

2014 In House/Facility Manager *Survey Offers Insight Into Overall Market*



For Complete Survey Results Visit
www.CMMOnline.com/in-house-survey.

The staff at *Cleaning & Maintenance Management* revamped its old benchmarking survey in an effort to more accurately gauge the modern trends and issues affecting the market and the professionals that operate within the JanSan industry.

This snapshot of the market helps *CMM* develop educational resources for the entire industry.

The following pages will help in-house managers and professional cleaners understand the commonalities and differences they share so they can operate in a more efficient and effective manner.

Interesting Findings

According to this survey, “improving productivity/efficiencies” was identified as very important by all facility types identified.

When segmented out these were the actual results of respondents who believe improving productivity/efficiencies is a very important issue: Education: K-12, 81 percent; Education: College/University, 82.6 percent; Healthcare: Hospital, 90 percent; Healthcare: Long-term, 80 percent; and Office/Government, 72.7 percent.

Health and safety also ranked high as a very important issue across all of these facility types.

Interestingly, according to the survey, the majority of the healthcare segments’ respondents noted that operating budgets

actually increased from 2013-2014, compared to the majority of education and office/government facilities, which remained “flat year over year.”

However, even with higher operating budgets, the majority of healthcare respondents also reported that their starting and hourly wages were lower than the majority of their education and office/government counterparts.

Open-ended Feedback

In addition to the multiple choice questions, we also asked two important open-ended questions to conclude our survey: What technology and/or innovation has positively impacted your facility in the past few years and What do you think are the three most critical issues facing the in-house/facility management industry today?

As for the most important critical issues facing the in-house/facility management industry today, the three most common responses include:

- **Budgets**
- **Costs**
- **Staffing issues.**

We thank all of those who took the time and effort to complete our survey and we hope you find these results useful to your operations. *CM*

Which of the following best describes your title or job function?

Director/Manager Custodial Services	19.7%
Director of Facilities.....	12.8%
Director of Environmental Services	12.8%
Director of Housekeeping.....	12.6%
Maintenance Manager/Supervisor.....	9.1%
Manager Building Services.....	6.0%
Director of Maintenance.....	4.3%
Facility Executive/Building Owner	4.3%
Directory of Buildings & Grounds	2.7%
Building/Facilities Engineer	2.7%
Other.....	12.8%

What best describes your management responsibilities?

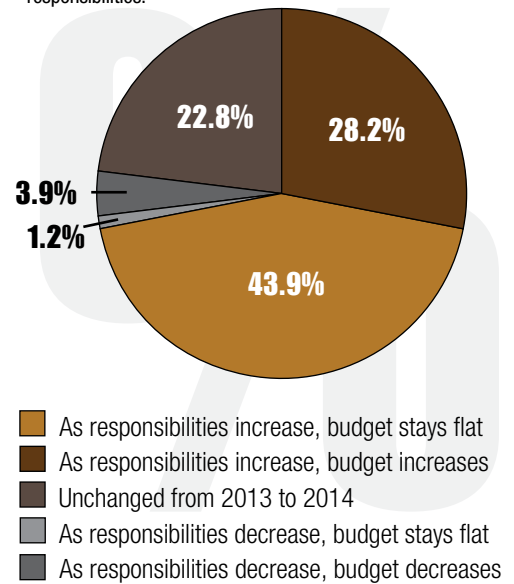
Facility Manager	26.5%
<small>(oversee multiple departments of a facility including cleaning/maintenance)</small>	
Manager of cleaning/maintenance for multiple facilities	22.8%
Manager of cleaning/maintenance for an entire facility	19.7%
Facility Executive	14.7%
<small>(oversee multiple departments of a facility including cleaning/maintenance)</small>	
Supervisor of outsourced/sub-contract cleaning contract	5.6%
Manager of cleaning/maintenance for part of a facility	4.1%
Other	6.6%

26.5%
are facility
managers
over multiple
departments

Rate the importance of the following issues as they pertain to your facility/operation.

	Very Important	Somewhat Important	Neutral	Less Important	Not Important
Health & Safety	85.2%	12.1%	2.9%	0.0%	0.0%
Improving productivity efficiencies	79.5%	18.0%	2.1%	0.2%	0.2%
Improving facility image	72.3%	19.6%	7.7%	0.4%	0.2%
Security	70.5%	19.5%	9.0%	1.3%	0.2%
Reducing overall cleaning/maintenance costs	66.9%	23.1%	7.5%	1.7%	1.0%
Training/education	61.4%	30.9%	7.1%	0.8%	0.2%
Energy management	54.7%	32.6%	9.9%	2.9%	0.0%
Reducing employee turnover	40.4%	26.7%	23.8%	5.2%	4.0%
Sustainable/green initiatives	36.8%	39.1%	18.2%	4.6%	1.7%

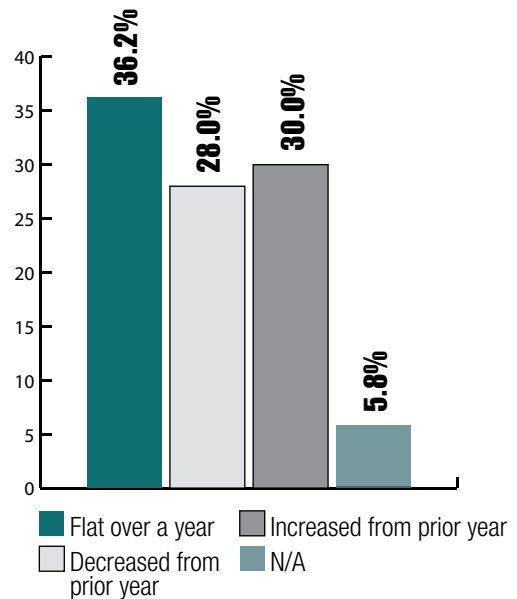
From 2013 to 2014, please select the statement that best describes your operational budget in relation to your responsibilities.



Which of the following tasks/responsibilities do you outsource or utilize in-house staff?

	In-House Staff	Outsource	N/A
Strip/recoat floors	74.0%	19.6%	6.4%
Restorative/deep clean carpets	64.5%	29.5%	6.0%
Polish/restore stone and marble surfaces	44.6%	23.0%	32.4%
Entry mats	65.5%	29.2%	5.3%
Light bulb replacement/relamping	88.6%	3.9%	7.5%
Window Washing	50.7%	44.8%	4.5%
Maintain HVAC Systems	66.0%	24.8%	9.2%
Laundry Operations	48.8%	29.5%	21.7%
Grounds Care	60.7%	30.7%	8.6%
Pest Control	15.7%	78.5%	5.8%
Exterior maintenance	68.7%	23.4%	7.9%
Painting	68.5%	24.0%	7.5%
Roof maintenance/repair	25.7%	66.4%	7.9%
Preventive Maintenance/building systems	79.0%	13.5%	7.5%
Building(s) Security	70.3%	20.6%	9.0%
Snow Removal	56.3%	24.3%	19.4%

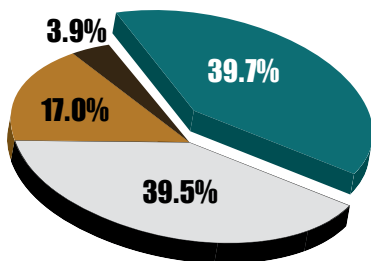
From 2013 to 2014, please select the statement that best describes your operating budget.



Have your facility's cleaning/janitorial services been outsourced or is outsourcing being considered?

No, outsourcing is not an option..... 49.3%
 No, but it has been analyzed..... 21.2%
 Yes, within the last year..... 4.9%
 Yes, more than a year ago 15.3%
 Other 9.3%

34.1% say Restrooms are the most problematic in cleaning/maintaining their facilities



When outsourcing services, do you have input on the specific products and equipment that will be utilized within your facility?

- Yes, I supply a list of specific brands & products to be used in my facility.
- No, I trust my service provider to utilize up-to-date equipment & supplies
- N/A
- Other

What is the starting wage for employees in your facility?

Less than \$8.00	4.3%
\$8.00-\$8.99	15.5%
\$9.00-\$9.99	18.0%
\$10.00-\$10.99	20.0%
\$11.00-\$11.99	11.4%
\$12.00-\$12.99	8.9%
\$13.00-\$13.99	4.3%
\$14.00-\$14.99	4.8%
Over \$15.00	13.0%

What is the average wage for employees in your facility?

Less than \$10.00	8.2%
\$10.00-\$10.99	10.0%
\$11.00-\$11.99	8.9%
\$12.00-\$12.99	12.5%
\$13.00-\$13.99	10.0%
\$14.00-\$14.99	8.0%
\$15.00-\$15.99	10.2%
\$16.00-\$16.99	5.9%
\$17.00-\$17.99	3.6%
\$18.00-\$18.99	5.2%
\$19.00-\$19.99	3.4%
Over \$20.00	14.1%

Has your purchasing power changed in recent years?

Yes, more centralized, but I still have final purchasing decision	20.1%
Yes, more centralized, and my authority over purchases has decreased	15.0%
No, I'm still responsible for my budget	52.5%
N/A	12.3%



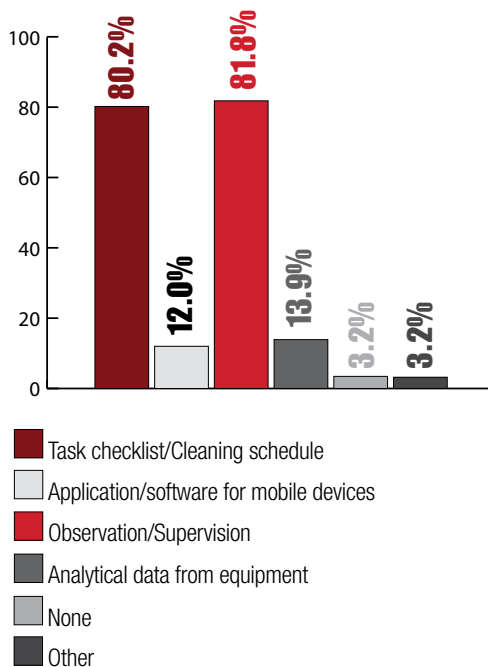
What portable technology do your employees use?

Smartphones	42.5%
Tablets	20.5%
Workloading, inspection and schedule software	18.4%
Two-Way Radios	53.4%
None	18.4%
Other	5.9%

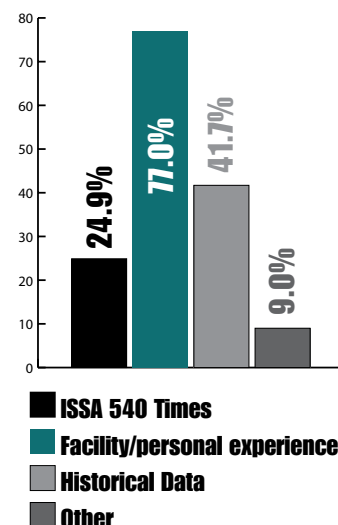
What products are you responsible for purchasing?

Carpet Care Chemicals	76.4%
Carpet Care Equipment (including vacuums)	76.1%
Cleaners & Disinfectants	85.6%
Cleaning Supplies (Mops/Microfiber/Carts/Can Liners)	83.9%
Employee Safety Equipment	73.3%
Facility Signage	42.1%
Floor Finish & Coatings	79.0%
Floor Pads & Supplies	79.9%
General/Multipurpose Cleaning Chemicals	83.7%
Grounds Care Equipment	27.4%
Hand Soap/Sanitizers	81.6%
Hard Floor Care Equipment	70.4%
HVAC Parts & Equipment	29.1%
Ice & Snow Removal	35.2%
Matting	67.6%
Measurement Equipment (ATP, IAQ, Slip, Moisture, etc.)	24.1%
Paper Products	75.4%
Pest Control	36.9%
Restroom Dispensers (Paper & Soap)	76.4%

What type of quality assurances do you implement in your facility?

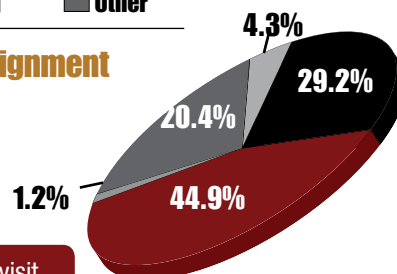


What baseline benchmark do you use for expected cleaning task time for employees?












Which of the following workloading/assignment systems do you use in your facility?

- Team Cleaning
- Zone Cleaning
- Gang Cleaning
- Combination/Hybrid System
- Other




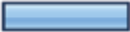





To view complete survey results visit www.CMMOnline.com/in-house-survey





1. Which of the following best describes your organization?

		Response Percent
Education: K-12		17.4%
Education: College/University		22.6%
Healthcare: Hospital		14.5%
Healthcare: Long Term		7.2%
Office/Government		9.1%
Retail/Commercial		3.5%
Hospitality/Lodging		3.5%
Industrial		4.8%
Other, please specify		17.4%






3. Which of the following best describes your management responsibilities?

		Response Percent
Facility executive – oversee multiple departments at multiple facilities		13.7%
Facility manager – oversee multiple departments of a facility including cleaning/maintenance		22.6%
Manager of cleaning/maintenance for multiple facilities		21.7%
Manager of cleaning/maintenance for an entire facility		18.4%
Manager of cleaning/maintenance for part of a facility		3.1%
Supervisor of outsourced/sub-contract cleaning contract		3.5%
Other, please specify		17.0%





4. Which of the following best describes your facility type?

		Response Percent
Class A		22.6%
Class B		12.6%
Class C		0.8%
N/A		64.0%






5. What level of LEED certification has your facility achieved?

		Response Percent
Certified		11.6%
Silver		8.9%
Gold		6.6%
Platinum		2.3%
None		70.6%






7. From 2013 to 2014, please select the statement that best describes your operating budget. (Select only one.)

		Response Percent
Flat year over year		36.2%
Decreased from prior year		28.0%
Increased from prior year		30.0%
N/A		5.8%





8. From 2013 to 2014, please select the statement that best describes your operational budget in relation to your responsibilities. (Select only one.)

		Response Percent
As responsibilities increase, budget increases		28.2%
As responsibilities increase, budget stays flat		43.9%
As responsibilities decrease, budget stays flat		1.2%
As responsibilities decrease, budget decreases		3.9%
Unchanged from 2013 to 2014		22.8%








9. Have your facility's cleaning/janitorial services been outsourced or is outsourcing being considered?

		Response Percent
No, outsourcing is not an option		49.3%
No, but it has been analyzed		21.2%
Yes, within the last year		4.9%
Yes, more than a year ago		15.3%
Other (please specify)		9.3%







11. When outsourcing services, do you have input on the specific products and equipment that will be utilized within your facility?

		Response Percent
Yes, I supply a list of specific brands and products to be used in my facility.		39.5%
No, I trust my service provider to utilize up-to-date equipment and supplies.		39.7%
N/A		17.0%
Other, please specify		3.9%







12. Which of the following areas/surfaces are the most problematic in cleaning/maintaining your facility?

		Response Percent
Restrooms		34.1%
Entryways		10.1%
Common/shared spaces		9.9%
Hard floor surfaces		12.0%
Carpeting		21.7%
Multi-surface spaces		5.6%
Other, please specify		6.7%










14. How many full-time employees do you have at your facility?

		Response Percent
10 or less		20.7%
11-24		17.5%
25-49		15.2%
50-99		16.4%
100-199		12.5%
200+		17.7%












15. How many part-time employees do you have at your facility?

		Response Percent
10 or less		62.7%
11-24		13.6%
25-49		9.3%
50-99		5.2%
100-199		3.9%
200+		5.2%






16. What is the STARTING wage for employees in your facility?

		Response Percent
Less than \$8.00		4.3%
\$8.00-\$8.99		15.5%
\$9.00-\$9.99		18.0%
\$10.00-\$10.99		20.0%
\$11.00-\$11.99		11.4%
\$12.00-\$12.99		8.9%
\$13.00-\$13.99		4.3%
\$14.00-\$14.99		4.8%
Over \$15.00		13.0%



17. What is the AVERAGE wage for employees in your facility?

		Response Percent
Less than \$10.00		8.2%
\$10.00-\$10.99		10.0%
\$11.00-\$11.99		8.9%
\$12.00-\$12.99		12.5%
\$13.00-\$13.99		10.0%
\$14.00-\$14.99		8.0%
\$15.00-\$15.99		10.2%
\$16.00-\$16.99		5.9%
\$17.00-\$17.99		3.6%
\$18.00-\$18.99		5.2%
\$19.00-\$19.99		3.4%
Over \$20.00		14.1%






18. What background checks do you use during the hiring process? (Check all that apply.)

		Response Percent
Drug screening		58.4%
Criminal record		89.5%
Credit report		13.4%
None		6.8%
Other, please specify		7.5%






19. Do you offer a training program to your full-time employees?

		Response Percent
Yes		87.7%
No		12.3%







20. What type of training do you offer to employees? (Check all that apply.)

		Response Percent
Hands On		91.1%
Classroom		57.7%
Online/Video		61.6%
N/A		3.9%
Other, please specify		4.1%







21. Who provides training for your employees? (Check all that apply.)

		Response Percent
Distributor/Vendors		51.4%
In-house trainers/supervisors		88.2%
Third party		21.4%
Online training options		37.3%
Other, please specify		4.8%





22. What portable technology do your employees use? (Check all that apply.)

		Response Percent
Smartphones		42.5%
Tablets		20.5%
Workloading, inspection and schedule software		18.4%
Two-way radios		53.4%
None		18.4%
Other, please specify		5.9%





23. What type of quality assurances do you implement in your facility?

		Response Percent
Task checklists/Cleaning schedule		80.2%
Application/software for mobile devices		12.0%
Observation/supervision		81.8%
Analytical data from equipment		13.9%
None		3.2%
Other (please specify)		3.2%

24. Which of the following best describes your role in the purchasing of equipment and supplies?

		Response Percent
I have sole purchasing authority		29.4%
I specify or recommend purchases		49.8%
I approve purchases		16.2%
Not involved in purchasing of equipment and supplies		4.6%

25. Has your purchasing process changed in recent years?

		Response Percent
Yes, more centralized, but I still have final purchasing decision		20.1%
Yes, more centralized, and my authority over purchases has decreased		15.0%
No, I'm still responsible for my budget		52.5%
N/A		12.3%






26. From whom do you purchase products? (Check all that apply.)

	Response Percent
Jan/San supply distributor	63.2%
Wholesaler	44.2%
Warehouse club	15.7%
Online retailers	27.8%
Manufacturer (Direct or Online)	43.3%
Other, please specify	12.0%







27. When purchasing products, from which of the following sources do you purchase ONLINE? (Check all that apply.)

	Response Percent
Jan/San supply distributor	43.1%
Wholesaler	29.6%
Warehouse club	7.6%
Online retailers	34.7%
Manufacturer (Direct or Online)	38.4%
Other, please specify	15.7%





















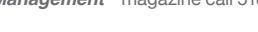

28. When selecting equipment for purchase, what is the most important factor in your decision?

		Response Percent
Performance		49.5%
Quality		31.0%
Price		14.1%
Brand		1.6%
Other, please specify		3.7%








29. What is the maximum purchasing amount you can authorize without additional approval?

		Response Percent
Less than \$2,500		48.8%
\$2,500-\$4,999		19.2%
\$5,000-\$9,999		13.0%
\$10,000-\$24,999		10.9%
\$25,000-\$49,999		2.5%
Over \$50,000		5.6%





**30. Which of the following products are you responsible for purchasing in your facility?
(Check all that apply.)**

		Response Percent
Carpet Care Chemicals		76.4%
Carpet Care Equipment (including Vacuums)		76.1%
Cleaners & Disinfectants		85.6%
Cleaning Supplies (Mops/Microfiber/Carts/Can Liners)		83.9%
Employee Safety Equipment		73.3%
Facility Signage		42.1%
Floor Finish & Coatings		79.0%
Floor Pads & Supplies		79.9%
General/Multipurpose Cleaning Chemicals		83.7%
Grounds Care Equipment		27.4%
Hand Soap/Sanitizers		81.6%
Hard Floor Care Equipment		70.4%
HVAC Parts & Equipment		29.1%
Ice & Snow Removal		35.2%
Matting		67.6%
Measurement Equipment (ATP, IAQ, Slip, Moisture, etc.)		24.1%
Paper Products		75.4%
Pest Control		36.9%
Restroom Dispensers (Paper & Soap)		76.4%
Software		19.9%
Uniforms & Apparel		41.6%
Other (please specify)		6.6%






31. Which of the following do you expect your distributors to help you with? (Check all that apply.)

		Response Percent
Inventory management		22.1%
Training		70.6%
Technical support		73.2%
Recycling programs		22.1%
Product demos		75.3%
e-Commerce		6.8%
Other, please specify		2.4%




32. What baseline/benchmark do you use for expected cleaning task time for employees? (Check all that apply.)

		Response Percent
ISSA 540 Times		24.9%
Facility/personal experience		77.0%
Historical data		41.7%
Other, please specify		9.0%









33. Which of the following workloading/assignment systems do you use in your facility?

		Response Percent
Team Cleaning		29.2%
Zone Cleaning		44.9%
Gang Cleaning		1.2%
Combination/Hybrid System		20.4%
Other, please specify		4.3%

34. Do you utilize Day Cleaning in your facility?

		Response Percent
Yes		76.8%
No		17.1%
N/A		6.2%

35. What resources do you use to learn more about the Cleaning/Facility Management industry? (Check all that apply.)

		Response Percent
Trade media (magazines, websites, e-Newsletters)		87.2%
Networking at industry trade shows		45.3%
Manufacturers		56.6%
Distributors		70.9%
Industry associations		34.4%
Social media outlets		22.0%
Other facility managers		51.9%
Other, please specify		2.1%