, big-picture information in a creative learning format.

The Irrigation Association voted during its summer board meeting to take a proactive stance against water shortages caused by population growth and catastrophic weather by organizing a Water Summit to be held in 1999. The meeting is designed to gain the attention of federal and state regulators about the importance of advanced irrigation technology as part of urban and agricultural water management.

The American Society of Landscape Architects announced plans for its 1999 centennial celebration. They will include a volunteer project renovating 100 green spaces for community life, a program recognizing well-known landscape designs, a commemorative postal stamp honoring Frederick Law Olmsted and an issue summit at ASLA's 1999 annual meeting in Boston that will examine the direction landscape architecture should take for the next century.

The American Landscape Contractor Association announced that Michael Gerber, author of "The E-Myth," will be the speaker at the 1999 Executive Forum, Feb. 20-24, in Rancho Mirage, Calif. The forum is aimed at enhancing the leadership, management and financial skills of company leaders.

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MARKET TRENDS

(continued from page 13)

PURSELL INDUSTRIES ACQUIRES IMC VIGORO

SYLACAUGA, ALA. — Pursell Industries acquired IMC Vigoro from IMC Global, Chicago, Ill. IMC Vigoro had 1997 sales of \$100.6 million from the sale of various fertilizer and soil additive products as well as some ice melter products to the professional and consumer markets.

Pursell will continue to manufacture and market Vigoro products under the Vigoro name and also acquired four IMC Vigoro production facilities in the deal, according to Taylor Pursell, CEO of Pursell Industries. **LL**

LETTERS TO THE EDITOR

Congratulations for being awarded the 1998 Editorial Excellence Award from Folio. L&L always stood out from the crowd of green industry magazines, which are often simply vehicles for supplier ads. It is quite refreshing to see your work get the recognition it deserves. L&L is the best national publication for the lawn care and landscape segments of the green industry.

Ron Gagne
Regal Chemical Co.

Congratulations to Lawn & Landscape on winning a Folio Editorial Excellence Award. It certainly speaks highly of your publication and organization.

Elizabeth Shake
SRDS

Being recognized by your peers is a great compliment and well deserved. Nice job!

Tom Tolkaez
Swingle Tree & Landscape Care

Congratulations on receiving the Folio Editorial Excellence Award! That puts you in some very select company, and is certainly well deserved. No matter how busy I get, I always find the time to read L&L.

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IRRIGATION NOTEBOOK

IRRIGATION DISTRIBUTORS PREPARE TO BATTLE NEW FOES

IT'S A TREND that different companies say they've seen coming for roughly a decade, and it's clearly here.

The nature of irrigation distribution is experiencing what many believe is just the beginning in a structural overhaul that will yield fewer companies serving larger portions of the market. That alone doesn't sound any different than the end result of consolidation in any industry. But what makes the irrigation distribution industry unique among consolidating groups is the evolving presence of the mass merchandisers, chains such as Home Depot and Lowe's Home Improvement Warehouse, and the unknown impact they will have on the distribution chain.

"I think the mass merchandisers' presence in irrigation distribution is pretty significant right now, and it's a trend we saw coming about 10 years ago," noted Mark Agnew, president, United Green Mark, Novato, Calif.

In particular, Agnew be-

lieves the smaller irrigation contractors are the mass merchandisers' primary irrigation customers right now. "I'm in a mass merchandiser's store at least once a week, and they definitely have breadth of product going for them," he recognized. "The other thing working in their favor is their number of locations and the convenience that can offer a contractor. But while a lot of contractors may be buying product from the mass merchandiser, I don't think they're buying a lot of product from them — their market presence hasn't translated into market penetration thus far."

Wayne Miller, president of Century Rain Aid, Madison Heights, Mich., agreed with Agnew, and said mass merchandisers can, in fact, have a positive effect on distributors' businesses. "I think there are a lot of other businesses such as plumbing and electrical that represent bigger opportunities for the mass merchandisers," he said. "What irrigation cus-

(continued on page 20)



While contractors may be able to purchase the same irrigation products from mass merchandisers, irrigation distributors offer far superior training and advice. Photo: Century Rain Aid

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IRRIGATION NOTEBOOK

(continued from page 18)

tomers they do get are primarily homeowners, do-it-yourselfers and smaller contractors, which can let distributors focus more on the larger contractors."

As a result, Agnew explained that United Green Mark has shifted its customer focus to some degree. "We've tried to slide up the food chain to work with the larger contractors on the larger jobs," he noted.

Where distributors' real challenge will lie in the future is in being able to offer the breadth of services that led to their success in the first place.

"Our service, automated billing, technical advice and so on are what will continue to differentiate us from the mass

merchandiser," pointed out Miller, whose company now has 88 locations.

"We've recently added product managers to our organization and we may add customer segment managers to specialize in different groups of customers," added Agnew, who noted that United Green Mark now has 27 stores.

But both Agnew and Miller recognized that some distributors may be unable to add these services and be able to compete against larger distributors such as their companies and mass merchandisers at the same time.

"Margin dollars have gone

down for everyone for two reasons," Miller explained. "Product prices are dropping as there's more competition among manufacturers and dis-

margin percents down as well.

"As a result, additional services such as job lead tracking for contractors tend to be dropped," he continued.

"There are some markets where there is a premium charged to the contractor for products where the smaller distributor isn't necessarily adding any significant value to the transaction," added Agnew.

"So whether I or Home Depot or

whomever enters that market, that distributor will have to make some changes in terms of their prices." — Bob West

'While a lot of contractors may be buying product from the mass merchandiser, I don't think they are buying a lot of product from them.' — Agnew

tributors, so even if margin percents were constant the dollars would be down. But the competition has driven

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New 6

This option is made of a piece for (48- and 11-gauge a 1- to 5- adjusts w the driven

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Read more about this amazing new machine on the following pages. Then see your dealer for a demonstration. For more information, call **1-800-537-8233**. Or visit us on-line at **www.deere.com**

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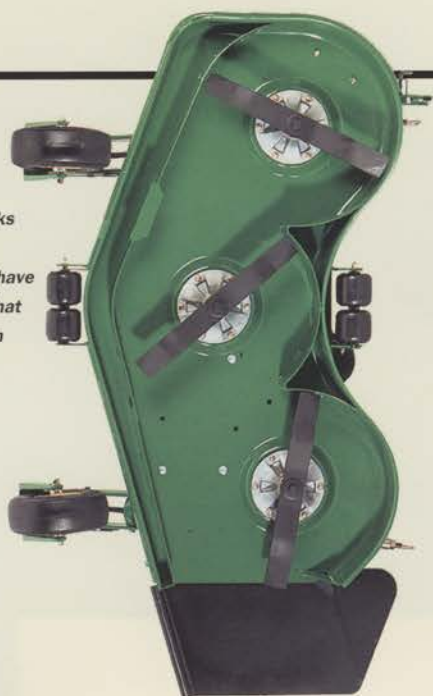
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60-inch deck

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ASK THE DROUGHTBUSTERS

Droughtbusters is a question and answer column provided as a service to the landscape industry by the Irrigation Association and Lawn & Landscape magazine. Please fax your questions to Droughtbusters at 800/455-4320 or e-mail them to irricom1@earthlink.net. Your answer will appear in the next issue (space providing).

Q How can I quickly troubleshoot for uniformity problems without doing a full irrigation audit? What can I achieve by changing nozzles?

A If you are hired to repair an irrigation system that you didn't install and haven't maintained, an audit is a good idea. Nothing is as accurate as catch-can measurements and running the data through an auditing or spacing program. Of course, what can you realistically change based on the information from an audit? There are certain items you can correct any problems or inefficiencies quickly.

For the answer, we asked Dr. Ed Norum with the Center for Irrigation Technology at California State University, Fresno, Calif. CIT does much of the uniformity testing for manufacturers and has also developed Hyperspace, a computer program that diagnoses uniformity problems.

GOT A MATCH? Manufacturers offer nozzle sets for their sprinklers so contractors can provide "matched precipitation," according to Norum. The purpose of these changeable nozzles is to provide the same application rate whether a head is full or part circle. "For example, if your full-circle heads have an 8-gpm nozzle, then the half-circle heads should have a 4-gpm nozzle and quarter-heads should have a 2-gpm nozzle," advised Norum. "This logic is sound, except when it comes to distance of throw. The smaller nozzles will not provide the same throw and, therefore, your spacing of part-circle heads will be off."

Since contractors are probably not going to change the spacing of part-circle heads right away, Norum suggested using a nozzle one size larger than matched precipitation would specify for part-circle heads. He also recommended using one nozzle size higher for heads on the upwind side of an irrigated site. "Upwind sides can dry out faster and often need 10 percent to 20 percent more water," he added.

The remainder of the full-circle heads should all have exactly the same nozzle. Because manufacturers can have different nozzle sets, it is always wise to use the same brand and model of sprinkler heads on turf areas. That way you know you have the correct nozzle.

The whole logic behind matched precipitation is to eliminate the need to mask bad uniformity with longer runtimes. "Our research has shown that poor uniformity is usually discovered around part-circle heads and on upwind sides of turf areas," Norum remarked. "Many of these problems can be resolved by changing nozzles."

Another key to efficiency can be selecting the appropriate heads on large turf areas, which usually employ multiple zones. For greatest uniformity, Norum recommended that zones should have close to the same number of matching sprinkler heads so that pressure and flow characteristics will match up.

Adjustable heads offer ways to change the breakup of the stream and the range of rotation. If range of rotation is reduced significantly, contractors may need to change the nozzle for matched precipitation. The purpose of changing the breakup is to divert water closer or farther from the head. This helps part-circle heads apply more water closer to the head where it is frequently needed. **ILL**

Droughtbusters is written by Irricom, the communications arm of the Irrigation Association. For more information on the Irrigation Association, call 703/573-3551 or visit its website at www.irrigation.org.

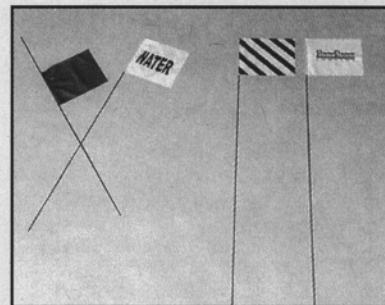


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*As the basics of irrigation
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business that is ultimately
threatened the most.*



By Bruce F. Shank

While landscape contractors have enjoyed a vigorous surge in construction during 1998, irrigation supply has been adapting to changing dynamics in manufacturing and distribution. Contractors, focused on abundant work and hiring qualified employees, might have overlooked the rumbling within the distribution network.

We don't know how the competitive battle between bona fide irrigation distributors and mass merchandisers will end, but these changes are expected to impact contractors in future years. However, a study by the Farnsworth Group for the Weather-matic Division of Telsco Industries provides insight. Contractors are benefiting from prices suppressed by competition between retail mass merchandisers and irrigation distributors fighting over market share. The downside is that short-term price advantages could be offset by the cost of technical services which were once free to customers from irrigation distributors and will only become more important as water restrictions continue to develop.

Ec
Ch

Keeping Up With Economic Changes

While contractors may be able to purchase the same irrigation products from mass merchandisers, irrigation distributors offer far superior training and advice. Photo: Hunter Industries

BLUE LIGHT SPECIALS. Mass merchandisers have captured the attention of irrigation manufacturers because they buy in huge volume. Selling to independent hardware and home stores requires two-step distribution, with brokers selling to the store owners. Manufacturers can eliminate one step by selling direct to mass merchandisers, who are expected to control nearly half of all retail hardware sales shortly after the turn of the century.

Aggravating the competitive struggle between distributors and mass merchandisers is the decreasing distinction between wholesale "contractor quality" products and retail irrigation components found on the shelves at mass merchandisers. Manufacturers are concentrating more on efficiencies and lower inventories, and, consequently, separate wholesale and retail product lines are discouraged.

Mid-sized irrigation distributors are being squeezed the most, according to the Farnsworth Report, as they are most vulnerable to competition from mass merchandisers.

In addition, mass merchandisers have at least two advantages: economies of scale and tighter margins. The Farnsworth Report indicated that mass merchandisers seek additional product lines to sell as they expand and mature. Irrigation is one of the lines they have adopted to fuel continuing growth, and because their overhead is spread across many different types of products, profits are often higher than for distributors.

Fearful of being mid-sized, distributors are aggressively trying to gain economies of scale to stay in the game and are behaving more like mass merchandisers with serve-yourself bins, longer



hours, more locations and lower prices. But lower margins threaten services, such as training, advice, delivery and credit terms.

At the same time, manufacturer consolidation has reduced the number of product lines available for distributors to carry. The result? More distributors taking on debt to expand in the face of lower profit margins.


Price pressure on both the contractor and the irrigation distributor ultimately reduces the technical safety net for contractors. Distributors are being squeezed from both ends, by the manufacturer and the buyer, and as a result, they have to reduce services to cut costs so they can survive.

The Farnsworth Group predicted that,

when the dust settles, irrigation distributors who specialize and have the skill to demand what they believe they are worth will emerge victorious. Contractors will have to choose between the technical vacuum of mass merchandisers or the support net of dedicated irrigation distributors.

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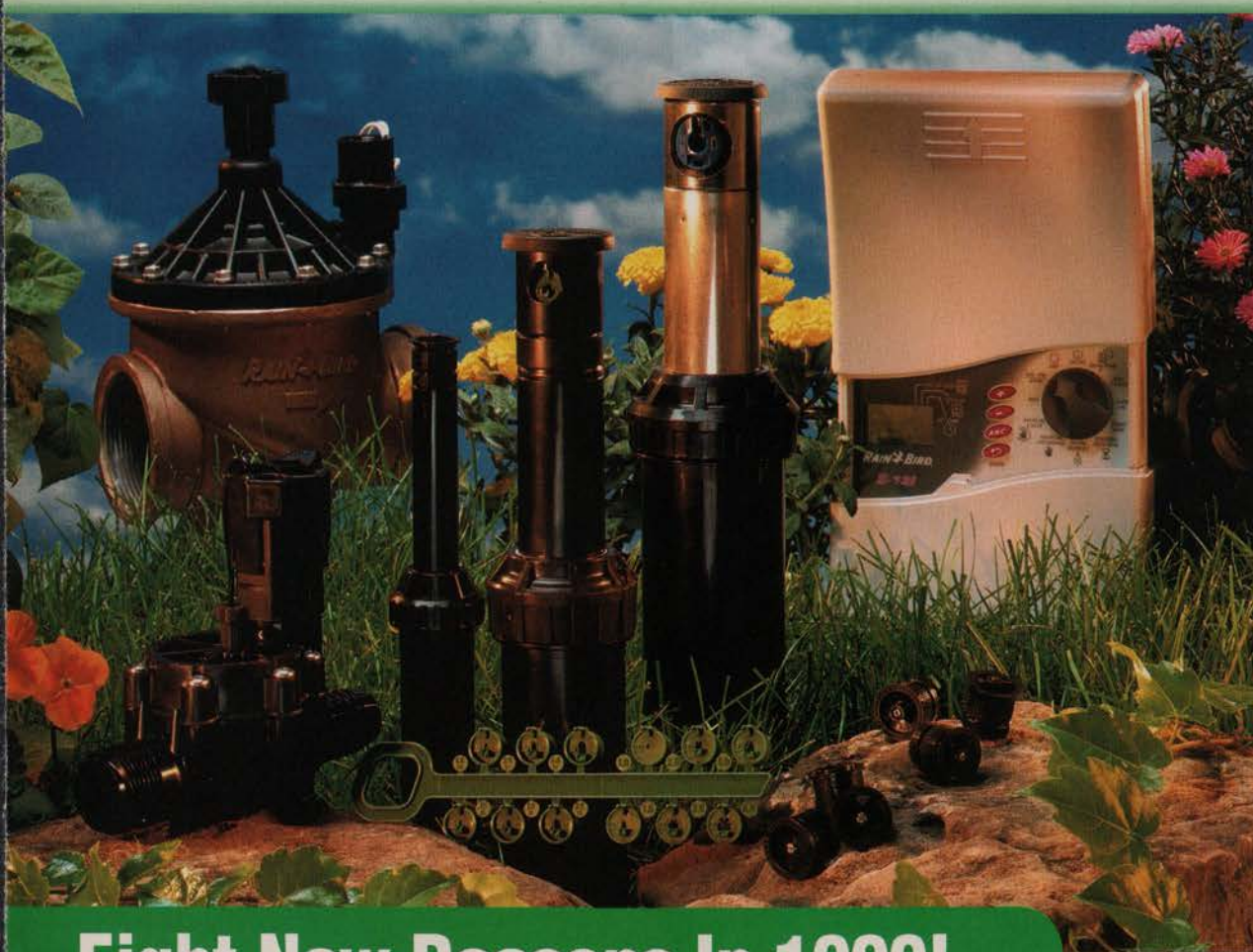
LOYALTY: THE TWO-WAY STREET. There are some signs that jockeying by manufacturers for better profit margins has reduced brand loyalty. Sixty percent of irrigation contractors always or frequently substitute products different than those specified in designs, according to an Irrigation Association survey. A third of contractors mixed brands of sprinklers, valves and controllers on jobsites.

The results might reflect contractors' and distributors' disappointment from manufacturers selling products similar to those offered by mass merchandisers. It could also indicate loyalty toward short-line manufacturers who have preserved the exclusivity of their "contractor-quality" products. The Farnsworth study revealed that "niche players" in wholesale distribution will be able to protect their operating profit because they offer exclusive products and services while the operating profits of mid-sized distributors are shrinking.

Niche distributors are, in fact, becoming the defenders of smaller manufacturers. By focusing on specific groups of customers, they aren't trying to compete with mass merchandisers. Their specialization results in the greatest degree of expertise about their customers' needs. Those needs often fall in product categories that don't meet the volume standards of larger manufacturers. These manufacturers then are being stretched in two directions, by retail and by specialty products distributed by the irri-

(continued on page 34)

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UNI-SPRAY™ SPRINKLERS



VARIABLE ARC AND SMALL RADIUS MPR NOZZLES

state of the irrigation industry

(continued from page 32)

tion distributor. It is possible that they might have to concede low-volume specialty items to meet their volume and profit standards.

DIRECT IRRIGATION. Hanging over irrigation distributors, and therefore contractors, is the manufacturers have to consider selling

direct to any large buyer to boost profitability. Cutting out steps in distribution significantly increases profit but reduces the ability to communicate special attributes of products. Complicated products need to be explained to customers. This complexity keeps products above the generic commodity level.

Some manufacturers have beaten the

conventional system by hiring their own technical representatives for key markets such as golf and municipal. Management groups such as American Golf, Club Corporation of America and Environmental Golf will soon control 5 percent of the golf courses in the U.S. They succeed with a combination of economy of scale, technical support and management expertise, and they seek direct purchases from manufacturers.

Consolidation within the landscape industry provides equally fertile ground for direct sales to companies such as TruGreen-Chemlawn, The Brickman Group, LandCare USA and Environmental Care. Will manufacturers exclude such large buyers from distributor territorial contracts even though distributors invest years and money in landing and cultivating large accounts? If so, how does the manufacturer repay the distributor for this investment when these accounts are converted to direct?

(This consolidation among landscape contractors creates companies with considerable opportunities to enjoy price breaks when purchasing products that the small or mid-sized contractor can't take advantage of. These price breaks may afford larger companies the opportunity to charge less for the same service smaller companies offer. Looking at it this way, it's clear that the average landscape contractor's situation isn't too unlike that of the irrigation distributor.)

Consolidation generates economies of scale that boost productivity and increase volume. The only things that level out the playing field are the cost of capital to expand (interest) and greater separation between the company and the customer. The smaller distributor and contractor retain a closeness to their customer that size can diminish. This closeness enables smaller organizations to help their customers face challenges, such as training employees, satisfying local building codes and adapting to water use ordinances in their area.

Manufacturers, meanwhile, are exposed to the liability of their products being improperly installed by inadequately trained people. When water use regulations become more serious, liability for misuse may filter back to the manufacturer. Therefore, there is a downside to selling products through a technical vacuum at the retail or wholesale level.

(continued on page 36)

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state of the irrigation industry

(continued from page 34)

LIQUID GOLD. The tug of war over water is just beginning. Some eastern cities don't have the infrastructure (large enough pipes) to carry the water for landscape irrigation during the summer. Farmers fight with municipalities and environmental groups over water in the West as falling aquifers and low rainfall threaten potable water supplies from Texas through Nebraska. Phoenix and Las Vegas, the two fastest growing cities in the country, are spreading like wildfire across deserts without any new sources of water. Canals delivering water from the Colorado River to California aren't even lined yet and the state is already debating a \$300-million package to improve them.

The writing is on the wall. Priorities for potable water will be set over the next 20 years. Waste won't be tolerated. Water will be recycled. Present landscape standards will change. A recent ordinance in Las Vegas restricting how much new turf that can be installed in a landscape is just the beginning.

Under present circumstances, it is highly doubtful whether the technical void of mass merchandisers can meet the informational demands of precise water application for landscape purposes. The irrigation contractor is a major part of the only logical solution to water conservation. Large projects will require an irrigation designer/consultant. Certification will separate the knowledgeable from the less professional contractors.

LOOKING BACK. As water becomes more valued, we will look back and criticize the way we wasted it in the past. Contractors will personally judge the efficiency of the systems they installed and realize, to an extent, that this inefficiency was dependent upon the product

.....

82 percent of contractors expect irrigation revenues to increase an average of 22.3 percent over the next two years.

.....

they purchased. Distributors will judge the same inefficiency based upon the products they sold.

The scaffolding that holds the irrigation industry up today has conceivably been weakened by the increased role of mass merchandisers in the distribution chain and the pressure that this has put on manufacturers to provide them with products to sell because of the volume of product they purchase. Technology for retail distribution is often considered sec-

ondary to professional-quality products and it may not deliver the same efficiency possible from well-designed irrigation systems. If this technology is forced on professional

(continued from page 38)

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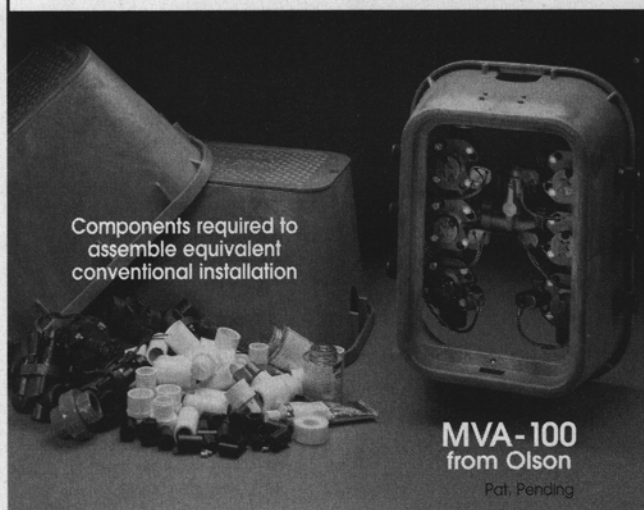
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(continued from page 36)

contractors to meet productivity and profit goals it could backfire.

Wasteful irrigation could be viewed some day with the same disdain as tobacco. We didn't do what we should have done knowing what we knew at the time. Smoking is, or was, a reward to many people for hard work and success. Landscaping is also a reward for hard work and it is, to millions, very habit forming. Unlike smoking, landscapes produce oxygen, cool our homes and cities and provide habitat for wildlife. It's a good habit, one that deserves the water required to protect it.

But, if we condone waste, many people could be deprived of landscaping in the future. That will result in lower sales by mass merchandisers, who will jump to another source of cash flow to fuel their giant stores. We could all benefit from some longer term thinking about water use and irrigation efficiency.

We may not want to think about these things now, but we should. Next time you drive past your local irrigation distributor to save 10 percent on parts at Lowe's, think of the possible consequences down the road. Think about who is going to train your new employees as you grow. Think about the cost of redoing a job because you didn't know the building code and neither did the sales personnel at the store from which you bought your supplies.

This trend is not happening only in the irrigation industry. Our manufacturers, distributors and large contractors don't really have much choice in the matter. It's capitalism, pure and simple. We all must adapt.

The thing that makes us different is water. As a vital, yet limited resource, water will certainly be regulated in the future. Technical compliance will be enforced. Knowledge and service will be very important.

In the final analysis, the overriding factor is how much we value our landscapes. The more dependent we are on landscapes, the more we will do what it takes to keep them. That includes meeting new restrictions and investing in technology that lets our customers keep their landscapes. **LL**

The author is president of IrriCom, Banning, Calif., the communications arm of the Irrigation Association.

Outlook Strong for Irrigation

It's no secret that irrigation services have been booming in recent years. The good news is that contractors expect the good times to continue.

According to a recent *Lawn & Landscape* survey of 500 irrigation contractors and 500 landscape contractors, 82 percent of the industry expects irrigation revenues to increase an average of 22.3 percent over the next two years.

Meanwhile, just 2.6 percent of respondents predicted a downturn in the market, with 15.4 percent anticipating little or no change at all.

With 83 percent of the respondents offering some type of irrigation-related service — including nearly 60 percent of landscape contractors — the fact that 90.1 percent of them said their irrigation revenues increased from 1996 to 1997 (by an average of 14.7 percent) shows how rapidly the industry is indeed growing.

Focusing specifically on landscape contractors, more than 95 percent of respondents reported an increase in irrigation revenues last year, and they expect average increases of 22.3 percent in irrigation installation revenues and 11.3 percent for irrigation maintenance revenues over the next two years.

Irrigation is clearly uncharted water for many landscape contractors, as almost one-third of them entered the market within the last three years, where more than 88 percent of irrigation contractor respondents did so at least six years ago.

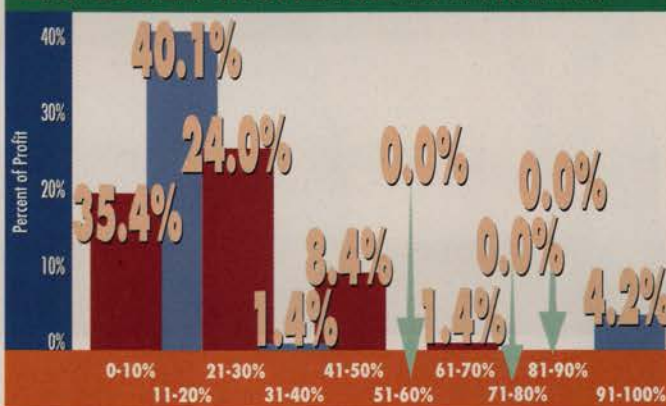
As expected, irrigation-oriented revenues represent a much greater portion of the irrigation contractor's business than the landscape contractors'. The survey results indicate, however, that both contractor groups continue to diversify their business mix. More than 22 percent of landscape contractors earn at least 25 percent of their total revenues via irrigation services while 21.4 percent of irrigation contractors generate at least 25 percent of their revenue from non-irrigation services.

Companies offering irrigation services continue to focus primarily on the residential market, with homeowners representing better than 63 percent of contractors' collective business and more than 42 percent of contractors saying residential contracts account for at least 70 percent of their overall irrigation volume.

Regarding product purchasing, there is no calendar-driven time for purchasing sup-

plies, as 65.4 percent of respondents indicated they purchase supplies on a job-by-job basis or as inventory needs replenishing. Meanwhile, the company owner is the final decision-maker on product purchasing almost 70 percent of the time followed by the designer/specifier 25 percent of the time. — **Bob West**

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USE READER SERVICE #21

Fertigation: It's for Contractors Too



- The delivery of carefully measured
- doses of liquid fertilizer product via
- an irrigation system can help
- contractors minimize labor needs.

Photo: Novartis

Fertigation systems have long been valued for agriculture and sports turf arenas, and are now options for contractors as well.

By Max Brown, PhD.

Television has helped spawn the desire for the perfect grass by showing the lush green landscapes that are available to sporting champions around the world.

As a result, landscape contractors are challenged to provide comparable turf conditions for their commercial and residential customers while making their services affordable, meeting labor challenges and securing profits and growth.

Fertigation, or the process of applying liquid nutrients through an irrigation system, is beginning to catch on as a tool for landscape contractors to provide the finest turf.

First developed in the 1940s for the agricultural market, fertigation is now the primary source of nutrient application for crops. The turf industry turned to fertigation more than 25 years ago as a cost effective, environmentally sound process to provide nutrients to the grass in extremely large turf areas. Today, turf applications have expanded beyond these large turf

areas to corporate campuses and mid-sized commercial properties.

FERTIGATION AS A CONTRACTOR SERVICE. Until recently, fertigation for the turf market has been primarily limited to treating large areas like golf courses, athletic venues and park or municipal settings. Experimentation in this market has paved the way for success in other turf environments, including those served by landscape contractors.

The key to integrating fertigation into contractor businesses resides with the ability to educate contractors about the superior benefits of fertigation. Obviously, it is the contractor who recommends a fertigation system and that person must then serve as the brain power to conduct turf sampling and dial in the appropriate prescriptions of liquid nutrients in order to guarantee the system's effectiveness.

In order to accurately establish the fertigation program, contractors can prescribe the nutri-

(continued on page 42)

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fertigation

(continued from page 40)

ent application based on the turf and soil conditions. One way to do this is with Near Infrared Reflectance Spectroscopy (NIRS) testing of a grass sample. A contractor collects grass clippings to submit to a regional laboratory licensed to conduct these diagnostic services which are part of a program used to identify various nutrient levels in the grass. From these results, a liquid nutrient fertility program is prescribed and applied to the site.

A key to bringing fertigation to the contractor market is that equipment and liquid nutrient products are both now available for moderate-sized turf areas. The smallest pump available from The Toro Company, Bloomington, Minn., applies 2.5 gallons of nutrients per hour and can be used on commercial properties and corporate landscapes. At the same time, liquid nutrients are available in compact 275-gallon containers and in 30-gallon drums. These low volumes reduce the upfront cost and eliminate the concern of having unwanted nutrients in storage tanks.

ADVANTAGES OF FERTIGATION. The advantages of fertigation over traditional methods of providing nutrients to turf make it an appealing program for landscape professionals. Fertigation is a process of "spoon feeding" nutrients in doses that are more accurate, lighter and more frequently delivered than those of granular fertilizers. This results in smaller amounts of nutrients being leached into ground water and eroding into environmentally sensitive areas. There is also no danger of burn to the landscape

because the fertilizer is diluted as it is applied through the water and immediately soaks into the soil.

The labor factor makes fertigation appealing to contractors. One person is able to control the entire system and decide how much fertilizer is applied and when the application is made. System operators are able to make adjustments in the amount of nutrients with the turn of a single dial. For contractors, there are no bags of fertilizer to handle. Additional staff is no longer required to spread granular fertilizer, since one operator can control the entire system from a central pump unit.

The cost of liquid fertilizer is comparable to that of dry materials and some of the large turf venues using fertigation have found that liquid fertilizer products used in fertigation actually cost less.

In essence, the application of liquid nutrients through an irrigation system is controlled, and low levels of nutrients provide the necessary plant nutrition.

Fertigation eliminates the feast or famine feeding that occasionally challenges granular fertilizer applications. The release of liquid fertilizer is more constant than that of granular, since dry nutrients are dependent upon outside factors such as temperature and rainfall, which cannot be adequately predicted.

.....

The key to integrating fertigation into contractor businesses resides with the ability to educate contractors about the superior benefits of fertigation.

.....

BARRIERS TO FERTIGATION BY CONTRACTORS. Many turf professionals are comfortable with granular applications because of the long history of positive experiences they've had with these products. As a result, they don't understand the benefits of fertigation. Other contractors know the advantages of liquid nutrients, but rely on spraying techniques rather than the labor saving fertigation methods.

The lack of availability and access to fertigation equipment and liquid nutrient products designed for fertigation of smaller turf areas has hampered the advance-

ment of the technique.

The quality of the irrigation system that applies the liquid nutrients is obviously important to a fertigation program. The installed irrigation system must be adequately designed with proper water flow in order for nutrient application to be effective. In addition, it is difficult to apply fertilizer through an irrigation system during rainy weather. Contractors interested in fertigation may need to have a backup granular system when in regions with long rainy seasons that prevent the application of liquid nutrients.

For smaller sites, cost of the hardware is also a barrier. For example, fertigation is not currently a viable option for residential properties since the base price for a small fertigation system starts at about \$3,500.

DECIDING TO USE FERTIGATION. The decision to use fertigation as a tool should be based on the customers' expected or desired results and cost benefits for the customer. Customers will need to invest in a pump station. Contractors need to counsel their customers about fertigation systems that result in superior nutrient applications with cost and labor savings. Customers can have the green, lush landscapes they desire. Contractors need to teach them how. **LL**

The author is Director of Agronomics Research and Development, The Toro Company, Bloomington, Minn.

Fertigation technology is new to landscape contractors and is most viable for large, commercial jobs. Photo: Brian Vinchesi



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Soil Oxygen: The Forgotten Element

Fertilizers and pesticides are certainly important products for producing a healthy turfstand, but contractors shouldn't overlook other keys like oxygen.

By Chuck Darrah

G

ood contractors know that good plant health care begins with healthy soils. Plants growing in poor soils usually exhibit poor color with little or no growth. In addition, they are more susceptible to insects and diseases as well as various environmental stresses. To add insult to injury, plants in poor soils takes longer or are less successful at completely recovering from these stresses. This further weakens the plants over time and increases the likelihood of failure. Meanwhile, healthy soils have good balance of their physical, chemical and biological components.

PHYSICAL COMPONENTS. Healthy soils do not have too much air or too little air. Nor are healthy soils too wet or too dry. The balance of soil moisture and soil air are two physical components of the soil that landscape managers must control in order to be successful. Soil air and soil water must be in balance with the solid component of the soil. When soils are in balance, the air and water occupy about 25 percent each of the soil volume with the soil solids occupying the remaining 50 percent (Figure 1).

All too often in the landscape, soil water is allowed to occupy too much of the soil volume too often (Fig-

(continued on page 48)



The physical, chemical and organic components of a lawn or landscape must be in the proper combination or ratio to one another for the plant materials to have the best opportunity to grow and thrive.

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soil health

(continued from page 44)

ure 1). This is frequently the cause for failure in irrigated shrub beds, lawns and sports turf. However, excess water can also result from poorly constructed, poorly draining soils. Other times, it is simply the result

of an excessively wet season or two. The net result is too little air in the soil for the growth of healthy root systems. This leads to weak plants, which may eventually die. Or in the case of lawns and sports turf, the

more desirable grasses are replaced with less desirable species or weeds that can tolerate the low soil air caused by excessively wet soils.

As is often the case with lawns and trees in the landscape, soil air may be limited by compaction. Compaction results as the weight of the soil solids increases per unit volume (Figure 1). This increase in soil bulk density is usually a result of foot traffic over time. However, it is very common on newly constructed commercial as well as residential landscapes from construction equipment. It is also the most common cause for thin, weak turf on recreational athletic

fields. When too much of the soil volume is occupied by the solid components, the net result is again too little air in the soil for the growth of healthy root systems.

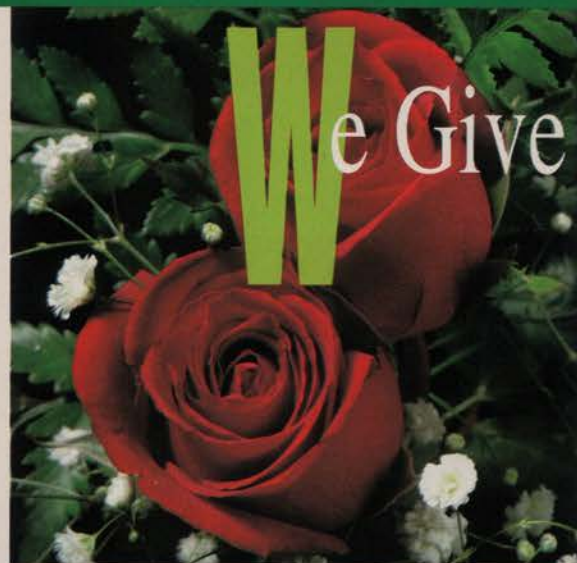
CHEMICAL COMPONENTS. Healthy plants require the correct balance of chemicals in the soil and especially the elements essential for plant growth (Figure 2). Fortunately, soil chemical tests are available to determine these components.

Plants have certain requirements for soil reaction or soil pH. Most plants do well in the pH range of 6.0 to 7.0, although certain acid-loving plants do best at a pH between 5.5 and 6.0. While most turf and ornamentals in the landscape cannot tolerate excessively low soil pH values, many are adapted to moderately alkaline pH values in the range of pH 7.8 to 8.3.

To maximize plant health, plant nutrients must be present in sufficient quantity in the soil and preferably in the correct

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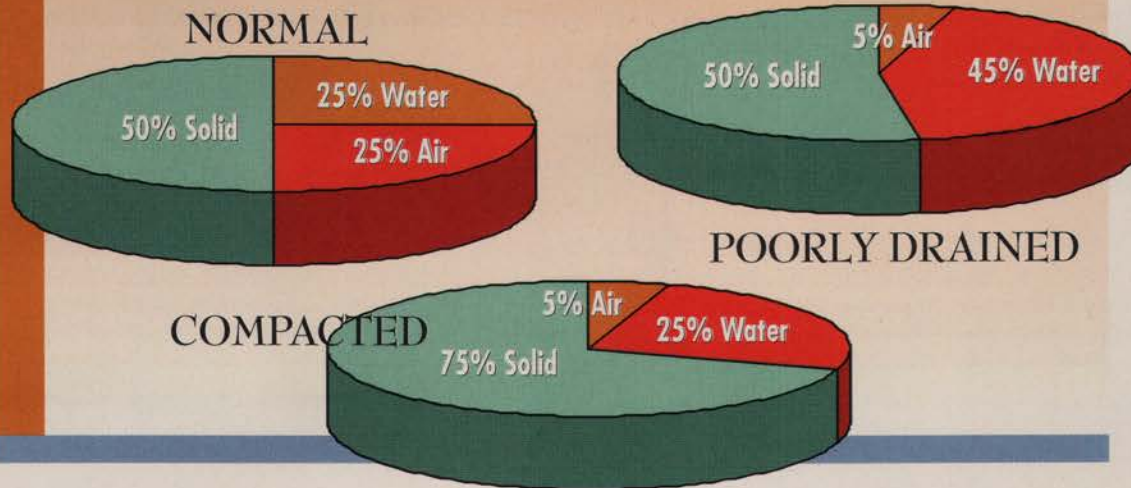


Figure 1. Healthy soils contain about one-half their volume as solids and one-half their volume as pore spaces holding equal parts of air and water (left). Compacted soils have increased solids and too little air (center). Poorly drained soils hold too much water and too little air (right). Credit: Darrah

balance. In many cases, the minerals making up the soil solids may be deficient in certain essential elements or the elements may be out of balance. This can be particu-

larly troubling because excesses of some nutrients in the soil may cause deficiencies of other nutrients in the plant. The overuse of fertilizers, in either their mineral or or-

ganic form, may lead to an imbalance in nutrients.

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optimum levels of the macro-nutrients, the secondary nutrients and the micro-nutrients is important, not only to the plants, but also to the micro-organisms in the soil. In most cases, deficiencies or imbalances can be corrected with the proper use of liming and fertilizer products.

ORGANIC COMPONENTS. The organic matter in soils is made up of the living and dead organic components such as plant roots, fungi, bacteria, nematodes, protozoa, mycorrhizal fungi and micro and macro arthropods. Healthy soils have a complex order of living organisms and they benefit from the living and decomposing organic constituents in a number of ways.


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material helps to bind and degrade toxic compounds and pollutants that injure plant roots.

Creating healthy plants in lawns and landscapes depends on creating and managing healthy soils. Soils are complex and dynamic in their physical, chemical and organic components. When

these three components are properly managed and in balance with each other, long-term plant health is nearly assured. 

The author is general manager and consulting landscape agronomist with CLC LABS in Westerville, Ohio.

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Contractors increase their profits when they take the right steps managing their mowing jobs.

By Nicole Wisneiowski

P

ark Landscape Maintenance used to send a five- or six-man crew to its commercial sites, which range from four to hundreds of acres. They would mow half the day and do the detailing afterward.

"One apartment complex took all day to complete," said John Cerul, president of the Las Vegas company. "And the mowing equipment would just sit on the truck all afternoon while the technicians were doing the detail work."

Six months ago, Cerul decided to maximize the profitability of his mowing crews. As a result, he separated his workers into five-person detail crews and seven-person mowing crews. The mowing crews do nothing but mow and the detail crews handle the rest of the landscape maintenance. The setup, Cerul enthused, is expected to bring in gross profit margins of 30 to 40 percent.

"Now we can cut two apartment complexes in one day," Cerul assured. "The mowing crews don't carry a whole bunch of equipment they don't need, and the same guys are using the same equipment continuously. They are responsible for it along with two mechanics. Their livelihood rests on that equipment."

The lesson to be learned? To maximize profitability in their mowing crews, contractors can't be afraid of a little change to establish the right-sized crew with the right daily plan of attack, even if they learn that the previous way of doing things was more efficient.

SIZE DOES MATTER. "Mowing is the biggest thing we do," said Kory Ballard, owner of Perficut Lawn and Landscaping, Ankeny, Iowa. "To make sure that it's paying off for us we try to average \$35 to \$45 per man hour. We expect an

(continued on page 54)



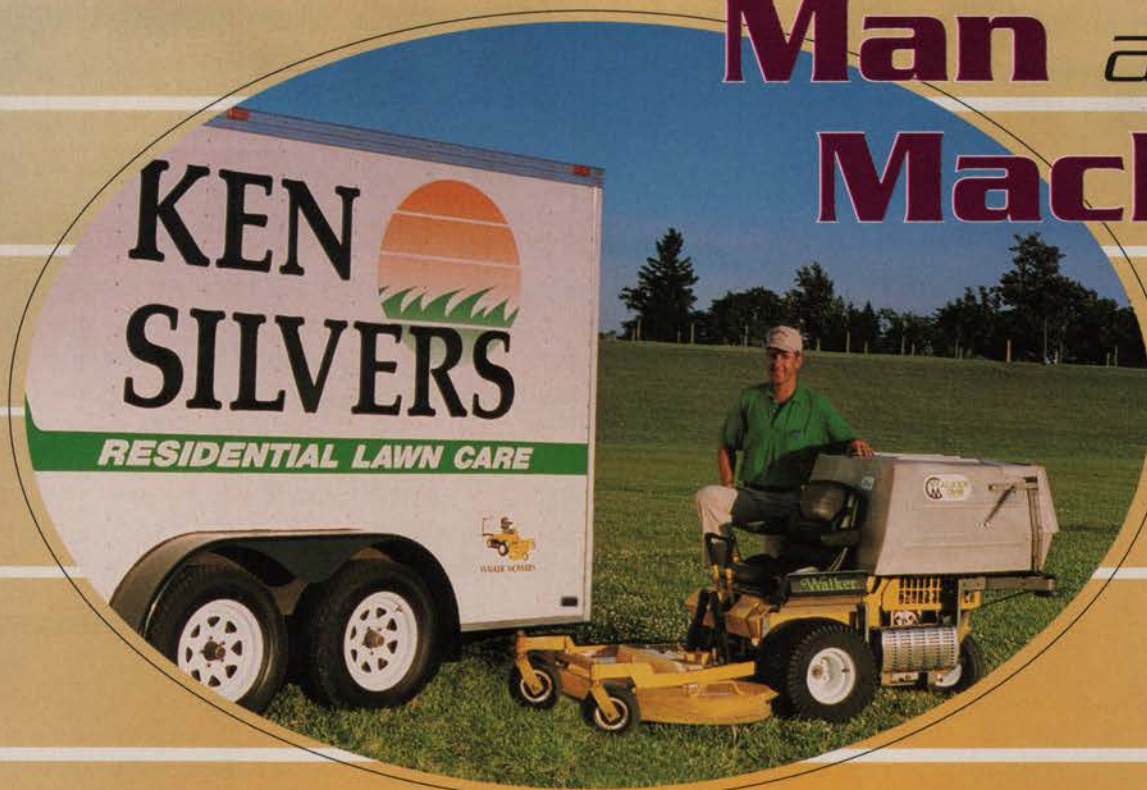
Some contractors have separated their mowing and trimming crews in order to maximize the productive hours of the equipment. Photo: Scag

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mowing crews

(continued from page 52)

average 32 percent gross profit margin, although some are as high as 40 percent."

Ballard favors using a three-person mowing crew. Out of his 60 employees, 26 are strictly mowers. He has a total of eight mowing crews with a foreman in charge of each.

"If I use a five-person crew, the guys have to be good," Ballard explained. "They tend to mess around a little more though. Big crews work on 30- to 40-acre mowing jobs, big condominiums and apartment complexes if you have good leaders with good routines. I use a three-person crew for 1-acre and up projects and they keep busy."

Ray Pelletier, president of Ray's Lawn and Garden, Naples, Fla., also favors three-person crews. But while Ballard's crews do nothing but mow, Pelletier's six three-person crews do mowing, edging, trimming, biweekly spraying and quarterly fertilizing.

"One crew does it all," Pelletier insisted. "I don't think clients want to see two different people out there at two different times."

All Geared Up

John Cerul, president of Park Landscape Maintenance, Las Vegas, Nev., said a big bonus to splitting his mowing and maintenance crews was the profitability he gained on his equipment.

"Now I can buy an \$8,000 or \$9,000 mower and I know it won't sit idle half of the day," he said. "I don't have to buy as much equipment to get the same amount of work done and I'm not spending as much on replacement equipment either."

Ultimately, a reliable machine has to make it to the end of the day everyday, said Mark Meagher, advertising manager at Dixie Chopper, Coatesville, Ind. If it's a rough ride and requires more effort from the operator, fatigue can set in quicker resulting in a less productive afternoon.

Contractors can make sure the equipment they're going to buy is operator-friendly by taking their employees out to test the equipment when they're buying it, Meagher said. Some equipment dealers

Three-person crews are fine for 10-acre and larger jobs, according to Dennis Bruce, president of Bruce-Lee Landscaping, Cranberry, Pa., but a two-person crew is ideal for residential jobs.

"The third worker generally slips through the cracks and is less productive in a three-

person crew on smaller jobs," Bruce explained. "If you use a two-person crew, you know they are both equally responsible to get the work done, especially in smaller yards where there is more downtime. And I don't have to pay for the travel of the third person. This way I can get two commercial

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dark day when
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finally quits.



will even bring a selection of equipment out on location to the contractor.

"The machine has to perform and it has to perform in their environment," Meagher asserted. "The machine should mow the maximum amount of grass in the least amount of time and give a good quality cut and comfort to the operator."

"You also have to think of the ease of repair," added Bill Shea, vice president of sales and new product development at Ferris Industries Inc., Munnsville, N.Y. "Make sure the machine uses common parts."

The size of the mower becomes another factor, Meagher pointed out.

"Production matters more than transport," he said. "A 72-inch deck may save money on larger areas, but a 60-inch deck may save more money because it can fit into some smaller areas. Contractors have to focus on buying the right size equipment to do the job. It's nice to have a big motor home to go on vacation, but how nice is it if you only go one week out of the year. Is it worth it?"

The decision isn't easy, Shea confessed, reminding contractors that they have to look at purchasing a mower as a large capital investment.

"You could save \$300 today and lose thousands in the investment in a couple years," Shea added.

"Make sure you buy the right piece for what you do. Don't just buy the good deal." — *Nicole Wisniewski*

properties mowed or 15 to 25 residential properties mowed each day."

With this setup, Bruce generates \$25 to \$35 per man per hour on residential sites and \$35 to \$45 per man per hour on commercial sites. Generally, his expected gross profit margins are approximately 65 percent.

Paul Skinner, owner of Total Grounds Systems, Orlando, Fla., also relies on a two-person mowing crew even though his business only cuts commercial sites ranging in size from 20 to 25 acres.

"Nine hours a day all they do is mow," Skinner said. "It takes just one of those

mowing crews

mowing crews to support four or five of my four-person maintenance crews."

Generally, mowing technicians don't have any other responsibilities besides mowing. Ballard's mowing foremen work with scheduling a little bit and keep an eye on each project for irrigation and weed control concerns. If such services are needed, they can call back to the office and inform the maintenance crews of the problem.

Bruce is currently debating whether his mowing crews should also do some weed pulling while they're on the property.

"We think it may be more profitable if the crews weed the beds while they're there because they are there every week," Bruce said. "That way we'll get weeding done in 20 minutes every week instead of it taking four hours every few weeks."

FOLLOW THE YELLOW BRICK ROAD. The route a mowing crew takes throughout the day is also a factor on the crew's profitability be-



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cause of travel time. More time spent on the road is less time spent on the job.

"We stick to our schedules," Ballard insisted, adding that he only accepts jobs within 30 miles of the office. "We used to go out of our route to stay busy, but we don't anymore. And

we'll turn down customers who need their appointment changed to another day."

The supervisors in charge of the mowing crews at Park Landscape dictate what days mowing will get done and what days detail work will get done on a certain property, Cerul said.

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"Mowing and detail work are never done in the same day," he noted. "Out here in the Las Vegas heat, are a lot of plant materials and turf dries up quickly. So it's good to have a different set of eyes look at the property almost every day of the week. And it's good for customer relations."

Bruce splits up his mowing crews' routes by the importance of his accounts. He sends crews to his larger, more prestigious residential clients on Thursdays and Fridays because they want their yards looking immaculate for the weekends. He sends mowing crews to his commercial sites on Saturdays when no one is there or on Mondays and Tuesdays so they're looking good for the beginning of the week. Mondays, Tuesdays and Wednesdays are also good days to send crews to the "non-picky" residential clients, Bruce said.

ON THE DOTTED LINE.

Using contracts for mowing jobs, especially with commercial properties, can help contractors predict what kind of profit they'll be turning based on money spent for equipment. Contracts ensure contractors an estimate of how long they will have a certain client and how many hours per week in mower time will be spent on that property. Bruce tries to extend his company's year-long contracts to two or three years for commercial sites.

"That way, if I buy a \$15,000 or \$25,000 mower, I know it will get good use for the next three years," Bruce explained. "The only problem is that we usually can't raise our prices until that contract is up."

Annual contracts can be very general one-page forms or they can be detailed, numbering up to 150 pages.

Perficut's contracts for commercial sites explain its rates, services and damage policy, Ballard noted, while Bruce-Lee Landscaping's contracts are more specific.

"In our contracts, we spell it all out, down to the number of cuts for the year and the day of the week we'll be there," Bruce explained. "We average 32 cuts for the year."

(continued on page 58)

'We make sure to say in the contract that the payments stay the same for either case.'

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mowing crews

(continued from page 56)

If it's dry and we only do 28 or if it's wet and we do 34, we make sure to say in the contract that the payments stay the same."

Commercial property managers appreciate the exactness of the specifications included in landscape maintenance contracts, insisted Cerul, who's nine- to 14-page contracts are also extremely detailed.

"Most of the commercial sites we mow never had specified requirements before," he said. "When they look at our contract they know how often their turf will get fertilized, how often their trees will get trimmed and exactly when we'll be there. They really like it."

When it comes to residential customers, though, contracts are not preferred, Ballard reported.

"Because there are so many competing companies for residential jobs, contracts tend to scare people away," he warned. "No one requests it. Besides, they feel more comfortable with a verbal agreement; and

we haven't had any problems keeping residential customers for five to six years without contracts.

"Typically, all contracts have a clause explaining that they are void after 30 days with a request letter by mail," Ballard continued. "So, anybody can get out of one in 30 days anyway."

That includes the contractor, Bruce noted. "It's good to know that in 30 days you can get rid of the customers that are overly picky or consistently late on their payments," he said.

Both Pelletier's commercial and residential clients have his one-page contract with exactly 12 items on it, the last one being the 30-day clause.

"We treat ours as a non-binding agreement, pointing out the 30-day clause," he stressed. "And it's the best type of contract to have with residential customers. This makes the contract no more or no less than a gentleman's agreement."

In addition, contracts can serve as annual reminders that update customers on additional lawn care services and any price changes at the beginning of a new season. Some contractors elect to send out an informal letter with a contract to their residential customers each January reminding them that they are starting a new year of services. This also gives them a chance to explain if and why they are raising prices for the next year, Bruce said.

"It's a real informal note telling them that we will be back out to start a new year of services," Bruce explained. "Also, mowing spawns other business," he continued. "I'll do anything to remind my mowing customers of my other services." **LL**

The author is Assistant Editor of Lawn & Landscape magazine.

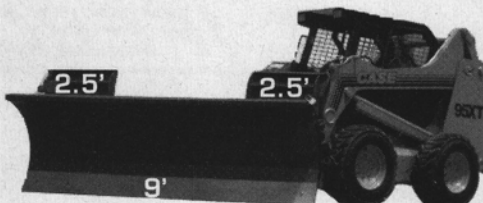
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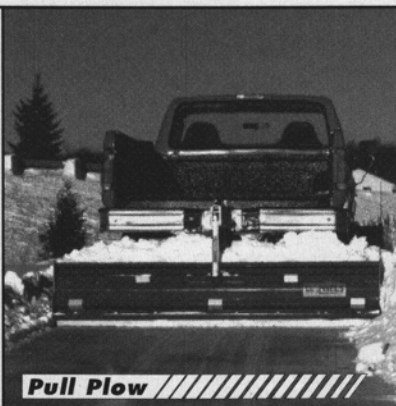
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The industry continues to thrive and contractors are confident in their future despite the rapid consolidation.

*By Bob West
and
Nicole
Wisniewski*

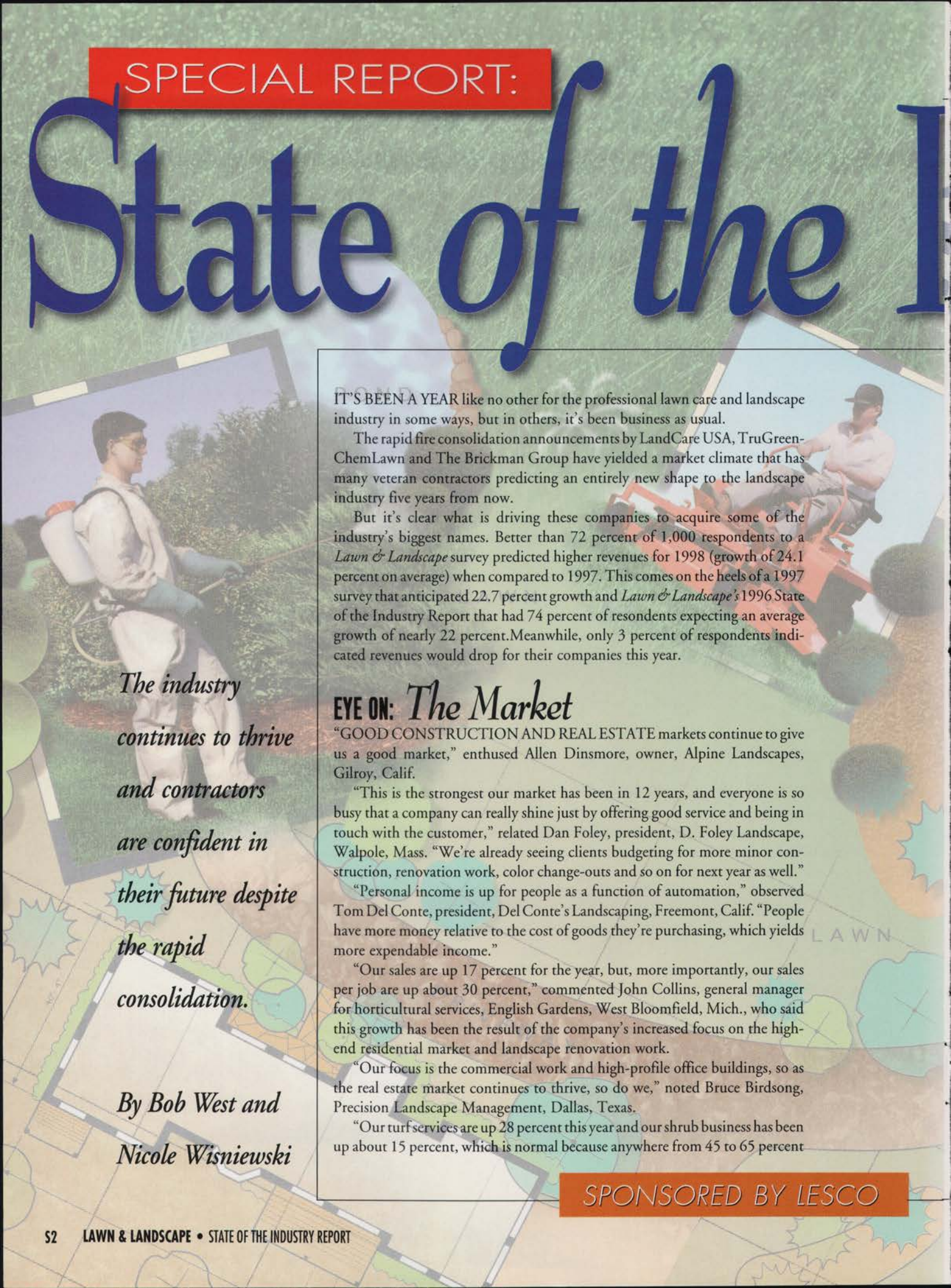
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State of the Industry Report

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SPECIAL REPORT:

State of the Industry



The industry continues to thrive and contractors are confident in their future despite the rapid consolidation.

*By Bob West and
Nicole Wisniewski*

IT'S BEEN A YEAR like no other for the professional lawn care and landscape industry in some ways, but in others, it's been business as usual.

The rapid fire consolidation announcements by LandCare USA, TruGreen-ChemLawn and The Brickman Group have yielded a market climate that has many veteran contractors predicting an entirely new shape to the landscape industry five years from now.

But it's clear what is driving these companies to acquire some of the industry's biggest names. Better than 72 percent of 1,000 respondents to a *Lawn & Landscape* survey predicted higher revenues for 1998 (growth of 24.1 percent on average) when compared to 1997. This comes on the heels of a 1997 survey that anticipated 22.7 percent growth and *Lawn & Landscape's* 1996 State of the Industry Report that had 74 percent of respondents expecting an average growth of nearly 22 percent. Meanwhile, only 3 percent of respondents indicated revenues would drop for their companies this year.

EYE ON: *The Market*

"GOOD CONSTRUCTION AND REAL ESTATE markets continue to give us a good market," enthused Allen Dinsmore, owner, Alpine Landscapes, Gilroy, Calif.

"This is the strongest our market has been in 12 years, and everyone is so busy that a company can really shine just by offering good service and being in touch with the customer," related Dan Foley, president, D. Foley Landscape, Walpole, Mass. "We're already seeing clients budgeting for more minor construction, renovation work, color change-outs and so on for next year as well."

"Personal income is up for people as a function of automation," observed Tom Del Conte, president, Del Conte's Landscaping, Fremont, Calif. "People have more money relative to the cost of goods they're purchasing, which yields more expendable income."

"Our sales are up 17 percent for the year, but, more importantly, our sales per job are up about 30 percent," commented John Collins, general manager for horticultural services, English Gardens, West Bloomfield, Mich., who said this growth has been the result of the company's increased focus on the high-end residential market and landscape renovation work.

"Our focus is the commercial work and high-profile office buildings, so as the real estate market continues to thrive, so do we," noted Bruce Birdsong, Precision Landscape Management, Dallas, Texas.

"Our turf services are up 28 percent this year and our shrub business has been up about 15 percent, which is normal because anywhere from 45 to 65 percent

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Industry

Industry Overview

of the turf customers pick up the shrub service as well," shared Jim Fanning, president, Evergreen Ornamental & Lawn Care, Apopka, Fla.

"The current market situation is very healthy for the industry because the smaller companies are doing so well," commented Tom Hofer, president, Spring Green Lawn Care, Plainfield, Ill.

"Commercial clients are really looking for grounds managers to be full service and stop by more than just once a week to cut the grass," according to Todd Pendleton, president, James River Grounds Management, Glen Allen, Va., who said some clients have requested his company provide services such as trash pickup and power-washing window awnings. "Partnerships are the buzzword and clients want to be involved in their landscape."

"This year has been better than average, and the early spring had a lot to do with that," noted Ed McGuire, president, The Lawn Co., South Dennis, Mass. "Last year, we had a good bit of snow and took it for granted that we'd keep that pace going once the season started, but this year we decided to go full bore once the weather would let us."

McGuire continues to resist the urge to expand his service offerings. "Everything we do stems from our lawn service, and that

won't grow in leaps and bounds," he said. "But we believe that if you specialize in one area and do it well, the business will be there every year."

"If anything, the growth has been a little out of control," admitted Shane Newman, president, Yard Apes Landscaping & Lawn Care, New Milford, Conn. "I'm more concerned now with staying where we're at client-wise and weeding out some of the smaller customers for some nicer accounts."

"Business has been more than we can handle," agreed Mark Baldwin, president, Mark J. Baldwin & Associates, Plymouth, Mich. "One change we've made is to get into the holiday decorating service in order to cut back on plant installations late in the year because that's where we incur a lot of our replacement costs."

"What's really been a hot service for us over the last year has been the patios and hardscapes," commented Tim Carr, president, Cardinal Lawn and Landscape, Spencerport, N.Y.

This continued growth isn't necessarily without its headaches or concerns, however.

"Our business has been a bit flat, but the problem lies in the inability of our management to handle more work," noted Malcolm Hilcove, owner, Green N' Growing, Scottsdale, Ariz. "We're getting to the point where we need our mid-managers to have suffi-

"The biggest need for the future is obviously employees, but the next issues to address are controlling costs and putting some kind of stop on all of this growth," said Mariani.

COMPANIES: 70,000

REVENUES: \$61 billion in 1997

EMPLOYEES: 623,000

AVERAGE YEARS IN BUSINESS: 17.5 years

AVERAGE FULL-TIME EMPLOYEES: 8.7 employees

AVERAGE PART-TIME EMPLOYEES: 2.7 employees

AVERAGE 1997 GROSS SALES: \$875,440

AVERAGE 1997 NET PROFIT: \$77,490

AVERAGE SALES GROWTH OVER 1996: 17.6 percent

ANTICIPATED SALES GROWTH FOR 1998: 24.1 percent

LANDSCAPE CONTRACTORS: 37.7 percent

LAWN MAINTENANCE CONTRACTORS: 24.2 percent

GROUND MANAGEMENT COMPANIES: 6.7 percent

CHEMICAL LAWN CARE COMPANIES: 5.8 percent

ORNAMENTAL SHRUB & TREE CARE COMPANIES: 4.7 percent

REVENUES FROM SINGLE-FAMILY RESIDENTIAL CONTRACTS: 52.9 percent

REVENUES FROM MULTI-FAMILY RESIDENTIAL CONTRACTS: 7.7 percent

REVENUES FROM COMMERCIAL CONTRACTS: 26.6 percent

REVENUES FROM GOVERNMENT/INSTITUTIONAL CONTRACTS: 9.9 percent

AVERAGE TRUCK EXPENDITURES PER COMPANY: \$32,558 per company

AVERAGE MOWER EXPENDITURES PER COMPANY: \$7,987 per company

AVERAGE PESTICIDE EXPENDITURES PER COMPANY: \$11,346 per company

AVERAGE NURSERY STOCK EXPENDITURES PER COMPANY: \$59,936 per company

¹ Research USA, November 1997

² Lawn & Landscape Reader Survey, August 1998

cient training in business management issues as well as landscaping."

"The market has been scary, it's been so good, but it bothers me when I see more work out there than people can possibly do and prices are still soft and people are beating themselves up to get work," commented Frank

Mariani, president, Mariani Landscape, Lake Bluff, Ill.

"We refuse to get in that arena. Instead, we base our work and our marketing approach on relationships."

"The quality of work you see being done has improved dramatically, and that makes the industry look better," related Joe Alcini, president, Foxfire Landscape Company, Macomb, Mich. "The only problem is that the quality of plant material available has gone down because the supply has gone down and growers are taking longer to produce the product."

"Marketing has become a real challenge for us as the big, regional players enter our market," noted Jaxon Ferm, president, Clean Lawn Service, Wilmington, Del. "We do about \$3 million a year, but we still can't market to commercial accounts like these big companies can."

"We had to start our maintenance services about six weeks early this year because of El Nino," noted Eric Cross, president, Duke's Landscape Management, Hackettstown, N.J. "We were mowing in early March and we had a month of wages that we had to pay that we couldn't get from clients."

EYE ON: Labor

"HOW DO WE DEAL with the labor shortage?

Patently," answered Clyde Haase, president, Haase Landscape, Spokane, Wash. "We've been increasing our pay and fringe benefits trying to attract people. The fact is that our industry relies upon unskilled labor but the prices we charge aren't representative of that."

"Labor is our biggest challenge, and we've raised our wages dramatically to attract workers," noted Jeff Zindel, national holiday manager for TruGreen-ChemLawn, Memphis, Tenn., and branch manager for Livingreen Interiors, Omaha, Neb. "But I've noticed that workers aren't as motivated by money as we think. They are motivated by doing something they like to do — personal satisfaction."

"The big problem is the middle management or foreman level for us," recognized Baldwin, voicing a concern echoed by a growing number of contractors. "With so much demand from growing contractors, there's not much to go around and it's driven wages up to \$12 to \$14 an hour for these positions."

"We've added a full-time human resources manager and have gotten real involved with the H2A program the government is putting together for legal immigrants," Pendleton explained.

"We've had some good success employing the Hispanic workforce because we care about our employees as people, not just as workers," commented Hilcove. "We have company outings every couple of months and all of our managers have made a real effort to learn to speak Spanish."

Mariani Landscape has also found an ability to work with the government. "We have 225 legal employees who have been verified by the Department of Immigration and Naturalization Services," Mariani explained. "On the average, they're 10 years older than our employees of a few years ago and we're paying them \$1 to \$2 more an hour, but now we have a steady workforce."

Mariani's company continues to prepare for the future, though. "We also have a college intern program to identify talented indi-

A Diversified

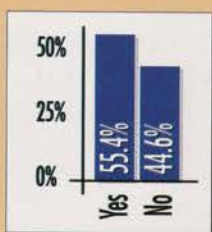
Workforce



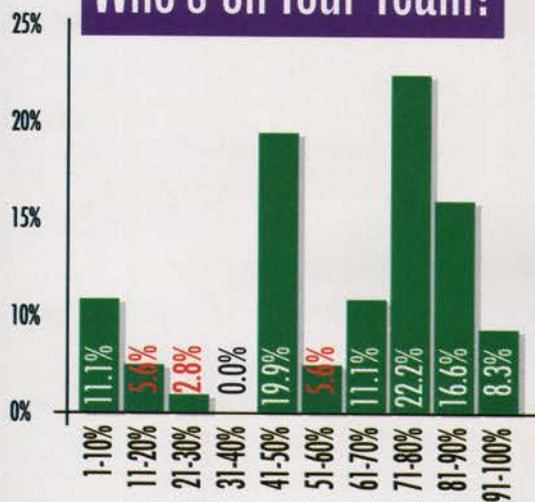
As contractors struggle to find qualified labor, Hispanic employees have emerged as a popular solution due to commonly cited strong work ethics.

Lawn & Landscape asked its readers whether or not they were pulling from this increasingly popular group of employees (see chart).

We followed this up by asking those contractors that use Hispanic employees what percent of their workforce



Who's on Your Team?



Source: Lawn & Landscape Reader Survey, August 1998

employees are Hispanic, and the responses show that contractors are relying heavily on this group.

viduals and continue bringing on quality personnel," he said.

One company went so far as to take itself to the employees.

"We bought an office location across the street from some apartments that are 95 percent Hispanic in population," related Mike Wheat, president, Wheat's Lawn & Custom Landscape, Vienna, Va. "It cost us more money to be there, but it helps to provide us workers."

Other companies shift their business focus entirely. "We've switched our focus to landscape installation work because we can do four times the volume that we do in maintenance with the same number of employees," related Bob Miller, president, Caladesi Landscaping & Maintenance, Palm Harbor, Fla.

"We think it's important that we start to expand into other markets in order to be able to tap into those labor pools as well," commented Alcini.

"I try to draw people in by offering them a job outdoors in a low stress atmosphere, but I'm still starting people out at \$12 an hour," recognized Henry DeLaRosa, owner, ProLawn, Campbell, Calif.

"This is the worst that it's been for us," added Mark Harris, president, M.B.C. Landscape, Houston, Texas. "We've always offered hiring incentives and we can usually hire through our current employees, but that hasn't worked this year."

ALCA

Report

The Associated Landscape Contractors of America are well aware of the industry's good fortune of late.

"Members are booking business well into 1999," noted Cynthia Peterson, ALCA president, McCaren Designs, Minneapolis, Minn.

And as issues such as the labor shortage and rapid consolidation arise that could present challenges to the industry's continued growth, ALCA believes well-managed companies still have plenty of opportunities to grow.

"Consolidation will change the face of the industry and make it stronger," commented Steve Glover, ALCA president-elect, L&L Landscape Services, Sunnyvale, Calif. "I think it will also create a more professional image and hopefully a higher standard of entry to the industry."

In addition, Glover sees the consolidation as a compliment to the industry. "The industry is in its infancy, and we wouldn't have companies throwing millions of dollars into the industry if they didn't see a future here," he claimed.

Despite the challenges, Peterson remains optimistic about the future, especially if associations can grow their effectiveness. "Continued growth will be spurred by grassroots and association's efforts to educate our buyers on the value of quality landscape design, construction and maintenance services," she noted. "There is a growing awareness among consumers of the environmental, physical and psychological benefits of a well-designed landscape."

How has The Lawn Co. handled the labor situation? "Right now, we're hiring for 1999," related McGuire. "We don't want to get caught short. We'd rather train people over the last half of the year and carry them over the winter. Plus, you tend to find better candidates now than in the spring."

EYE ON: Wages

"WE HAD TO UP OUR starting wages by 10 percent," admitted Jeff Meyer, president, Desert Care Landscaping, Phoenix, Ariz. "Pricing has gradually gone up as well, but we're squeezing the margins because we're giving more to entry-level people."

"We have to pay more when Taco Bell is hiring people at \$8 an hour," lamented Tom Fochtman, president, CoCal Landscape Services, Denver, Colo.

"We pay above average wages and have a

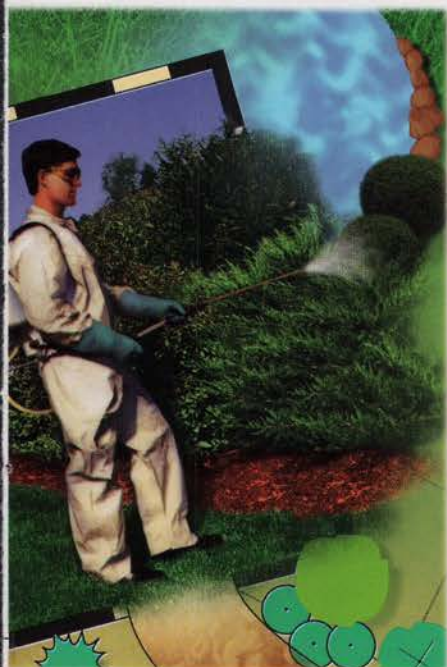
41-hour average work week with very few Saturdays on the job, but it's still an issue," agreed Birdsong.

"A couple of years ago, wages went up faster than we could recoup and we had to pay those rates if we wanted to keep the people," Alcini recalled. "Now, things seem to be more in line, though."

"Labor as a percentage of revenue clicks up a couple of points every year on average, especially as people look for more benefits," added Hofer. "In fact, it's going up faster than we can raise prices, so maximizing the productivity we get out of the employees is a serious priority for us."

"You have to pay people as much as you can rather than as little as you can," added Del Conte. "We try to be our employees' allies — it's not my company; it's our company. Include them so they want to stay."

"We've put in a 401(k) program this



SPECIAL REPORT:

Housing Starts

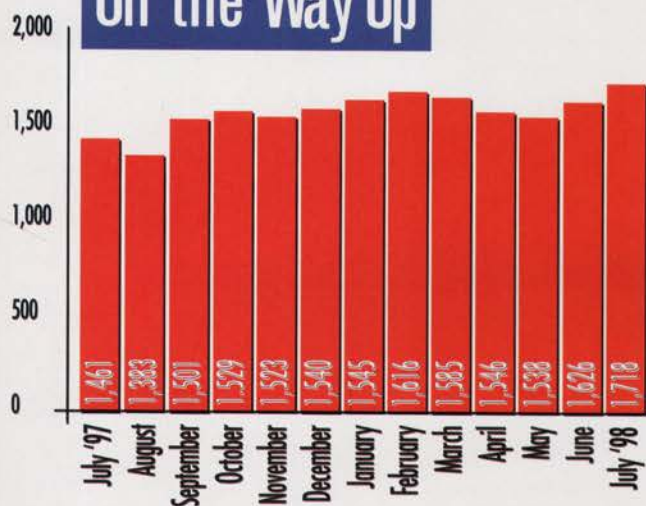
Continue to Climb



WASHINGTON, D.C. — Many of the contractors interviewed for this year's State of the Industry Report watch the survey of new housing starts as a barometer for the industry's next few months. In that case, all systems are go, most likely through the first quarter of 1999.

New, privately owned housing starts totaled 1,718 in July 1998, compared with 1,461 in July 1997, for a 17.6 percent jump. In particular, the South shows the most promise, accounting for better than 47 percent of the nation's housing starts, followed by the West at almost 25 percent, the Midwest at just shy of 18 percent and the North and its 8.5 percent.

On the Way Up



Source: U.S. Census Bureau

year, added to our health benefits and provided as much year-round employment as possible," said Carr.

"We're getting our employees more involved in the future of the company by soliciting their ideas about the direction their department is headed and what kind of work they should be doing," added Collins.

"We've adopted an open book management style in order to get the employees more involved," agreed Foley, who is also hoping for recruiting help from some of his suppliers. "We offer a referral bonus to employees who bring in new employees, and we've extended that offer to our network of suppliers this year."

"Employees aren't interested in just paycheck dollars, though," countered Pete Lucadano, vice president and chief operating officer, Luke Brothers Landscape Maintenance, New Port Richey, Fla. "Having an attractive facility and the nicest equipment fleet around can make employees proud to work for a company, and that's important too."

EYE ON: Prices

FOR THE FIRST time in a few years, the market has accepted notable price increases from many contractors.

"For maintenance work, we can pretty much write our own ticket right now as long as people feel

they are getting value for their dollar," commented Baldwin.

"Our prices have gone up the last few years, but that's because we offer Nordstrom-type service and try to turn any negative situation into a positive for the customer," maintained Haase.

"Our prices are up 15 percent over last year and we're still selling more," pronounced Fanning. "We used to be a moderate price contractor, but now we're about the third highest out of 50 in this market."

"We didn't want to put a great deal of revenue into equipment purchases just to chase a dollar that would turn over every year," Fanning reasoned. "So we decided to invest in people and equipment, and if we can get more money per customer, then that's so many less lawns we have to do to maintain our margins and volume."

"Our prices have gone up an average of 5 to 7 percent over the last three years," noted Birdsong. "The lack of labor drives it up, along with the shortage of plant materials and their increasing costs."

"We've had no problem getting the prices we've wanted, but the problem I see out there is that we continue to raise the bar of quality and we'll get to a point where we can't jump over the bar," Mariani warned. "Contractors need to tell customers that we can't do better than our best and work to actually set their expectations."

The majority of the contractors, however, continue to struggle when it comes to charging more for their services.

"We've been able to increase our prices 3 percent, but clients aren't willing to pay much more than that," said Hilcrove.

"We try to get a 2 to 3 percent increase each year, but we're willing to take a smaller increase in exchange for signing a longer contract," noted Brian McAnally, division manager, lawn care, Clarence Davids & Co., Plainfield, Ill.

"Some companies who have been in business here for awhile are starting to make desperate attempts to get income, which is driving prices lower and lower," observed Lucadano. "In some cases, that means we have to settle for a one-year contract in order to prove ourselves to the client."

"Whereas there were only about five companies in our market that knew what

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they were doing 10 years ago, it seems like there are 50 now," related Cross. "That has really driven our prices down—below where they were in the early 1990s—so we're really looking for relationships as opposed to contracts so the clients' decision isn't just about the bottom line."

"The pricing seems to be pretty flat with a little less cutthroat bidding going on," observed Foley. "I think a lot of contractors have become less aggressive with competitive pricing because of the concerns associated with finding the labor necessary to get the work done."

"Our prices seem to go down every year, particularly in bid situations," noted Miller. "In that regard, this labor shortage may be something of a blessing."

"We still get the aggressive telemarketing from other lawn care companies every spring that includes some low ball pricing where they quote a price over the phone because they know what we're charging," McGuire added.

"We've got customers calling us looking to save double-digit percentages," declared Carr. "Everyone is trying to fall in line with the big, corporate accounts, and that really limits our ability to pay our workforce. We're only getting 1 percent increases a year right now."

"The big, regional players have been coming into our market, which has driven pricing down," noted Ferm. "It's gotten to the point where I think they have to be doing some jobs at a loss."

Such pricing battles may also be harbingers of future problems.

"I hear all of these contractors complaining that they can't find people, yet they're out there bidding jobs without an understanding of what it costs to do business," pronounced Mariani. "So why not just take fewer jobs at a higher profit?"

"If the industry goes into another slump, I think we'll see more contractors go out of busi-

ness," Mariani continued. "And, quite frankly, it's their own fault because, as an industry, we don't do a good job of going through the bid in proper fashion and covering our costs."

EYE ON:

Competition

FOR MANY COMPANIES, the issue of competition has been solved by proactively defining what their competition will be instead of chasing too many jobs and expanding the number of competitors they have.

"We like to think that we don't sell plants, shrubs, etc., but we sell the experience of sitting out on a patio and enjoying your property," explained Collins. "That means our competition is also the boat dealer, new car dealer, swimming pool company and so on, and we need to be able to separate ourselves from them."

"There are three or four of us in this market who are good competitors and who communicate with each other pretty regularly to push each other to get better," shared Haase. "At the bottom end of the market, when one company goes under, six show up to take its place, but they don't really know the market."

"Getting to a certain level as a commercial contractor has naturally weeded out the smaller competition that doesn't have the resources to offer the large portfolio manager the one-stop shopping he's looking for," related Fochtman.

"It seems like we've seen a few more of the fly-by-night guys in the residential market this year," recalled Dinsmore.

"I wouldn't say there's been any more or less competition, but the sales pitch has become more difficult and competitive," noted Del Conte.

"We got out of doing installation work a few years ago because that was so much more competitive than maintenance," noted Baldwin.

PLCAA

Report

The changing composition of the green industry can have rippling effects on groups besides the contractors, and the Professional Lawn Care Association of America is one such group.

After naming Tom Delaney as its new executive vice president in 1998, PLCAA is reexamining itself, its members and how it serves its members.

"We plan on making some changes in the next few years to adjust to the industry and its changes," noted Bob Ottley, president-elect, One Step Tree & Lawncare, N. Chili, N.Y. "Contractors need to be doing a lot of strategic planning now, and so does PLCAA so that we keep moving in a positive direction."

In particular, Ottley said, he expects the association to diversify its membership and attract companies involved in services other than traditional lawn care.

Another challenge for the association is meeting the needs of member companies ranging dramatically in size. "About 95 percent of our members are smaller companies," recognized Larry Messina, president, Lawn Cure of Southern Indiana, Jeffersonville, Ind. "We need to be in touch with their needs."

Ottley promised that PLCAA will remain a valuable resource for member companies.

"Consolidation obviously also affects the companies that don't consolidate, and they will continue to need good business management information to succeed," Ottley noted.





"We have a garden center that sells to a lot of smaller contractors and they've really been complaining about how competitive the market it is, so I think that's where competition is really a problem," said Carr.

"One estimate said there are more than 600 landscape companies in the Phoenix area," related Hilcove. "So we've got a mission statement and company vision meeting coming up. These are the types of things we

think a company has to do to establish the long-term relationships with clients."

EYE ON: Consolidation

"IT'S CLEARLY TAKING the industry by storm," noted Zindel, who sold his company to TruGreen-ChemLawn. "And I think it will have a positive effect by offering more positives to the customer."

Some contractors, though, are concerned about their future in this new environment.

"I think this is going to make it difficult for the rest of us to compete at the real high level," predicted Carr, "because these companies will limit our ability to attract quality, corporate jobs and grow."

"I could end up being bought out of pure frustration," admitted Ferm. "It seems like I have to work harder each year to make less money."

"I'm curious to see what will happen," admitted Harris. "I don't think companies will be able to mesh so many different company cultures into one operation."

"The consolidation concept makes sense, but I think there's always going to be room in this industry for the locally owned service provider that lets a customer deal with the owner instead of some large, corporate structure or salesperson," Fochtman observed.

Rex Gore, president, Clean Cut, Austin,

Texas, whose company was acquired by LandCare USA, said there will be positive results for the industry. "While this may reduce competition a little, I think it will help accelerate the perception of us as a professional industry," he said.

"I'm looking to grow with the company," noted Meyer, whose company is also now part of LandCare USA. "I think consolidation is the right thing for the industry because it provides a one-stop shopping source for the customers. Within a few years, I think there will be about five major players and the

Money Matters



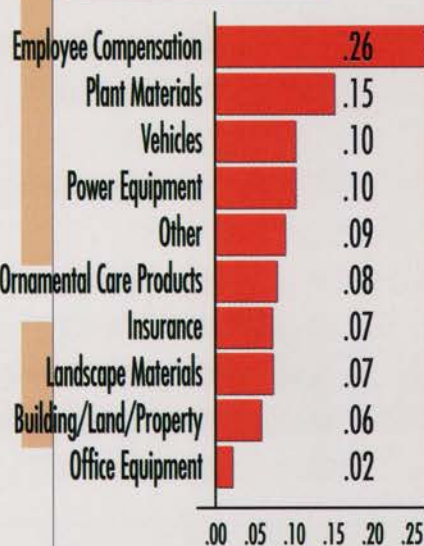
In a surprising twist, respondents to a survey of 1,000 *Lawn & Landscape* readers noted they spent less

money — down 1 percent — on employee compensation in 1998 than in 1997.

Meanwhile, 10 cents out of every dollar these companies spend goes to equipment acquisition and maintenance, which is up 3 percent from 1997, and may represent a shift toward a greater reliance on more efficient equipment instead of labor by contractors.

Plant materials, turf and ornamental care products (fertilizers, pesticides, etc., and insurance) were all up 1 percent as well this year.

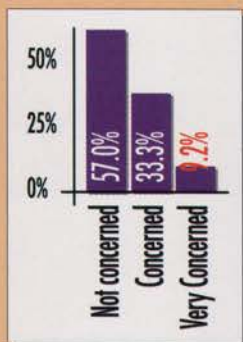
Money Talks



Can You

Compete?

With all of the attention consolidation has received this year, it begged the question of how concerned contractors are about their ability to compete against these companies. Better than 42 percent of respondents indicated some concern.



Source: *Lawn & Landscape* Reader Survey, August 1998

Source: *Lawn & Landscape* Reader Survey, August 1998

SPECIAL REPORT:

medium-sized companies will have been bought out."

"Several of the national companies have entered the Dallas market this year, but we don't expect it to effect us," shared Birdsong. "We've developed true relationships through 17 years of business and our clients know us and trust us."

For the most part, contractors aren't professing too much concern, nor nearly as much

as was voiced in the spring, about their ability to continue operating successfully.

"A similar thing took place when Dallas was booming in the early 1980s and all of the big companies came to town to take advantage of it," Birdsong continued. "Our experience has been that people in Dallas really don't care who maintains the corporate headquarters somewhere else. They just care about how their property compares to the one up the street."

"I don't know if this consolidation will be good for the industry, but it should be good for the companies doing the consolidating," commented Hilcove, who added that his company is considering making some acquisitions. "The companies that can figure out how to give more service for less money and maintain the right attitude will survive."

"Truthfully, I think these big companies actually need the rest of us because of the additional voice we lend to the customers," asserted Joe Williams, president, Lawn Master, Pensacola, Fla. "Otherwise, one company doing a poor job can give an entire industry a bad reputation."

"At first I was nervous, but then I realized that a well-managed company will survive just fine," Del Conte noted. "We'll just have a big gap between the top 10 companies in the industry and number 11."

"The question isn't whether or not consolidation should happen, because it will continue," Zindel concluded. "These new, consolidating companies are addressing the needs of the clients. The naysayer says this will hurt the customer, but I don't think it will if these companies are handled properly. It's the best of both worlds for the different companies who join in because then they have the financial backing of a huge company as well as the operating efficiencies of a smaller company."

In some cases, contractors think their particular service market will minimize consolidators' interest. "I don't think we'll see this consolidation in the installation industry because that will always be a creative process driven by one-on-one contact between the designer and the homeowner," noted Collins.

Another commonly held view is that being bigger still doesn't solve the industry's

Good

Growing

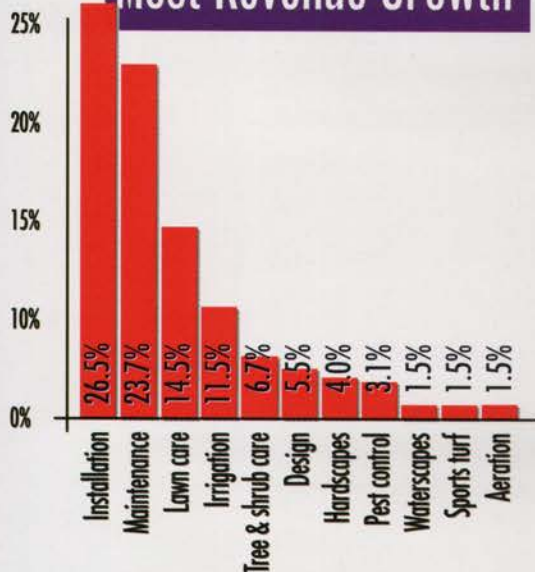
It's no secret that business is good for green industry contractors, who are expecting an average jump of 24.1 percent in sales from 1997 to 1998. But some areas of business are even hotter than others.

Predictably, installation and maintenance services showed the greatest growth — they were singled out by 26.5 percent and 23.7 percent, respectively, of respondents to a survey of 1,000 *Lawn & Landscape* that asked which service areas showed the most growth.

A sign of contractors' continued diversification efforts can be seen in the

growth of some of the other services, however. 61.5 percent of the respondents to the 1997 survey put maintenance and/or installation among their most rapidly growing services. Growth in the lawn care and irrigation industries, in particular, made up a larger share of contractors new found business this year than last year. Sports turf, waterscapes and structural pest control were also new additions to this year's list of responses.

Most Revenue Growth



Source: *Lawn & Landscape* Reader Survey, August 1998

number one problem. In fact, for companies where a premium is placed on growth in order to satisfy the interests of Wall Street, the labor shortage could be an even more critical issue.

"Everyone is having trouble finding employees, so I'm curious to see where the companies will get the new employees necessary to keep growing," shared Baldwin.

"It can't hurt us to have money invested from the private sector, but what could be a problem is if the prices of companies in the market get over inflated," Foley said. "That could destroy the market for anyone who is looking to make an acquisition."

"Some of these investment groups may be in for a rude awakening when the industry goes through another downturn," related Mickey Strauss, president, American Landscape, Canoga Park, Calif. "I can't see Wall Street people tolerating a losing proposition, and during the early 1990s, parts of everyone's business were losing propositions."

Of course, as one contractor pointed out, the consolidation within this industry isn't the only consolidation that could impact the contractors.

"The consolidation that really concerns me is what's going on with the large, commercial businesses we serve," Pendleton added. "That's where a relationship that has been built over years can be dissolved immediately because a new owner wants to consolidate vendors."

EYE ON: *The Future*

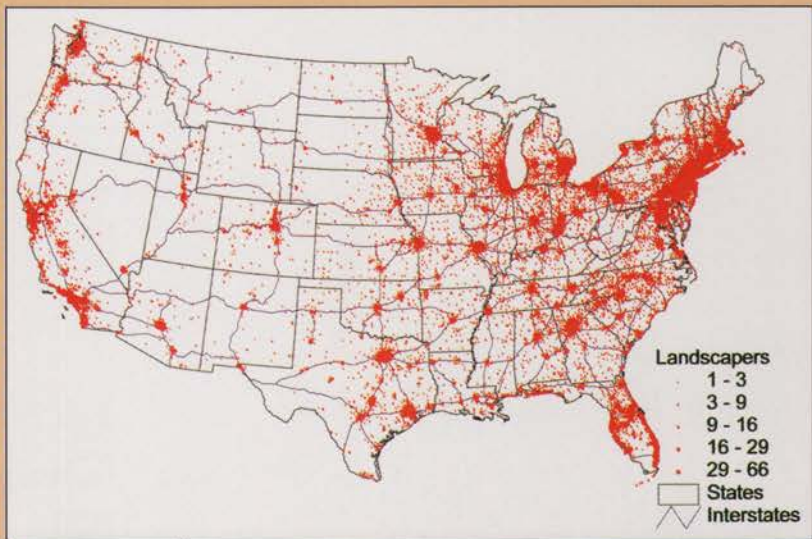
IN THE END, the industry remains confident about the next few years. In fact, better than 95 percent of those contractors surveyed by *Lawn & Landscape* said they are optimistic about 1999.

"Cost effective marketing is always a challenge, and everyone is worried about retaining customers. But getting them and keeping them never stops," said Hofer.

Landscaper Locations Across the U.S.

Thinking of starting up a new lawn care or landscape company? Here's a suggestion: consider areas west of the Mississippi River. The chart below (courtesy of Husqvarna Forest & Garden Co., Charlotte, N.C.) plots the location of landscape businesses across the country.

Of course, a similar style map plotting single-family homes in the United States would show equally heavy concentrations in the areas most densely populated by contractors. The primary difference between the two maps? The plotted points of single-family residences cover a great deal more of the country than do the contractor dots, reinforcing what so many companies already know — there's a great deal more business out there than the industry is presently serving.



Source: Husqvarna Forest & Garden Co.

Many of these companies have recognized that the key to their success will be their ability to resist the urge to chase too much business and, instead, focus on what they do best and most profitably.

"Companies need to stay focused," maintained Haase. "You have to pick your markets and focus on a niche. For example, there's a ton of snow up here, but we don't plow. We just work nine months out of the year and stay focused. Going around figuring out how to do something new just costs time and money."

"I see a future of companies finding their niche in the market and not trying to do everything," remarked Lucadano. "Companies need to pick a type of client to serve and develop relationships with them because a good relationship will withstand the heaviest of attacks from any competition."

"I think the quality of work we provide will have to continue to improve due to the competition," said Del Conte.

"The industry is going to be looked upon to be more professional," asserted Haase. "Customers will hire based on a company — not just one person — because of that company's knowledge and staff."

"I think we're going to see more partnering between different contractors on

State

major jobs in order to split the responsibilities," predicted Harris.

"We keep watching the local planning commission to get a sense of the construction market, and it seems to have plenty of projects coming before it," added Baldwin.

"There will be a lot of outsourcing options because large companies have the same problems finding labor," noted Foley. "If we can find a way to serve their property maintenance needs effectively, we should have an advantage over an in-house staff."

Strauss noted that contractors should be prepared for any market downturns to come. "Generally, we're one of the last people on to a job and other industries should take a hit before we do," he noted. "We just need to read into the housing starts and other building information and gear up accordingly."

"Cost effective marketing is always a challenge, and everyone worries about retaining customers," noted Hofer. "But getting them and keeping them never stops. And while retention rates seem to be steady, it continually costs more to get a new cus-

tomers. So as much as you want them, getting them can drive you out of business."

"The biggest need for the future is obviously employees, but the next issues to address are controlling costs and putting some kind of stop on all of this growth," Mariani explained. "We feel very comfortable at our current size, and we'll continue to grow our maintenance department as we can add good people there because then we can offer more services to our clients. But our design/build growth will be limited because we want to make sure our key personnel are involved on every job there."

"Companies have to anticipate the future and come up with a game plan," Mariani concluded. "When we had problems with employees a few years ago, we came up with four plans based on what worked and what didn't, and we were confident we could make it work. If you're prepared, you don't need to rely on luck."

The authors are Editor and Assistant Editor of Lawn & Landscape, respectively.

Overcoming

Obstacles

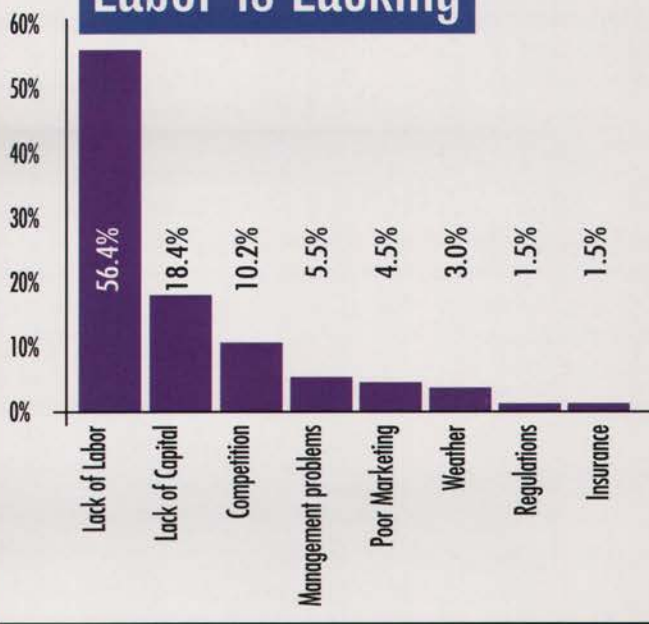
It's no big surprise to see the labor shortage at the top of any survey asking contractors what factors are limiting

their ability to grow. And the

problem is apparently growing more severe, comparing this year's 56.4 percent finding with the 50.1 percent of respondents who pointed to the labor shortage last year.

The lack of capital to fund expansion and growth continues to be the second most commonly cited obstacle, followed by competition and management problems.

Labor is Lacking



Source: Lawn & Landscape Reader Survey, August 1998

(continued from page S16)

\$29,162,136.80 per company. These companies expect revenues to grow by an average of 16.77 percent in 1998, and just three expect revenues to drop off in 1998. The median 1997 revenue value was \$10,415,395.

These 100 companies can be found in 27 states, with California at the top of the list with 19 companies calling it home.

EDITOR'S NOTE: Lawn & Landscape made every attempt to identify and contact companies it believed should be included on the list. Certain companies are absent because they elected not to disclose their revenue figures. However, if anyone knows of a company that should be included on this list, please contact Bob West at 800/456-0707 or bwest@gie.net.

How has the industry been in your market this year?

What is challenging your business, and what unique solutions have you uncovered to these problems?

Lawn & Landscape wants to know. Visit our Internet site (<http://www.lawnandlandscape.com>)

and post your thoughts on our Bulletin Boards.

TOP LAWN AND LANDSCAPE COMPANIES		1997 REVENUE	PERCENT CHANGE FROM 1996	EXPECTED CHANGE IN 1998
51.	R. Glass Landscape Co., Roselle, IL	\$10,500,000	10	10
52.	Post Landscape Services Inc., Atlanta, GA	\$10,415,935	13	13
53.	Cedar Landscape Inc., Hillsboro, OR	\$10,369,501	21	20
54.	Western Dupage Landscape, Naperville, IL	\$10,368,000	14	6
55.	The Morrell Group, Stone Mountain, GA	\$10,330,000	27	45
56.	Environmental Design Group, Atlanta, GA ▼	\$10,182,516	2	23
57.	Clarence Davids & Co., Blue Island, IL	\$10,000,000	3	10
58.	Urban Farmer, Denver, CO	\$9,809,067	18.9	33
59.	New Garden Landscaping & Nursery, Greensboro, NC	\$9,800,000	30	20
60.	Landscape Specialist, Lake Forest, CA	\$9,500,000	23	20
61.	Lifescapes, Atlanta, GA ▼	\$9,300,000	9	6
62.	McFall & Berry Landscape Mgmt., McLean, VA	\$9,200,000	3	2
	L&L Landscape Services, Sunnyvale, CA	\$9,200,000	22	28
64.	Lewis Landscape Design, Las Vegas, NV	\$9,000,000	30	45
	Hermes Landscaping, Lenexa, KS	\$9,000,000	7	7
66.	Ground Control Landscaping & Maintenance, Orlando, FL ♦	\$8,979,000	6.8	N/A
67.	Lewis Landscape Design, Las Vegas, NV	\$8,900,000	40	53
68.	Landscape Management Inc., Dallas, TX	\$8,312,024	N/A	N/A
69.	Stiles Landscape Service Co., Pompano Beach, FL	\$8,300,000	13	33
70.	Senske Lawn & Tree Care, Kennewick, WA	\$8,200,000	9	9
71.	Countryside Industries, Wauconda, IL	\$7,940,779	2.5	5
72.	Dennis 7 Dees' Landscaping, Portland, OR	\$7,700,000	9	20
	Hillmeyer Nurseries, Lexington, KY	\$7,700,000	(-7)	16
	Pro Scapes, Wilsonville, OR	\$7,600,000	15	15
75.	D.A. Hoerr & Sons, Peoria, IL	\$7,600,000	6	(-5)
76.	Diablo Landscape, San Jose, CA	\$7,526,000	10	25
77.	Yardmaster, Inc., Painesville, OH	\$7,500,000	14	23
78.	Horticultural Industries, Sarasota, FL ♦	\$7,417,000	95.4	N/A
79.	Arteka Corporation, Eden Prairie, MN ♦	\$7,366,000	4.5	N/A
80.	Swingle Tree & Landscape Care, Denver, CO	\$7,261,000	16	(-10)
81.	Rood Landscape, Tequesta, FL	\$7,252,000	(-6.6)	8.5
82.	All Phase Landscape, Lakewood, CO	\$7,000,000	20	0
	Mainscape, Indianapolis, IN	\$7,000,000	10	10
	Environmental Landscape Services, Houston, TX ▼	\$7,000,000	N/A	N/A
85.	The Greenery, Hilton Head, SC	\$6,755,180	11	16
86.	Northwestern Landscape Company, Puyallup, WA ▼	\$6,717,000	10	15
87.	R.B. Stout Inc., Akron, OH	\$6,600,000	6	7
88.	Desert Care Landscaping, Phoenix, AZ ♦	\$6,481,000	9.0	N/A
89.	Landscape Workshop, Pelham, AL	\$6,200,000	24	20
90.	Buckeye Landscape Services, Columbus, OH	\$6,153,232	4.7	0
91.	Smallwood Design Group, Naples, FL	\$6,100,000	8.2	7
	Industrial Landscape Services, San Jose, CA	\$6,100,000	9	9
93.	Otey Brothers, Westboro, MA ▼	\$6,012,612	33	20
94.	ILT Vignocchi, Prairie View, IL	\$6,000,000	5	5
	Glen Gate Co., Wilton, CT	\$6,000,000	0	20
96.	CoCal Landscape Services, Denver, CO	\$5,900,000	11	19
97.	Redwood Landscape, Santa Rosa, CA ♦	\$5,859,000	16.6	N/A
98.	RH Dupper Landscape, Tempe, AZ	\$5,478,848	(-2)	9
99.	Sebert Landscaping, Bartlett, IL	\$5,400,000	10	5
100.	Laflamme Services, Bridgeport, CT	\$5,240,000	(-21)	(-8)

1998

Who could've known last year when we published the *Lawn & Landscape* Top 50 that the industry would soon enter a period of consolidation that would affect so many of the companies included on that list? At the same time, the L&L Top 50 became a very popular resource for any organization — be it landscape, financial or other — looking to identify potential acquisition candidates.

Due to the tremendous interest readers indicated in this list, we have expanded it this year to the *Lawn & Landscape* Top 100, a comprehensive listing of the 100 largest companies in the green industry, based on year-end 1997 revenues.

Companies on this list were surveyed in August and September of 1998 and asked to provide the information included in the chart. Their revenues include all divisions, branches and green-industry profit centers that they owned as of Dec. 31, 1997.

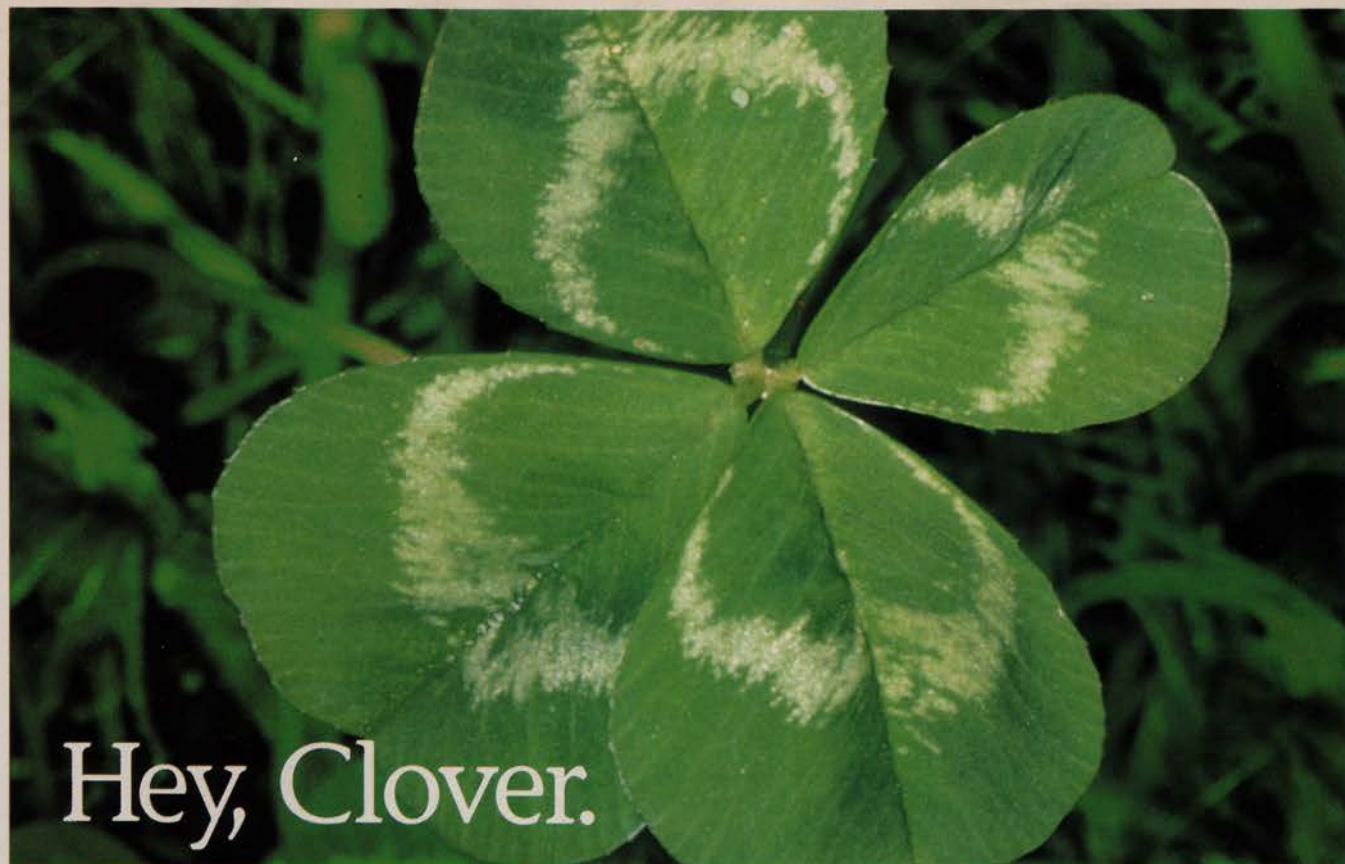
Because this list uses 1997 revenues, the acquisitions of LandCare USA, TruGreen-ChemLawn and The Brickman Group are not included. However, these acquisitions are indicated by the various symbols in the L&L Top 100 list.

The L&L Top 100 earned a total of \$2,916,213,680 in 1997, or an average of

(continued on page S15)

	TOP LAWN AND LANDSCAPE COMPANIES	1997 REVENUE	PERCENT CHANGE FROM 1996	EXPECTED CHANGE IN 1998
1.	TruGreen-ChemLawn, Memphis, TN	\$800,000,000	18	N/A
2.	Environmental Industries Inc., Calabasas, CA	\$351,000,000	17	21
3.	The Davey Tree Expert Co., Kent, OH	\$295,000,000	10.5	6
4.	The Brickman Group, Long Grove, IL	\$103,000,000	14.4	30.1
5.	Rentokil, Riverwoods, IL	\$90,000,000	N/A	N/A
6.	Bartlett Tree, Stamford, CT	\$89,000,000	8	10
7.	Weed Man, Mississauga, Ontario, Canada	\$45,000,000	10	10
8.	Lawn Doctor, Holmdel, NJ	\$43,000,000	6	15
9.	Ruppert Landscape Co., Ashton, VA ▼	\$41,000,000	12	n/a
10.	ISS Landscape Management Services Inc., Tampa, FL	\$40,000,000	18	22
11.	Randall & Blake, Littleton, CO	\$37,500,000	15	0
12.	Greenspace, Toronto, Ontario, Canada	\$33,000,000	26.9	15.2
13.	Gothic Landscaping, Phoenix, AZ	\$32,000,000	20	20
14.	The Bruce Co., Middleton, WI	\$27,500,000	20	24
15.	Hendricksen — The Care of Trees, Wheeling, IL	\$27,000,000	10	10
16.	Leisure Lawn, Dayton, OH	\$21,000,000	8	9
17.	American Landscape, Canoga Park, CA	\$20,000,000	11.1	10
	Buccola's Landscape, Anaheim, CA	\$20,000,000	35	20
	The Groundskeeper, Tucson, AZ	\$20,000,000	10	15
	Lipinski Landscape Contractors, Mount Laurel, NJ	\$20,000,000	50	20
21.	California Landscape Co., Anaheim, CA ▼	\$18,000,000	N/A	N/A
22.	Teufel Nursery Inc., Portland, OR	\$17,006,002	2	5
23.	Four Seasons Landscape & Maintenance, San Jose, CA ◆	\$16,066,000	20.2	N/A
24.	Clean Cut Inc., Austin, TX ◆	\$15,865,000	22.5	N/A
25.	AAA Landscape, Tucson, AZ	\$15,785,078	26.6	10
26.	Landscape Resources Inc., Irving, TX	\$15,784,056	15	8
27.	Northwest Landscape Industries, Tigard, OR ▼	\$15,178,970	0	12
28.	Landtrends Inc., San Diego, CA	\$15,083,000	28	22
29.	Schumacher Landscaping Inc., South Natick, MA ◆	\$14,800,000	36	30
30.	Landscape Resources, Dallas, TX	\$14,455,000	27.2	N/A
31.	Mariani Landscape, Lake Bluff, IL	\$14,450,000	19	14
32.	Southern Tree & Landscape Companies, Charlotte, NC ◆	\$14,176,000	6.9	N/A
33.	Chapel Valley Landscape Co., Woodbine, MD	\$14,000,000	28	9
	Jensen Landscape Services, Cupertino, CA	\$14,000,000	N/A	N/A
35.	Cagwin & Dorward Landscape Contractors, Novato, CA	\$13,792,000	1	13
36.	D.R. Church Landscape Co., Inc., Lombard, IL ◆	\$13,257,000	21.1	N/A
37.	Pennink Arrimour Inc., Huntingdon Valley, PA	\$12,500,000	7	30
38.	Pacific Environmental Landscape, Los Angeles, CA ◆	\$12,205,000	20.2	N/A
39.	Brookwood Landscape, San Diego, CA	\$12,000,000	10	10
	Landscape Concepts, Grayslake, IL	\$12,000,000	15	25
	Lied's Landscape Design & Development, Sussex, WI	\$12,000,000	3	10
	Nanak's Landscaping, Longwood, Fla.	\$12,000,000	24	20
43.	Vila and Son Landscaping, Miami, FL	\$11,936,800	(-9.5)	15
44.	Green Tree, Atlanta, GA ◆	\$11,905,000	32.0	N/A
45.	Park Landscape Maintenance, Santa Ana, CA	\$11,700,000	31	21
46.	NaturaLawn of America, Frederick, MD	\$11,500,000	28	28
47.	Landscape West, Anaheim, CA ◆	\$11,408,000	13.1	N/A
48.	Week's Landscaping, Norcross, GA	\$11,200,000	26	28
49.	KT Enterprises Inc., Chantilly, VA ●	\$11,000,000	9	15
50.	Dora Landscaping, Apopka, FL	\$10,835,080	12	11

Acquisitions through 9/24/98: ◆ LandCare USA, ▼ TruGreen-ChemLawn, ● The Brickman Group



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For the Course

Drought conditions certainly cause problems, but the rains of this spring meant intense weed, disease and insect problems for many parts of the country.

By Bob West



It's one of the great every spring—what lawn care season hold trees and ornamental plants across the country?

As each new season rolls around, contractors have to find out how much damage was caused the preceding winter. From there, it's time for spring rains and warmer weather. Or is it? And what follows then? For some, a mild summer may be in store, but others must prepare to battle drought conditions and scorching temperatures. And soon...

While the climatic conditions may have varied across the country this year, most contractors cited few troubling or irregular problems compared to years past.

WEEDS. The Rocky Mountain region had perfect winter and early spring conditions for seed bed preparation, and the expected weed outbreaks have developed. John Pfeiff, president, JP Total Lawn & Property Maintenance, Kittredge, Colo., said some weed problems—mainly dandelion and Canadian thistle—have been the worst that he's seen in eight years.

(continued on page 78)



Lawn care operators in the Southeast can expect winter weed problems due to hurricane rain. Photo: Lawn Specialties



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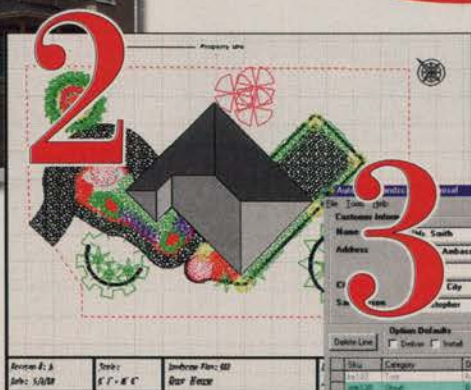
BEFORE

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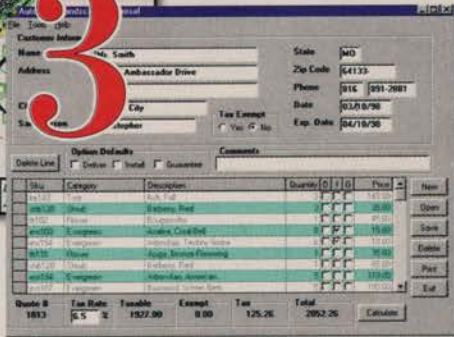


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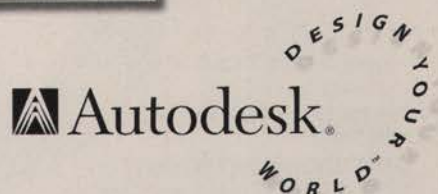
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pesticide use

(continued from page 76)

"We had some wet spring snow that brought seeds to the surface more than normal, and growing conditions were just perfect after that with a fairly heavy drought followed by rain," Pfeiff recalled. "The drought provided some control, but the weed seeds still had perfect bed conditions, and the drought also stressed the turf."

Pfeiff estimated dandelion problems have been four or five times worse than normal and said that warm, dry, breezy conditions through the summer helped spread Canadian thistle seed heads.

"The crabgrass and spurge has been a

Yelverton said this rain may also cause the winter annual weeds to arrive on the scene earlier than normal so contractors should've made preemergent applications earlier.

little worse than normal because the hot, dry summer caused some breakthroughs on our preemergent," noted Mike Small, owner, Highland Park Lawn Company, Grand Island, Neb.

However, an early season dryspell in Florida is being credited for less incidence of crabgrass, according to Adam Jones, training and technical director, Massey's Green Up, Maitland, Fla.

"Our most troublesome weed is the dallasgrass in the warm-season turfgrass, and that's primarily a problem in new properties we take care of that haven't been cared for properly," related Larry Dorsey, president, Dorsey's Landscaping, Monticello, Ga. "But it can be a nuisance because it crops back up in about three days and has such big heads that make it noticeable."

On top of that, the Southeast has been faced with "a pretty good drought in August and September," according to Dorsey, which further exacerbates turf problems by adding one additional stress to it.

Gil Landry, a turf extension agronomist at the University of Georgia, Griffin, said lawn care operators in the Southeast were reminded this year about the importance of making good winter applications and keeping them adequately spread out. "We had some significant increases in winter weed control problems due to above average amounts of winter rain," he recalled. "In particular, there were problems with poa annua and annual broadleaf weeds."

Fred Yelverton, with the department of crop science, North Carolina State University, Raleigh, N.C., said a lack of rain in that area decreased weed pressures this past summer, but the stream of fall hurricanes may cause problems this winter. "Overall, the problems associated with wet summers, such as the sedges, have been around but haven't been too bad, and the crabgrass and goosegrass is just starting to show up a little more," he said. "But Hurricane Bonnie dumped 10 inches of rain on us in early September, so contractors should expect to see a lot of breakdowns in weed control."

Yelverton said this rain may also cause

(continued on page 80)

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pesticide use

(continued from page 78)

the winter annual weeds to arrive on the scene earlier than normal, so contractors should've made their preemergent applications about a week earlier than normal this

year, which would mean during the third or fourth week of August. "The biggest thing to battle down here is poa control and winter annual broadleaf weeds," he said.

"Weed pressure can't be allowed to get too high when the warm-season
(continued on page 82)

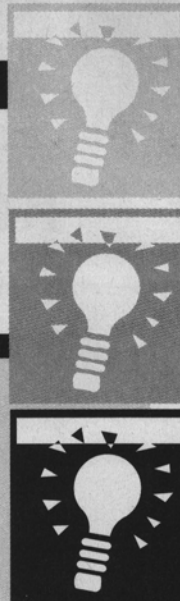
Contractors Offer Suggestions

Pesticide manufacturers must be manufacturing quality products of late, based on feedback gathered from lawn care contractors. When asked what areas they'd like to see pesticide manufacturers do a better job in, it was the support manufacturers offer contractors that was their focus.

"There is a need for a layman's explanation for everything involved with these products, the regulation issues surrounding them and how they can be used correctly," observed John Pfeiff, president, JP Total Lawn & Property Maintenance, Kittredge, Colo.

"I love that some manufacturers put MSDS labels on the Internet and I can store them on my computer," said Steve Mattingly, president, Mattingly Lawn Care, Indianapolis, Ind. "But every year there are new tank mix possibilities, so I'd like more information discussing what works well together and what doesn't, especially for multiple manufacturers' products."

"We're using injection technology, and one problem is that the formulations are so concentrated that we have to create slurries because the application rates are too low for injection equipment," added Adam Jones, training and technical director, Massey's Green Up, Maitland, Fla. "There's a trend toward microinjection in the industry, but it's hard to use 1 or 2 gallons in a backpack sprayer and measure out the right amount of product." — **Bob West**



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(continued from page 80)

grasses go dormant or off color in the winter because of how noticeable green weeds will be in a brown lawn."

DISEASES. "In general, our biggest problem every year is with summer patch on bluegrass," added Small, "although it hasn't been too bad this year. We've tried a bunch

of different products and haven't been able to get much control, and what control we have gotten has been pretty short lived and it ends up being too cost prohibitive to treat for it.

"Instead of the summer patch, we've had brown patch this year like we've never seen before on the bluegrass because of the heat.

That has left the lawns looking pretty bad right now," added Small.

Dorsey agreed that the heat has led to some sizeable brown patch problems, but primarily in fescue grasses. "But we don't use too much fescue in Georgia," he said.

Landy said most of the brown patch problems have been found in the tall fescues and cool-season grasses. "We've also had a lot of secondary issues related to drought stress from a lack of rain in the late spring and early summer," he added.

Dollar spot has cashed in on some late summer humidity in Florida. "All of the leaf spot fungi have been more prevalent this year," maintained Jones. "As a result, we're ending up with field situations where the technicians have to determine whether or not to use a fungicide, whereas in previous years the problem was so minimal that we could let the fungus grow out of the turf. Our fungicide use is probably up 100 percent this year as a result."

INSECTS. "Our biggest problem with insects has been grubs, spittle bugs and chinch bugs," commented Dorsey. "North of us is fescue turf, so we see a lot of bermudagrass and centipedegrass. This is the worst I've seen the chinch bugs and grubs, and the spittle bugs are causing damage that makes turf look drought stressed."

Dorsey said grub control continues to be a big push with residential customers and he's trying to get them to communicate the importance of this with their neighbors. "Grub control also takes care of the Japanese beetles, and we're trying to get people in subdivisions to work together against these insects to keep them from spreading," he noted.

Armyworms have shown up in Georgia, according to Landy. "We've had an outbreak of the fall armyworms that started in August," he explained. "This occurs about every five years or so."

The armyworms also made a surprise appearance along with the expected sod webworms in Florida this summer, according to Jones. "Armyworms were persistent through August and we haven't been able to pin down the cause," he related. "But it's not an epidemic."

The author is Editor of Lawn & Landscape magazine.

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- the day.

Creating a feeling of safety in a customer's landscape can be done without compromising its appearance.

By Nicole Wisniewski



esigning a landscape in 3000 B.C. Persia was completely opposite from the way it is today.

"The first thing they put up was a wall," exclaimed Joy Dorst, owner of Design with Nature, Tallahassee, Fla., and a professor of landscape design at Florida Agricultural and Mechanical University, Tallahassee, Fla. "Then came the trees."

During that time, the Persian environment was hostile. When there wasn't a fight brewing with the Egyptians there was a battle nearby with the Greeks. Safety and security were landscape priorities.

"People did not want to have to leave their yards," Dorst explained.

It wasn't until 16th century Paris when King Louis XIV hired designers to create the lavish, wide-open landscape of Versailles that things changed.

"It's all about curb appeal now," Dorst said. "The front yard is open and exposed. We're shunned when we enclose our yards because we're thought to be turning our backs on our neighbors. Today, when I think of a suburban neighborhood with families, the yards are an open thoroughfare for the kids to get from one property to the other."

And because landscapes can be such high traffic areas, about 25 to 35 percent of residential customers, and almost all commercial customers, bring up safety when talking to a landscape designer, said David Davis, a salesman/designer at Marvin's Gardens, Sarasota, Fla.

(continued on page 86)



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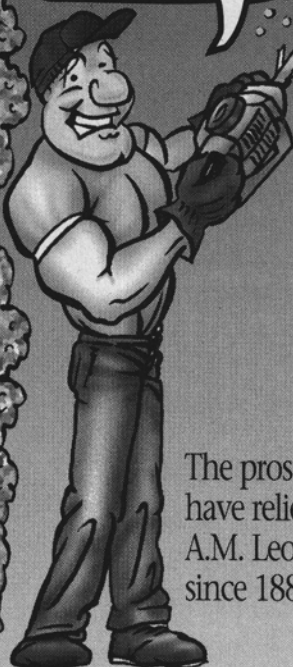
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landscape safety

(continued from page 84)

"And if they're not thinking about it, the customers look to us to bring up safety issues," stressed Rich Deckman, administrative director for landscape architecture at Lifescapes Inc., Canton, Ga.

Designing a landscape for a customer's functional and personal safety can be done without compromising its appearance. For commercial properties, safety is always an issue because there is more traffic. On residential properties, it's all about how the customer feels living there, Dorst insisted.

"No residential landscape can be fully secure, like a prison, and most customers wouldn't want that," she assured. "It's about

a feeling of safety. I feel safe in my yard, but I don't know if it's secure. I naturally wouldn't feel comfortable walking along tall shrubs at night in any situation. But if I keep the trees and bushes trimmed to avoid overgrowth around my windows and do some lighting around the house at night, a burglar may go next door."

SAFETY FIRST. Security was the first priority for one of Michael Currin's customers a couple of years ago. The president of Greenscape Inc., Holly Springs, N.C., was designing a land-

(continued on page 88)

Detering Unwanted Visitors



The idea of using the physical environment as protection against attack may date back to the cavemen, but it wasn't until recently that creating a defensive environment was approached from the physical and the psychological aspects at the same time to create both physical and symbolic barriers to intrusion.

Landscaping as a physical barrier to prevent movement around the perimeter of a building can be achieved with several strategies, including:

- **Thorny plants.** One strategy is to use a landscaping theme with cacti or other thorny plants along block walls and perimeter fencing. There are many different kinds of prickly plants that will provide a deterrent to intruders attempting to climb walls or trespass on private property.
- **Box hedges.** If more substantial barriers are needed, shrubbery such as evergreen hedges can be used to create more formidable obstacles. Box hedges planted along the outside edge of the property are "natural fences."
- **Fences.** Wooden privacy fences can act as physical barriers around the perimeter of a property and can be incorporated into many landscape design themes. Choose sturdy fences that are no more than 4 feet tall.

Landscaping can also be used as a symbolic or psychological barrier to subtly mark "no trespassing" zones around a home or facility. Following are several options for symbolic barriers:

- **Decorative fences**
- **Flower beds**
- **Ground cover**
- **Cement patterning in walkways**

Security consideration in landscaping should be part of any environmental design project to promote safety and cut down on crime. Knowledge of design principles that enhance appearance and security will pay off in the long run for businesses ready to meet the demands of clients who are increasingly concerned with protecting their assets. — **Bob Decker**

The author is assistant vice president of loss control at Florists' Mutual Insurance Co, Edwardsville, Ill.

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landscape safety

(continued from page 86)

scape for the head of a large health care company. This customer wanted security access gates, TV cameras and screen monitors implemented into his landscape so that he could clearly see visitors before they entered his property.

"The whole landscape project was close to \$250,000 and \$60,000 of that was just for security cameras and devices," Currin noted. "In this type of situation, having a landscape architect on board is good because we are more sensitive to aesthetics and appearance. Having that type of security requires many electrical connections and cables. We were able to run the cable to coordinate with the irrigation installation to minimize the amount of damage to existing trees and turf. We also did a good job of blending the security equipment into the landscape by tucking the cameras in trees."

Although most residential landscape design projects don't require this amount of security, there are some basic safety rules for designers to follow from the start.

"The first thing we focus on when dealing with outdoor safety is the building codes," said Dennis Murphy, design manager at Mariani Landscape, Lake Bluff, Ill. "For example, if there is a sudden drop in elevation on a landscape, then a fence or plant border needs to be put in there. A driveway should be wide enough for two cars to get in and out. If there is a swimming pool on the property, we have to make sure it follows the regulations, which could include installing a fence to restrict access."

"The top code requirement with commercial properties is view," Dorst added. "The Department of Transportation limits the use of shrubs in sight triangles or places where cars are pulling out into traffic. Nothing should block a motorist's line of sight. Usually, you can't plant anything between 1 and 6 feet high in these areas."

On commercial properties, common safety knowledge includes the proper installation of irrigation systems. Because of the heavier flow of traffic on commercial properties, water should be kept far away from walkways, Currin explained.

"By doing this you're eliminating safety hazards of water possibly freezing on the walkways," he said.

Functional safety also means making

(continued on page 90)

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(continued from page 88)

sure guests on residential or commercial properties are directed naturally toward the right entranceway. This can be done with plant-bordered walkways or proper lighting in the evening.

"You don't want a guest wandering around a residential client's property only to show up at the back patio door and the

client is in his or her pajamas," Currin remarked. "And on commercial properties, you want to draw more attention to the public visitor entrance than the employee service entrance."

FENCED IN. Murphy recently finished a design project for a woman with seven

'It's also wise to include a general disclaimer in every contract that says there is no guarantee of full safety and security.'

children. Functional safety for the children playing in the yard was her main concern.

"She wanted to be able to use the yard and driveway for play," Murphy explained. "We absolutely were not allowed to use steps or walls or anything the kids could trip or fall over. The yard had to have a smooth riding surface for kids' sports and fencing so that the younger kids wouldn't wander out of the yard when mom's back was turned."

Adding fencing to a landscape can provide a safe and beautiful feature as long as it's done correctly, Currin pointed out.

"Sure, a chain link fence with 3 inches of barbed wire on top is safe," Currin admitted. "But how can we give that same feeling of safety and make the design look a lot better? Brick columns with a rod iron railing look nice. A wooden fence is very appealing. You can also use a combination of materials, such as adding wooden gates or columns to the rather inexpensive chain link fence."

When it comes to fencing, a designer has to know his materials, Murphy said.

"Screening off a landscape with shrubs or fencing can add a lot of beauty to it," he observed. "Ornamental fencing works well with any design. We use a lot of rod iron fencing on upscale budget projects and it comes in many handsome-looking designs."

A pool may also require fencing for safety, depending on the city codes, Deckman said.

"Thirty to 40 percent of our residential clients have pools," he noted. Since Atlanta doesn't require fencing in pools, automatic locking pool covers are popular options.

"Many clients around here want a free form pool that has a very different shape," Deckman added. "Because that type of pool is difficult to put a cover on or keep a fence around, we usually have to resort back to a rectangular or square pool."

LIGHT THE WAY. Lighting is one of the most important landscape safety features because

(continued on page 92)

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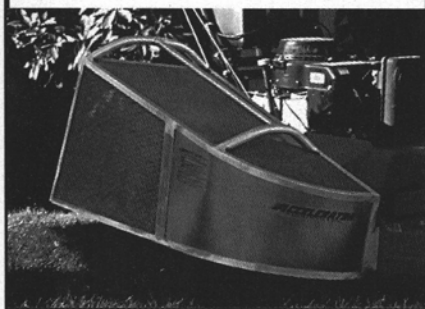
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landscape safety

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it provides comfort at night, whether it's on a residential site where a homeowner is returning after a late dinner or on a commercial property where an employee is leaving work just as it's getting dark.



A safe design includes consideration of issues such as how quickly and easily someone can get from their car to the house.

Lighting is used differently on each site, however, due to the amount of traffic the site gets and the property's specifications.

"On residential properties, it's all about the customer being able to walk to the front door feeling safe," Dorst noted. "Pathway lighting is important in this case, especially in places where there is a change in elevation or steps."

Recess lighting tucked into the steps is aesthetically pleasing and lights the way at the same time, Currin added.

"You don't have to use blinding lights on residential properties," Currin stressed. "You just need enough to

show people that there's one step down from the patio or to give people enough light so that they don't feel like they're walking into a dark cavern."

Motion sensor lighting works well in the frontyard of a home, Deckman advised, because it saves on electricity and can make a homeowner feel very secure knowing exactly when someone or something, i.e. a person or animal, is in their yard.

"We've also used a motion sensor beam that shoots across the driveway and alarms a bell as a visitor walks past it," Deckman said.

"High voltage mood lighting can even be used on a timer to come on as it gets dark and go off at 1 a.m. or so or remain on until the morning," added Jim Greene, creative director and landscape architect at Lifescape.

Because there is more traffic on a commercial site, lighting becomes more of a safety feature than an aesthetic enhancement to these types of properties.

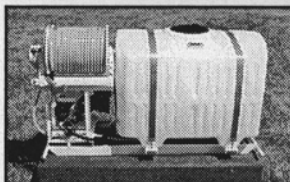
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landscape safety

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"When lighting a commercial site, no ambient or mood lighting is used, especially in wide open parking lots or fields," Dorst said. "Large pools create deep shadows. You have to use a consistent level of flood lighting so that it's easy for an employee or visitor to see from the door to their car."

EVERY ROSE HAS ITS THORN. Around her mother's home, Dorst planted thorny bushes underneath the windows as a deterrent to burglars attempting to get in.

But poisonous plants and thorny plants, such as holly bushes, aren't always endorsed for safe landscapes.

"I wouldn't recommend a prickly bush to clients for safety reasons," explained Greene. "It may deter kids, but it won't deter hardcore burglars."

Thorny, poisonous plants can also be dangerous to children or pets on a residential property, Murphy advised.

"Even if the thorns are on branches in a

tall tree, like the Hawthorn tree, they can still fall; and if children are running around the yard barefoot or sitting on the grass it can be painful," he warned.

SAFETY FOR THE DESIGNER. "No prudent design person would design something that would end up breaking someone's neck later," said Jim Leatzow, president of Leatzow & Associates, Chicago, Ill.

That's the argument most people use when they sue their landscape designer because someone got hurt on their property.

"We've paid as much as \$50,000 on claims with no merit," Leatzow remarked.

When the issue of safety is involved in any landscape project, a designer or architect can limit their exposure by having professional liability and errors and omissions insurance and by putting detailed disclaimers in their contracts.

"Generally, a designer has to be found in neglect first, meaning they did something

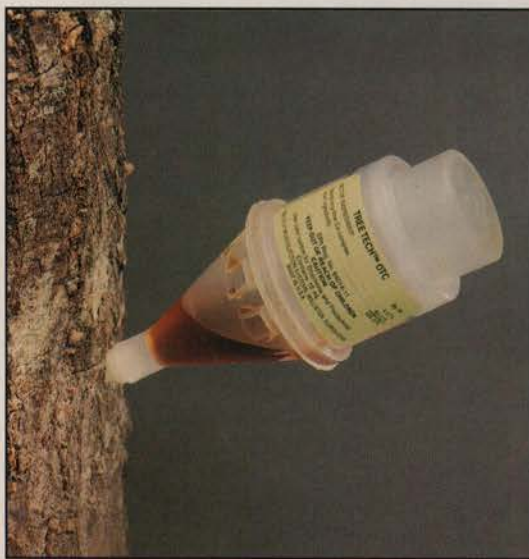
wrong or they didn't do something they were supposed to do," said Bob Decker, vice president of loss control at Florists' Mutual Insurance Co., Edwardsville, Ill. "But you never know. The judge is going to believe the homeowner before a business."

When a designer is in a situation where there are discrepancies between what he or she recommends for safety and what the client wants, Decker recommended describing the differences in the contract to reduce the risk of being sued later.

"You can put in the contract that you installed X number of bushes at the homeowner's request and that these bushes generally are not recommended," he pointed out. "It's also wise to include a general disclaimer in every contract that says there is no guarantee of full safety and security in the landscape design." **LL**

The author is assistant editor of Lawn & Landscape magazine.

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USE READER SERVICE #90

Motivating *Your Service Staff*

Facing an increasingly competitive environment, attendees at the second Lawn & Landscape School of Management were interested in motivating the people doing the work for them.

By Bob West

- Lloyd Smigel noted that 50
- percent of employees'
- complaints about their jobs are
- related to their managers.
- Photo: Care Management
- Consultants



Before launching his own business consulting firm – Care Management Consultants, Oceanside, Calif. – Lloyd Smigel acquired quite a bit of first-hand experience managing service personnel for many years for Truly Nolan Pest Control. Smigel shared some of this expertise from his days in the service industry as well as some of the secrets to success he has observed as a consultant with attendees at the second annual Lawn & Landscape School of Management.

A PERCEPTION PROBLEM. “If I think I give a lot of credit to my employees, but they say I don’t, am I right or wrong?” wondered Smigel. “I’m wrong. That’s why we as managers are always the problem with employees and why the knowledge of one’s own limitations is the first step toward success. We can’t do everything.”

From there, Smigel said managers have to be able to act upon that knowledge and do something about those limitations. “Otherwise, your business is destined to remain dormant as your competitors pass you by because they’ve learned how to support their limitations,” he predicted.

Indeed, professional lawn care and landscape companies nationwide generally believe they could grow their companies if only they could find additional, quality labor. In fact, better than 56 percent of the respondents to a Lawn & Landscape survey pointed to a lack of labor as the number one limitation on their ability to grow their businesses (For more information, see the State of the Industry Report, page S1). “The good news for our country is that just about everybody is working,” Smigel observed. “The bad news is that there’s no one left to hire, and when you do hire, what do you end up with?”

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(continued from page 96)

Smigel has found, however, that most companies are ignoring a potential solution to this problem – the people they already have working for them. “Too many people are working for us without having to think, and a lot of that is our fault as managers because we don’t train people to think or expect them to think,” he said. “We have to

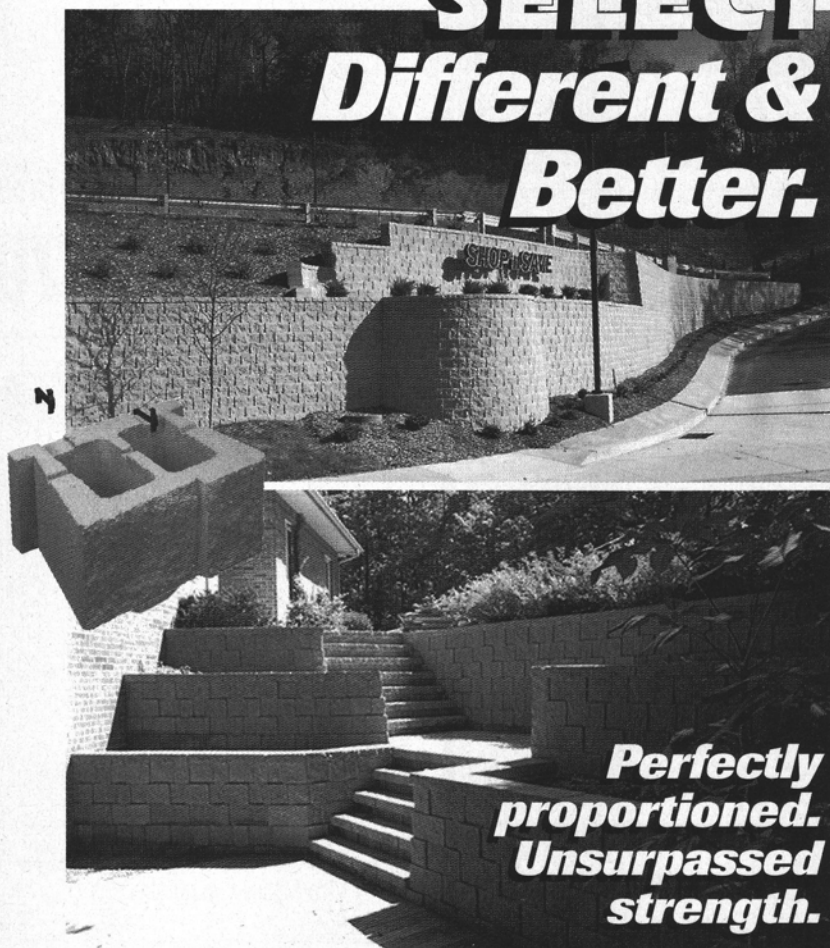
raise our expectations and help these people stand up and do better.”

WHAT’S WRONG HERE? According to a survey cited by Smigel, some of the most common employee complaints about their jobs are: the hours worked (15 percent); amount paid (11 percent); benefits package (7 per-

cent); tools available to them to do their job (7 percent); lack of training (6 percent) and unsafe working conditions (4 percent). But business managers often think these areas represent a great deal more than 50 percent of employees’ unhappiness with their jobs.

“Conflicts with management, unfair treatment by superiors and a lack of support

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USE READER SERVICE #70

Facts of Life

“T here are three kinds of people in the world: those who make things happen, those who watch things happen and those who wonder what happened,” according to Lloyd Smigel, president, Care Management Consultants, Oceanside, Calif.

Smigel pointed this out to attendees at the second annual *Lawn & Landscape School of Management* to illustrate how attuned managers have to be to their employees’ approaches to their own jobs in order to successfully grow a company.

“There are three other facts about human behavior that are important to remember:

- All people are motivated, but they may not be motivated to do and say what their managers want them to do and say.
- Managers cannot motivate people, but they can create an environment in which employees want to motivate themselves.
- People do things for their own reasons.” — *Bob West*

or recognition — those three areas represented the other 50 percent of responses,” Smigel countered, explaining that too many managers focus on working ‘in’ the company as opposed to working ‘on’ the company.

‘We have to raise our expectations and help these people stand up and do better.’

— Smigel

“Half of the problems were problems with managers,” Smigel pointed out. “What employees are saying here is that there are problems that managers could fix pretty quickly, but instead they lead to employee turnover because we, as managers, don’t actually know

what our employees want.

“A lot of managers would like their employees to do more so they can spend more time on the company’s vision,” Smigel continued. “Margaret Thatcher said a leader’s responsibility is to shine a spotlight on the future. As managers, we should all want to nurture our people to that goal, but instead we have to react everyday to operations and we never get to look at the future.”

Smigel noted that employers have to get to know employees to the point that they understand what each employee is ultimately looking for from the company. At the same time, the managers have to get employees to understand the goals and direction for the company. “When we have people who don’t know where we’re going as a company, what we’re trying to accomplish and the part they play in that,

they’re just doing their job,” he explained. “If they understand all of this about the company, it will lead to involvement, which leads to commitment, which leads to ownership, which equals effectiveness.

TIMES ARE A CHANGIN’. The nature of the workplace has changed over the years. “Em-

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(continued from page 98)

employees expectations of bosses are different today," recognized Smigel. "Managers used to review employees, but now they're reviewing us. The pendulum is swinging away from bosses running the company, and I don't think it has swung all the way out there yet."

Such a shift in office dynamics underscores the value of being a proactive and involved manager, according to Smigel.

"Most companies don't run forward — they run in place," he said. "Too many people are trying to grow and solve problems by using the same thought processes that got them to the present situation. But what got you to where you are may not be what will get you to where you want to go. To move ahead, it may be necessary to change the way you do things and the way you think."

Smigel's work has led him to work with Federal Express, a company he claims is committed to involving all of its employees in its success. "FedEx has an annual 29-

Bothering the Boss

The following are the six most annoying behavior traits to find in employees, according to a survey of managers cited by Lloyd Smigel, Care Management Consultants, Oceanside, Calif., in his presentation at the second annual Lawn & Landscape School of Management.

- Arrogance/ego
- Absenteeism/tardiness
- Failure to follow instructions
- Whining
- Lack of commitment
- Laziness/lack of motivation

"Curiously, incompetence didn't make the list," observed Smigel.

"Screwing up won't raise a boss' hackles as much as lying about it will."

— Bob West

question survey for employees to fill out about their boss," he noted. "It asks questions like, 'How well do I listen? Do I provide recognition?' If, according to his or her employees, a manager fails in an area, the company brings in a human resource development person to work with that manager, and this takes place all the way through the company, up to the CEO.

"FedEx understands that it's the people that make up the company, not just the management," Smigel continued. "And if the management isn't doing what the people expect of it, then the company won't grow."

"If we, as managers, don't react to the employees in the same way, we'll lose them, and they'll go somewhere else to work," Smigel concluded. "When it comes to leadership, you can't afford not to invest yourself and your time in your people." **LL**

The author is Editor of Lawn & Landscape magazine.

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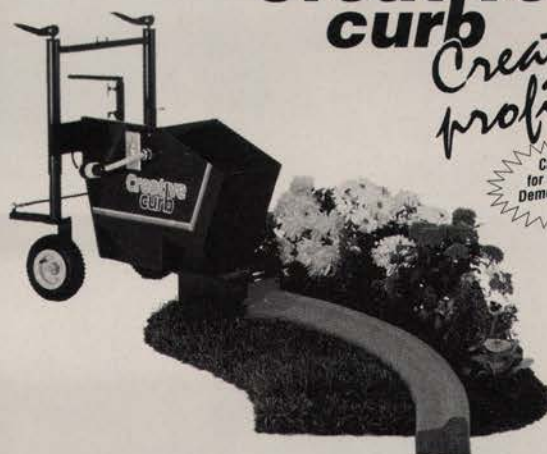
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USE READER SERVICE #74

Understanding Income Statements

By Frank Ross

I suspect that almost all landscape contractors think they know how to read an income statement, or at least they figure that since someone on their payroll does, that's all they need. I beg to differ. If you are going to price landscape services with any degree of accuracy, you – not someone on your payroll – had better understand how your company functions financially.

The most popular of all financial reports, the income statement, is one of two documents you should be receiving on a periodic basis – the other is the balance sheet. Some of us receive reports like these as often as monthly – and what do we do with them? Unless I miss my guess, we say thank you, slink off to the security of our office and stare at the reports in hopes that some flash of brilliance will leap off of the pages and inspire us as to what the documents mean. That's a tragedy because, if you take the time to learn their messages, these reports can be two of your most valuable management tools.

Both documents provide a reader with critical information about the financial operations of the company. For example, the balance sheet, which is a company's life-to-date scorecard, shows how liquid a company is and how effectively it uses its leveraging power. On the other hand, the income statement, a scorecard for a specific period of time, describes how much business a company performs in a given period and if it makes a profit on that work.

Among its many points of interest, the balance sheet shows how successful the company has been since its inception (retained earnings), how old its equipment is (fixed asset newness), how leveraged its assets are (debt-to-assets ratio), how much money it is able to borrow (debt-to-equity ratio), how effectively it manages its inventory (inventory turnover), how quickly it collects its money from customers (age of accounts receivable) and how stable its credit relations are with its vendors (age of accounts payable).

Were this an article on issues of cash flow, leverage or a company's market value, we would spend a great deal of time understanding the various intricacies of the balance sheet. However, we will direct all of our attention to the cost structure of the company and how it sets up by each type of work it performs. For this information, we need to turn to the income statement.

At first glance, it's nothing but jumbled numbers, but to the discerning eye the income statement can be the road map to profitability.

By the Numbers

ALL SET UP. The income statement is structured to tell us, among other things, how much revenue we have generated by type of work, what the raw cost is of what we were selling, what the support cost is of what we were selling and how much profit we made by selling it. We all agree that this is valuable information to have at our fingertips, particularly if our charge is to run our businesses as efficiently as possible. Nevertheless, it is amazing how few companies have this data because they never appreciated how useful the data could be in the management of their business and because whoever set up their system didn't do so in such a fashion that the information could be generated in an easy-to-read format.

Reading an income statement is fairly straightforward, given that we follow two very important criteria:

1. The income statement format must be complementary to how we do business.
2. The income statement must be broken into profit centers so that each type of business may be analyzed on its own merits.

The income statement describes the financial results of a particular period of time, i.e., 12 months or less. This is contrary to the balance sheet, which is a financial document describing the cumulative results of a company's operations since its inception.

Why a 12-month cycle? You can thank Uncle Sam for that. In the early 1900s, Congress found that it could not live on hot air alone, so it passed into law what is now lovingly referred to as the federal income tax. The law's passage formalized our government's authority to tax businesses and individuals. The calendar year was adopted as the basic tax period – probably because it coincided with the natural cycle of our then agrarian economy.

Many companies have found that producing income statements on a more frequent basis than annually can be a real benefit to managers and owners, particularly if the data provided is processed in an accurate and timely manner. Probably the most popular timing for producing an income statement is monthly. The rationale is that a monthly cycle is best to measure the seasonal swings that are so typical in the

green industry. Sometimes seasonality can be so severe that to produce a scorecard any less often would be tantamount to flying blind.

For the purposes of this article, we'll refer to the fictional company Green Industry Inc., a multi-divisional company doing \$1 million of business in exterior installation, exterior maintenance, interior maintenance and retail combined.

A quick read of the income statement summary for the exterior landscape division tells us that it performed \$450,000 worth of work. This means that the division installed work that has a value of \$450,000. Be

careful not to confuse the value of work performed with how much work was sold, billed or collected during the period.

An equally quick glance to the bottom line reveals that the division generated \$43,455 in net profits. This means that, against the \$450,000 of work in place, the division spent a total of \$406,545 in expenses to produce it, leaving a difference of \$43,455. This difference is called net profit productive. The percentage to the right of net profit is its relationship to earned revenue – 9.66 percent – meaning that, on average, out of every dollar of revenue produced by the division, it was able to earn nearly 10 cents in profit.

Here is probably where many contractors will conclude the analysis process. They look at the top line, then look at the bottom line – 'Great, we made money. Next issue.'

Sound familiar? It's a pity to use this approach because the report provides a great deal of practical information to be used in daily management, if you can train your mind to look for it. Following are a series of footnotes to an income statement that should enlighten you to a few pieces of knowledge it can provide.



Green Industry Inc.

Exterior Landscape Division Income Statement

Earned Revenue	\$450,000	100.00%
Direct Costs	\$237,695	52.82%
Gross Margin	\$212,305	47.18%
Overhead Expenses	\$168,850	37.52%
Net Profit Productive	\$43,455	9.66%



Becoming familiar with your company's income statement and examining it regularly can put meaning to all of the obvious costs associated with labor and equipment as well as the not-so-obvious costs such as overhead. Photo: John Roberts

EARNED REVENUE. This is the value of work in place. In a construction operation, this number is a product of the percentage of completion method of accounting. An accountant will say that percentage of completion earned revenue is the total of our billings for the period, plus the value of the work we have installed and not yet billed, less the billings we have sent clients for work we have not yet performed. Whew! In layman's terms, the way to understand earned revenue is to imagine if time were stopped on a certain day and we were challenged to measure exactly what had been installed on all of our jobs and bill that amount – what would the value of that invoice be?

DIRECT COSTS. This is a category of expenses representing the raw cost of what we sold to our customers. Direct costs tend to be unique in that they are easily identifiable with work we have done or products we have sold. In a contracting environment, direct costs resemble job estimates. That is, the elements of direct costs – plant material, hard material, direct labor, labor burden and subcon-

tract costs – are those that are normally taken off by our estimator, costed and marked up for overhead and profit. No overhead or cost not easily identifiable to the job is included in direct costs. Rather, those expenses can be found in their own accounts in the overhead section on the income statement.

GROSS MARGIN. This is a term referring to the amount of money remaining from earned revenue once the out-of-pocket costs to provide the work are expensed. Gross margin can be found two ways: earned revenue minus direct costs equals gross margin or total overhead plus net profit equals gross margin. In the case of the landscape division, the remaining margin is \$212,305 from an earned revenue of \$450,000, once

The report provides a great deal of information to be used in daily management if you train your mind to look for it.

the specific costs (labor, material, subcontracts, etc.) to perform the work are expensed. The gross margin generated from our work is then used to pay for the overhead expenses of the division. Any money remaining from the gross margin once overhead is paid is profit – in this case, that is \$43,455.

OVERHEAD EXPENSES. These are the costs spent in support of the sale. Many of them can be specifically identified with the job

being installed or the product being sold, but typically are not, due to the difficulty of being able to estimate and track them uniformly. Therefore, these costs are placed in their own accounts in overhead and are applied to the direct cost of what we sell through our markup procedures.

Overhead expenses are commonly divided into three areas: indirect expenses, equipment expenses and administrative expenses. The rationale behind these breakdowns is to generate as much meaning as possible from the overhead listings for the division.

The number of subcategories is purely a matter of choice. We opted for three subcategories but could have just as easily had five or six or two or none. In your company, have as many as you wish, so long as the detail you generate does not detract from the readability of your statement.

In our example, total overhead expense as a percentage of earned revenue is 37.52 percent. This means that out of every dollar of sales, I can expect to spend an average of 37.52 cents in overhead. So here's a question: If I were pricing a job, I would mark up the job by 37.52 percent to recover my overhead, right? Wrong – this percentage has absolutely nothing to do with pricing. It simply means that, on average, we as a division spend 37.52 cents of every dollar we sell to support the activity of what we are selling. **LL**

The author is an industry consultant with Ross-Payne & Associates, Barrington, Ill. He can be reached at 847/381-8939.

DISCLAIMER: The specific figures used in the above examples were developed for these examples. Each company's specific dollar values will vary based on their businesses.

Portions of the above article were excerpted from Pricing for the Green Industry, by Frank Ross. The book is available from the Associated Landscape Contractors of America at 800/395-2522.

Trucks

for Contractors

While truck fleets differ greatly between big and small companies, the important concepts are the same.

By Bob West

Green industry contractors refer to trucks as anything from the lifeblood of their company to the cornerstone of their entire operation. The importance of the role trucks serve in contractors' businesses is undeniable – if not for the trucks, how else would the crews and equipment ever get to a job site? But how does a company make sure it is running the right trucks? What are the differences between the hundred of choices available to them? *Lawn & Landscape* asked two companies to talk about their truck fleets, why they're set up the way they are and what they think the keys are for other contractors to consider.

INSIDE THE BOX. It's a fairly common bit of advice – "You need to think outside of the box." – and it's intended to get people to think about things in new or unique ways that differ from the obvious approach most people will take. For Tony Bass, president, Bass Custom Landscapes, Bonaire, Ga., thinking outside of the box meant putting his equipment inside the box.

In the early 1990s, Bass had definite plans to grow his company, and he decided one key to the company's success would be its ability to standardize the equipment it used. "Every truck I buy and every truck I build is made to be as close to a mirror image of the last one as possible," Bass shared. "I used to search for the best price I could find with little concern for make or model, but that's not the case today. Our trucks have a very specific mission, and that mission is to save labor."

Today, Bass Custom Landscapes runs six maintenance trucks, four installation trucks and four miscellaneous vehicles.

Through research and experience, he also decided what type of trucks he didn't want. "It was my

(continued on page 106)



An enclosed truck system can reduce theft and vandalism problems while also providing a non-stop marketing opportunity. Photo: Bass Custom Landscapes

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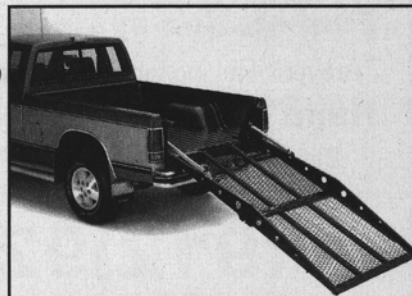
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(continued from page 104)

goal to eliminate pickup trucks from our fleet," Bass recalled, explaining that the trucks he has gone to have a larger carrying capacity and don't require as much time for loading and unloading. "I talked to nine different dealers about different trucks' prices, operating costs, availability and payload capacities for research."

In addition, he decided against land-

scape trailers. As a result, he turned to a system that features a van-type body on top of a cab and chassis so that all of a crew's equipment can be transported inside the truck.

"This system improves security and eliminates our need for warehouse space," Bass said.

As an added benefit, Bass can use the sides of the truck body as mobile billboards that

advertise his company wherever they go.

When it comes to financing a new truck addition, Bass' strategy changes based on the situation. "I tend to buy used trucks and lease new ones, but it really depends on each person's preference," he stated. "I think it costs a little more money in the long run to lease vehicles, but doing so will improve cash flow by taking less money out of your pocket. So the decision has to match a company's cash flow capabilities more than anything else."

LOOKING AHEAD. For Tom O'Donnell, fleet and safety manager for Scott Byron & Co., Lake Bluff, Ill., and its 75 vehicles, the key to successful truck purchasing is knowing what the business is going to need. Identifying exactly what types of vehicles will need to be added for the coming season allows him to get the right vehicle at the best possible price.

"By the fall of each year, we've already looked at our needs for the coming year in order to determine what vehicles or crews we'll need to add for each division," O'Donnell said, adding that they've learned to identify certain revenue levels or growth amounts that necessitate a new crew each year. "Then we'll have the manufacturers bid out and specify the vehicle in the fall for a late March or early April delivery."

When it's time to identify the specifics of a new vehicle to order, O'Donnell said technician safety and comfort are at the top of the list. "Safety related options, such as airbags, are very important to us," he explained. "In addition, it's our philosophy to get away from the single cab pickup trucks as much as possible. Once one of those

.....

'History has shown us that diesel engines offer more power, do a better job holding a load, offer better pulling capabilities and these engines tend to hold up longer than gasoline engines.'

.....

(continued on page 108)

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USE READER SERVICE #51



Model 420 Internal Relief Valve

trucks

(continued from page 106)

vehicles is retired, it will be replaced with a four-door unit so we don't have to worry about guys sitting in the back of the truck."

Diesel engines are another popular feature among O'Donnell's orders. "History has shown us that diesel engines offer more power, do a better job holding a load, offer better pulling capabilities and they tend to hold up longer than gasoline engines," he explained. "Yes, we'll end up paying an extra \$1,500 up front for a diesel unit, but we'll get those dollars back in long-run savings."

O'Donnell also has high expectations in terms of the length of a truck's life. "We'll run a vehicle for seven years or 150,000 miles, whichever comes first," he remarked. "But if a truck is becoming costly to maintain, we'll keep a closer eye on it and we may retire it sooner." **LL**

The author is Editor of Lawn & Landscape magazine.

Dealing with the Dealer

Jim Reed, president, Reed's Truck Sales, Peekskill, N.Y., is one of the leading truck dealers in the New York metropolitan area.

As a result, Reed comes into contact with a number of lawn care and landscape contractors each year. Despite the number of trucks contractors purchase and the varied uses they have for them, Reed continues to be surprised by how unprepared contractors are when they walk through his doors.

His advice to this group is pretty simple: "Make sure you're buying from a dealer who knows what he or she is talking about when it comes to commercial trucks."

The criteria involved in selecting the appropriate truck to purchase are generally

pretty simple. "What type of work the contractor does, how the truck will be used and where it will be used," are Reed's key questions he asks of contractors.

"There are so many different facets to this industry and the type of truck the contractors use can really vary from a GVW of 12,000 pounds to 32,900 pounds and any of about 40 different models with a number of different body options for each model," Reed observed.

Tony Bass, president, Bass Custom Landscapes, Bonaire, Ga., has come to realize the importance of working with a good dealer.

"Working with a dealership that specializes in servicing the fleet dealer is a huge help because that type of dealer understands that contractors can't make a living without their trucks," Bass noted, adding that he even selected a dealer located within one of his service crew's routes to make it easier to drop off and pick up equipment. — **Bob West**

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108 LAWN & LANDSCAPE • OCTOBER 1998

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USE READER SERVICE #12

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The Winning Edge!***

PRODUCT PROFILE

A MATERIAL MOVER

EARLY EVERY morning, a Gardner Design crew heads out to a customer's home and turns a residential lawn into a work of art. Trees and shrubs are carted in and planted as flowers splash color throughout.

It's that eye for color and design that makes Gardner Design, Bryn Mawr, Pa., a success. Formed seven years ago, Gardner Design is the natural outgrowth of a retail garden center business. "We've owned a garden center for years," said Robert Gardner, owner.

In the early years, Gardner's retail operation dabbled in the landscape business and consistently commanded robust sales. That's one of the reasons

Gardner began searching for a new landscape truck about eight years ago. "Even before I formed Gardner Design, we were doing bigger and bigger jobs on the retail side," said Gardner. "We were hauling larger loads and we needed a truck to handle the job."

But Gardner was looking for more than durability. He wanted to move an increasing amount of product and equipment. "We wanted to become more cost efficient, so we decided to switch from gasoline to diesel-powered trucks to capitalize on the fuel efficiency of a diesel engine," he said. Gardner purchased a



Gardner Design prefers vehicles with diesel engines and maximum hauling capacity. Photo: Mitsubishi Fuso

Mitsubishi Fuso FE, an 11,600-pound gross vehicle weight truck with a lift gate on the back for loading trees.

Gardner recently purchased a retail garden center that will operate under the name, Gardner's Landscape and Nursery. Both operations will rely on Mitsubishi Fuso trucks to transport crew and equipment to jobsites. One four-wheel-

drive truck is equipped with a backpack and dump body and is used for hauling trees, soil and mulch and other vehicles include specially designed shelving to haul flats of plants.

— Karen Schweizer

The author is a public relations consultant to Mitsubishi Fuso.

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- Available now for the Dixie Chopper®

Circle 200 on reader service card

Snowman Snowplow™

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- High lift capability (maximum lift height 47 inches)
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- Fast and convenient hookup
- No welding with installation
- Standard box wings or optional extension wings and parking stand

Circle 201 on reader service card

ASOMA-WTC IntelliWater

- Computer-controlled watering system
- Uses the principle of vapor pressure deficit (VPD)
- Works with existing timer

Circle 202 on reader service card

Lawn & Landscape training videos

- Newly released titles include: "Safe Operation & Management of Riding Equipment," "Safe Operation & Maintenance of Intermediate Walk-Behind Mowers" and "Safe Operation & Maintenance of String Trimmers and Blowers"
- 15- to 20-minute programs available in English or Spanish
- Equipment and footage supplied by The John Deere Co., The Toro Co., Scag Power Equipment and Maruyama U. S.

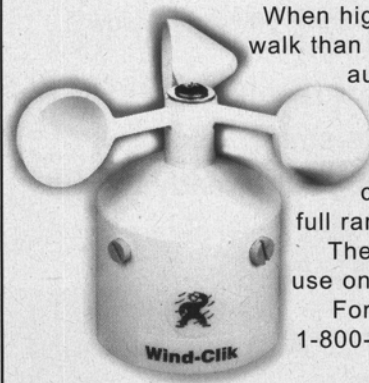
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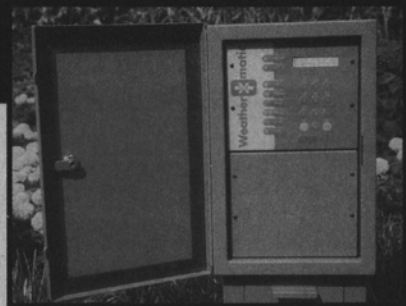
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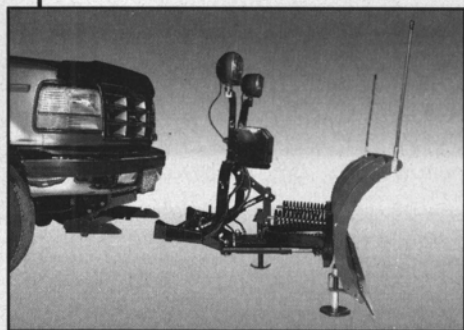
- operation for each program
- Pump start or master valve assignable by station

- 3-second safety delay for master valve/pump shutdown
- Sensor to detect problem situations
- Urethane-coated heavy gauge steel housing
- Separate transformers for valve output and controller operation

Circle 204 on reader service card

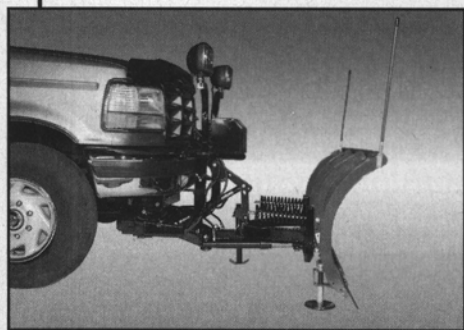
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SNOW PLOWS



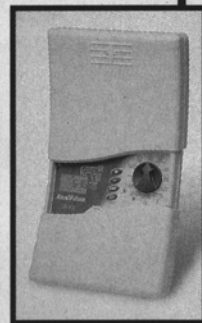
Otterbine Barebo's Giant Fountain Series

- Available in 7.5, 10, 15 and 25 horsepower
- Comes in four spray patterns that can reach spray heights of up to 90 feet
- Launching system that requires no hoists or cranes for installation

Circle 205 on reader service card

Rain Bird E Class Controllers

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- Requires no fuses or batteries
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- Includes a wall bracket for mounting



Circle 206 on reader service card

AquaScape Surface Aerator/Fountain

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- Optional light system with either three or six 75-watt bulbs
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Circle 207 on reader service card

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Circle 208 on reader service card



Isuzu NPR Gas-Powered Commercial Vehicles

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- Feature Isuzu's Aerocube cab design and standard daytime running lights
- Cabs have an application of cationic electrodeposit primer E-coat and an alkali-proof paint
- Plastic liners added to the wheel wells
- Liquid crystal display odometers

Circle 209 on reader service card

Barrier Ornamental Landscaping Herbicide

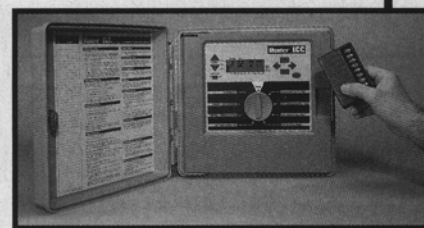
- Granular, soil-active product
- Contains 4 percent dichlobenil
- Applied as preemergent or early postemergent
- Recommended for use in and around labeled ornamentals in beds and landscape plantings
- Available in 50 percent wettable powder

Circle 210 on reader service card

Hunter ICC Controller

- Universal controller handles eight to 48 stations
- Uses four- or eight-station snap-in modules
- Programmable rain delay and master valve

Circle 211 on reader service card



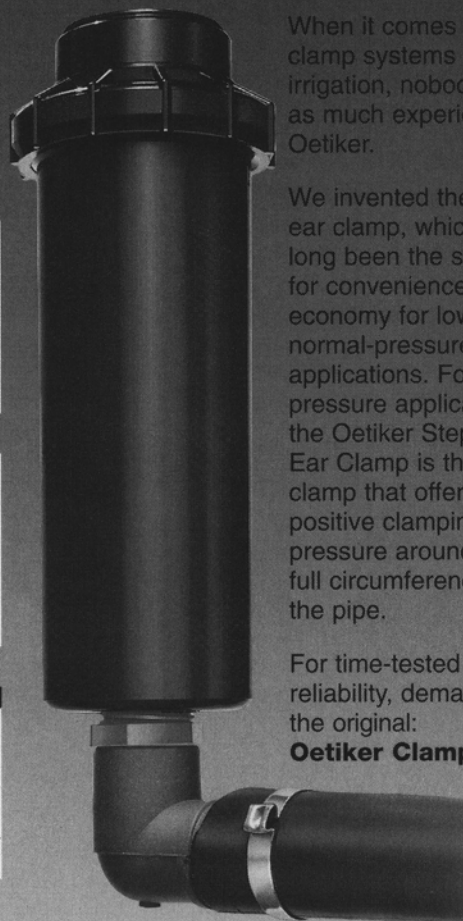
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Circle 212 on reader service card

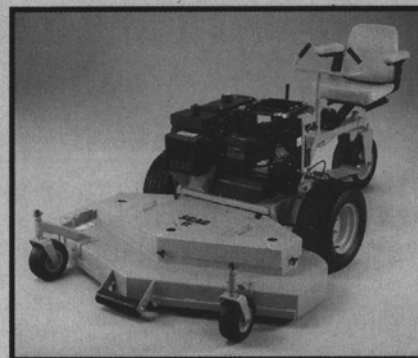
Flomatic Valves 508 Ball Check Valve

- Fusion epoxy coated, cast iron valve
- Available in five different sizes from 1 inch to 2.5 inches
- Rated to 150 psi with a temperature maximum of 180 degrees Fahrenheit
- Includes a vertical or horizontal mount
- Equipped with a self-cleaning phenolic ball and Nitrile rubber seat

Circle 213 on reader service card

Scag STHM Hydro Rider

- Out front deck
- Available with a 52-, 61- or 72-inch cutter deck and 20- or 22-hp Kohler Command engines
- Uses a patented pivot mount frame
- Equipped with a 13-quart nylon reservoir and cooling radiator
- Optional accessories include a 44-gallon capacity grass



catcher with auxiliary engine, a mulching plate and an electric deck lift

Circle 214 on reader service card

Glenmac's S6 Harley Power Box Rake



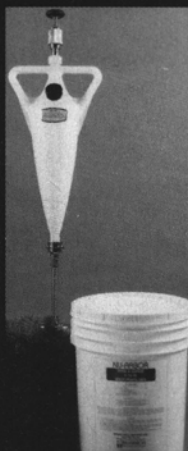
- Hydraulically-driven unit
- 72-inch bi-angular, bi-directional power landscape rake for skid-steer loaders
- Adjustable, removable heavy-gauge box endplates mounted at each end of the roller

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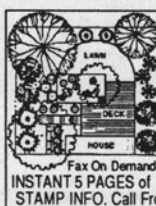
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IRRIGATION SERVICE TECHNICIAN

The Green Plan, Inc., a full-service landscape company located in Boulder, Colorado, is seeking qualified applicants for Irrigation Service Technician. Applicants must be experienced in all phases of commercial and large open space systems. Immediate openings available, year-round employment and full benefits included. THE GREEN PLAN, INC., P.O. Box 17338, Boulder, CO 80308. Phone 303/938-8230, Fax 303/938-8137.

DIVISION MANAGER

Award winning, full-service landscape management firm is seeking a motivated individual to build its senior management team. Located in the fast-paced San Francisco Bay Area, our growth has created the need for a division manager in maintenance. The top candidate will be a good communicator, organized, customer-focused and able to understand financial statements. An AA or BA degree is preferred with five years experience in the commercial landscaping field. We offer generous salaries, profit distribution, company vehicle, health/dental/life insurance and 401k with company match. For immediate, confidential consideration mail, fax or E-mail resume to Gachina Landscape Management, Inc., 1130 O'Brien Dr., Menlo Park, CA 94025, Fax: 650/853-0430, E-mail: jobs@gachina.com

MANAGEMENT/SALES



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The chosen professional will be responsible for generating sales and expanding markets within our professional turfgrass division. This includes developing and executing micro-market strategies and representing our company to various producers and distributors. We require a B.S. degree in an agricultural business related field i.e.: Ag Econ., Agronomy, Weed Science or Horticulture. Several years of practical experience in agricultural marketing or professional turfgrass management is beneficial and will be considered in lieu of formal education. Extensive travel is required for select periods of the year. We offer a competitive compensation and benefits package. For consideration, please send your cover letter, resume and three references to: L&L, Box 399, 4012 Bridge Avenue, Cleveland, OH 44113.

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For immediate considerations, mail, fax, or e-mail your resume to HR Dept., Cagwin & Dorward, P.O. Box 1600, Novato, CA 94948-1600, Phone: 415/892-7710, Fax: 415/897-7864, URL: <http://www.cagwin.com>

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We offer an excellent starting salary and an outstanding benefits package. Please mail your resume to Mr. Kiran Taunk, Longwood Gardens, Inc., P.O. Box 501, Kennett Square, PA 19348.

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FROM THE FRONT LINES

FUN WITH A FIELD DAY

THE FAMILY that plays together stays together. This axiom can hold true for business as well. Although the work your employees do for you is serious business, an excellent way to improve team morale while at the same time educating employees is by having a company field day.

GETTING STARTED. The planning process of your company field day shouldn't be an arduous task, if you begin planning ahead of time.

First, think about what you want to accomplish for the day. If labor relations are a concern, plan activities that will develop teambuilding, motivation, group participation and cooperation. These activities can relate directly to your business or can merely be stress-relieving activities like relay races.

A good idea is to enlist services from outside your operation. Outside opinions add fresh ideas to your company and can stimulate your own employees. Try scheduling a motivational speaker for a "mental pick-me-up."

If new techniques have developed in your industry or if you plan to introduce a new piece of equipment to your op-

eration, one of your activities should be its introduction, followed by a demonstration and test runs by the employees.

Another activity could be a lecture/discussion of possible changes inside your organization. Soliciting feedback from employees on these issues will make them feel more a part of your business while giving you an idea of their concerns for the future.

PLANNING. For each of your activities, appoint one person to

From the Front Lines is designed to share specific programs or ideas that have been successfully implemented by lawn care or landscape contractors. If your company has a program that you think would be of interest to your colleagues, send a 650-word explanation of the program to: Bob West, *Lawn & Landscape*, 4012 Bridge Ave., Cleveland, OH 44113, or fax it to 216/961-0364.

supervise the planning and execution. This person should decide the time, supplies, equipment and personnel needed for the activity. When each task force has set its plan of action, they all should meet to discuss any problems, set the schedule of the events and develop transitions between events.

It is at this point that a list of volunteers from your pool of employees should be created. Using internal workers keeps the continuity of worker unity by showing the day's efforts are

a team effort. Everything from event parking, to ushering, to preparing food for the day should be handled by employees.

YOUR EVENT. When your field day event approaches, get activity coordinators together a week before hand to have a "dry-run" to weed out any unforeseen problems. All events dependent on

outside resources should be confirmed and any special preparations for your meeting should be completed.

A field day can benefit every person involved. Simultaneously, vital information about yourself, your company and your future can be expressed all while involved in a different atmosphere.

— Howard Koontz

The author works for Chapel Valley Landscape Company, Woodbine, Md.

A Field Day at Chapel Valley

PROGRAM ITINERARY

Chapel Valley's recent Field Day schedule:	11:45 State of the Company address
7:15 Coffee and Donuts	12:00 Lunch
8:00 Motivational Speaker Jim Paluch	1:00 Identification and Skid-Steer Competitions
Q&A Session with Immigration Officials	1:30 Planting Competition
First Aid Presentation from Red Cross	2:45 Relay Competition
10:45 Blower and Mower Competitions	3:30 Recognition and Awards



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- **PUSHES BACK DESERTS, LANDSCAPES SHEIKS' PALACES, Saudi Arabia.**
- **PLANTED OVER 600,000 BARE-ROOT ROSES, 16 YEARS, LOSS FEWER THAN 1 IN 1,000, Albuquerque, New Mexico.**
- **SAVED ALL TREES TRANSPLANTED by U.S. Corps Of Engineers, FOR CAMOUFLAGE, WORLD WAR II.**
- **TWO WEEKS DIFFERENCE IN HYDROMULCHED GRASS STAND, ALONG FREEWAY BANK FOR EROSION CONTROL.** — Maryland.
- **SAVED ALL CELERY TRANSPLANTED IN 17 LARGE HOUSES, before and after one without, IN WHICH ALL LOST.** — California.
- **1200 TREES WITH 4" CALIPER TRUNKS BARE-ROOTED IN DESERT JUNE. NO LOSS.** — Tucson, Arizona, City Parks Department.
- **BIGGEST TRANSPORTATION OF LANDSCAPE MATERIALS, CALIFORNIA TO FLORIDA, TO PLANT Disney World.® NO LOSS.**
- **KEPT ALL PALM SPRINGS DESERT GOLF COURSE'S GREENS PERFECT, SUMMER WHEN ALL OTHER COURSES WITH BENT GRASS GREENS IN AREA LOST 6 TO 14 GREENS.**
- **HIGHLY COST-EFFECTIVE EARLIER, INCREASED YIELD — ABOVE THE BEST — FROM SEED, TRANSPLANTING, DRIP IRRIGATION, SPRAYING YOUNG CROP PLANTS: Recent EXAMPLE: ONE GALLON ON DRIP RAISED 25 ACRES OF GRAPE TONNAGE 26%, SWEETER, LARGER — WHILE EACH NEARBY GROWER LOST HALF OF CROP TO SHATTERING STORMS.** — California



◀ **38 EXTRA INCHES GROWTH ABOVE FERTILIZERS-ALONE. SEVEN MONTHLY USES.** Tucson, Arizona, City Parks.



◀ **TREE-SAVING RECORD OF 1/2 CENTURY.** California Polytechnic State University, Cal. Capitol, Cal Tech, U. of Cal., Cal. State U.



◀ **SAVED GIANT CACTUS TREES authorized moved to desert botanic garden, Reported planted all famous and "world's biggest" Nevada hotels. Pushes back Africa desert.**

TIP LANDSCAPERS:

- Point with pride to ALL your jobs.
- Build demand for you.
- Protect and save essentially 100% of all plant material.
- Predict healthy, active, uniform and beautiful "super-normal" plants.

VITAMIN INSTITUTE 5409-15 Satsuma Ave., NORTH HOLLYWOOD, CA 91603

(800) 441-8482, FAX (818) 766-8482

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