

2017 In-House/FM Survey Results: CMM's Annual Analysis

Key findings from the 2017 In-House/Facility Management Benchmarking Survey

By Kelly F. Zimmerman



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The Ohio State University (OSU) in Columbus, OH, is no small campus. It boasts approximately 600 buildings across 1,900 acres, and in 2015, had the third largest enrollment for public universities in the United States.

As the former director for environmental services for student life, Carl Bowman can tell you a lot about the university and its facilities. When he worked there, he was in charge of the cleaning and maintenance for any building associated with student life with the exception of classrooms and labs. This included all the dormitories, dining facilities, recreation facilities, and even the student union.

Bowman says while working at OSU, one of the biggest challenges was making sure that all of his employees (225 at his high point) across campus were completing tasks to the same standard. "I wanted to make sure that the standard we had in one area was pretty much the same standard we had in another," he says. "Anything above and beyond would cost."

A good percentage of *Cleaning & Maintenance Management (CMM)* readers may be able to relate to Bowman's challenge from his time at the university. About 33.5 percent of survey respondents from CMM's 2017 *In-House/Facility Management Benchmarking Survey* work in education facilities at the college/university level, and about three-quarters of them are responsible for the cleaning/maintenance of 11 or more buildings. That's a lot of square

footage and a lot of responsibility. Let's take a look at what else we learned from this year's survey respondents.

Survey Summary and Methodology

This year, 272 respondents completed the *In-House/Facility Management Benchmarking Survey*, with about 60 percent of them working in some type of education facility (33.5 percent

in higher education and 27.2 percent in K-12).

The rest was split among hospitals (16.5 percent); commercial facilities, such as offices and government buildings (9.6 percent); long-term health care facilities (4.8 percent); hospitality facilities (4.0 percent); recreation/transportation facilities

(2.6 percent); retail facilities (1.5 percent); and industrial facilities (less than .5 percent).

To conduct the 2017 *In-House/Facility Management Benchmarking Survey*, CMM editorial staff distributed the survey in April via email to all active contacts in the CMM in-house/facility manager email database. Survey questions were designed to address participants' operations, employee, and purchasing dimensions, along with additional critical issues in-house/facility managers face on a daily basis. A roundup of responses and top findings are available on the next several pages.

For more information about the 2017 CMM *In-House/Facility Management Benchmarking Survey*, visit www.cmmonline.com/fm-survey-2017.

About 60 percent
of this year's survey
respondents work
in some type of
education facility.

8 Facts About Your Fellow FMs

How do you
measure
up to your
peers when
comparing
facility
operations?



Schools and Universities Rule

Education facilities employ nearly 61 percent of 2017 survey respondents. This group has been the largest percent of respondents for the past three years and is up about 13 percent from last year.

1

Labor Is a Top Budget Item



Six out of 10 survey respondents said labor accounted for at least half of their operating budget.

2



Services Stay In-House

Labor expenditures may be high, but FM's are trying to keep the work in house as much as possible. About **four out of five** FM's have not outsourced cleaning services in the past five years.

3

Pest Control Takes Priority



FMs are most likely to outsource pest control services over other types of services. Restoration for fire and water damage follow closely behind, with roof maintenance and repair coming in third.

4



Responsibilities Stretch Far and Wide

More than **one-third** of respondents manage at least 20 facilities and **43 percent** are responsible for at least 1 million square feet of space.

5

Budgets Are Steady



About **42 percent** of total respondents are looking at flat budgets for the 2017-18 fiscal year; however, particularly in higher education facilities, the same percentage of respondents are looking to cut expenses.

6



Restrooms Are Still No. 1

Restrooms were listed as the **top trouble area** for facilities three years in a row, and are moving up the ranks in terms of popular problem areas.

7

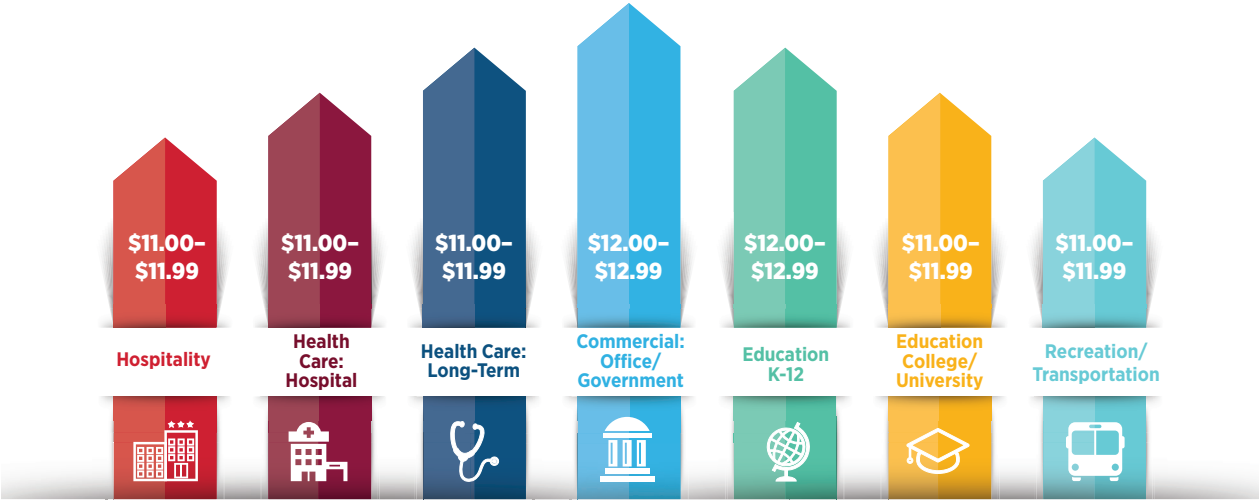
Wages Vary



More than **one-third** of respondents start their front-line employees with an hourly wage of **US\$10-12 per hour**. However, for the rest, starting wages land all across the board.

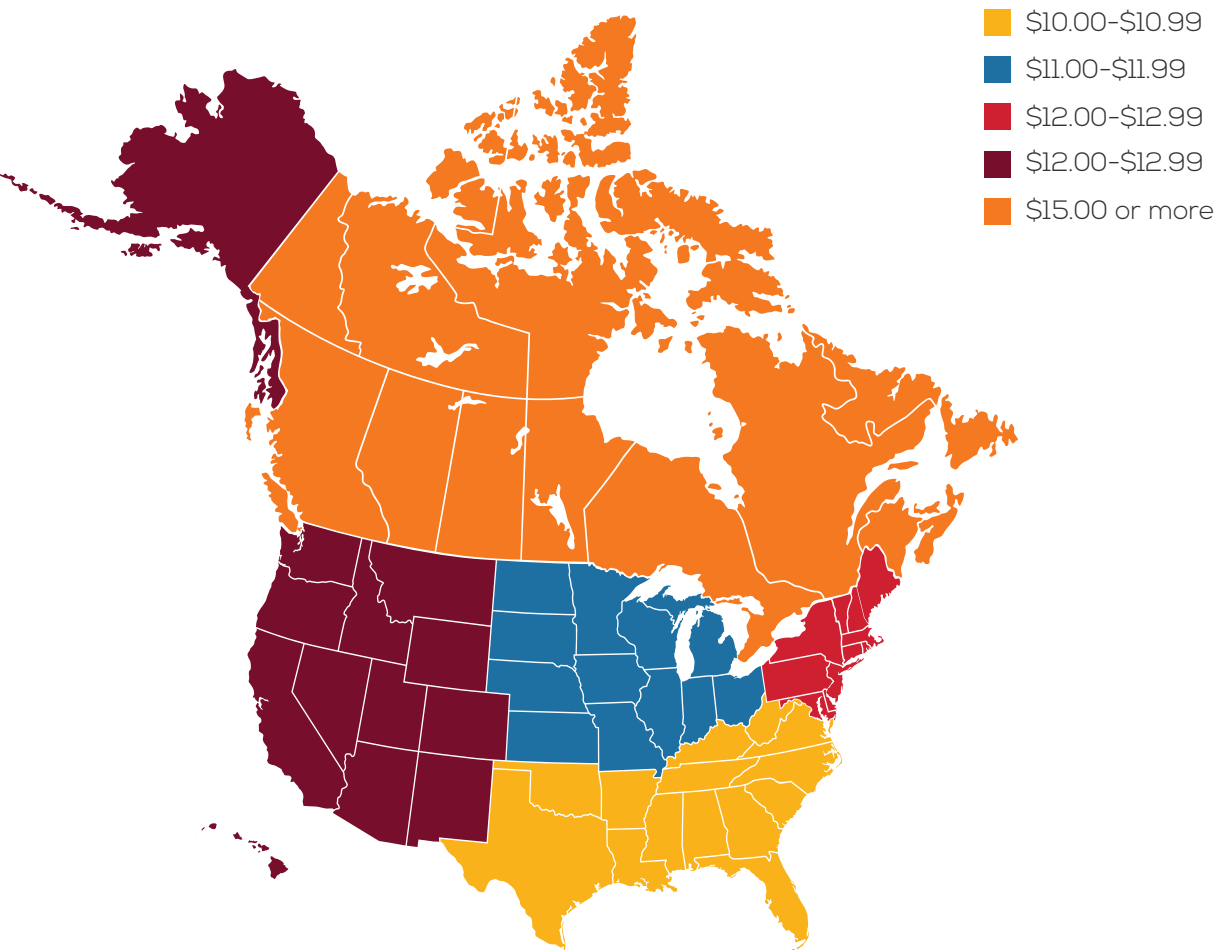
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Median Starting Hourly Wage by Facility Type



Median Starting Hourly Wage by Region

Below are the median starting hourly wages (in U.S. dollars) for in-house staff in various regions across the United States and Canada, according to survey respondents.



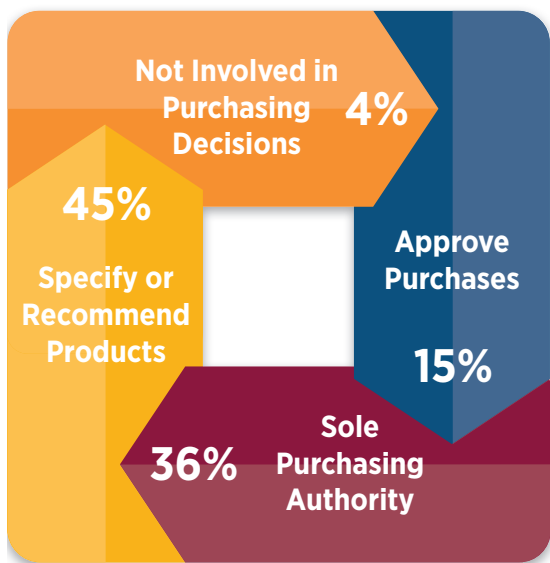
Top 5 Issues

Survey respondents said the following were “very important” in their facilities/operations:



Purchasing Power

Facility managers' role in the purchasing of equipment and supplies



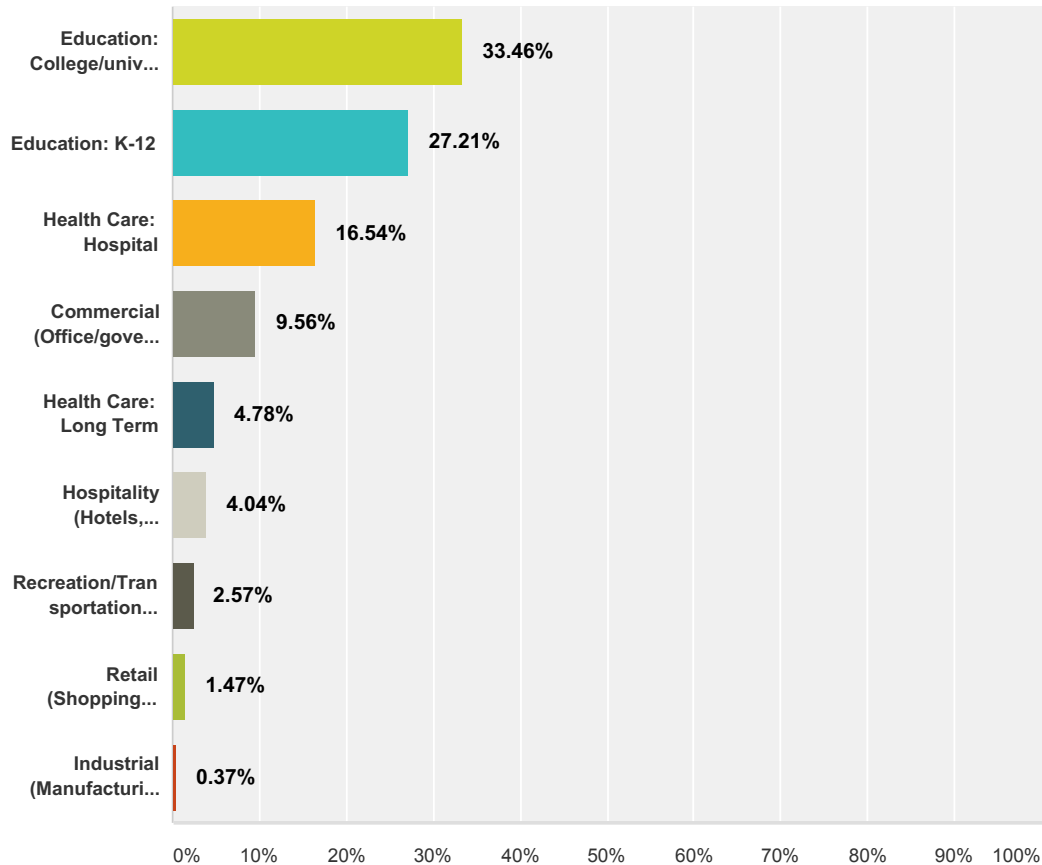
Online Purchasing

In the age of Amazon and online ordering, **27 percent** of respondents do not purchase products online. However, **25 percent** purchase at least half of their products online.

Products Facility Managers Purchase	Percentage
Cleaners and disinfectants	92.1%
Cleaning supplies (mops, microfiber, carts, can liners)	91.4%
Hand soap/sanitizers	91.4%
Restroom dispensers (paper, soap)	90.2%
Floor finish/coatings	89.5%
Floor pads/supplies	88.0%
Carpet care chemicals	88.0%
Employees' safety equipment	87.6%
Carpet care equipment (including vacuums)	86.8%
Paper products	85.3%
Hard floor care equipment	82.7%
Odor control products/chemicals	82.0%
Matting	77.1%
Batteries (equipment)	75.2%
Uniforms/apparel	56.4%
Material handling equipment	52.3%
Quality assurance programs/tools	48.1%
Facility signage	45.1%
Hand dryers	42.9%
Ice and snow removal	42.1%
Grounds care equipment	35.3%
Measurement equipment (infrared, ATP, IAQ, moisture)	35.0%
Pest/bird control	33.8%
HVAC parts/equipment	28.2%

CMM 2017 In-House/Facility Management Benchmarking Survey

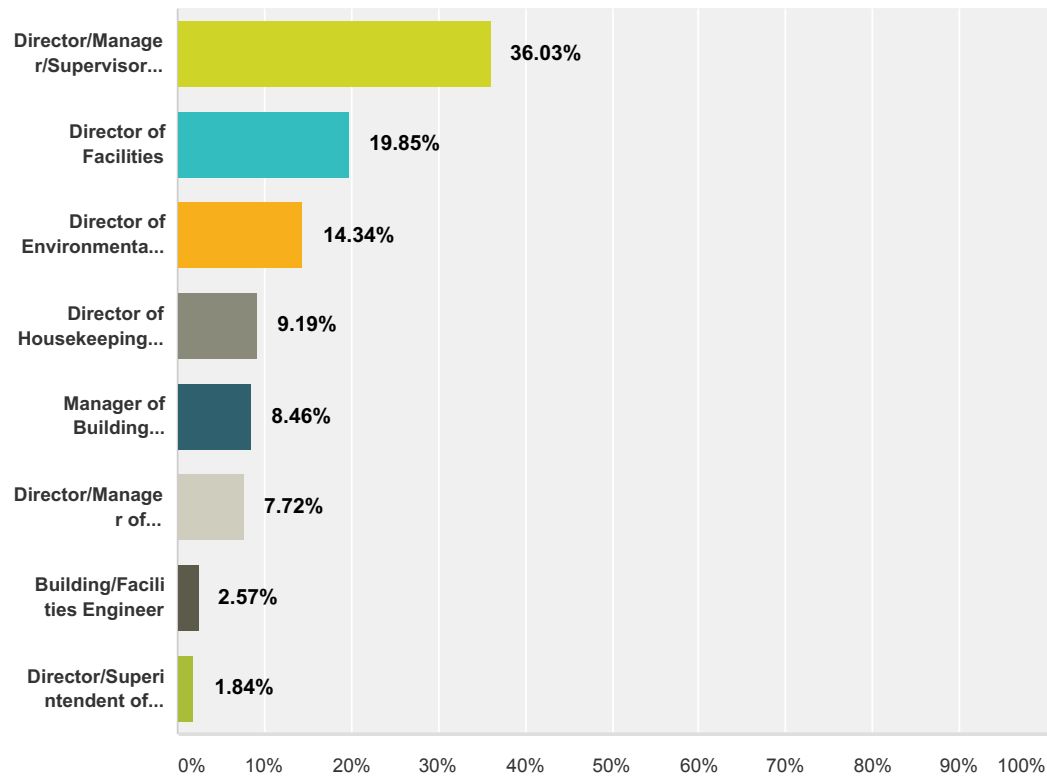
Q1 Which of the following best describes your facility/institution?



Answer Choices	Responses
Education: College/university	33.46%
Education: K-12	27.21%
Health Care: Hospital	16.54%
Commercial (Office/government buildings)	9.56%
Health Care: Long Term	4.78%
Hospitality (Hotels, motels, apartment, convention)	4.04%
Recreation/Transportation (Arenas, stadiums, airports)	2.57%
Retail (Shopping centers, entertainment, churches, museums)	1.47%
Industrial (Manufacturing, warehouses)	0.37%

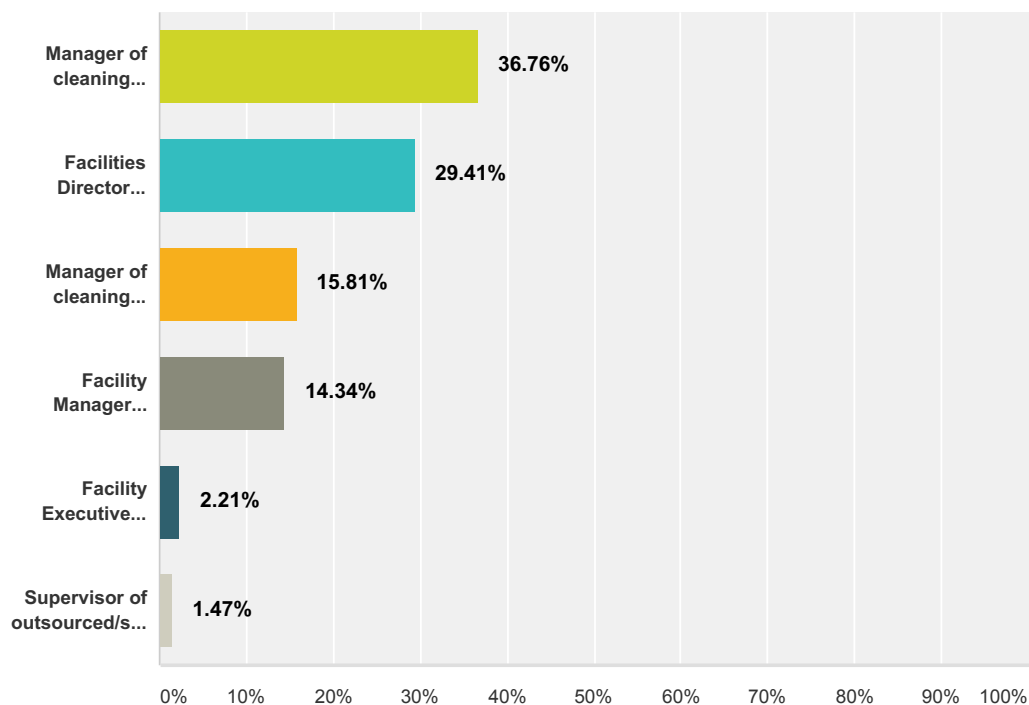
CMM 2017 In-House/Facility Management Benchmarking Survey

Q2 Which of the following best describes your job title/function?



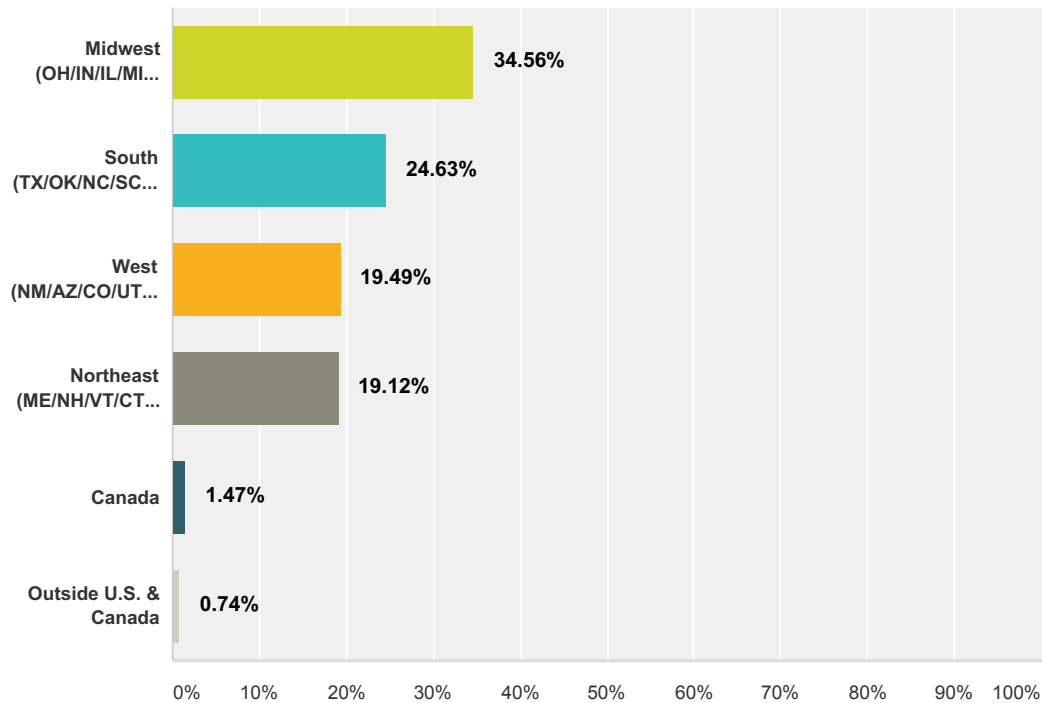
Answer Choices	Responses
Director/Manager/Supervisor of Custodial Services	36.03%
Director of Facilities	19.85%
Director of Environmental Services	14.34%
Director of Housekeeping/Executive Housekeeper	9.19%
Manager of Building Services	8.46%
Director/Manager of Maintenance/Operations	7.72%
Building/Facilities Engineer	2.57%
Director/Superintendent of Buildings & Grounds	1.84%

Q3 Which of the following best describes your management responsibilities



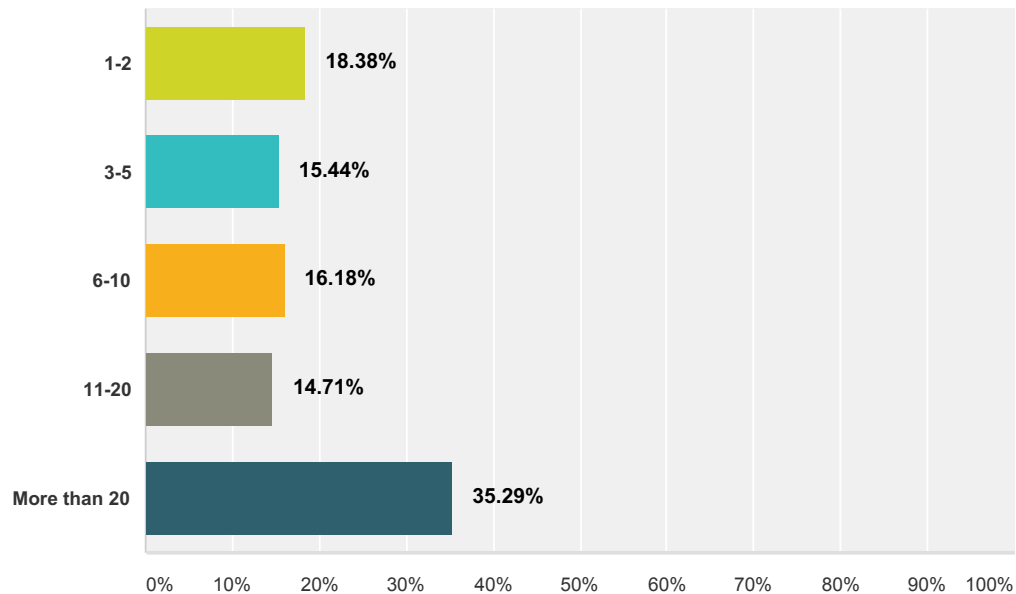
Answer Choices	Responses
Manager of cleaning services for multiple facilities	36.76%
Facilities Director (oversee multiple departments at multiple facilities, including cleaning/maintenance)	29.41%
Manager of cleaning services for a single facility	15.81%
Facility Manager (oversee multiple departments at a single facility, including cleaning/maintenance)	14.34%
Facility Executive (Building Owner)	2.21%
Supervisor of outsourced/subcontract cleaning services	1.47%

Q4 In what geographic region is the facility/are the facilities you manage?



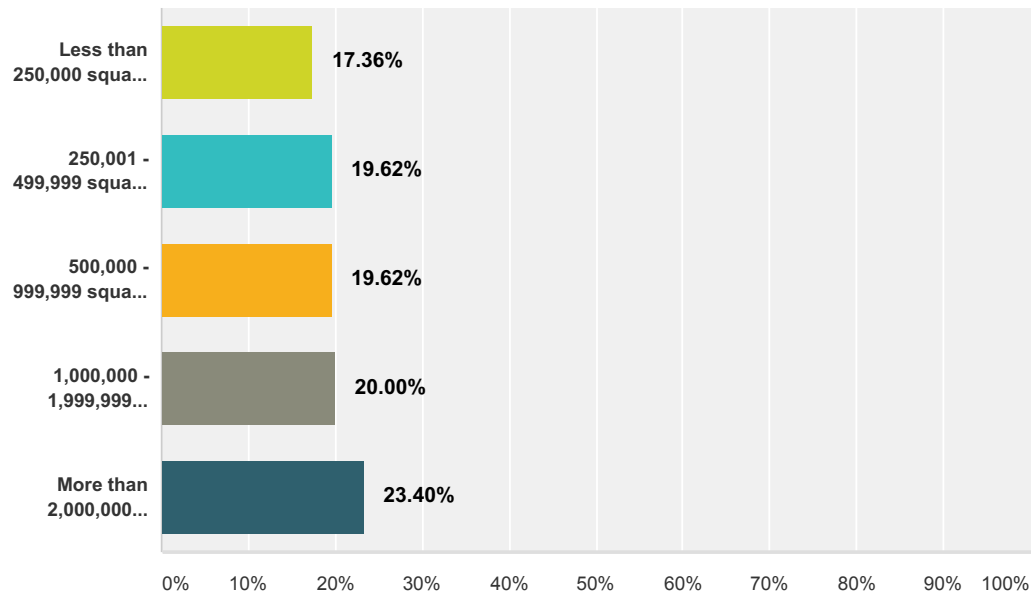
Answer Choices	Responses
Midwest (OH/IN/IL/MI/ND/SO/WI/NE/KS/MO)	34.56%
South (TX/OK/NC/SC/GA/FL/TN/AL/MS/AR/LA/KY/WV/VA/DC)	24.63%
West (NM/AZ/CO/UT/WY/MT/ID/WA/OR/NV/CA/AK/HI)	19.49%
Northeast (ME/NH/VT/CT/MA/RI/NY/PA/NJ/DE/MD)	19.12%
Canada	1.47%
Outside U.S. & Canada	0.74%

Q5 How many buildings/facilities are you responsible for cleaning/maintaining?



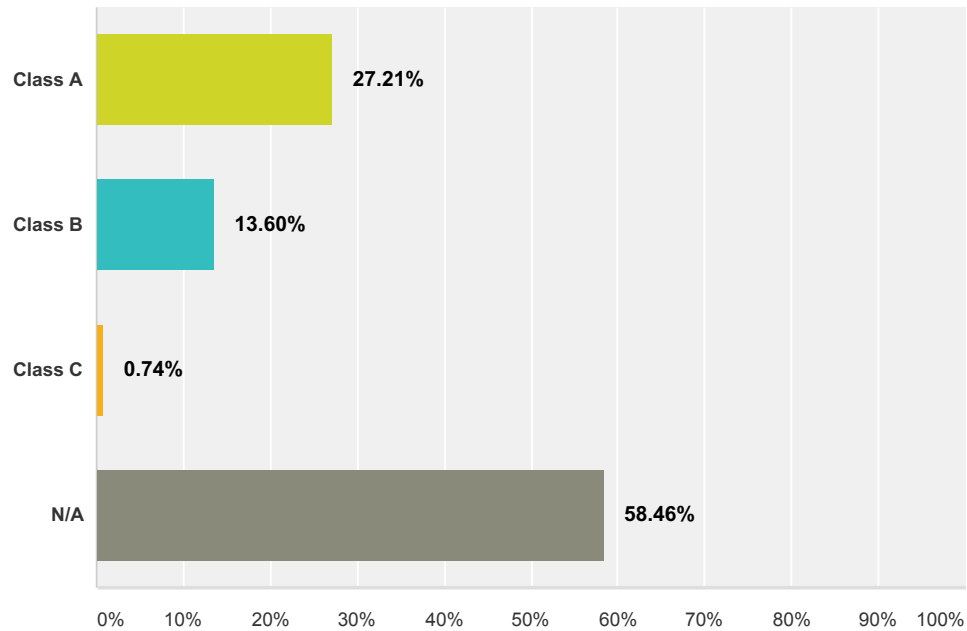
Answer Choices	Responses
1-2	18.38%
3-5	15.44%
6-10	16.18%
11-20	14.71%
More than 20	35.29%

Q6 How much square footage are you responsible for cleaning/maintaining?

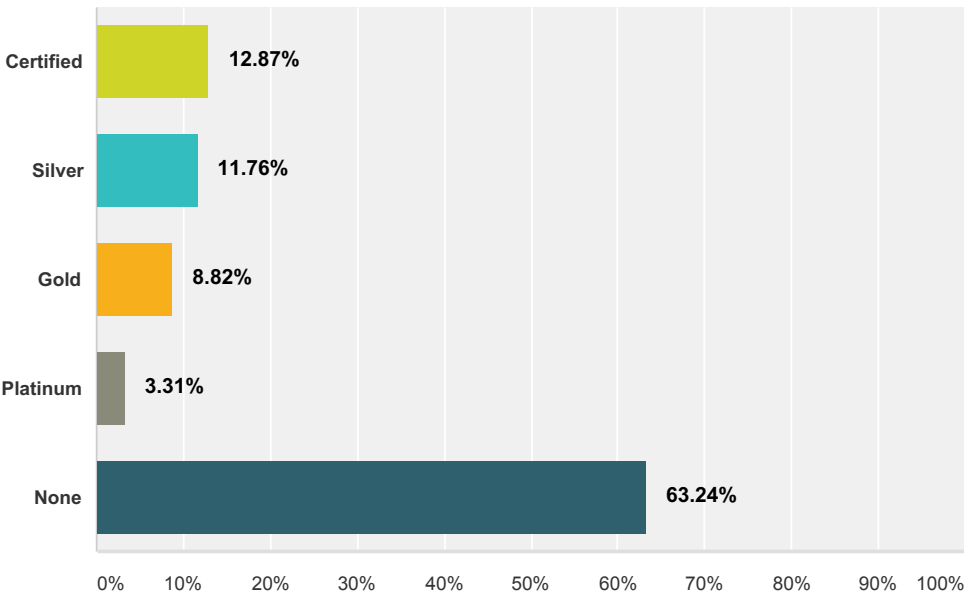


Answer Choices	Responses
Less than 250,000 square feet	17.36%
250,001 - 499,999 square feet	19.62%
500,000 - 999,999 square feet	19.62%
1,000,000 - 1,999,999 square feet	20.00%
More than 2,000,000 square feet	23.40%

Q7 Which of the following best describes your facility(s) type?



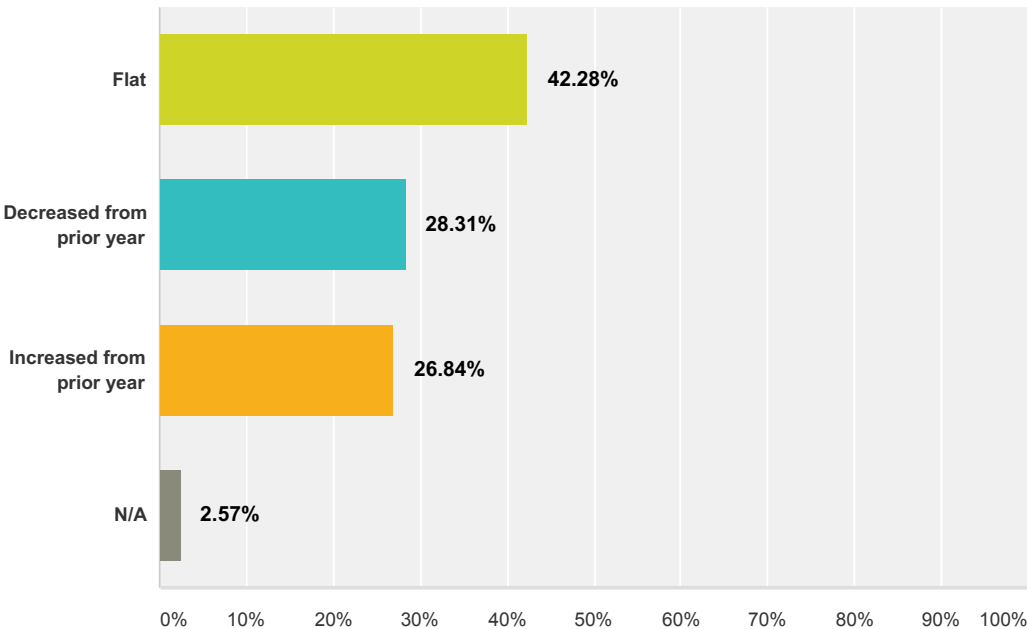
**Q8 What level of LEED certification has your
facility/facilities achieved?**



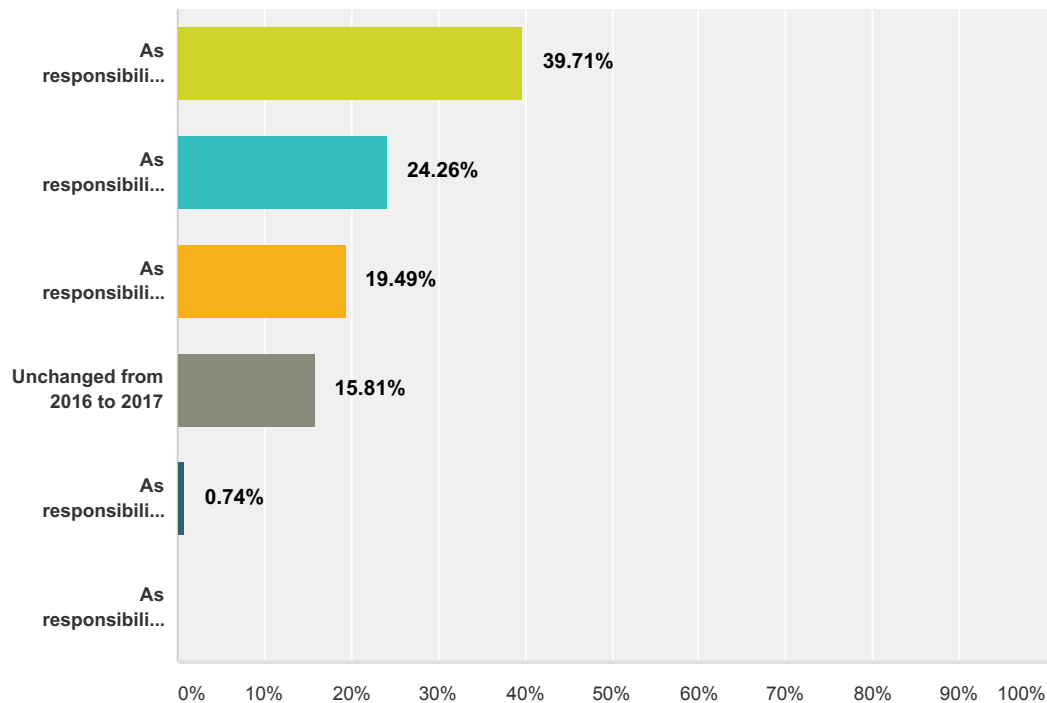
Q9 Rate the importance of the following issues in your facility/operation. Please answer each option.

	Very Important	Somewhat Important	Neutral	Less Important	Not Important	
Improving productivity/efficiencies	79.04%	15.07%	5.15%	0.74%	0.00%	
Health and Safety	76.38%	19.93%	3.69%	0.00%	0.00%	
Improving facility image	72.49%	21.93%	4.83%	0.74%	0.00%	
Training/education of staff	64.71%	29.04%	6.25%	0.00%	0.00%	
Security	60.90%	25.94%	10.53%	2.26%	0.38%	
Reducing overall cleaning/maintenance costs	51.66%	37.64%	8.49%	1.48%	0.74%	
Absenteeism	51.30%	23.05%	20.45%	4.09%	1.12%	
Validating/proving budget to management	47.97%	32.47%	16.97%	1.48%	1.11%	
Reducing employee turnover	46.86%	23.62%	21.77%	5.54%	2.21%	
Energy management	46.64%	35.45%	15.30%	2.24%	0.37%	
Sustainable/green initiatives	27.88%	39.78%	25.28%	4.83%	2.23%	

Q10 Please select one statement that best describes your 2017-2018 operating budget.

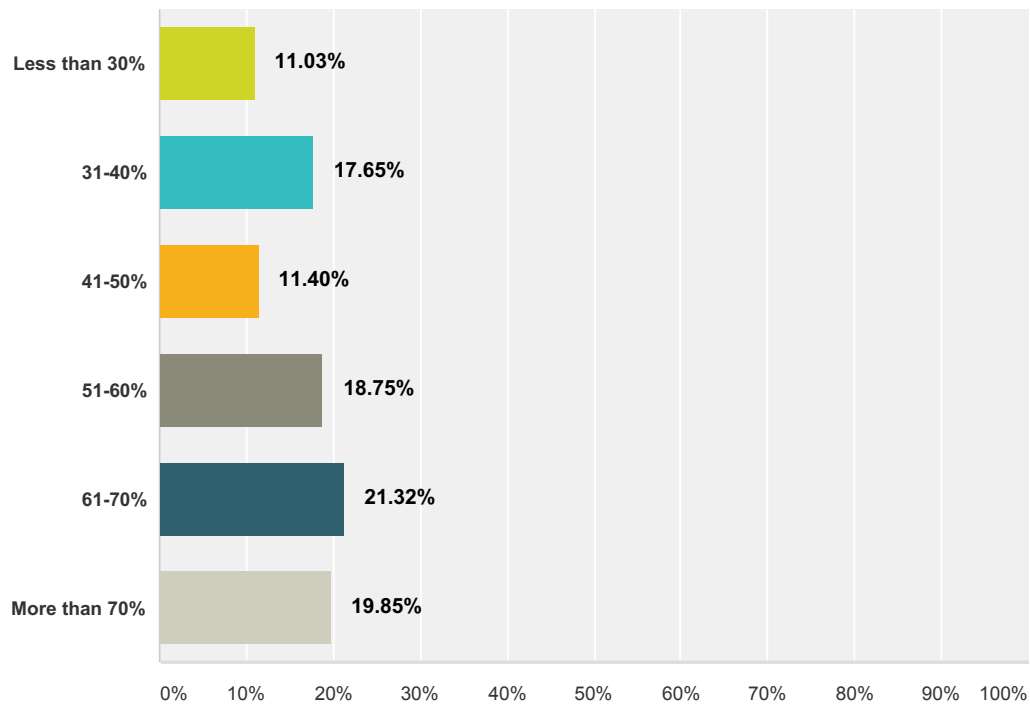


Q11 Please select one statement that best describes your 2017-2018 operating budget in relation to your responsibilities.

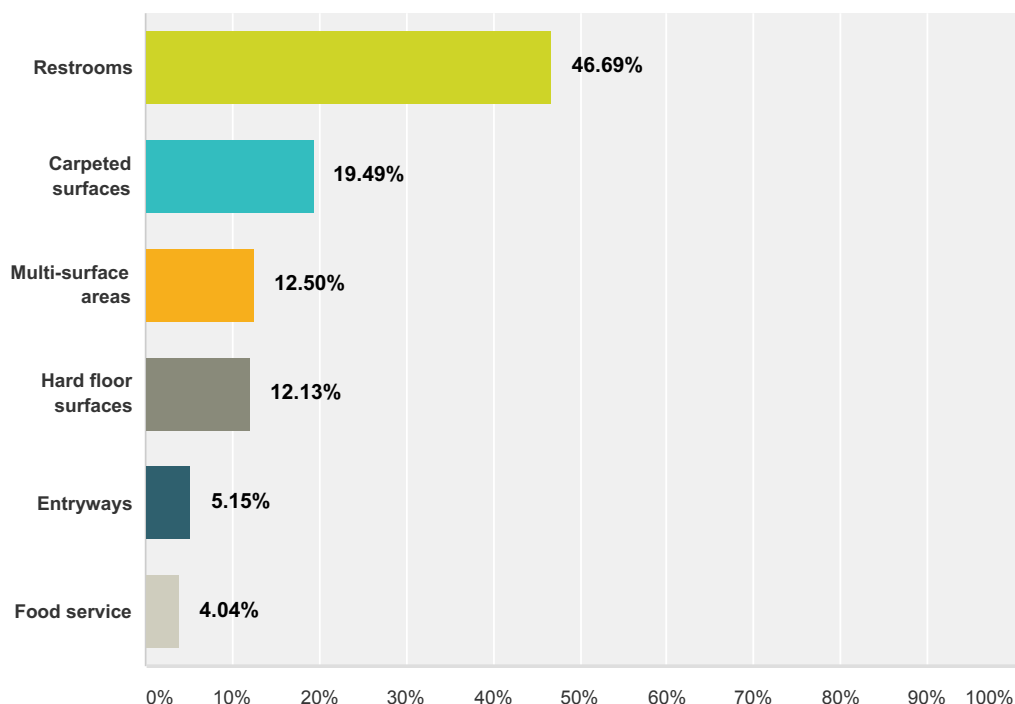


Answer Choices	Responses
As responsibilities increase, budget stays flat	39.71%
As responsibilities increase, budget increases	24.26%
As responsibilities increase, budget decreases	19.49%
Unchanged from 2016 to 2017	15.81%
As responsibilities decrease, budget stays flat	0.74%
As responsibilities decrease, budget decreases	0.00%

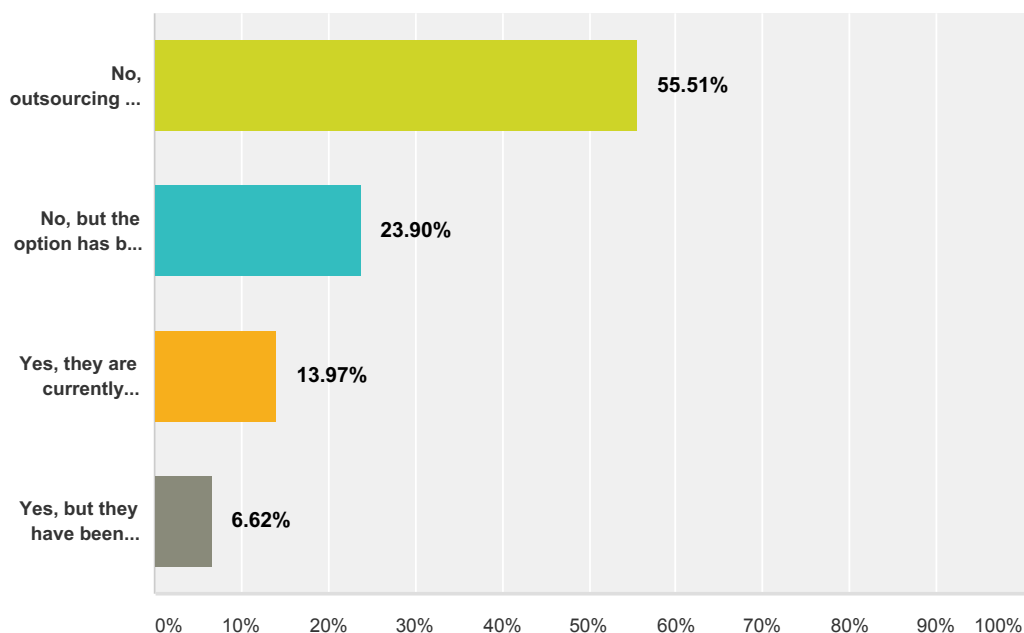
Q12 What percentage of your operating budget is spent on LABOR?



Q13 Which of the following areas/surfaces are the most problematic in cleaning/maintaining your facility?



Q14 Have your cleaning/janitorial services been outsourced in the last five years?

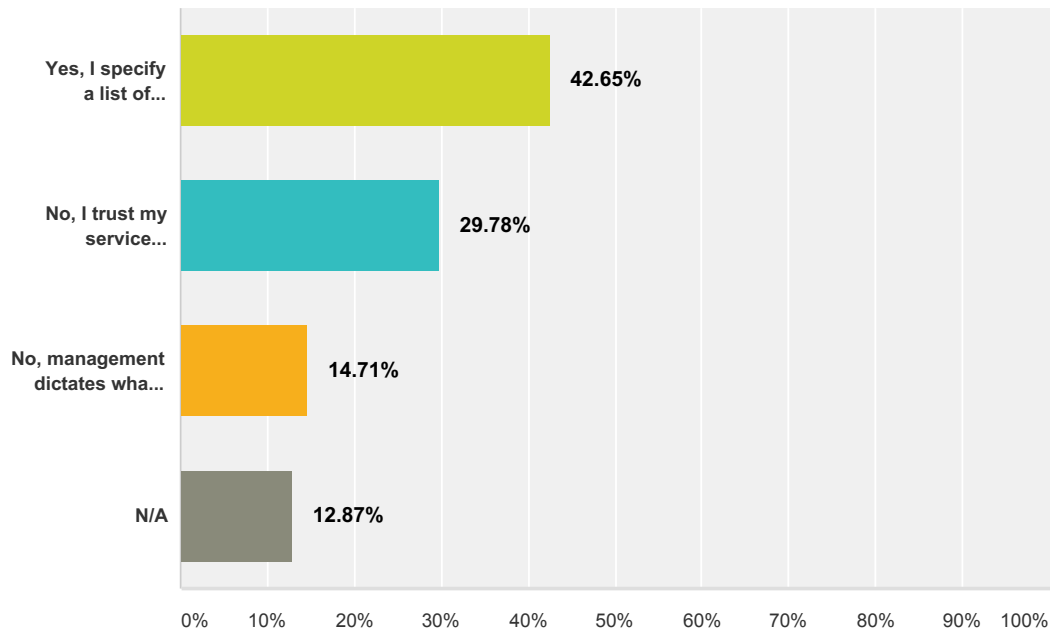


Answer Choices	Responses
No, outsourcing is not an option.	55.51%
No, but the option has been analyzed/considered.	23.90%
Yes, they are currently outsourced.	13.97%
Yes, but they have been brought back in house.	6.62%

Q15 For which of the following tasks/responsibilities do you outsource or utilize in-house staff? Please answer each option.

	In-House Staff	Outsource	N/A	
Bird/pest control	25.09%	66.29%	8.61%	
Fire/water damage restoration	22.22%	62.22%	15.56%	
Roof maintenance/repair	30.11%	60.59%	9.29%	
Window cleaning	53.14%	43.54%	3.32%	
Laundry operations	49.25%	30.97%	19.78%	
Restorative/deep cleaning carpets	71.22%	26.94%	1.85%	
Grounds care	68.77%	25.65%	5.58%	
Polishing/restoring stone and marble surfaces	46.49%	23.62%	29.89%	
Painting	70.52%	23.51%	5.97%	
Snow removal	57.46%	22.01%	20.52%	
Exterior maintenance (sidewalks, parking, etc.)	72.59%	21.11%	6.30%	
Matting cleaning/maintenance	74.44%	20.00%	5.56%	
Building(s) security	71.00%	20.07%	8.92%	
Maintaining HVAC systems	71.59%	19.70%	8.71%	
Preventive maintenance/building systems	78.81%	13.01%	8.18%	
Stripping/recoating hard floors	84.44%	12.22%	3.33%	
Clean rooms	75.84%	9.29%	14.87%	
Lightbulb replacement/relamping	92.19%	1.86%	5.95%	

Q16 When outsourcing services, do you have input on the specific products and equipment that will be utilized within your facility?

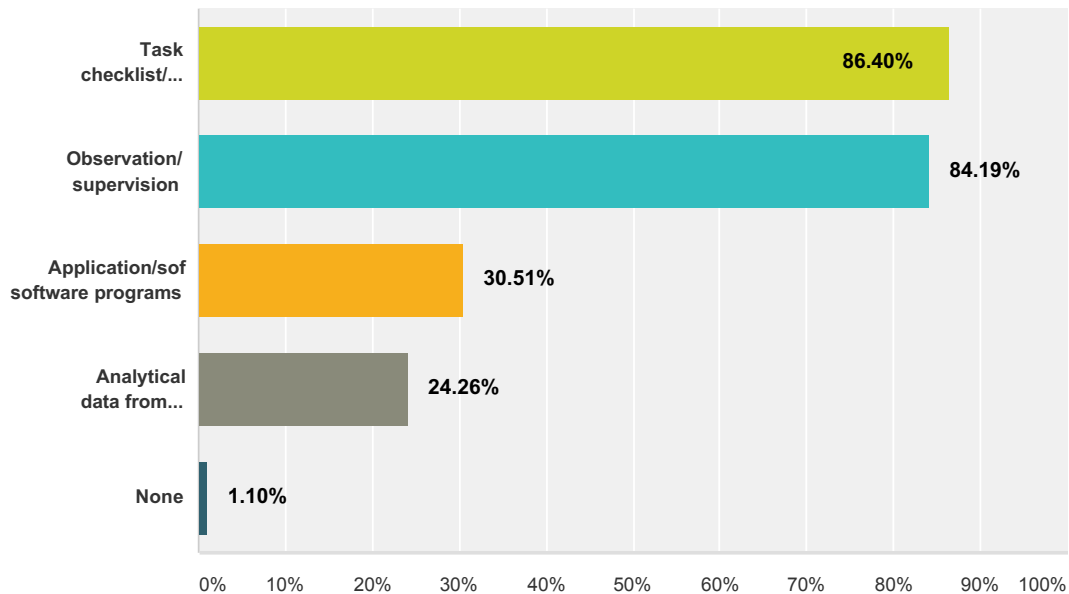


Answer Choices	Responses
Yes, I specify a list of specific brands and products to be used in my facility(s).	42.65%
No, I trust my service provider to utilize appropriate equipment and supplies.	29.78%
No, management dictates what products/brands are used in my facility(s).	14.71%
N/A	12.87%

**Q17 Rate the importance of the following criteria
when selecting an outsourced service provider.
Please answer each option.**

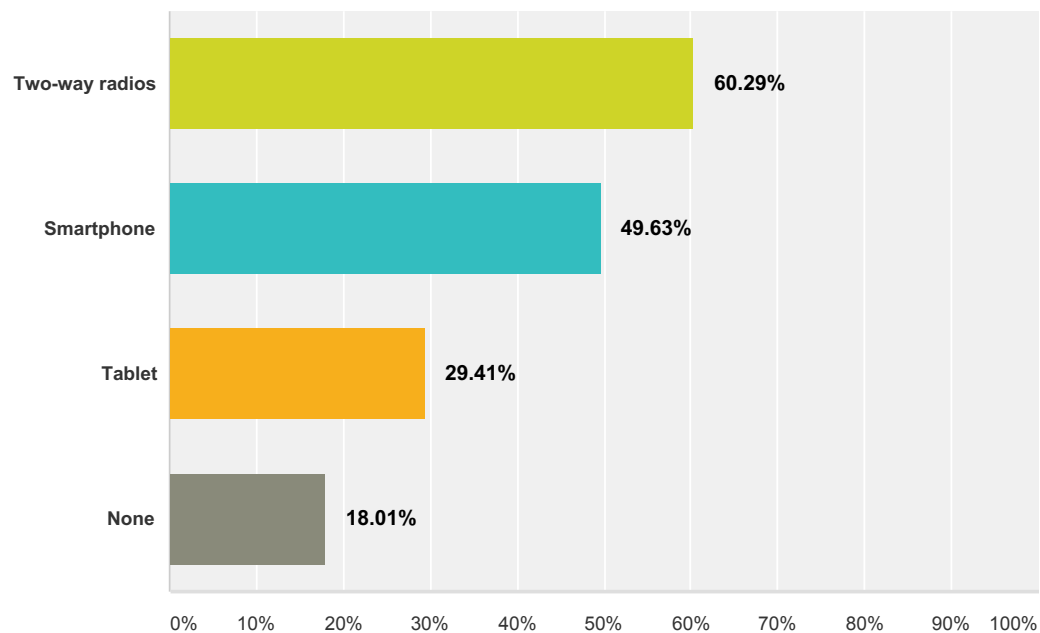
	Very Important	Somewhat Important	Neutral	Less Important	Not Important	
Reputation	70.85%	18.08%	10.33%	0.37%	0.37%	
Pricing	68.89%	24.81%	6.30%	0.00%	0.00%	
Certifications	57.46%	27.24%	14.93%	0.37%	0.00%	
One-stop shop (complete integrated facility services)	30.48%	32.34%	33.09%	2.97%	1.12%	

Q18 What type of quality assurances do you use in your facility(s)? Check all that apply.

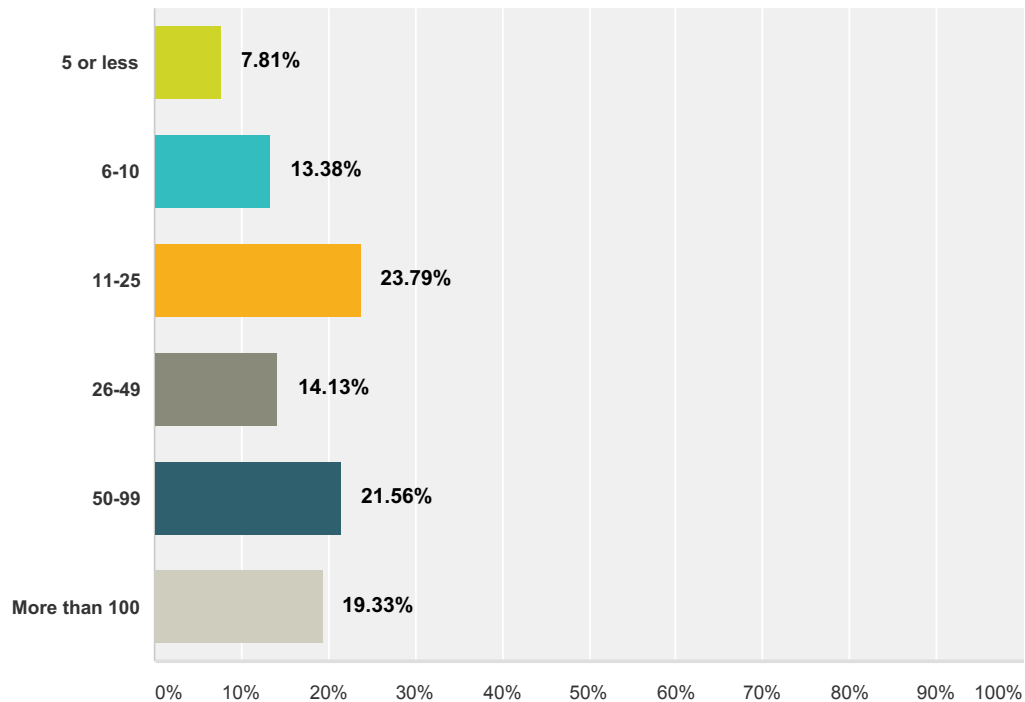


Answer Choices	Responses
Task checklist/cleaning schedule	86.40%
Observation/supervision	84.19%
Application/software programs	30.51%
Analytical data from equipment (usage and/or performance data)	24.26%
None	1.10%

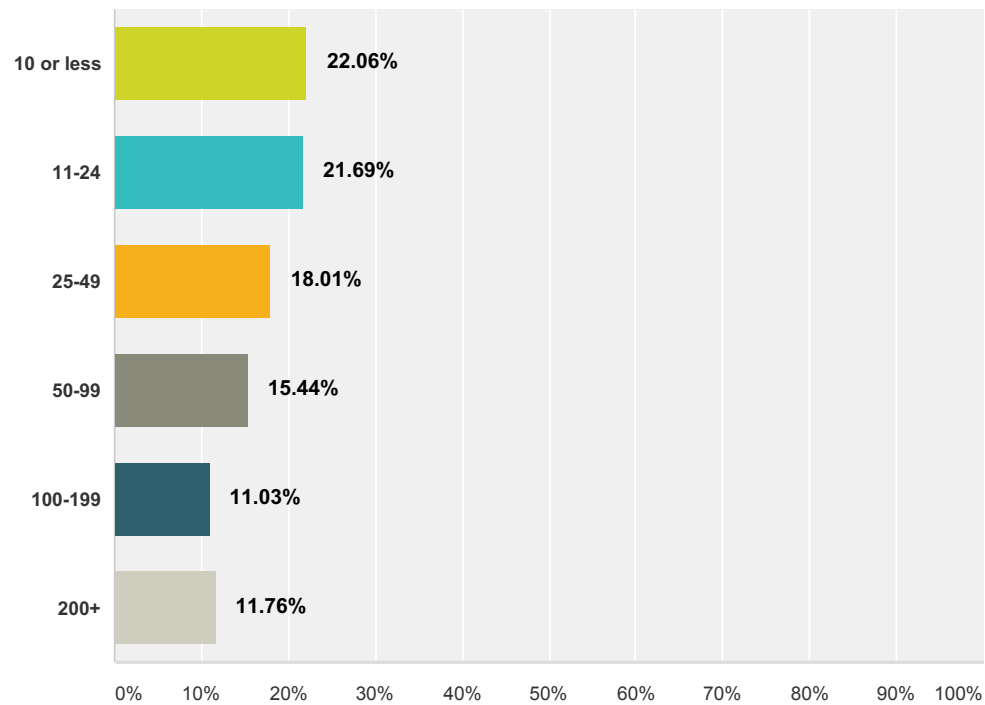
Q19 What portable technology do your employees utilize for their jobs? Check all that apply.



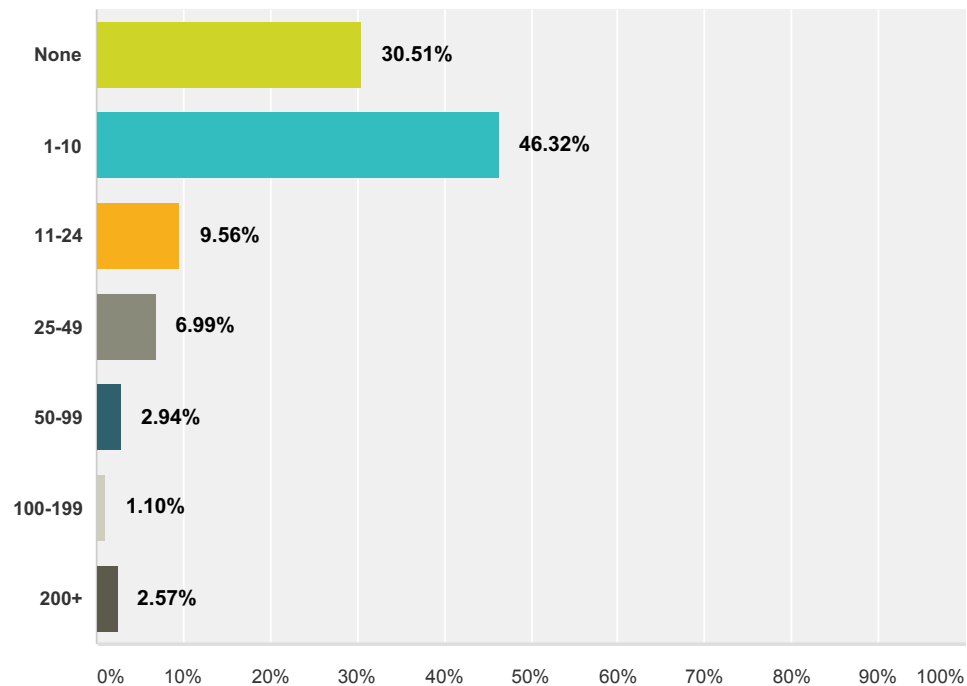
Q20 How many staff are you responsible for/ do you supervise (directly or indirectly)?



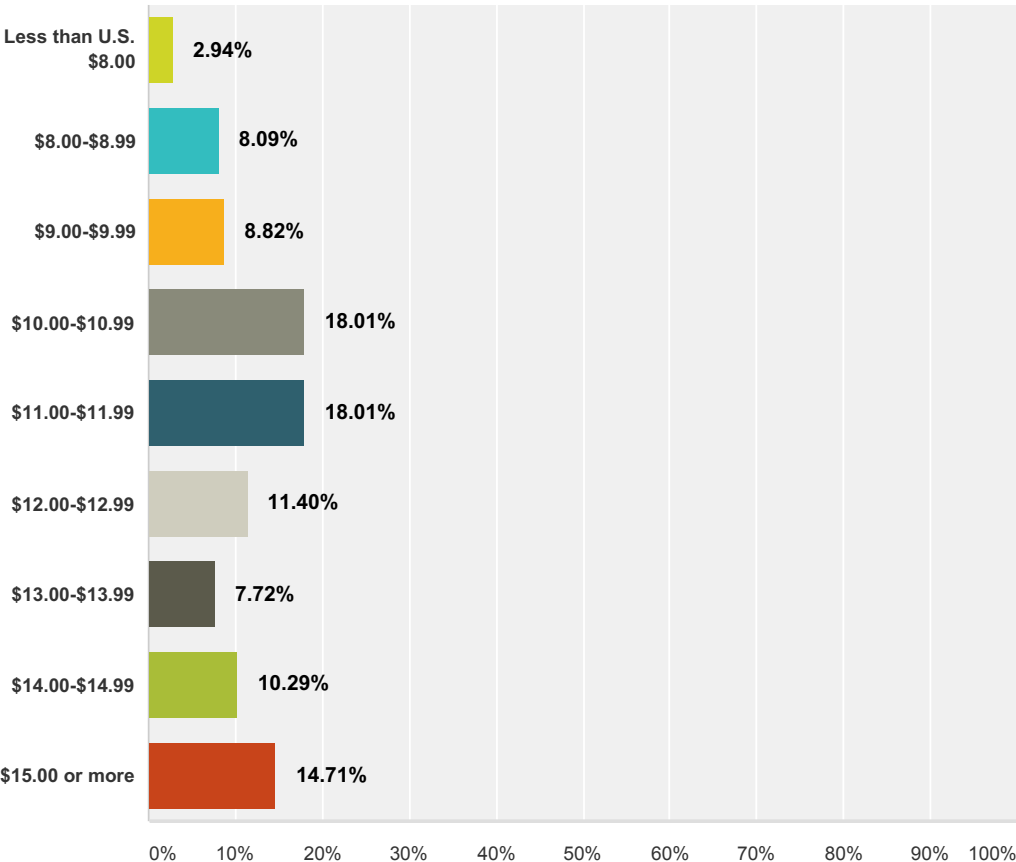
Q21 How many full-time employees work in your cleaning/maintenance department?



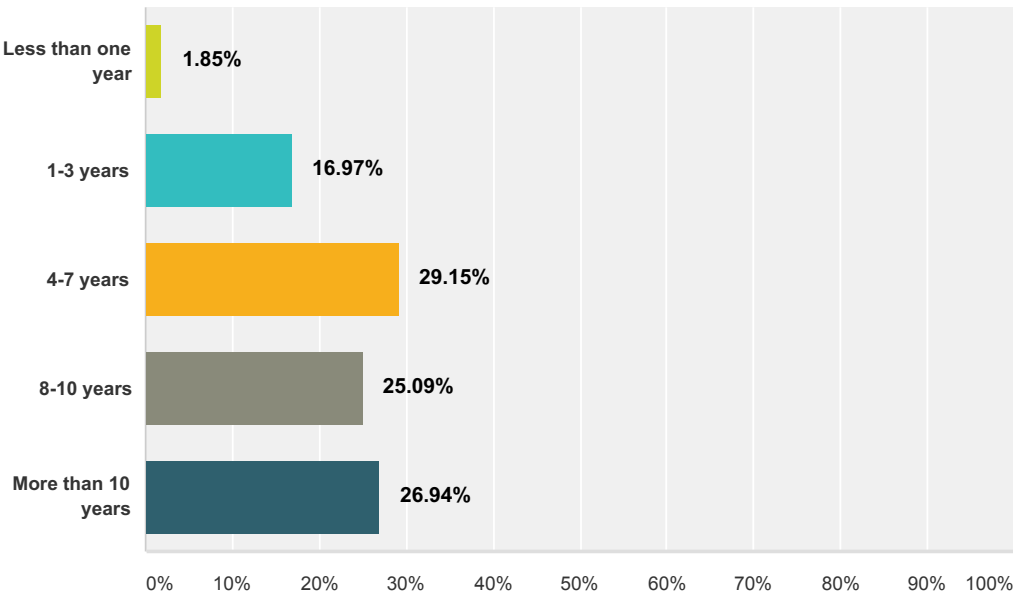
Q22 How many part-time employees work in your cleaning/maintenance department?



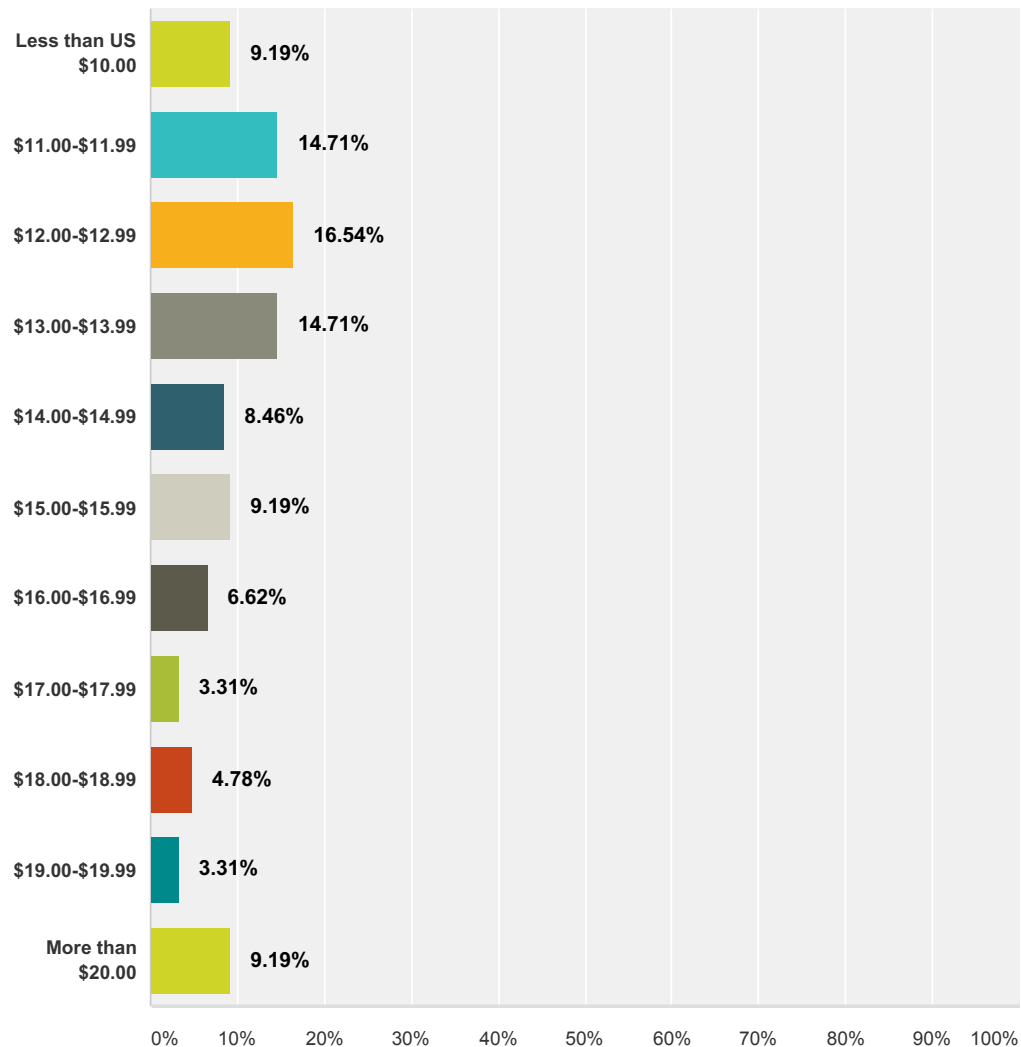
**Q23 What is the STARTING hourly wage for
FRONT-LINE employees in your facility(s)?**



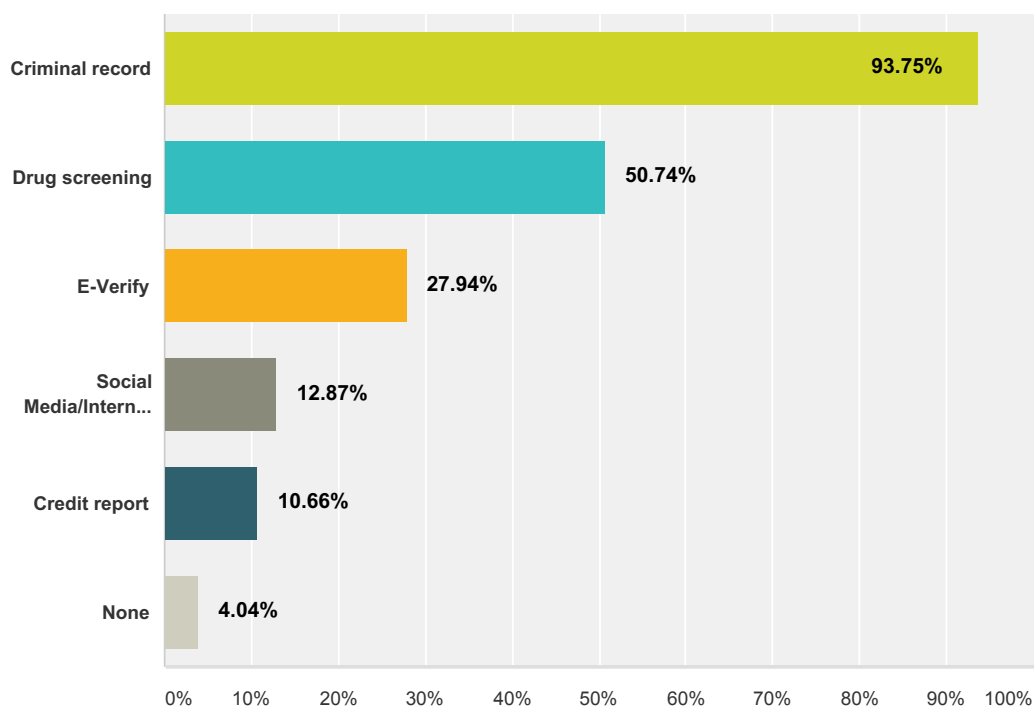
**Q24 What is the average tenure of your
cleaning/maintenance staff?**



Q25 What is the AVERAGE hourly wage for FRONT-LINE employees in your facility(s)?

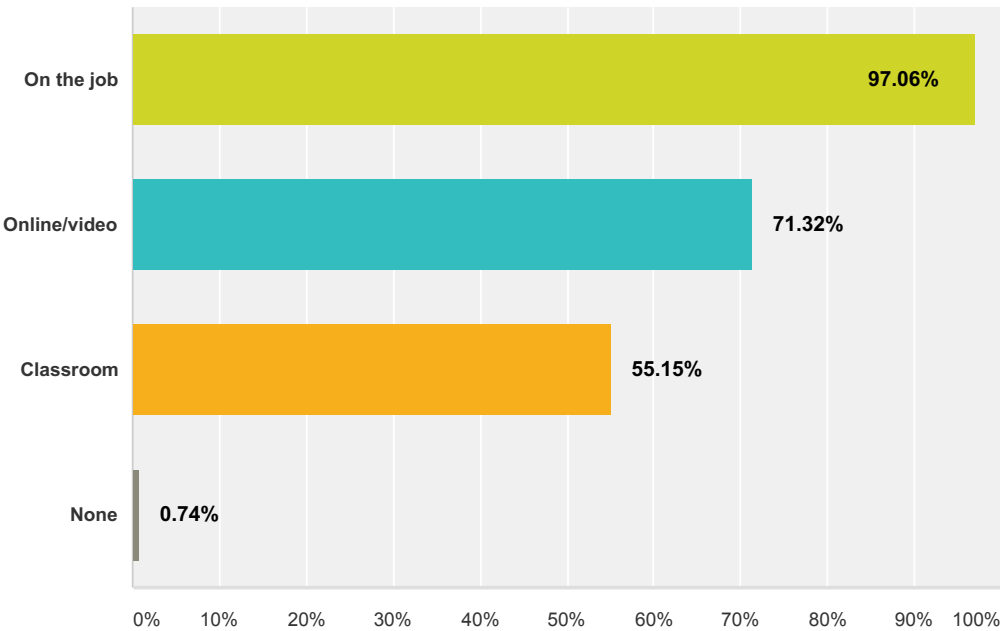


Q26 What background checks do you use during the hiring process? Check all that apply.

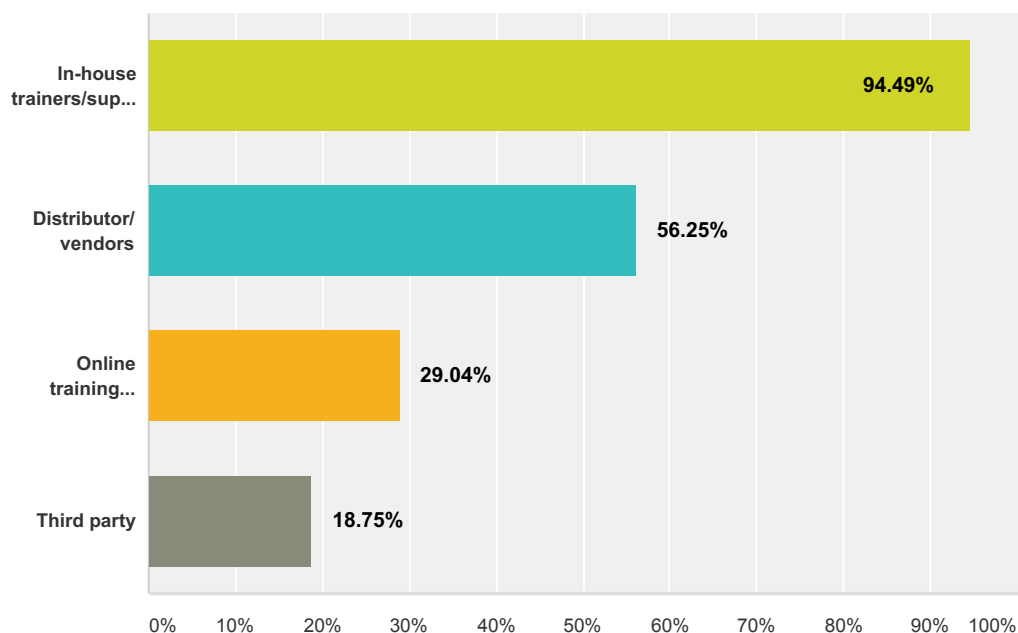


Answer Choices	Responses
Criminal record	93.75%
Drug screening	50.74%
E-Verify	27.94%
Social Media/Internet search	12.87%
Credit report	10.66%
None	4.04%

Q27 What type of training do you offer employees in your facility(s)? Check all that apply.

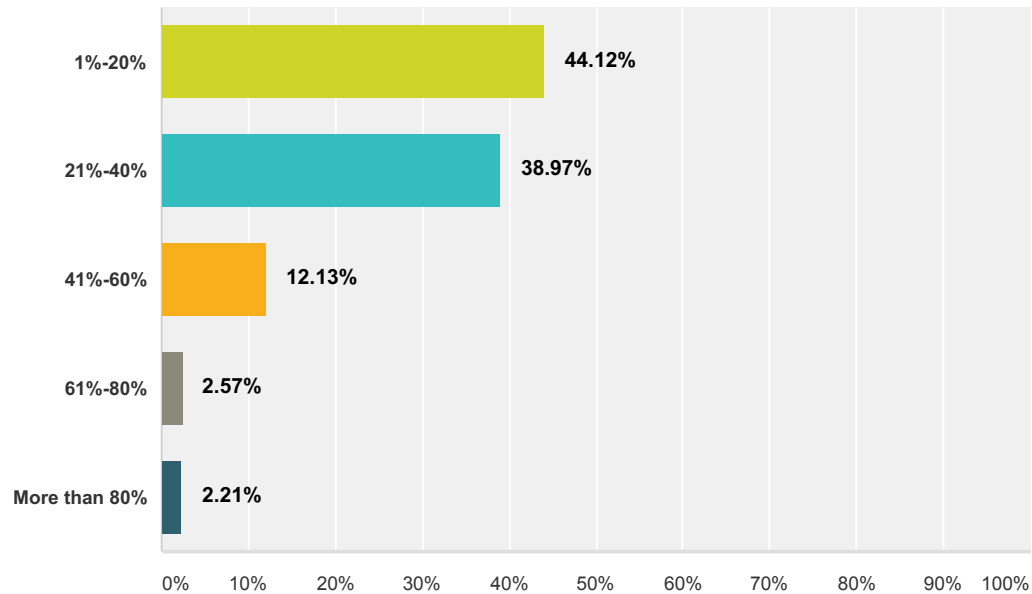


Q28 Who provides training for your cleaning/maintenance staff? Check all that apply.

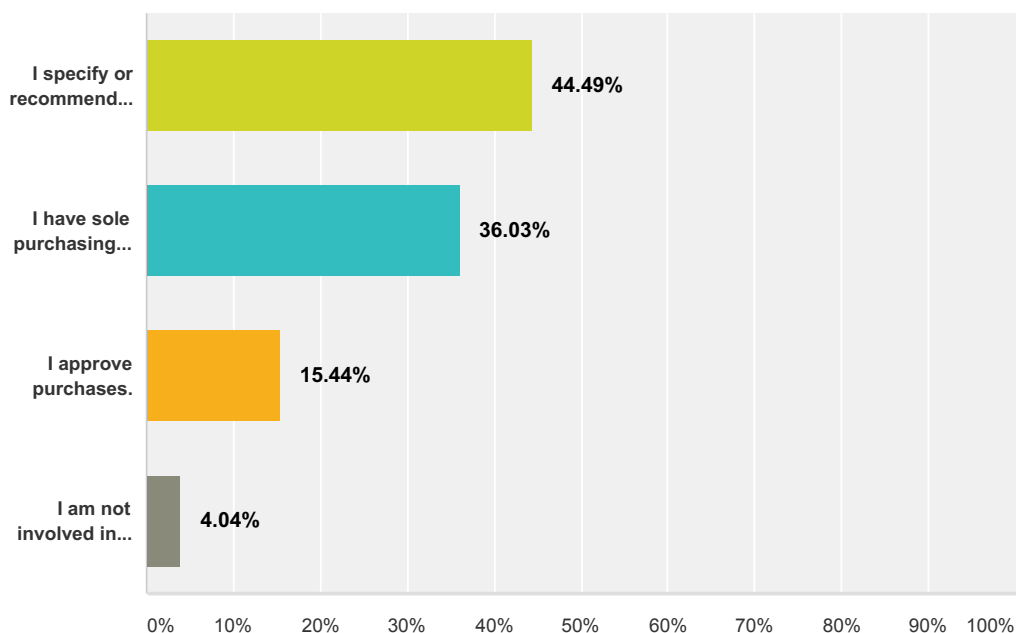


Answer Choices	Responses
In-house trainers/supervisors	94.49%
Distributor/vendors	56.25%
Online training provider	29.04%
Third party	18.75%

Q29 What percentage of your operating budget is spent on cleaning/maintenance equipment and supplies (purchase and maintenance)?

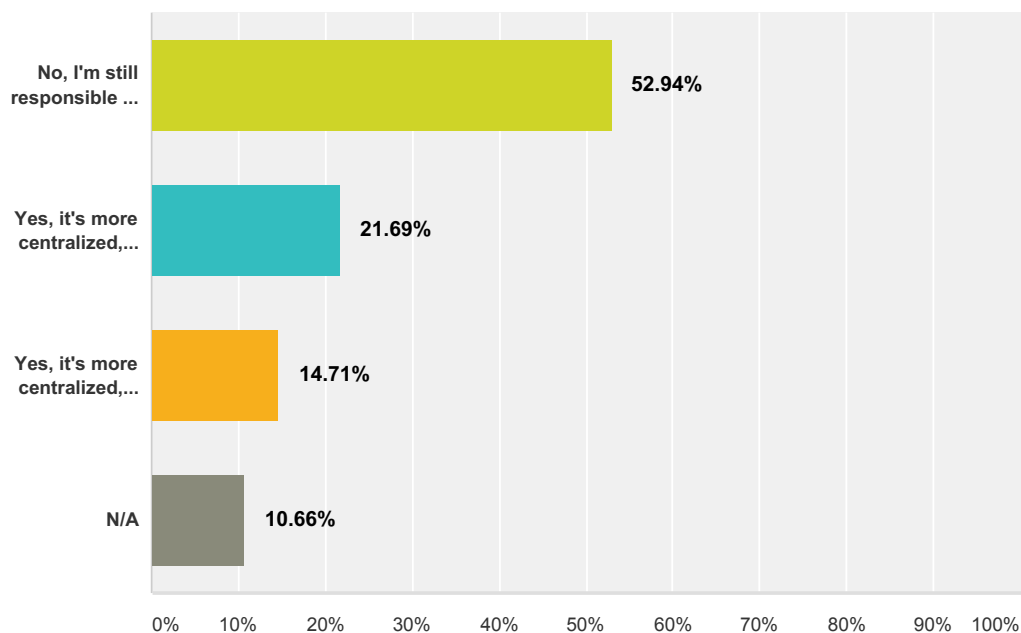


Q30 Which of the following describes your role in the purchasing of equipment and supplies?



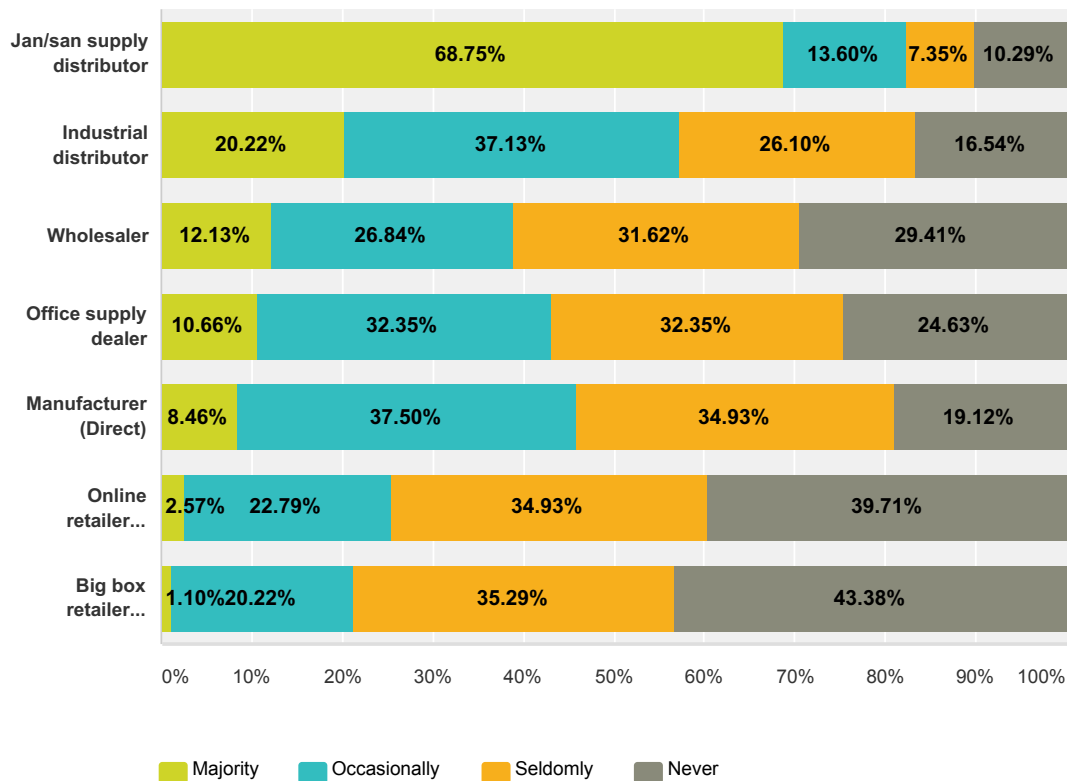
Answer Choices	Responses
I specify or recommend purchases.	44.49%
I have sole purchasing authority.	36.03%
I approve purchases.	15.44%
I am not involved in purchasing of equipment and supplies.	4.04%

Q31 Has your purchasing process changed in recent years?



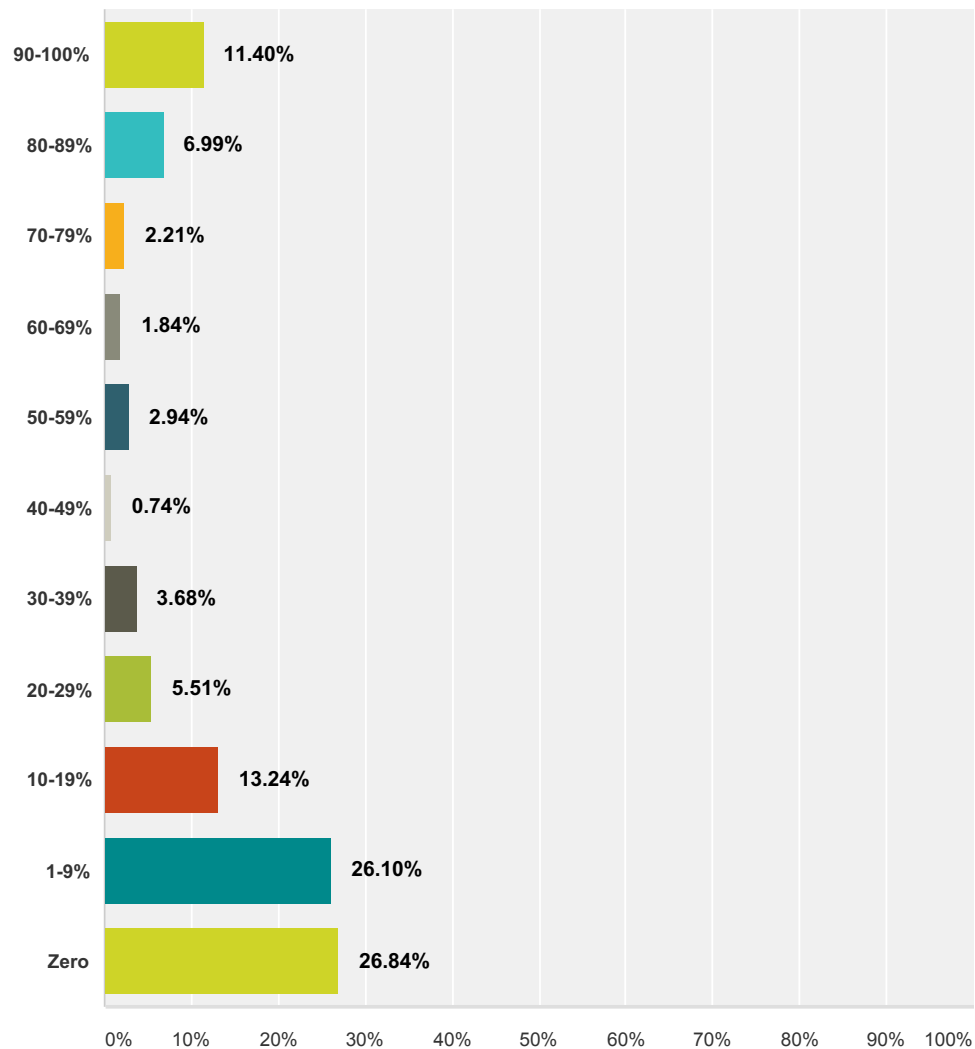
Answer Choices	Responses
No, I'm still responsible for my budget.	52.94%
Yes, it's more centralized, but I still have final say.	21.69%
Yes, it's more centralized, and my authority has decreased.	14.71%
N/A	10.66%

Q32 To what extent do you purchase cleaning/maintenance products from the following sources?

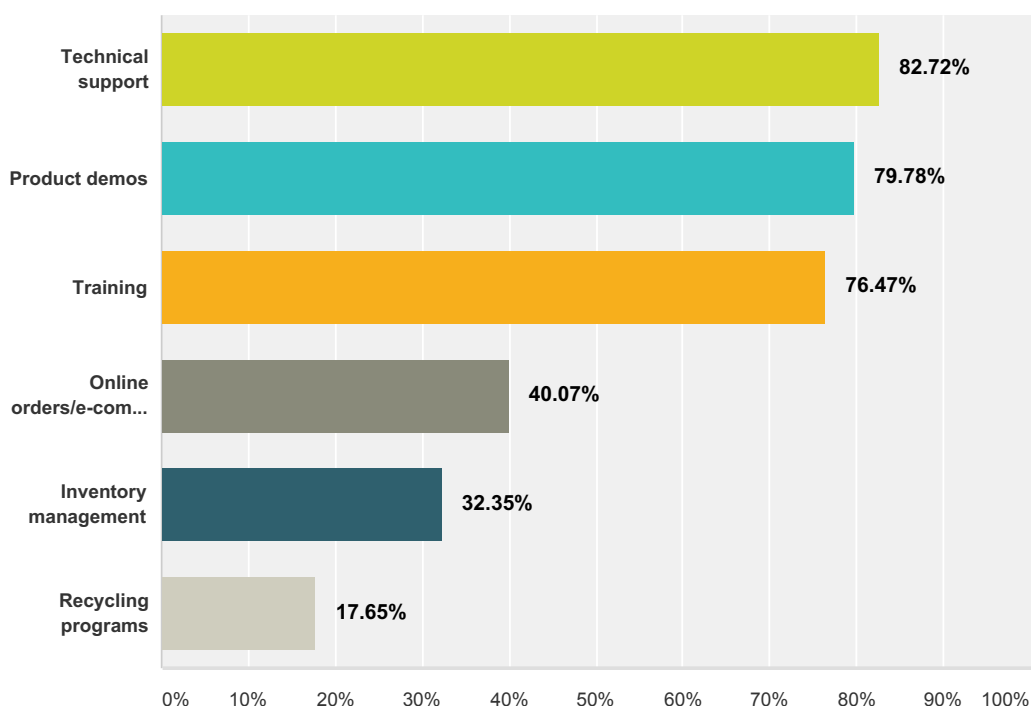


	Majority	Occasionally	Seldomly	Never	
Jan/san supply distributor	68.75%	13.60%	7.35%	10.29%	
Industrial distributor	20.22%	37.13%	26.10%	16.54%	
Wholesaler	12.13%	26.84%	31.62%	29.41%	
Office supply dealer	10.66%	32.35%	32.35%	24.63%	
Manufacturer (Direct)	8.46%	37.50%	34.93%	19.12%	
Online retailer (Amazon)	2.57%	22.79%	34.93%	39.71%	
Big box retailer (Costco)	1.10%	20.22%	35.29%	43.38%	

Q33 What percentage of your cleaning/maintenance products are purchased ONLINE?



Q34 Which of the following do you expect from your distributor/vendor? Check all that apply.



Answer Choices	Responses
Technical support	82.72%
Product demos	79.78%
Training	76.47%
Online orders/e-commerce	40.07%
Inventory management	32.35%
Recycling programs	17.65%

Q35 Which of the following products are you responsible for purchasing in your facility(s)? Check all that apply.

