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STATE OF THE INDUSTRY



Bruner: an 'unbelievable' amount of work.

petition is not even an issue. We aren't taking more work for the season, and we're working a year in advance.

"People are blending the landscaping costs into the mortgage, a trend that is migrating north from Colorado. We're designing and selling before they even break ground on a property."

Commercial work is booming, too, Christiaansen says. "I thought we'd see an end to this but it hasn't died down yet."

John Bruner, owner of Bruner Construction Ltd. in Kansas City, KS, says "Businesses are relocating here due to its convenient central time zone. We're in a boom that's feeding on itself."

Bruner's does mostly street and highway work, and maintenance on large commercial tracts of ground, reservoirs, dams and military sites. The amount of mowing and maintenance opportunities are "unbelievable," says Bruner.

Bruce T. Moore, Sr., CCLP, president of Eastern Landscape Management Co., Stamford, CT, says the market in the Northeast has improved a lot in recent years.

"We're seeing an upturn," says Moore. "Our area is just coming out of a severe economic recession and there's a lot of construction and real estate because people have money now, and landscaping is growing."

Where are the workers?

"It's always tough to find employees; it's perhaps the toughest part of the business," says Christiaansen, who has had success with local college students who want to work.

Labor is, indeed, hard to find, Moore in Connecticut adds. "This is a high cost-of-living area with the influence of a large metropolitan area, New York City. There is a definite lack of middle-management-level people, because the cost of living means they don't live here," he explains.

"There is no unemployment here, so finding help is hard," Skradski says of the Nebraska region.

"We don't have trouble finding help; we have a problem finding good, qualified workers," says Woods, whose company is headquartered near Hartford, CT. "We do the training ourselves."

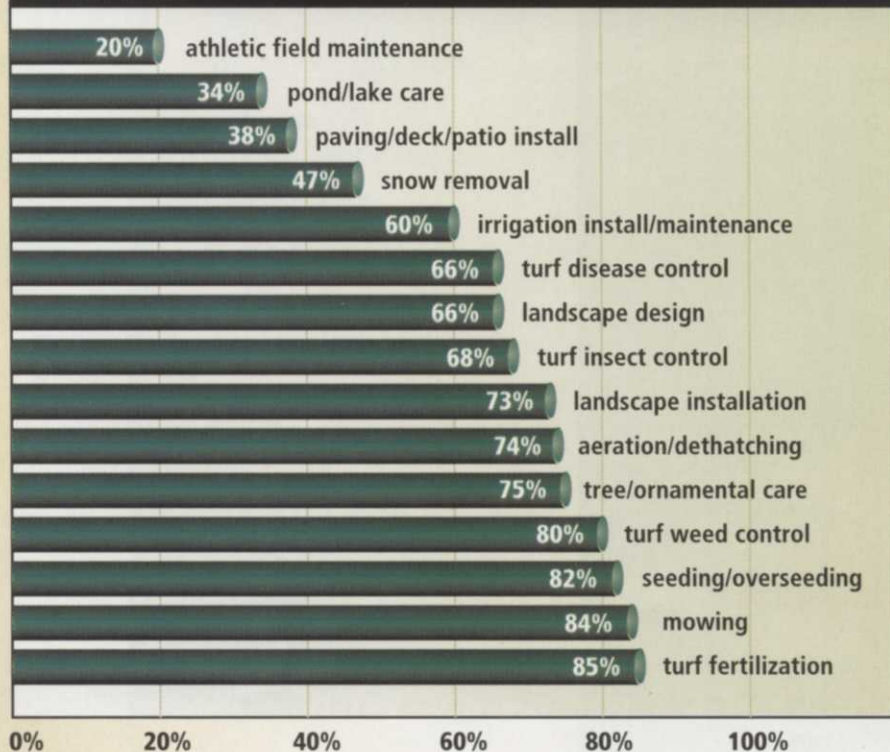
Woods has also had good luck with college students as summer workers, although they're rarely available early in the season and leave before it's over. "Our biggest problem is finding people with transportation and legitimate drivers' licenses," he says.

Pay vs. quality of work

Landscapers are always debating the relationship between pay and work quality, and 1998 is no exception.

Russell Schmidt, president of Schmidt Landscaping, Hillsboro, MO, says he used to believe that paying more brought in better workers,

SERVICES PERFORMED IN 1997 BY LANDSCAPE/LAWN CARE COMPANIES



but "now I think it's in how you treat people, above and beyond money," he says. "I take a keen interest in my employees' families and provide good benefits, vacation time and so on."

Christiansen's company is "right in the middle of the heap" in terms of salaries, he says. To him, the relationship between pay and worker quality is proportional. "The good ones will move on (if you don't pay enough). What I dislike about our industry is that we lose good guys due to the seasonal nature of our work," he notes.

"We do snow removal in the winter to keep some of those people with us."

"Right on target," is how Woods describes his company's pay scale. "I communicate regularly with five or six other local companies to see where they are on pay rates, and try to be consistent with them."

"When I was younger, I thought there was a direct correlation between paying more and getting good work," says Woods. "As I get older, I'm less convinced of that relationship. If someone is doing a poor job, more money won't change them," he adds.

Purse strings a bit looser

Client purse strings are loosening up, says Moore, but not too much, landscapers tell LANDSCAPE MANAGEMENT.

"It's not like the 1980s, where you could ask almost any price and get it," says Moore. "The only way you

can justify price increases is by providing added value and personal attention."

Budgets are a mixed bag, says Woods. "General contractors shop the budget to death, although they are seeing the results of that approach; you get what you pay for. Saving \$5,000 on the price may cost the client or contractor \$10,000 in the long run. We just stop bidding on the work if the contractor has that attitude."

His company often gets urgent calls to fix something or step in when a client realizes that his bid translates to better-quality work, Woods

notes, but "I'm not a gouger. I'm looking to build ongoing relationships, not do one-time projects."

"I used to be fiercely competitive, but I realized that everyone was a lot happier if we worked together," says Bruner.

"Now I have several colleagues in the landscape industry and we share business, employees and equipment as we need."

Diversification

Pressure of the marketplace can push companies into trying to offer more services than they can maintain at a quality level, contractors tell LM.

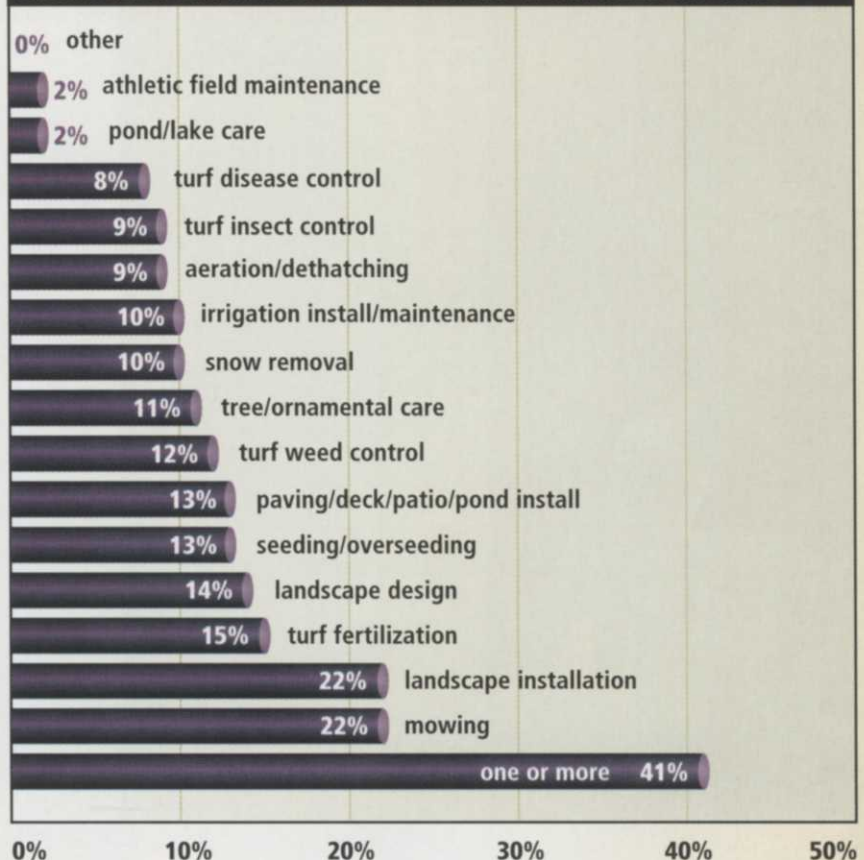
"Our company has a retail garden center, design/build team and pretty large maintenance division, so we are diverse to an extent," says Woods.

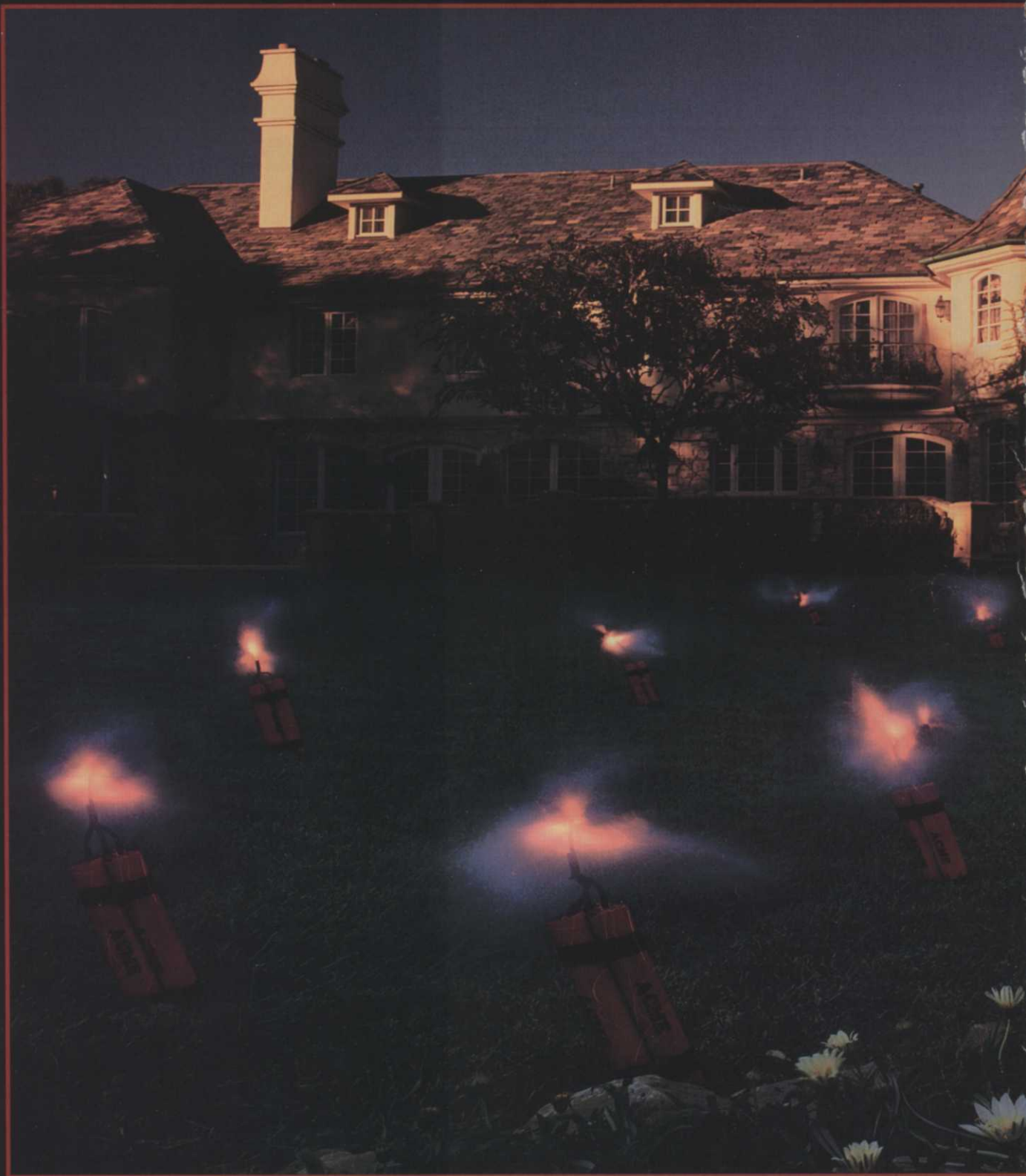
"There are limits, though. We don't do any tree work or irrigation. We refer that to others," he says.

Woods' company has found a lucrative niche in golf course work, rebuilding bunkers, tees and providing maintenance, reconstruction and modification.

"It's a tough business to break into. Golf course superintendents tend to think of the courses as their own

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STATE OF THE INDUSTRY

homes and you have to get work by word of mouth." He secured a contract when the Professional Golfers Association (PGA) came to town in 1990 and since has parlayed that into work for the developer that owns property abutting the golf course and with the Jaycees, who run the tournament.

"This started out as a small

"Diversity is a good thing," he says. "Sod, trees, concrete, snow removal; I do everything. It's how I became successful."

Distributor relations

The LM survey revealed that many industry members use more than three distributors for their equipment and materials.

Woods does use several distributors. "That happens

buying from their competitors. I believe in spreading the wealth and don't like to burn bridges with any distributors."

On the other hand, "I can't say enough good things about my vendors. They're always there, providing training and service. Without their dependability, I wouldn't be where I am."

Moore also only uses a few "preferred" vendors for better service. "We test-market early every spring and late in the fall to comparison shop and make sure our vendors are cost-effective," he adds. It works: "We are getting what we need, for the most part. Our distributors give feedback and ask what they can do to work out any problems."

Bruner also uses several different distributors. He buys seeds and fertilizer locally to save on transportation and storage costs. On the whole, he says, he gets the service he needs. "If you have a breakdown, price is meaningless," he notes. "Most people in business for a number of years have learned that there is a real obligation to be of service to their clients; if they don't meet it, they'll be out of business."

A healthy industry

"The industry is quite healthy, although I'd like to see the quality of help improve. It would make life easier," says Woods. "Some companies must be on Planet Mars. They charge so little that they simply can't do the job and that makes everyone

in the industry look bad."

"I don't see anyone starving in our area," says Schmidt. "The amount of work I turn down is staggering. My concern is with people who take work they can't do, don't show up or otherwise make the industry look bad, which creates ill will. What also needs work is involvement in trade organizations. We all should get involved and leave our petty differences behind. It aggravates me when I see people who aren't sharing information."

To Christiaansen, the industry is growing and healthy, but "the lack of accepted standards in techniques is a real issue. I think we're kind of wishy-washy in that arena," he says.

Moore finds the industry "basically healthy, but with lots of room for improvement." He feels that consolidations will increase the level of professionalism in the Green Industry and reflect a positive trend of moving the industry from being "a sort of cottage industry," providing more standardization and visibility.

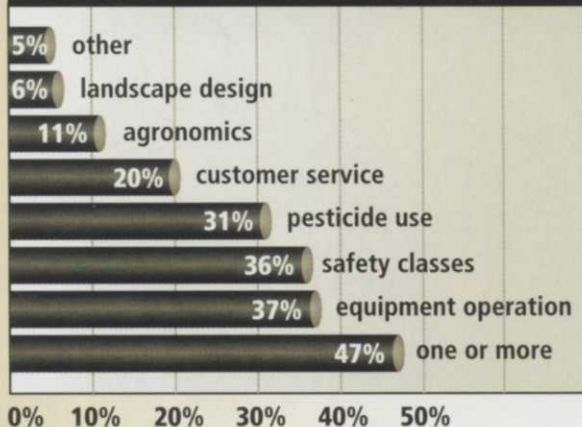
Survey data by Readex, Inc.

State of the Industry survey

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TYPES OF LANDSCAPE-RELATED TRAINING PROGRAMS OFFERED



job for the tour and ended up a major business," says Woods. "We saw an opportunity and took on something nobody else wanted."

Schmidt says, "Smaller companies are dying on the vine because they are trying to do too much. It's easy to get locked into thinking that you've got to do everything for your customers or they will find someone else who does; it's hard to say 'no' but you have to know your limits."

Skradski says it's impossible for the industry to ever become "too diverse."

with chemicals, because we buy them through stores and need variety," he explains.

"With a garden center, we have to be diverse. We have to get plant material from the West Coast if we want to make money on it."

He deals with one Case dealer for equipment and one sod dealer, because of great service.

That service element is critical. "I don't just shop price, although I wouldn't pay a premium," he says.

Schmidt has several distributors. "Most know I'm also

Parks, grounds pros gain in smarts

Skillful grounds managers insist on training and technology to raise recreation grounds management to a higher level.

By ROBERT E. REAVES

The parks, recreation centers and sport complexes of today are experiencing exciting growth and quality improvement thanks to training, technology, emphasis on quality and smart management. The state of this industry segment is strong. The old image of the custodial groundskeeper has changed, attracting many new sharp and skilled people.

More certification, training

A strong commitment to training continues to enhance

the professionalism and safety record of the parks and recreation industry. Most budgets now include training for both full-time and part-time employees. Why is that? Much of the reason can be attributed to federal and state regulatory agencies that mandate safety training.

However, there's more to the story. The parks and recreation industry has learned that training and certification equals professionalism, quality improvement and employee career enhancement. The Irrigation Association (IA) and Professional Grounds Management Society (PGMS) have played a major role in getting this message across.

David Chapman, Parks Superintendent for the City of Tallahassee Parks & Recreation District believes in training. We've been sending our employees to classes in communication, conflict resolution and planning, as well as sponsoring a Floyd Perry seminar. Each year employees in our horticultural division attend Disney's Color Magic and the Spring Garden Expo at Callaway Gardens. Chapman tries to utilize every training resource possible, such as the Florida Cooperative Extension Service and the Tallahassee

Training Institute.

Tom Dew, Superintendent for Landscape & Pavements Maintenance at Texas A&M University at College Station is another big proponent of training. Not surprising, Dew is also the Southwest Regional Director for PGMS.

"Right now we are looking at the PGMS Groundskeeper Certification Program," says Dew. "We also take several benchmarking trips each year to other campuses and places like Moody Gardens in Galveston, TX. Benchmarking allows us to measure ourselves

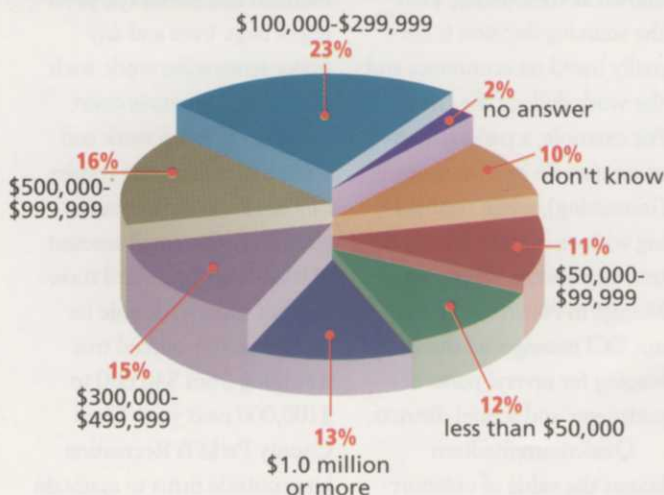


Dew: workers will leave over 50 cents, but Texas A&M crew is stable, efficient.

against others in order that we can improve our quality."

"We have \$20,000 in our budget earmarked each year for training," says Chuck Ainsworth, Park Project Coord-

1997 ANNUAL BUDGETS (FOR LANDSCAPE, LAWN CARE, GROUNDS & GOLF)



STATE OF THE INDUSTRY



Shorney: good benefits attract 50 applicants for one job opening.

director for the City of Fort Collins, CO, Parks Division. Right now we are stressing certification in landscape maintenance, irrigation and backflow testing for our full-time people." Crews will train seasonal workers. Each seasonal employee has a half-day of training. About every second Thursday is held training sessions on safety, equipment, restroom maintenance and playground equipment.

"We have a horticulturist on staff that goes out to each of my zones and conducts training. The same goes with

our own irrigation specialist who trains our irrigators," explains **Jerry Royther**, manager of parks for Clark County in Las Vegas, NV.

"For safety, we utilize OSHA trainers as well as training materials on the equipment we buy. We also ask the manufacturer or distributor to come in a train our people

when we buy a new piece of equipment."

"Our safety training continues to be very positive. We've seen a marked reduction in the number of severe accidents, adds **Jerry Shorney**,

Sr., Superintendent of Operations and Lincoln Parks & Recreation in Lincoln, NE. We have our own safety committee made up of employees from every area of responsibility. This committee reviews all the accidents over the past month and recommends ways to eliminate injuries."

Outsourcing

More and more parks & recreation departments and sports complexes are turning to outside landscape management companies to maintain landscaping. This trend is called industry consolidation or outsourcing. One such company is Environmental Care, Inc., based in Calabasas, CA. When a client does not have the time or the skills to perform landscape management, they use outsourcing to get the job done, says Tom Moore, vice president of Environmental Care, Inc.

Co-sourcing combines strengths

A middle-of-the-road approach to outsourcing is known as co-sourcing. Here the sourcing decision is normally based on economics and the work skills of the crew. For example, a parks department may do its own mowing (insourcing), while contracting with an outside firm to do tree care (outsourcing), adds Moore. In Northern California, ECI manages all the landscaping for several parks departments and school districts.

Qualcomm Stadium knows the value of outsourc-

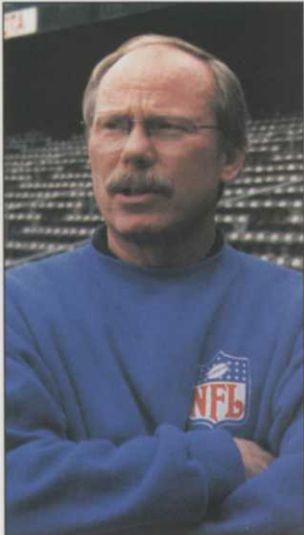
ing. "We use outside management companies to maintain the trees and outside perimeter landscaping. In many cases, these firms offer better economics and better quality," explains Wightman. "We have very busy stadium with an event every three days. Outsourcing gives us breathing room. However, when it comes to the sports field industry, Wightman does not see the complete elimination of the head groundskeeper.

Tallahassee Parks & Recreation Department has contracted with a local pest control firm to handle all of its major pest control needs for the past three years. We started this because we found it more cost effective, since much of the work had to be done at night, says Chapman. We also use a tree service firm for our electrical line trimming and contract out mowing and all routine maintenance at two of our smaller parks.

Fort Collins outsources medians and parkways, pruning of large trees and any major renovation work such as asphalt and tennis court resurfacing, fence work and some major irrigation repairs. Lincoln Parks & Recreation contracts out a small amount of island and boulevard mowing, but plans to double its budget on outsourced tree trimming from \$40,000 to \$100,000 next year. Clark County Parks & Recreation hires outside firms to maintain

Common themes across the USA:

- ▶ Green industry is healthy;
- ▶ Part-time labor is the foremost concern;
- ▶ Outsourcing and cosourcing on the increase;
- ▶ High emphasis on certification and training;
- ▶ Multiple number of distributors used;
- ▶ Distributor selection usually based on lowest bid;
- ▶ Good wages and benefits attract and retain employees;
- ▶ Land acquisition for new parks and sport complexes on the increase;
- ▶ More greenbelts and natural no-mow areas decrease crew workload



Wightman: formal training supplemented by weekly 'tailgate' meetings.

right-of-ways and other situations where it makes economic sense.

Business with suppliers

For parks and sports complexes that fall under local and state government jurisdiction, bidding by chemical and equipment suppliers is a way of life. We use many distributors, probably a total of 30, says Wightman. "Price is number one, but if a distributor is providing poor service, we go somewhere else. But for the most part, I'd say our distributors are holding up their end of the bargain."

Lincoln Parks & Recreation has around 14 vendors.

"Our distributors generally give us very good service. If they don't, we deny them from bidding next year," says Shorney. He says distributors are required to supply Material Safety Data Sheets (MSDS) for all deliveries.

Equipment vendors are asked to supply some training and supply a video on servicing the equipment.

Fort Collins deals with many vendors—five irrigation distributors and five seed and chemical suppliers. In the past, not everyone carried the same products. Now, more and more distributors carry most all items—even the same brands, adds Ainsworth.

"Don't let distributors rest on their laurels and assume they will continue to get your business. A distributor should add value by keeping you informed about price increases and reductions, new products and information about the green industry."

Ainsworth says much of the training offered by distributors does not meet the crews' needs, comes at the wrong time of year or is redundant.

Not everyone deals with large numbers of vendors, as is the case with Tallahassee Parks & Recreation.

"We've become more comfortable with certain distributors and brands," says Chapman. "We get most of our fertilizer from one distributor and have a preference for one brand of mowing equipment which we buy from usually one distributor. Right now we have three different irrigation distributors and prefer to have fewer."

Regional factors

If you talk to different parks departments and sports complexes in different regions

of the country, you'll notice that each has its own challenges or factors that make life easier. In Las Vegas, the biggest challenge stems from a booming population growth and 24-hour activity. This places an extra burden on the parks department with no room for sports field rehabilitation.

In Nebraska, property taxes are a big issue. This has led to a reduction in budgets throughout the state. Downsizing is another big challenge at Lincoln.

"During the early 1990s, we lost about 36 percent of our full-time staff, while at the same time we had a 54 percent increase in the number of acres we manage," says Shorney.

"It's just the opposite story in Fort Collins, where budgets are strong," says Ainsworth. "We are in a boom area. Money is fairly flush for the city and we've been able to keep up with the need for new parks, explains Ainsworth.

Sometimes the makeup of a city can make things easier for a parks department, according to David Chapman.

"The areas strong economy allows us to maintain our budgets with a highly-skilled labor force," says Chapman.

The future

Pressure from insurance companies and lawyers will continue to nudge districts into upgrading sports facilities.

"The trickle-down effect

from major league to little league facilities will continue to generate activity in playing field renovation," comments Wightman.

"Our industry needs to come up with new and improved plant materials," says Ainsworth. "In the desert Southwest, many plants have been taken off the approved planting list because of allergies, leaving us with a limited list of plant materials. We need more deciduous trees and new grasses that can withstand the high temperatures of the desert. We also need bermudagrass varieties that spend less time in dormancy and more time in active growth, says Royther. This could help us decrease the amount of overseeding.

"The Green Industry is booming," says Jerry Shorney.

"City planners will continue to look at adding additional green space and trails. Natural trails will continue to be a huge issue in new subdivisions. However, I believe there must be a public acceptance of no-mow areas and less formal landscaping. We would rather maintain one or two areas very well than six areas that are just average."

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