

Skills Needs Analysis

of the

Australian Landscaping Industry

Undertaken by
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of
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For
Landscaping Australia



&
AgriFood Skills Australia



With the assistance of
Landscaping Australia Inc
Landscaping NSW
Landscape Industry Association Tasmania
Landscape Industry Association Victoria
Landscape Association of South Australia
Landscape Industries Association Western Australia
Landscape Queensland

And
Food, Fibre & Timber Industry Training Council of Western Australia
Primary Skills Victoria
AgriFood NSW
Challenger TAFE
Skills Tasmania
Agribusiness Skills & Extension Strategy Queensland
Primary Industry Skills Council South Australia

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Landscaping industry skills needs analysis (SNA)

Project Brief

The project brief was to address concerns held by the landscaping industry over a number of labour market and workforce development issues especially relating to new higher-level skill requirements, business skills and labour attraction and retention.

Background

AgriFood Skills Australia is one of 11 Industry Skills Councils that provide accurate industry intelligence on current and future skill needs and training requirements for industry. One of AgriFood's key roles is to provide advice to and assist industry and governments on workforce development, skill and labour needs, both in the immediate future and the next 10 years.

AgriFood in conjunction with Landscaping Australia Inc conducted this workforce development project across the industry during the second half of 2011.

The landscaping industry had concerns over a number of labour market and workforce development issues especially related to higher-level skill requirements and labour attraction and retention. AgriFood and the industry were keen to identify current and future skill requirements for established and more senior industry workers and use the opportunity to identify preferred training delivery methods and associated issues.

Project Scope

The project included both qualitative and quantitative components.

Component 1: Skill Needs

A: Higher-level skills:

- Identify those new and emerging skills required by the more experienced landscape contractors whose tasks include landscape design, supervision and planning, control and management of jobs
- Determine the extent these skills are held by members.

These skills may be associated with:

- New requirements, legislation, regulations and community expectations on the use and disposal of waste products, interaction with the environment including waterways, wetlands, use of energy, revegetation etc and the requirements of operating in a carbon economy
- New technology, machinery, use of 'smart' equipment.

B: Business Skills

- Confirm the skills and underpinning knowledge required by owner/operators to run their landscaping businesses
- Identify the extent these skills etc are held by the business owners/operators.

These are the skills required by a micro or small-medium business which would not normally be of sufficient size to employ a full-time or part-time manager for each of the human resource, business development, finance, workplace relations, training and OH&S etc tasks.

C: Entry Level Worker

- Identify the essential skills, knowledge and attitudes required by landscape business owners of entry-level workers.

These are the foundation or core skills and attributes new entrants should exhibit irrespective of the mode of entry i.e. new adult worker, apprenticeship, trainee, via a school-based program etc.

Component 2: Workforce Development

The following issues were to be examined:

A: Training-related:

- Identify preferred method of learning/training by landscape business owners and their employees
- Identify highest level qualification held by industry members
- Identify industry member 's understanding and utilisation of social media and their attitude to social media being used for delivery of training and professional development
- Determine use of, attitude toward and ability of industry members to utilise web sites and electronic media to access work-related information.

B: Business Development

- From the perspective of industry contractors, examine and rate factors influencing the attraction and retention of employees to the industry. This item is to include the importance of a career pathway(s) on attraction/retention.
- Identify barriers to growth of the business, now and over the next 5 years
- Identify the four most important attributes of a registered training organisation (RTO) relating to (1) the delivery and (2) assessment of training programs.

Project Boundaries

The project focused on the occupation of landscape gardener (ANZSCO 362213). The industry describes the occupation as landscape contractor.

The qualifications which cover these occupations are:

- AHC 21610 Certificate II in Landscaping
- AHC30910 Certificate III in Landscape Construction
- AHC 50611 Diploma of Landscape Design.

Methodology

The project methodology included the following four activities:

- An online survey using Survey Monkey was distributed nationally to a database of around 750 landscaping businesses. 126 responses were received. The database was prepared with assistance from the national and state industry associations and by using Yellow Pages Online. The survey results can be seen in Appendix 1. The various state industry training councils or their equivalent also assisted.
- Focus group meetings were held in all states. The questions proposed and responses can be found in Appendix 2. Initially funding was available for focus groups to be held in only three states and Landscaping Australia requested that these be held only in Western Australia, South Australia and New South Wales, suggesting that these states would be representative of the nation. However, a very poor response to both the survey and the focus groups was received from Western Australia and South Australia and much livelier interest was shown in

Tasmania, Victoria and Queensland so focus groups were also held in these states.

- One-on-one meetings were held with two employers and two of their staff in Western Australia, South Australia and New South Wales.
- Registered training organisations were consulted on the findings of the survey in Western Australia, South Australia, Victoria, Tasmania and Queensland.

Obstacles faced by the project

The membership of the national association is currently in a state of flux. Its membership comprises the various state bodies but prior to the project being instigated both the Victorian and Queensland associations had withdrawn their affiliation. As the project proceeded, Western Australia withdrew and South Australia is also proposing to withdraw.

As a result, almost no support was gained from the Western Australian organisation and very limited from South Australia. In spite of their lack of affiliation, the Victorian organisation provided excellent support and a Queensland national board member provided support for the focus group in Queensland. Both the New South Wales and Tasmanian organisations provided excellent support to the project.

The lack of input from South Australia and especially Western Australia means that the information contained in this report cannot be assumed to be relevant and valid for these states. This is a very disappointing outcome and represents a major missed opportunity for the industry.

It was recommended at the initial reference group meeting for the project that the national organisations should distribute the online survey as industry members were unlikely to open and read an email from the consultant, whose email address would be unknown to them. It was felt that a far better response to the survey and, indeed to the invitation to join the focus groups, would be attained if the emails came from the association. The association declined to do this and as a result a very poor response was received. It was only when the national president sent an email to the members of the New South Wales association that a good response to the survey was received. Thus, more responses were received from NSW than from all the other states combined. Again, this is a major missed opportunity to gather data on future needs of the industry nationally.

In all states bar Western Australia and South Australia, the state organisations took control of encouraging participation in the focus groups and, as a result, the required number of at least 5 attendees was reached. A total of three people attended in South Australia and none in Western Australia.

It is recommended that prior to the undertaking of any future national industry SNA for any industry sector, unconditional support should be attained by the relevant national association and all state bodies. The association should provide the membership database for any online survey and should send, at least, the initial communication to each individual member. This will maximise the probability that members will open and respond to that communication.

It is also recommended that the landscaping industry form a national, fully representative body with a commitment to the future of the industry in order to maximise the benefits and outcomes from projects such as this. The majority of the state organisations do not have sufficient funding to be able to employ full-time executive officers and/or development officers. It is clear that ways to be able to achieve funding for these positions should be investigated.

Landscaping Australia has provided expert advice into the final report of the project. It is felt that this, along with the input from the focus groups and individual business owners and their staff, has resulted in findings that identify the real needs of the industry into the future, in spite of the low participation in some areas.

Findings

The industry as a career

There is a feeling throughout the industry that a major campaign is required to raise the perception of the industry by those who use the industry and by those who may join the industry to find a career as well as by those industries which work alongside landscaping.

The majority of landscapers feel that the public has the perception that landscapers are just 'mower men' when, in reality, they are outdoor builders responsible for a large range of construction activities as well as the greening of the spaces. It is thought that the role of a landscaper today is 60% construction and 40% horticulture. Some sectors of the industry would prefer to be aligned with the construction industry rather than with horticulture as the fit is seen to be much closer. Hence, a considerable impetus exists to move the industry from the horticulture training package (AHC10) to the construction training package (CPC08). This could necessitate a more definite division of the industry into subsectors along the line of outdoor construction, soft landscaping and landscape maintenance with perhaps the soft landscape and the maintenance remaining in AHC10.

Being associated with the construction sector is seen to have the following advantages:

- Being seen as a 'real trade'
- Being able to charge a better rate for services – construction rates rather than horticulture rates
- Being able to pay higher wages
- Being able to attract a better pool of people from which to select new employees into the sector
- Being recognized by parents, guidance officers etc as a trade resulting in having access to students with higher attainment levels at school as apprentices
- Giving the public more realistic expectations of the cost of a landscaping project
- Meaning that the construction industry would have more respect for the landscaping sector and would work more closely with the sector, better understanding the needs of the landscaper on the job.

Entry to the landscaping industry is very easy. 'You buy a ute and a wheelbarrow and get a dog and you are ready to hang out your shingle.' This sentiment was expressed many times in the focus groups. This means that many unskilled, unqualified people are

operating as landscapers, doing shoddy work at prices that undercut the professionals and giving the industry a bad reputation.

There is a strong push by those in the eastern states for a national accreditation and licensing scheme and the compulsory implementation of ongoing professional development for the maintenance of accreditation. This would also play an important role in the movement towards a clear industry career path.

Recommendation 1

That Landscaping Australia should lead a further investigation to identify whether the industry should be positioned as part of both the construction and the horticulture industries.

Qualifications

For over 70% of survey respondents their highest level of qualification was a vocational education and training qualification with the Certificate III being the highest for 25% of respondents. Twelve percent had a university degree and a further 7%, a postgraduate qualification.

Although there is a push for an accreditation scheme by well-established businesses, there is limited interest in gaining further landscaping qualifications above the Certificate III. Landscapers want to gain the skills they need to do the job but many don't see the value of a qualification. There is no Certificate IV in Landscaping in the new ACH10 training package and there was almost no interest in gaining such a qualification. There is however, considerable interest in undertaking short courses to gain skills that are relevant to the job and delivered in an accessible way. This is discussed further later in this document.

Restriction to the growth of businesses now and in the future

As expected, two of the major factors restricting the growth of businesses now and five and ten years into the future are the lack of people with supervisory skills and the lack of people with higher-level technical skills.

Only 13% see doing business in the carbon economy as a restricting factor now but 69% see that it will be a factor in the future. However, there was little interest in gaining skills in this area to better assist businesses to cope with the carbon economy. This is perhaps because, at the time of the survey, the carbon tax legislation had not been introduced and it has not yet reached top of mind for most landscapers busy working in the business rather than on the business. The other major factor identified was increasing input costs and together these represent an opportunity for upskilling the industry. Reducing waste and energy usage and using machinery more efficiently, for example, will contribute to sustainability and will reduce input costs.

The landscaping industry would benefit by taking similar actions to other industries in helping to prepare their members for doing business in a carbon economy. Many sectors have identified that to remain viable, businesses will be compelled to review their operations due to the increasing cost of fuel, greater expectations and more stringent requirements on the recycling and reduction of waste, and further restrictions on access to cheap water.

Recommendation 2

That Landscaping Australia coordinate a series of industry forums, information sessions and technical workshops on the theme of sustainability and doing business in the carbon economy to introduce members to what it means for the industry in general and their businesses in particular. Strategies and practical tools for businesses should be provided to assist them to reduce input costs, especially those related to fuel, energy and raw material usage.

Supervisory & technical skills in demand

The need for improved skills in this area is clear especially for the owners of smaller business (up to 20 staff) and for site supervisors and foremen in all businesses. In this industry, supervising is not just about managing people – it is also about managing the job, ensuring that it be done on time, on budget and to the specifications required.

Supervisors need to be able to get the best out of their people, to be good leaders and excellent communicators. Just as importantly, they need to know and understand the following:

- How the quote or tender was put together
- How to manage a budget
- How to allocate resources on a daily and weekly basis
- How to read specifications and plans
- How to interpret those specifications and communicate that to the team
- How to negotiate with the client
- How to manage specialist subcontractors
- How to manage the contract and how to do a variation
- How to calculate quantities to ensure minimum wastage
- How to manage their time
- How to keep accurate records

Supervisors also need all of the higher-level technical skills (listed below) in order to be able to supervise and manage the subcontractors on the job and the standard of their work.

Some of the technical skills needed by these managers and supervisors are listed above. But they must also know and understand:

- The content of local building codes and government regulations
- Their responsibilities and the business responsibility in regard to workplace, health and safety and also industrial relations
- Plant identification
- Plant requirements for healthy growth
- The growth habits of plants in the local environment and how they interact
- Plant maintenance
- Soil health
- Drainage
- Irrigation
- Survey and set-out
- Requirements of foundations and all parts of the building process
- Advanced stonemasonry, concrete techniques, construction techniques
- Public liability responsibilities.

Raising the supervisory and higher level skills of industry

The above-mentioned skills are not covered in the Certificate III in Landscape and the new training package does not contain a Certificate IV in Landscape Construction. There appears to be little industry interest in a full Certificate IV course. However, there is considerable interest by all who participated in the focus groups in two formal Skill Sets around contract management, project management and costing.

Recommendation 3

That the following Skill Sets at Certificate IV level be introduced to the AHC10 training package, be delivered to industry in association with the state industry bodies and be delivered under government funding. The delivery of the training should be contextualized for the landscaping industry. It must be industry specific to ensure it is relevant to the sector and participants gain knowledge and skills that will enable them to do their roles more effectively and more efficiently.

Skill Set 1: Contract and project management for the landscaping industry to cover:

- Reading contracts
- Reading plans and specifications
- Interpreting and managing budgets and understanding margins
- Communicating specifications to the team
- Negotiating with the client
- Preparing variations to contract
- Planning and scheduling
- Managing resource allocation – daily and weekly
- Minimising waste
- Record keeping
- Ensuring the work is done to the standard required in the specifications.

Skill Set 2: Costing, quoting and tendering for the landscaping industry to cover:

- Preparing and interpreting costings and budgets
- Preparing and interpreting quotations
- Writing and interpreting tenders including government tenders
- Using an estimating software package and/or using a spread-sheeting program such as excel.

The interest in improving the skills in working with plants was fairly spasmodic. In some discussions, increased plant craft was something that the landscapers wished for but, in others, the general comments was ‘we only use 20 plants and we know how they grow’ which is a fairly sad indictment of the industry’s plant knowledge.

Recommendation 4

Hence, it is recommended that a further skill set at Cert IV level be added to the AHC10 package specifically for landscapers.

Skill Set 3: Plant expertise for landscapers to cover:

- Plant identification
- Plant physiology
- Plant interactions
- Soil analysis
- Plant pests and disease.

Business skills

General agreement exists across the industry that business skills are lacking and are needed. Almost every focus group participant indicated that the Certificate IV in Small Business Management should be compulsory for all people starting a business. Whilst that is not likely to happen in Australia, there was some commitment by participants to sign up for such a course now if it were presented in the following way. The courses should be:

- Held locally
- Offered on a one three-hour session per week basis
- Coordinated by the state industry association to ensure the examples used are industry specific, practical and relevant
- Assessed by activities on the participant's own business
- Supported by one-on-one mentoring to ensure that learnings are transferred to the business
- Supported on an ongoing basis by the establishment of small groups of landscapers who meet regularly to mentor each other after the program is completed.

Many of those who were not interested in the whole Cert IV were keen to undertake units from that program where they could see an immediate benefit to them and their business.

Recommendation 5

That the Certificate IV in Small Business Management should be delivered in such a way as to be contextualised to the landscaping industry and offered on an ongoing basis to the industry in the format described above. Landscaping Australia should drive this process along with the state associations who should work with the local state government small business support agencies.

The particular business skills in highest demand were:

- People skills especially around motivating employees
- Identifying and maintaining your competitive advantage
- Financial skills especially preparing, understanding and managing cash flow and budgets
- Understanding the responsibilities and duties of a company director.

Leadership and communication skills

The need for better leadership and communication skills is pronounced throughout all states and is seen by focus group participants to be critical to the success of the industry. Landscapers have found it to be very difficult to find a course that provides the outcomes they are seeking.

Recommendation 6

That a Certificate IV level Skill Set on leadership and communication for landscapers be added to the training package. When developed it should be offered to owners, managers, foremen and site supervisors in the landscaping industry. It should cover the following:

- Motivating staff
- Mentoring and coaching others
- Rewarding positive behaviour
- Giving clear directions and ensuring that they are understood

- Listening actively
- Understanding and following instructions
- Targeting communication to the audience
- Negotiating with clients, subcontractors and suppliers
- Providing positive and negative feedback to staff and subcontractors
- Preparing and presenting reports, both written and oral.

IT skills

Proficiency at using Excel is the IT skill most in demand by this industry. Most people have basic skills but it is such a useful tool for the industry that almost all would like to gain more advanced skills. There is also some interest in learning how to use CAD, estimating packages and project management software.

To date, there has been minimal take-up of new 'smart' technologies such as smart phones, tablets and usage of Facebook, Twitter, Blogging, You Tube, webinars etc. but there appears to be a willingness to be exposed to these ideas to see how they could benefit the business.

Recommendation 7

It is recommended:

That industry nights are organised to showcase the benefits of using the new smart technologies and that follow-up training nights are run so that people can learn how to use them. Industry people who are already using these technologies would demonstrate how they use them and what the advantages are.

The skills required by people joining the industry for the first time

Landscapers expect new entrants to the industry to have the basic employability skills and attributes such as:

- Punctuality
- Reliability
- Energy and enthusiasm
- Observation skills
- Be able to take direction and understand communication
- Maths ability.

Further discussion of the availability of people with these attributes follows later in the document.

The apprenticeship system

There is much consternation about the apprenticeship system with many comments being made during the discussions about the 'dumbing down' of the system and the lack of knowledge and skills of completing apprentices who come through the TAFE system. Statistically, in 2011 across Australia there were 2483 students studying the Certificate III in Horticulture (Landscape) (RTF30403). Of those, 1 407 signed on in 2011. During 2011, 787 students withdrew from the course.¹ These figures show that a high percentage of those who sign-on do not complete their apprenticeship and this results in a lack of skilled people in the industry and a shortage of people who can progress to supervisory roles

¹ Vet students by industry, NCVET, 2011.

Many landscapers are not aware of how to go about hiring an apprentice nor are they aware of the government incentives that exist. Many are not aware of the power they have in terms of choosing a registered training provider, determining the way in which their apprentices are trained and the influence which they can exert to ensure that the outcomes they are seeking from the training are met.

Recommendation 8

Landscaping Australia in conjunction with the state associations should run a promotional program to raise awareness of the benefits of employing apprentices. Landscapers need to understand how the system works in order to enable the signing on of more apprentices and the successful completion by a greater percentage of those apprentices.

Attraction and retention of employees and career pathways

The major issue identified here was the poor quality of the pool of people that are attracted to apply for jobs in the industry. Many advertisements for an apprentice generate 80 responses but most employers are happy if one of those turns out to be a suitable candidate. Public perception of the industry is that it is a non-skilled industry but that is not the reality. The work involves physical labour but it is also quite technical and the ability to do calculations is critical. There is a real need to change this perception especially within the schools system.

The majority of employers locate new candidates through traditional methods such as word-of-mouth but many also advertise on SEEK. The industry, in general, has not yet taken up the opportunities offered by social media but there is interest in understanding how this works and how it could help the industry.

Retention of employees does not appear to be a major issue for the industry especially where the selection process and the induction processes have been well carried out. The other key factor is the clear identification and promotion of a career path within the industry. Leaders within the industry have excellent processes in place but there is a need for better understanding and knowledge in this area for many.

Whether the industry re-categorises itself from being in the horticulture sector to the construction industry or not, there is an opportunity to promote the professionalism of the industry and the career opportunities within the sector. Blogs could show the transformation of a building site into a beautiful landscape over time, which would encourage the public to use professionals.

Career pathways exist in many businesses within this sector and should be showcased. A You Tube clip could show the successful advancement of some employees from labourer to apprentice to site supervisor to foreman to project manager to operational manager.

Recommendation 9

It is recommended that social media be used to promote the advantages of:

- Using a professional landscaper to undertake landscaping
- Embarking on a career in the landscaping industry.

Mature worker incentives

There is almost no knowledge within the industry of the government incentives to hire and train workers over 50. It is felt that work on-site is too physical for workers over 50

so it is not appropriate for small business. However, larger businesses saw that there could be opportunity to hire people with specialist skills such as estimating.

Preferred learning methods and ongoing professional development

There is almost no interest in gaining new skills through distance learning, either paper-based or on-line. However, there was considerable interest in webinars once they were explained so there is opportunity to introduce these to the sector.

Landscapers prefer to learn on-the-job or in workshops coordinated by their industry association. Mentoring is also popular and there is opportunity to set up cross-business mentoring processes.

The national association and the state associations have a major role to play in identifying, coordinating and promoting skills development opportunities for the landscaping sector. Landscapers have requested that their associations become active in this space as many of them are unaware of what opportunities exist and what government support is available whether it be in the area of apprenticeship training, school-based training opportunities or training for themselves at management level.

Recommendation 10

It is recommended that Landscaping Australia and the state associations work together to:

- Assist their members and the industry in general to identify existing opportunities to upskill and become more professional
- Customise and coordinate skills development programs to assist landscapers and their staff to gain the skills they need to grow their businesses and increase their profitability.

There is a great opportunity for the associations to run industry nights and workshops in conjunction with suppliers and industry experts, as this is the manner by which landscapers want to learn new skills and keep up-to-date with new technical skills and new technologies.

Sustainability

The industry feels that it does not need to focus on environmental sustainability as it has a reputation as being a green industry. As mentioned earlier, however, operating in a carbon economy was seen to be restricting the growth of the business now by only 13% but 69% thought that it would be a restricting factor in five years time.

Increasing input costs are seen as an issue today by 42% of survey respondents and assisting landscapers to minimise waste will assist them to reduce income costs and will increase sustainability. The skills sets around costing and contract management will raise awareness of the need to minimise waste so their development, implementation and promotion is paramount.

Some clients express an interest in having their project be environmentally sustainable but when they are presented with the quote they change their mind. Hence there is not, at present, any impetus for becoming greener but recommendation 2 suggests a way forward for the industry to ensure that businesses are prepared for the opportunities and threats presenting in the future.

Industry accreditation

There is much discussion in the industry around unqualified, unaccredited, unlicensed practitioners operating in the industry. They undercut prices, do shoddy work and generally lower the reputation of the industry as well as making it more difficult for the professional landscaper to win contracts.

Different states seem to have varying ideas around what accreditation scheme should be implemented but, since many do work across state borders, it is imperative agreement is reached on a unified, national scheme. This scheme will also be a key part of establishing an industry-wide career pathway and will provide incentive for landscapers to join their state organisation if promoted well. (It is estimated that only about 20% of landscapers currently belong to their association.)

Some interest was shown in the following during the focus group discussion:
After successful completion of the Certificate III in Landscape Construction (AHC30910), the person would become a Landscaper.

After then successfully completing the three Level IV Skill Sets in Costing, Contract Management and Plant Craft, the landscaper would become a Master Landscaper.

To maintain accreditation as a Master Landscaper, the person would be required to complete two units of a professional development program coordinated by Landscaping Australia each year. These could be units out of the Certificate IV in Small Business Management or the Diploma of Landscape Design (AHC50610) or other programs put together by the association.

Recommendation 11

That the national association develop, implement and promote a national accreditation program that is linked to a career pathway.

Key factors considered when choosing a training provider

When considering what organisation to employ to deliver training for them and their staff, the key requirements to be met are:

- The organisation has a good reputation within the landscaping industry
- The trainers have industry currency
- The content is relevant to the business
- The assessment tools are clear and relevant
- Recognition of prior learning is available and easy to access
- Location of the training is nearby
- The training is cost effective.

The majority of participants in this project were disappointed with the standard of training and assessment currently offered to this sector by the public providers. There is a strong feeling that these providers receive insufficient funding to allow them to provide high quality training by industry-current and experienced trainers.

Preferred times for undertaking training

No matter when training is offered, it will never suit everyone but the following suggestions were obtained in the discussions:

Tasmania: In winter, on a Tuesday, Wednesday or Thursday evening at 5pm.

Queensland: During the wet months in work hours on a Tuesday, Wednesday or Thursday.

South Australia: During January or February beginning at 7am over breakfast on a Tuesday, Wednesday or Thursday.

Victoria: Over breakfast between January and June.

New South Wales: Early morning in either autumn or winter.

Recommendation 12

It is recommended that training organisations build robust relationships with industry associations and with industry members in order to better understand what skills development the industry needs so that they can deliver it in such a way that industry can access it easily and cost effectively.

Recommendation 13

It is recommended that training providers employ current industry people as casual trainers to ensure that training is up-to-date with industry practices and issues.

Appendix One

Online survey

A national online survey was undertaken using Survey Monkey during August 2011. A database of landscape business owners and managers was prepared with the assistance of Landscaping Australia and some state landscaping associations and through web research. The survey was sent to over 750 respondents and 126 responses were received. Responses from the states was varied as shown in the table below:

State	Number of responses
New South Wales	69
Queensland	6
South Australia	12
Tasmania	16
Victoria	15
Western Australia	8

Table 1 Participation in survey by state

Who participated in the survey?

Eighty-seven percent of those who participated were the business owners with the majority of the remainder being managers. Respondents indicated that the major areas of activity for the businesses were residential landscaping, both hard and soft (Figure 1). Many were also undertaking government contracts and environmental landscaping. (Ten respondents replied after the closure date for the survey, so their responses are not included in the following data.)

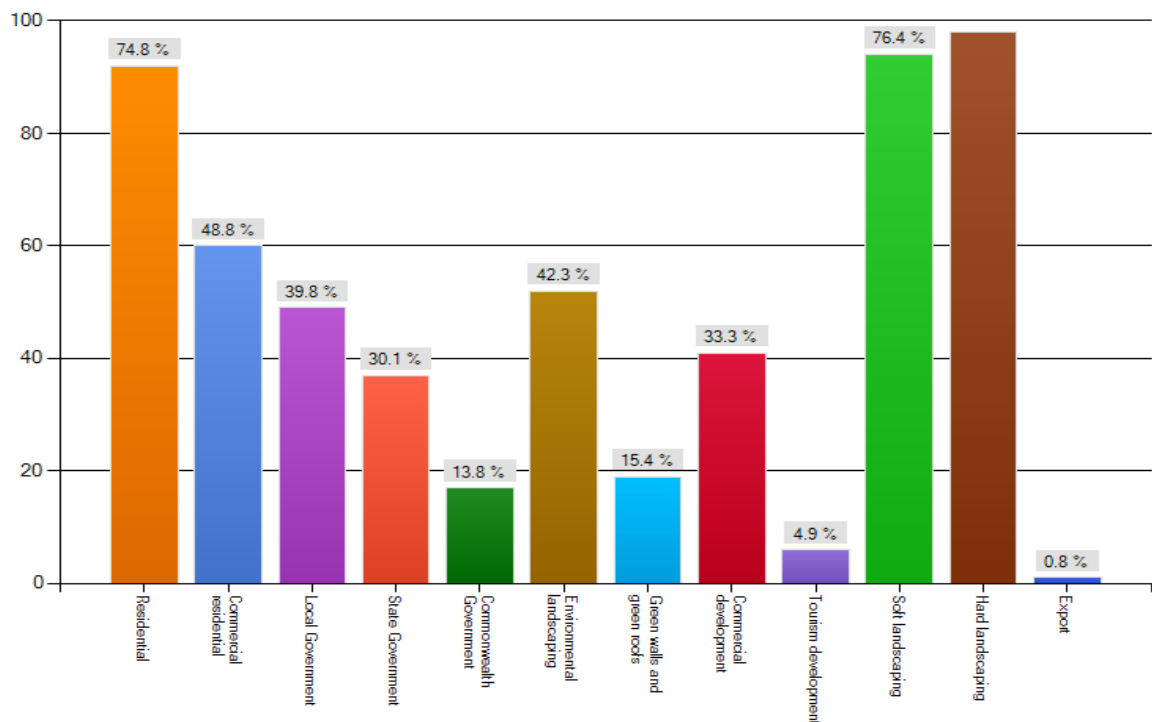


Figure 1 Percentage of businesses identifying the varying major focuses of the business.

The turnover of the majority of businesses in the survey was less than \$500 000 as shown in the figure below.

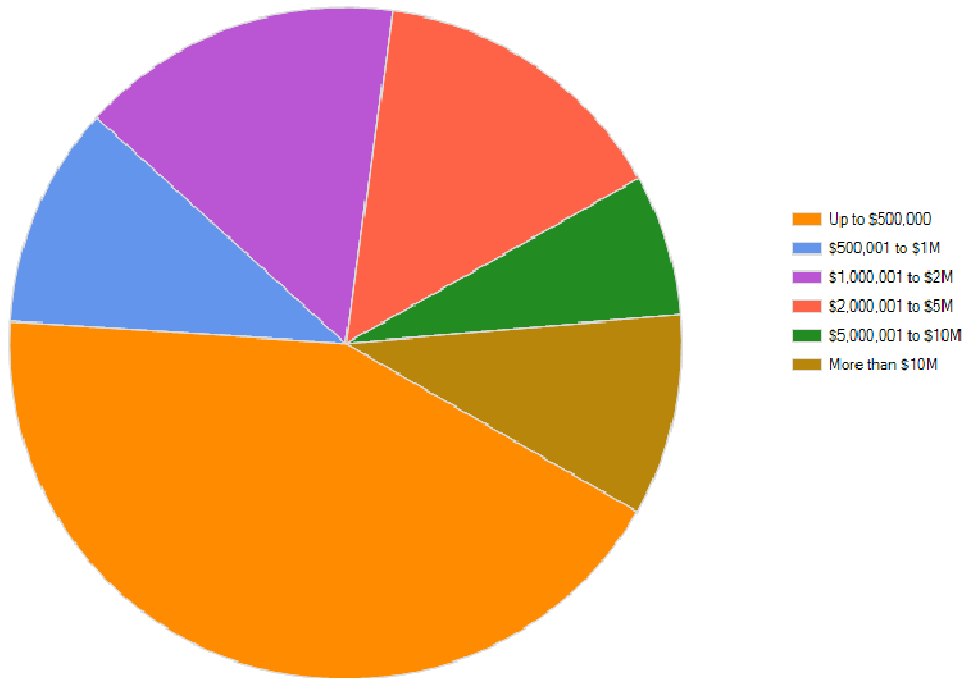


Figure 2 Business turnover

Qualifications of respondents

The highest level of education of 70% of respondents was a vocational qualification with approximately one third of those holding a Certificate III in Landscaping. A further 19% have university qualifications.

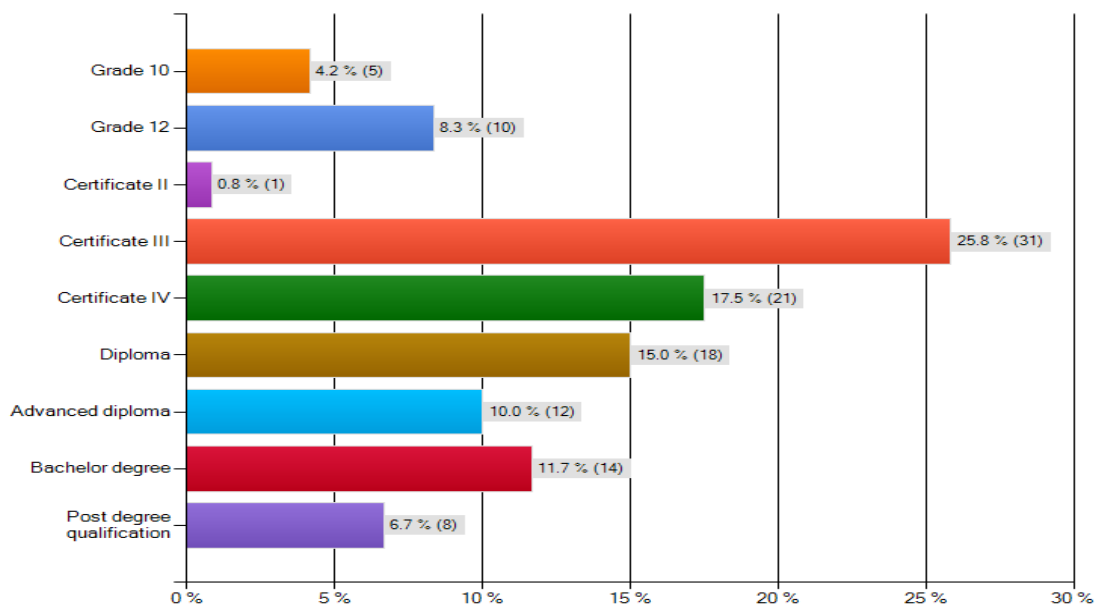


Figure 3 Highest level of qualification held by respondents

Number of employees and apprentices

Over half of the respondents employed five or fewer full-time permanent employees and around 31% employed between six and 20 full-time permanent people.

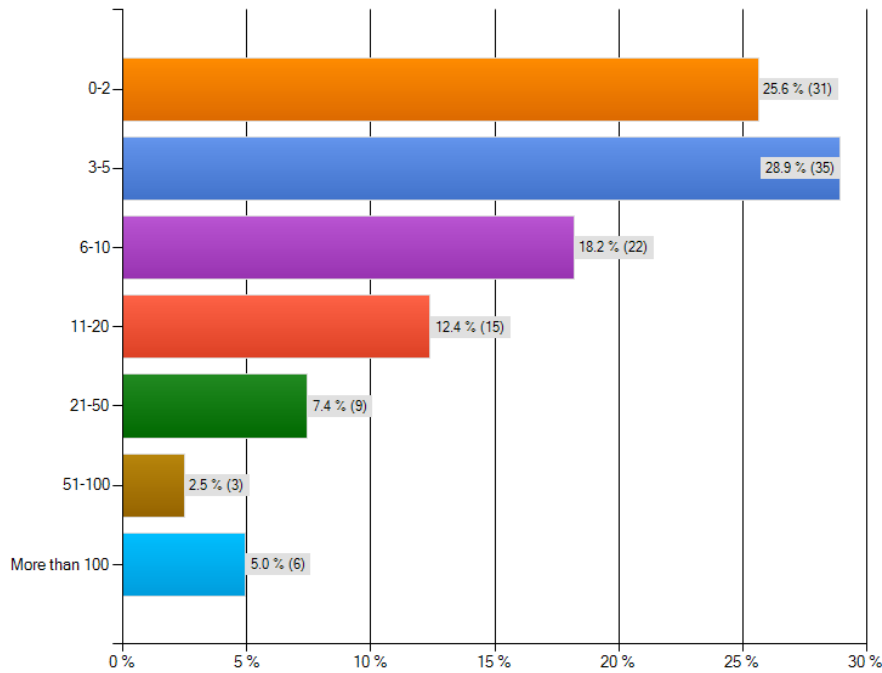


Figure 4 The number of full-time, permanent employees by business is shown in this figure

The size of the part-time and casual workforce was quite small with 70% of respondents employing two or fewer and 22% employing between three and five. Forty-four respondents indicated that they used labour hire regularly with 20 using one day per week and eleven using five days per week.

Seventy-five percent of participants indicated that they thought the major method of upskilling the industry to meet the needs of the future was the signing on of apprentices but 27% have not employed an apprentice since 2008.

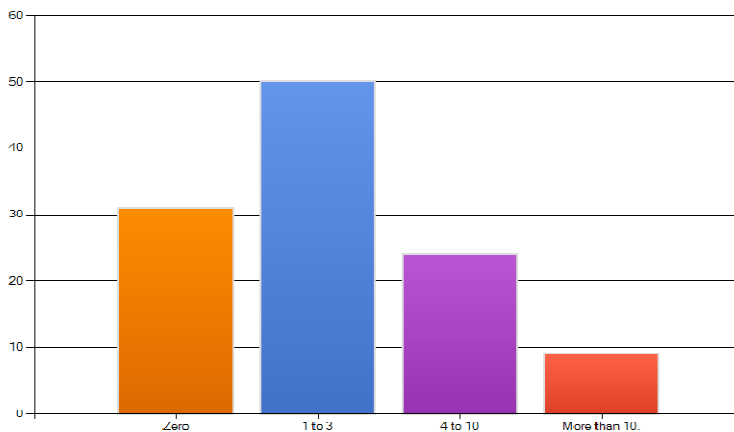


Figure 5 Number of apprentices employed since 2008

Business Structure

The business structures of the respondents are:

- Companies; 60%
- Partnerships; 9%
- Sole traders; 24%
- Family trusts; 7%

Factors affecting the growth of the business

This is an interesting question that was asked early on in the survey and then repeated towards the end with a timeframe of five to ten years out. The responses to both indicated consistent concerns about the **shortage of people with both higher-level landscaping skills and supervisory skills** and this is obviously an area for which a solution needs to be found. The other major areas of concern were the rising input costs for business and the high levels of competition that is putting downward pressure on pricing. Many are concerned that unqualified, unlicensed contractors are impacting negatively upon the marketplace. Figures 5 and 6 show the relative importance of the various factors. It is interesting to note that carbon pricing is seen to be quite insignificant now with only 13% seeing it as a restricting factor but in the future some 69% see it as being extremely or somewhat restricting.

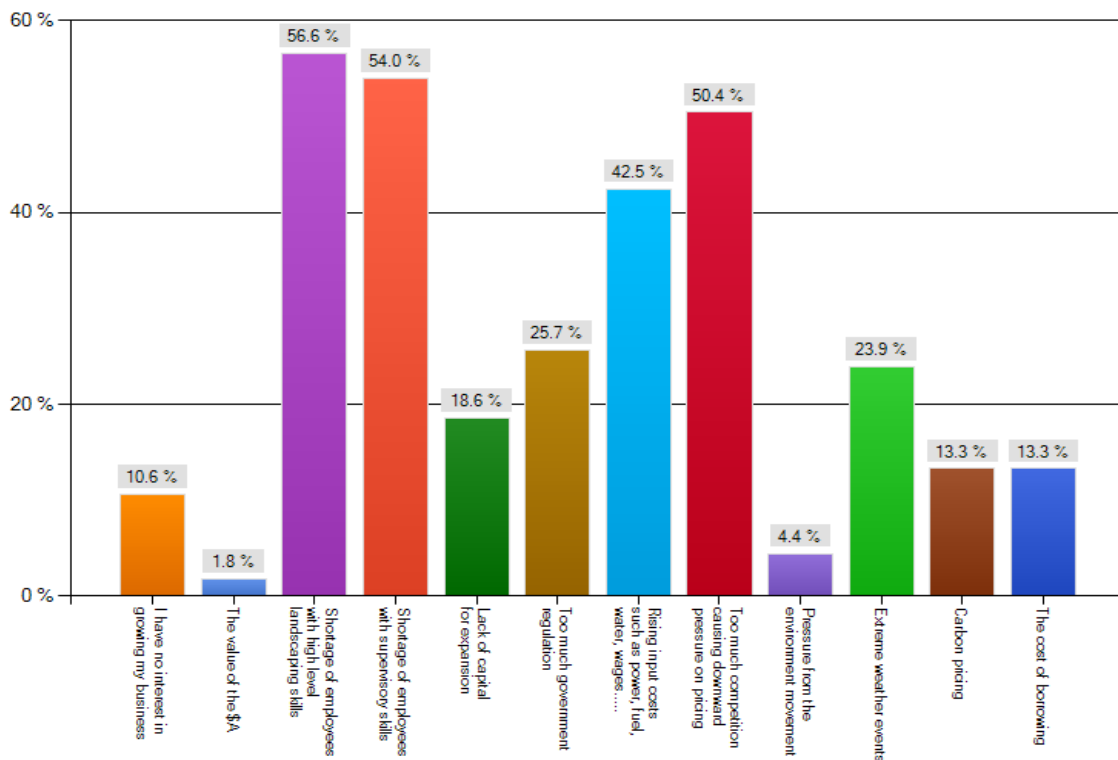


Figure 6 Factors currently restricting business growth

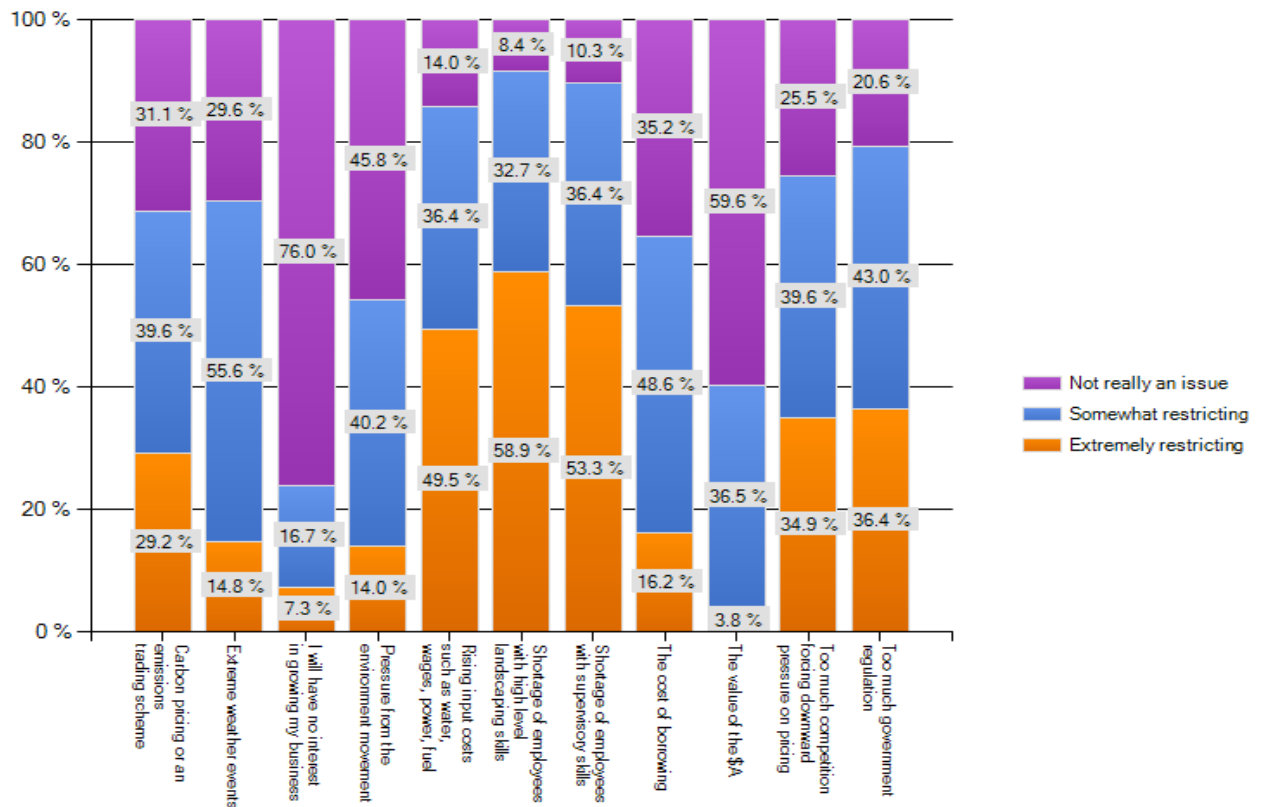


Figure 7 Factors affecting the future growth of the business

Memberships

Ninety-six percent of respondents belong to a landscaping industry organisation and 27% to an allied industry organisation whilst 14% are members of a local business organisation such as a Chamber of Commerce. It is thought that only 20% of all landscapers are members of their industry association so clearly the survey may not be representative of the total industry.

Attraction & retention of motivated, hard working employees

Eighty percent of employers find it very difficult or somewhat difficult to attract good employees. Only 5% find it very easy to do so.

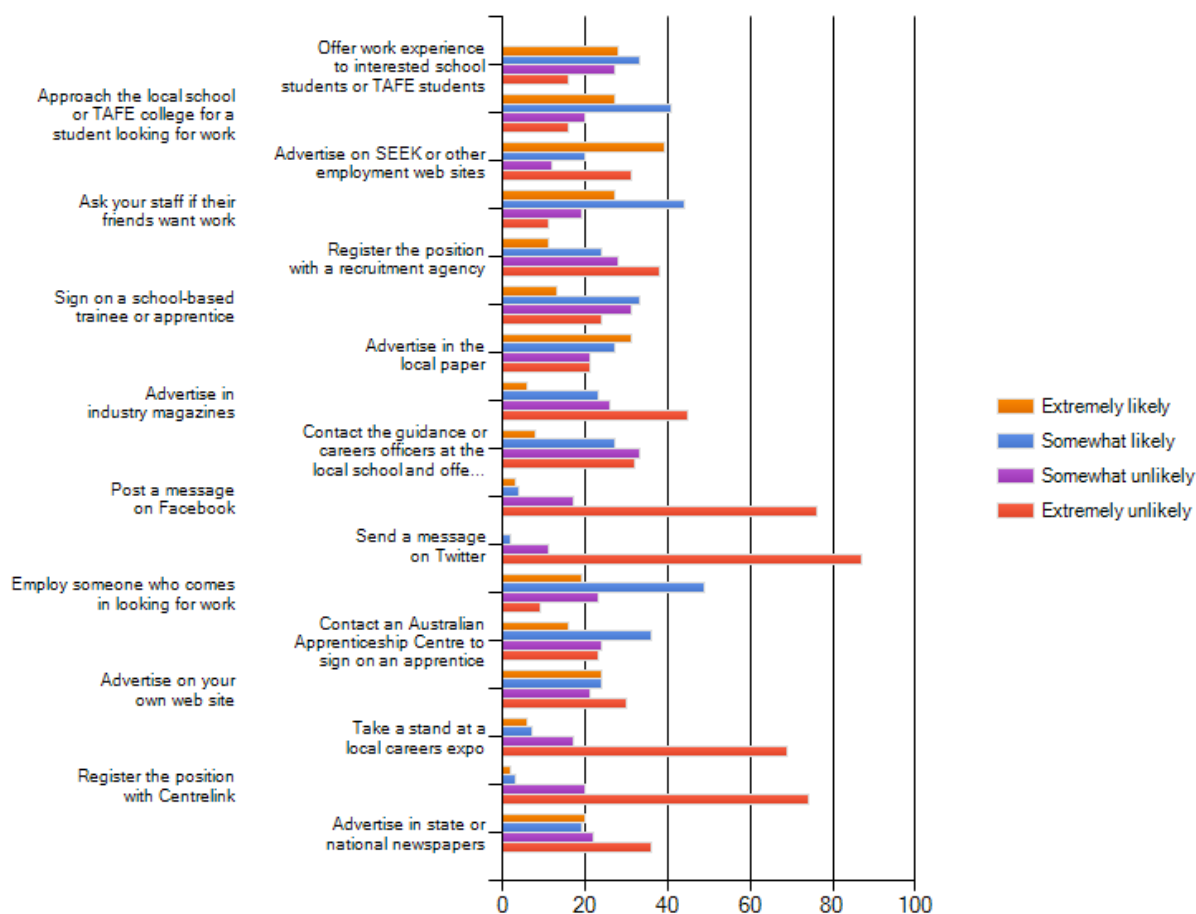


Figure 8 Methods of attracting new employees

The new social media used by young people do not feature highly in the way by which businesses look to attract new workers. Only 2% use Twitter and 5% use Facebook. The traditional methods are still favoured by the industry with the following extremely likely or somewhat likely to use them when needing staff:

- Asking staff if their friends want work: 70%
- Employing someone who walks in: 68%
- Asking a school or TAFE to recommend someone: 65%
- Offering work experience to TAFE or school students: 62%
- Advertising in the local paper: 58%
- Listing the job on seek or another employment web site: 58%.

It is pleasing to see that 52% would approach an Australian Apprenticeship Centre (AAC) to sign on an apprentice as experience of other industries in the AgriFood sector would suggest that only a very small minority would even know that AACs exist, let alone what they do. Since 75% indicate in the survey that the best way to upskill the industry is through the employment of apprentices, there appears to be an opportunity to increase awareness of the apprenticeship system throughout the industry.

Retention of employees appears to be less of a problem with 60% finding it easy or somewhat easy to keep their employees and only 40% finding it very difficult or

somewhat difficult. However, with 40% finding it difficult, this is an issue that needs to be addressed by the industry.

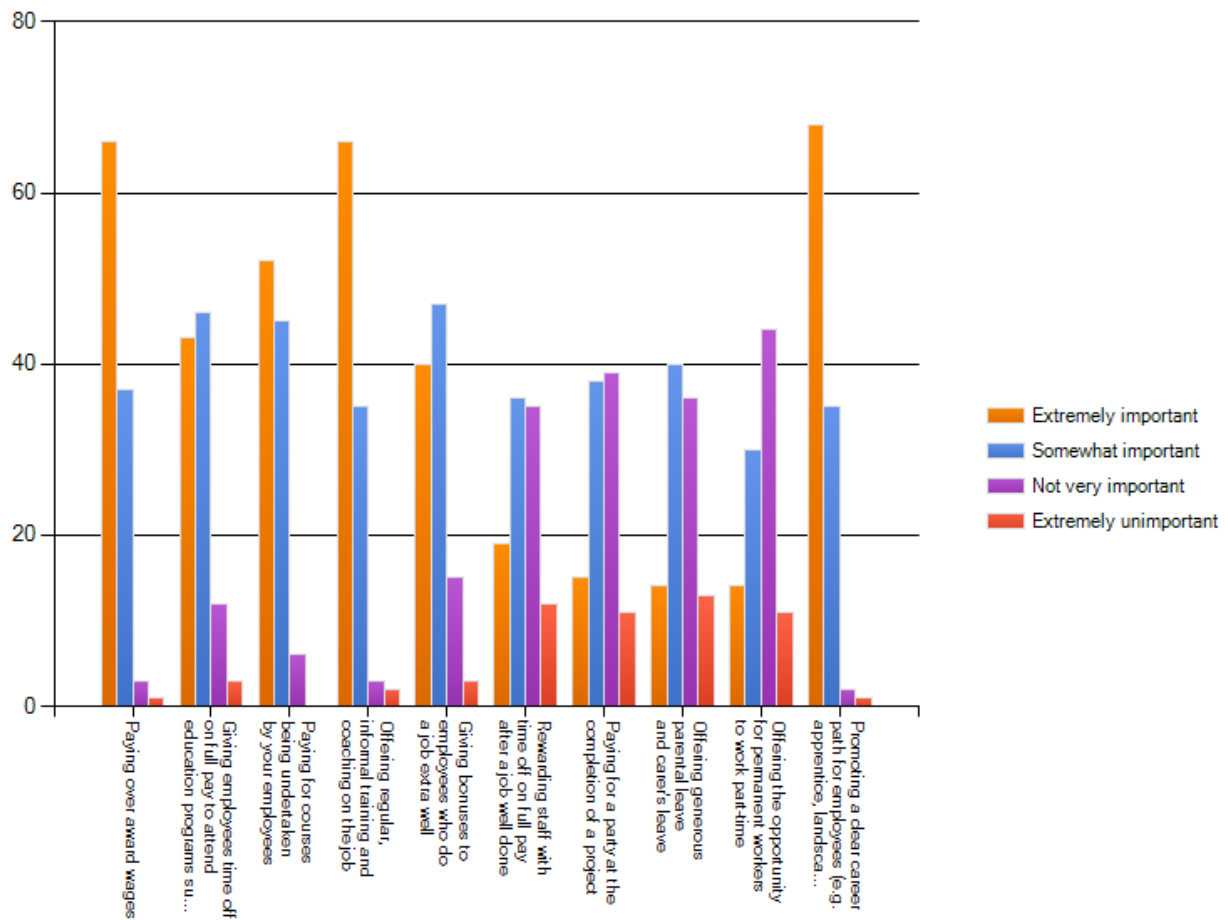


Figure 9 Preferred methods for retaining employers

Offering a career path, over award wages and the opportunity to do training are seen by over 90% of respondents to be the key to retention of employees. A question arises as to whether the industry has adopted the family-friendly workplace with 52% seeing the opportunity for parental leave and permanent part-time work as not being important in terms of keeping their good employees. Or is it that the industry is family friendly but they don't see it as part of their retention strategy?

It appears that it is common for employees to leave a business to start their own business and several employers thought that was a good outcome for the industry as these people had the necessary skills and experience. However, over 80% of respondents indicated that those who left their businesses were often the wrong sorts of person for the industry; their values didn't match those of the business or pay levels were unsatisfactory. Some 66% identified the loss of employees to another industry such as construction or mining.

Management Skills

People Management skills

There appears to be considerable interest in gaining improved skills in managing people with many saying they feel they have the skills but would still like to improve. Gaining better skills in motivating people was the stand out response here as seen in the figure below but surprisingly there was little interest in learning more about employing apprentices:

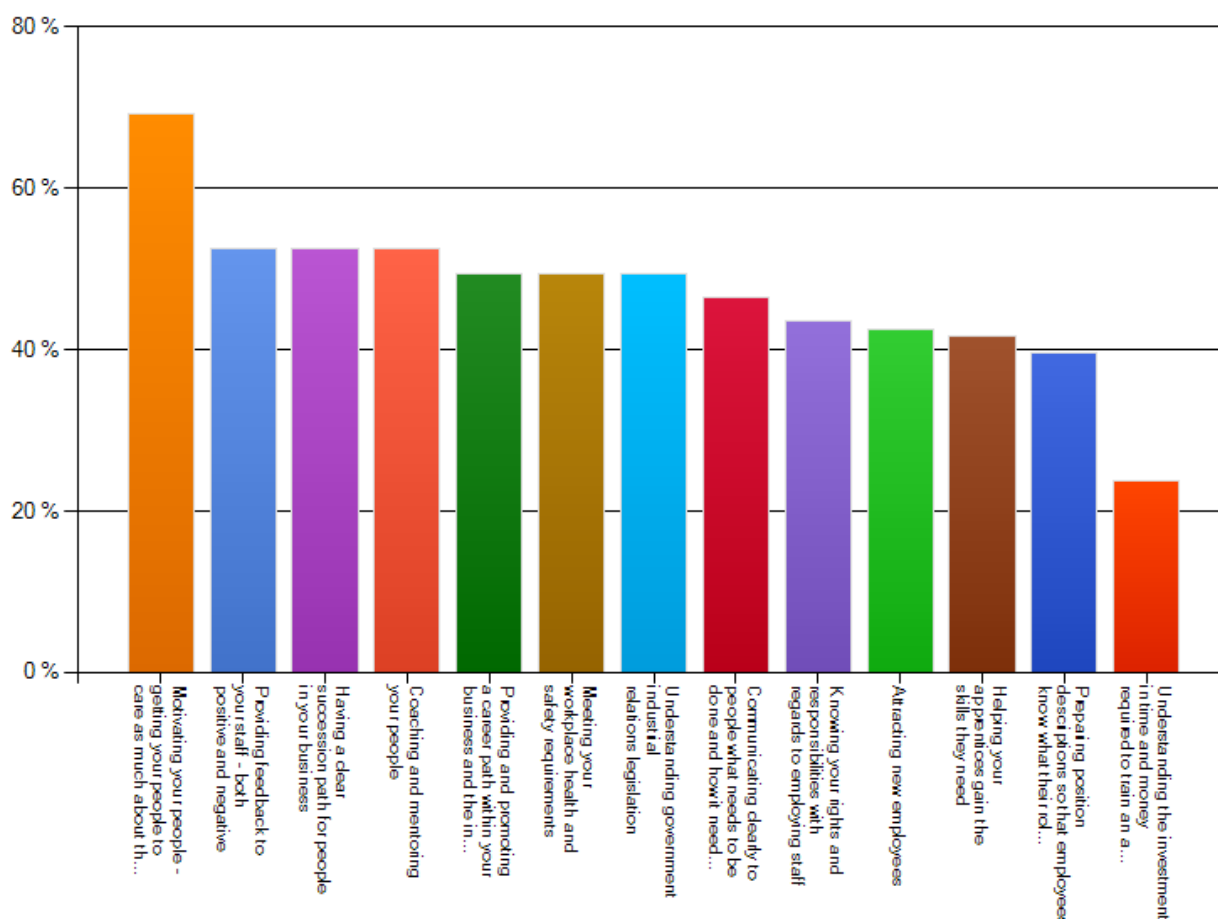


Figure 10 People management skills in demand

Marketing skills in demand

Concern about knowing how to identify and maintain a competitive advantage was expressed by 61% of correspondents whilst over 50% identified a wish to improve their skills in measuring the effectiveness of their advertising and establishing client service standards for the business.

Almost 50% wanted to gain skills in using their web page to promote their business but only 29% were interested in learning how to use social media as a marketing tool and only 17% were keen to learn more about writing an electronic newsletter.

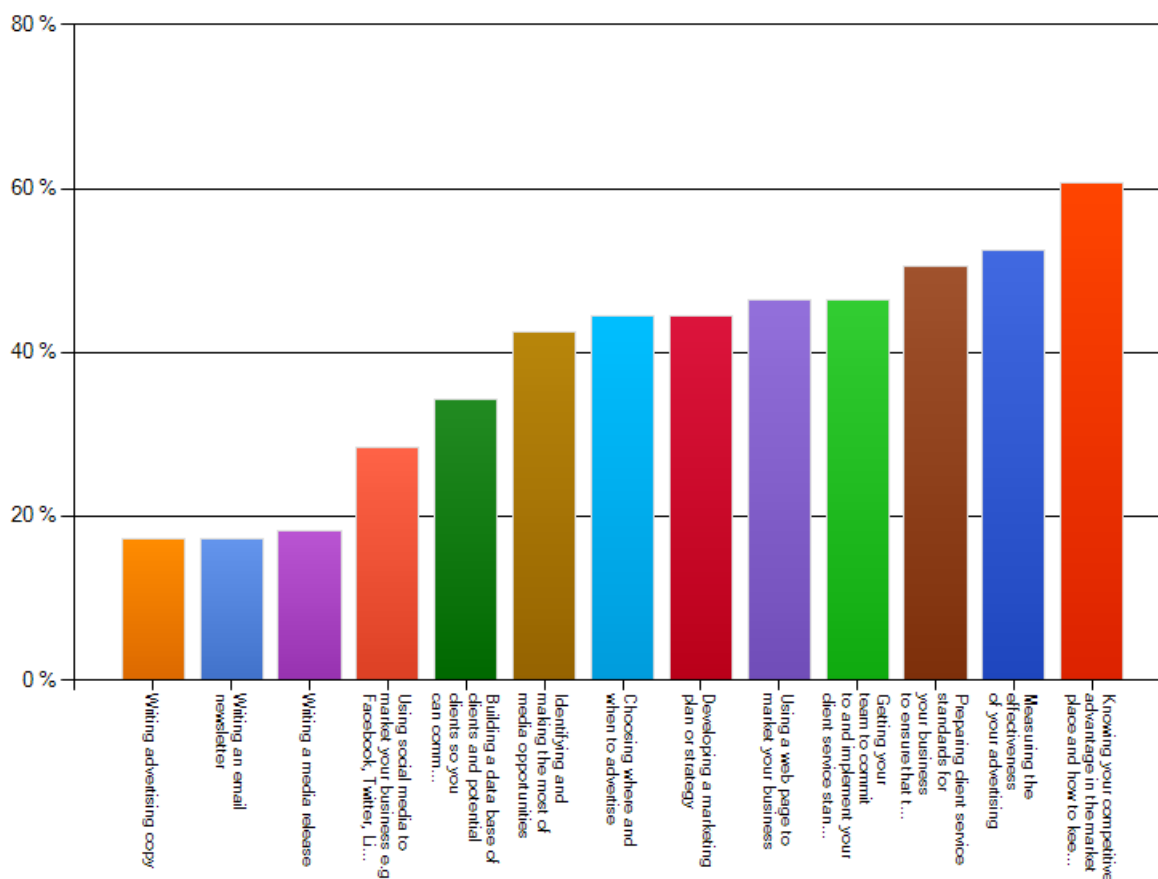


Figure 11 Marketing skills in demand

Skills to better manage the finances of the business

Over half of the respondents indicated that they would like to improve their skills in tendering for government projects. The skills in demand are the ones focused around quoting more accurately and include:

- Preparing a quote or tender: 37%
- Costing a job: 34%
- Using a software-estimating package: 42%.

Also in demand were the skills to prepare cash flow forecasts and budgets (37% of respondents).

Business planning skills in demand

The main demand identified in this section was the need to understand the legal responsibilities and risk levels of the business and identifying risk (around 50%) but only 29% showed interest in improving their skills in managing this identified risk.

Around 40% indicated that they wished to improve their skills in:

- Implementing a planning process for the business
- Maximising the effectiveness of business insurance
- Preparing the business for sale or passing onto the next generation
- Planning and managing individual projects.

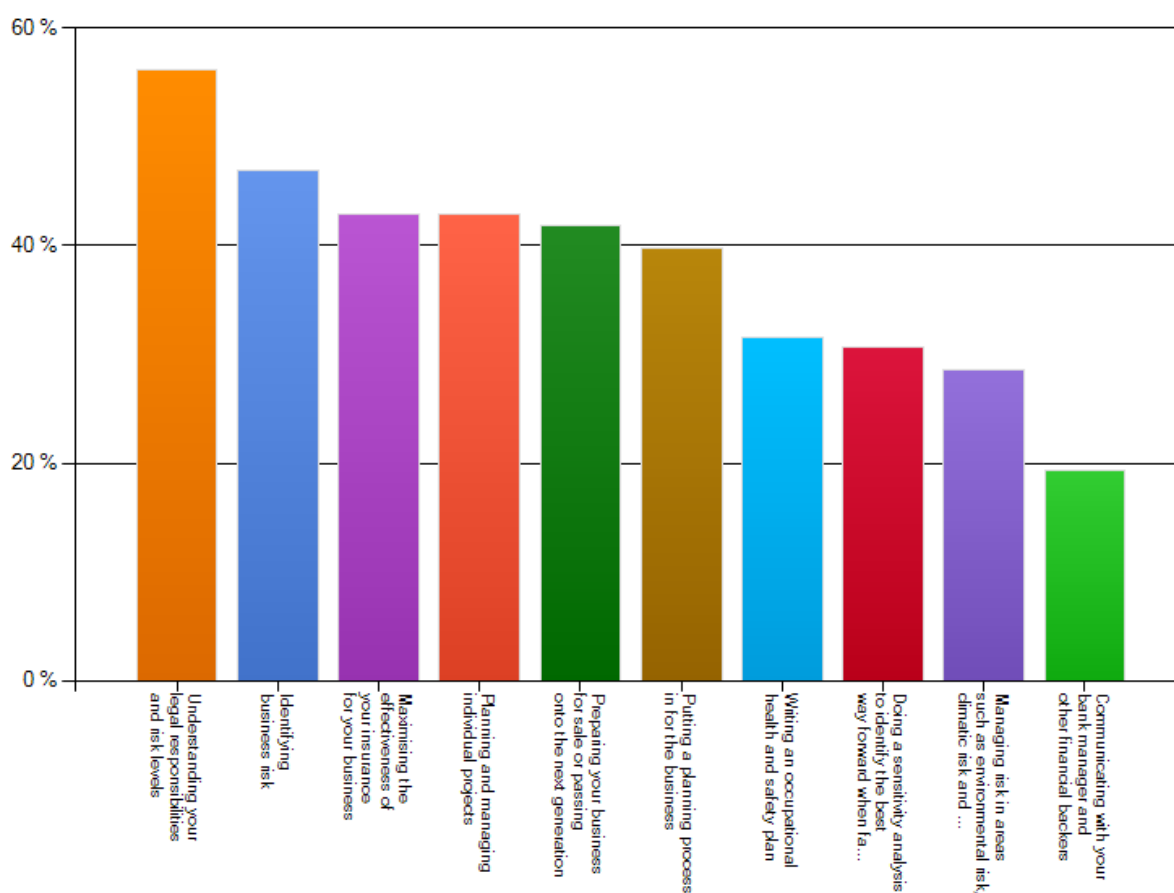


Figure 12 Planning skills in demand

Technological skills in demand

The top seven skills in demand in this section are:

- CAD design: 51%
- Using project management software: 50%
- Using spread-sheeting software such as Excel: 41%
- Using smart phones, tablets, laptops etc in field: 40%
- Designing a web page for the business: 27%
- Using technology to discover the best profit lines for the business: 27%
- Using a financial management program such as MYOB or QuickBooks: 25%

Higher-level technical landscape skills in demand

The figure below shows the top ten landscaping skills in demand by respondents. There was minimal interest in the other areas listed in the survey. It will be interesting exercise for training organisations and industry to map these skills to those in the training package.

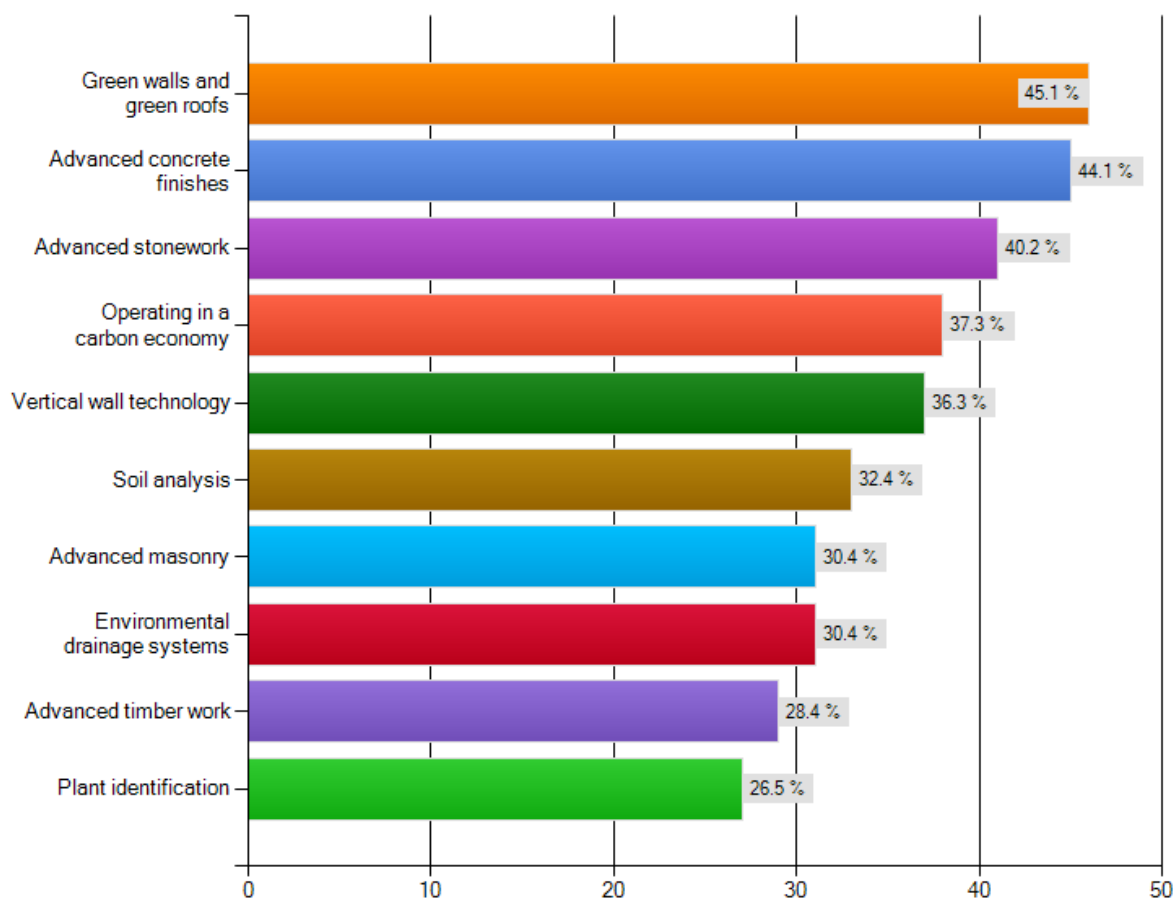


Figure 13 Higher level landscaping skills in demand

Core skills and attributes required by a person entering the industry

The chart below shows the basic skill and qualities or attributes that landscaping employees want people entering the industry for the first time to have. The answers to this question were quite consistent across the board with the five most popular responses being:

- Punctuality
- Reliability
- Energy & enthusiasm
- Observation skills
- Ability to take direction & understand instruction.

Basic computer skills were not seen as being a pre-requisite for employment in the sector even though there is a lot of interest in using technology in the field. Although machinery tickets are required by the industry, they were not seen as key pre-employment skills so the presumption is that the industry will train people in this area specifically to suit the needs of the business.

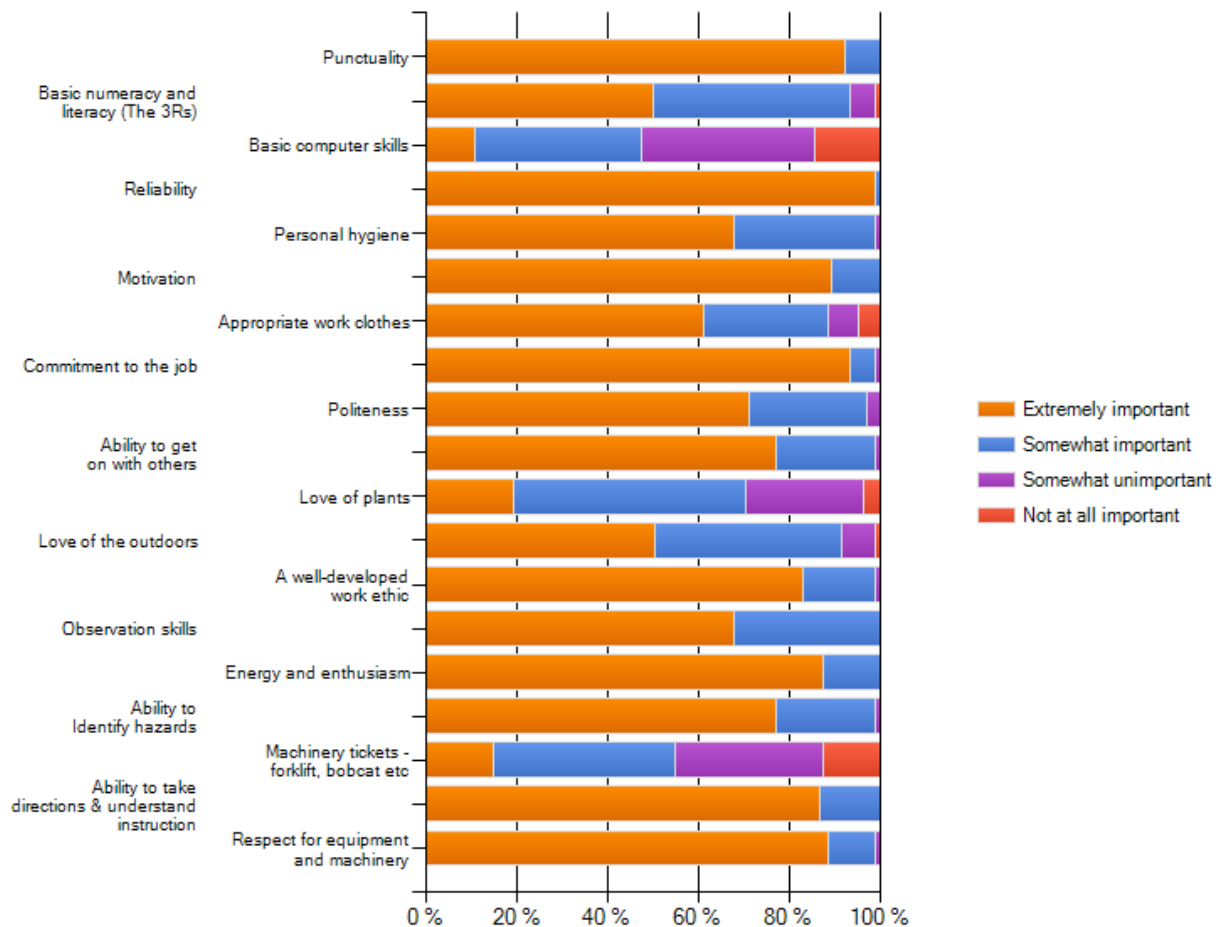


Figure 14 Skills & attributes required of new employees in the industry

Upskilling the landscaping industry for the future

This chart clearly shows that the industry is agreed that the future of the industry depends on the employment of apprentices and mentoring and coaching people on the job. A successful adoption of these principles would seem to require a substantial move by employers to sign on apprentices and improve their own mentoring and coaching skills as well as those of managers and supervisors within the industry.

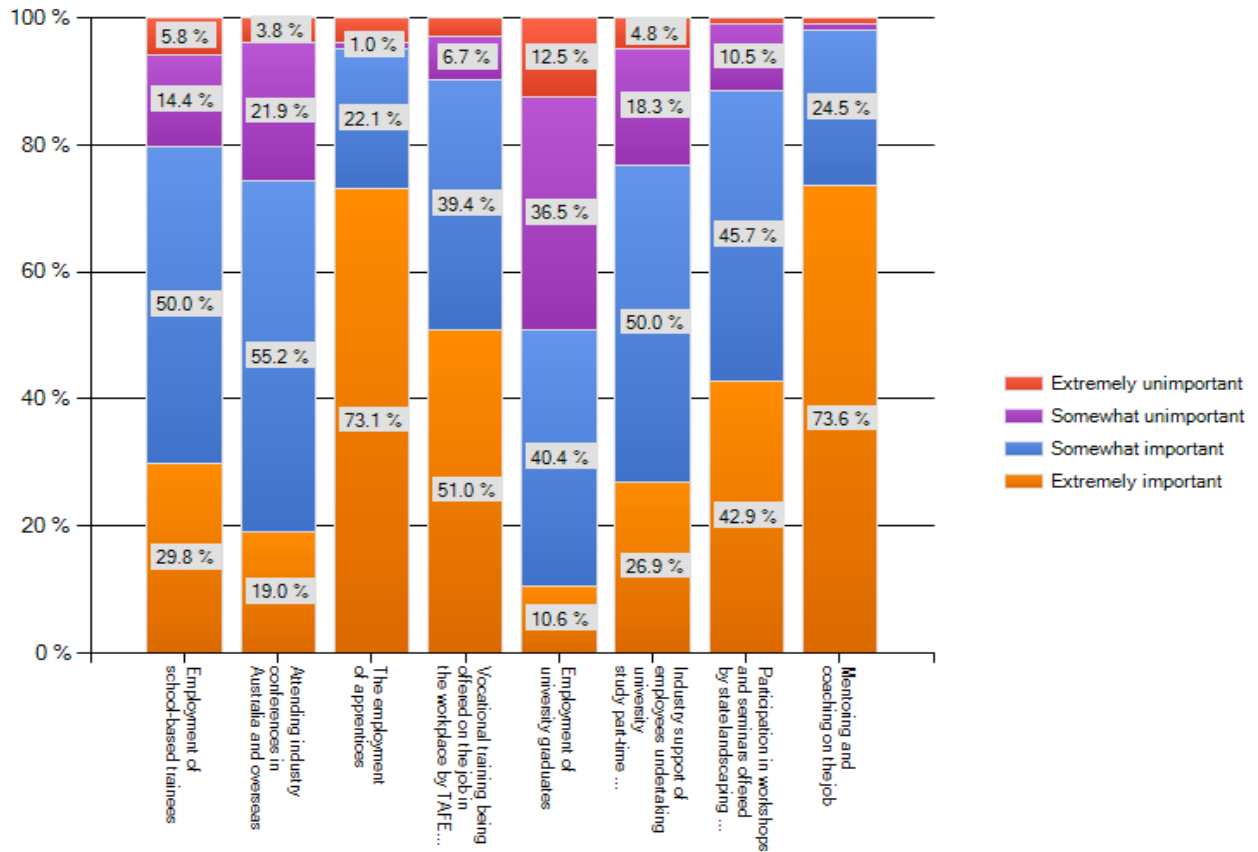


Figure 15 Preferred method of raising the skill levels of the industry to meet future needs

Preferred learning styles of landscaping business owner and managers

The survey shows clearly that people prefer to learn on the job, face-to-face in a classroom or at an industry-run workshop in the local area. There is virtually no interest in distance learning whether online, paper-based or through a webinar. This certainly has implications for how skills development programs should be offered to this sector.

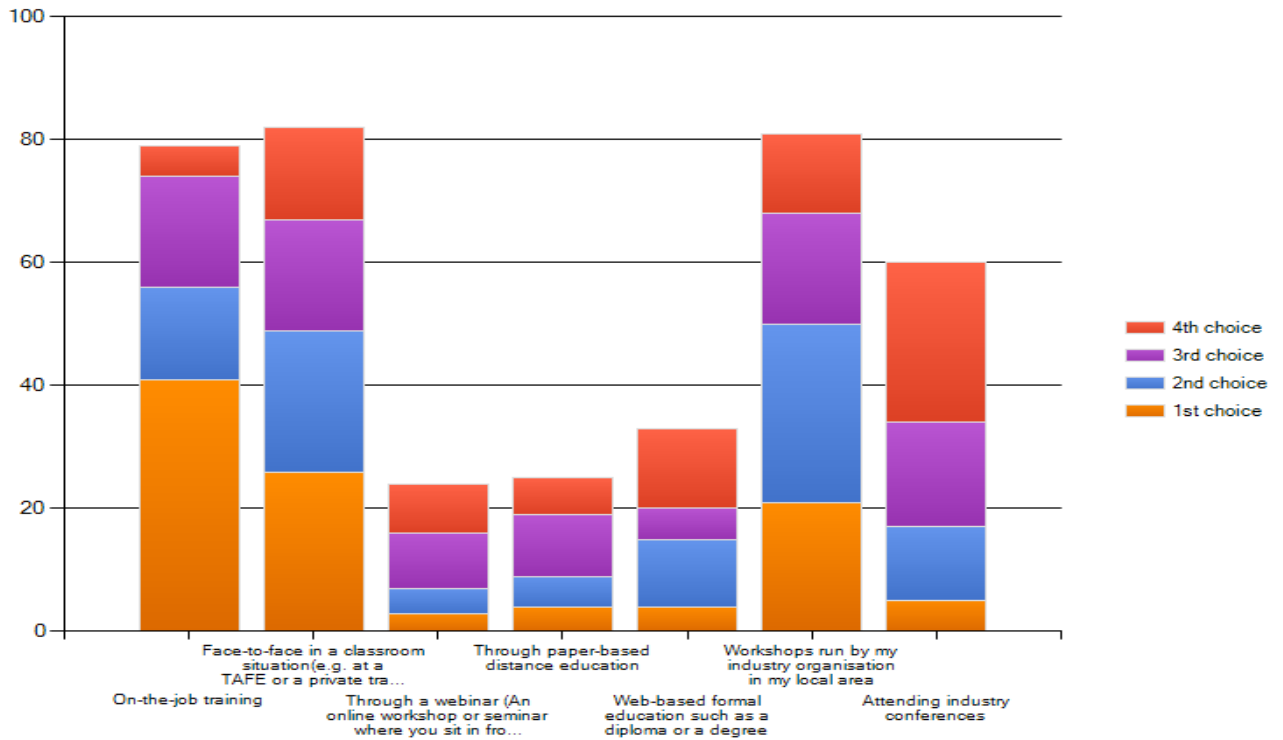


Figure 16 Preferred learning styles of employers in the industry

Choosing a training organisation

Two factors appear to be critical when a business is choosing which training organisation to use:

- That the trainer has current industry knowledge and experience
- That the training organisation has a positive reputation with the industry.

These observations reinforce the need for training organisations to build close relationships with industry and to take every opportunity to ensure that their trainers are immersed in industry on a regular basis.

Other factors that businesses consider to be important are shown in the chart below.

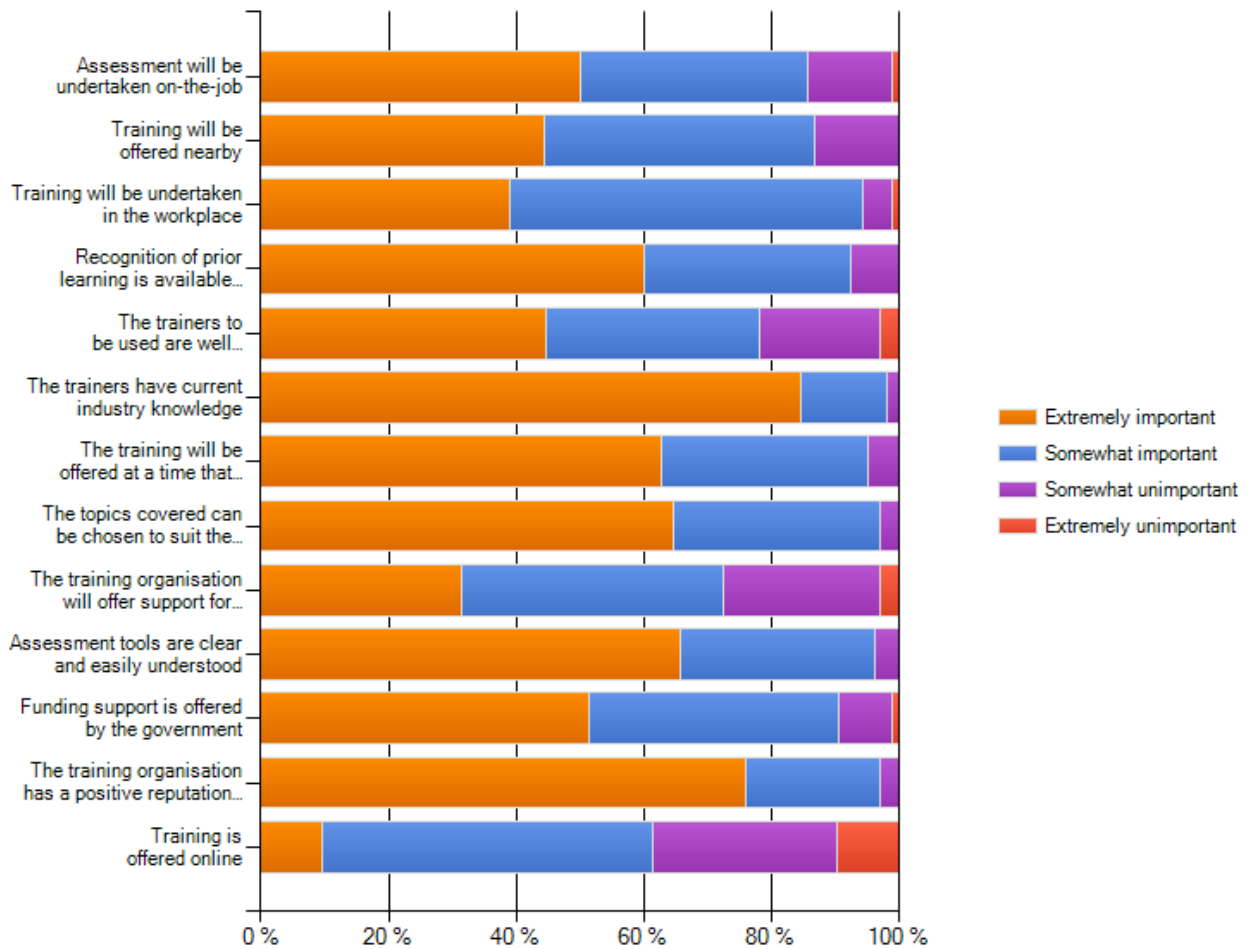
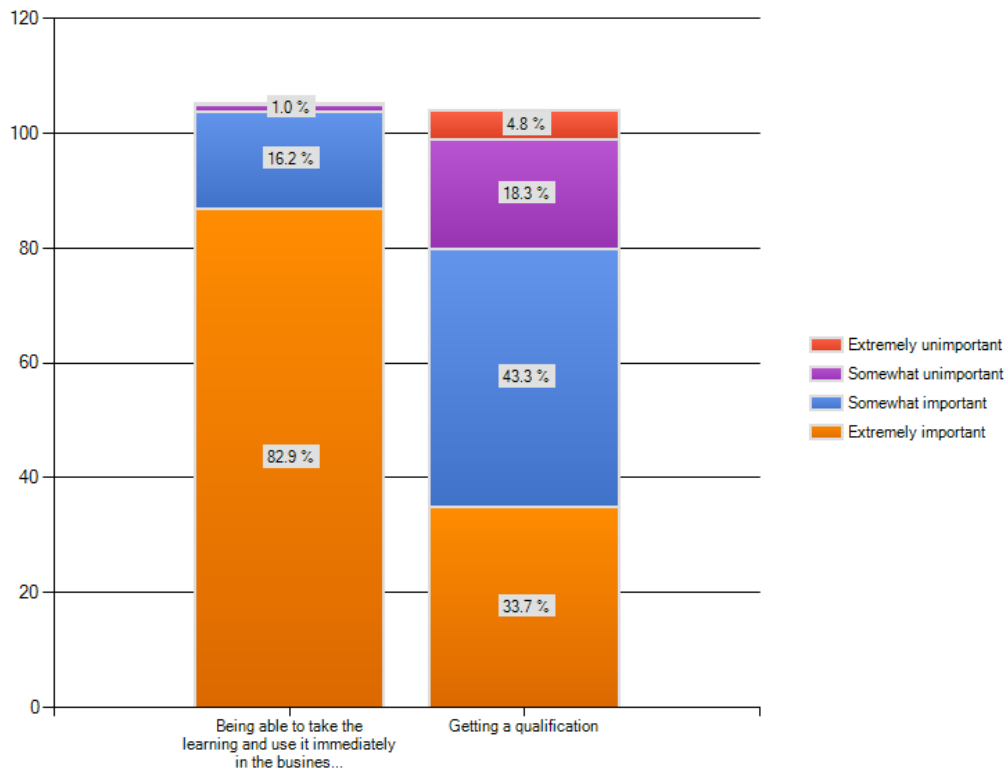


Figure 17 Factors considered when a business chooses a training organisation

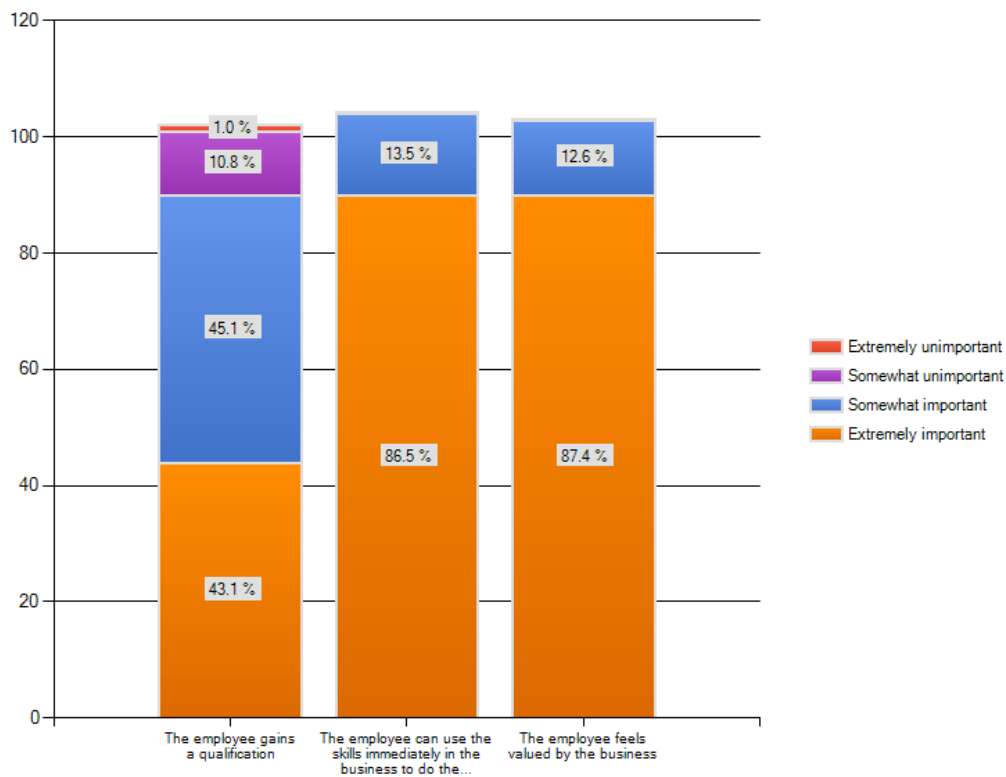
Importance of a qualification

There is always some debate around the outcomes that businesses are seeking from their training program. This survey reinforces previous findings from this sector that gaining a qualification is less important than being able to use the skills immediately in the business to do things better. The employer is also looking to have employees feel more valued by the business as a result of the training program. These results are shown clearly in the charts below.



Figure

18 Desired outcomes from training undertaken by the owner/manager.



Figure

19 Outcomes desired from the training of the employee by the employer

Appendix 2

Notes from the focus group discussions

Attendance at the focus groups

Western Australia: Zero attendees at each of the two focus groups 15/9/11 and 16/9/11.

South Australia: Two attendees at the discussion on 22/9/11. One attendee at the discussion on 23/9/11

New South Wales: Five attendees at the discussion on 28/9/11. Seven attendees at the discussion on 29/9/11

Queensland: Eight attendees at the focus group on 7/10/11

Victoria: Five Attendees on 14/10/11.

Tasmania: Six attendees on 17/10/11.

Total focus group attendees: 34

Responses

The information presented and the questions asked by the facilitator are in black type and the responses are in blue. To maintain the privacy of the participants, responses from the states are not separated but are presented together. The responses are listed in note form as they were spoken to provide accuracy of content and context. They are the words of the participants not the facilitator and have not been consolidated or collated in order to provide a clear picture of the thoughts and feelings of participants.

A. *Restriction of business growth*

The survey has shown that two of the key factors restricting the growth of the industry are:

- Lack of people with supervisory skills
- Lack of people with higher-level technical skills.

1. What supervisory skills are you unable to find in people?

- Skills to allow people to supervise the job not supervise the people
- High-end finer detail construction skills
- Basic knowledge of how to put landscapes together
- Set out and surveying
- Understanding of the engineering of the job – in the past, this wasn't necessary but now jobs contain complicated construction
- Interpreting plans
- Visualising how the plan comes together
- Planning and scheduling the job
- Sticking to budget and meeting timelines
- Doing the necessary administration and paperwork – so complicated today to meet standards
- Managing staff
- Soft landscaping skills – plant skills are lacking
- Managing the contract – to achieve on time, on budget, and best quality project:
 - Understanding contractual issues and knowing how to work the system
 - The need for adding variations to contract
 - Reading and understanding specifications

- Programming and scheduling – daily and weekly resource allocation
- Managing various contracts at the same time
- Skills from building and construction degrees
- Negotiation skills
- Ability to motivate staff
- Looking after the needs of their staff not just the job outcomes
- These skills are not currently coming from TAFE – people are learning through their work and their industry
- Companies that allocate a reasonable percentage of their budget to training are at a disadvantage when quoting against a firm that does not spend on training, as their price must be higher to cover the cost of training
- Only 20% of content in courses in project management is relevant to this industry
- Communication skills are critical – they must be able to articulate, be savvy, on the phone, when coordinating work, liaising with clients, ordering
- Project managers are really managing their own small business within the business and need these skills
- Leadership skills
- Need people management skills
- They are good at the trade, go into business but need to learn how to manage people
- Communication skills – listening.
- Negotiation skills.
- Managing people – they are good tradesmen but lack people skills
- Motivating people
- Communication – talking to clients, architects, council officers etc.
- Reading plans and specifications.
- Communicating industry regulations, legislation etc to staff
- Interpreting specifications and council regulations etc for staff.
- Computer skills – project management, excel, PowerPoint, Word, Estimating packages
- We need a leadership program to be specific for the construction industries
- Managing resources including people
- It is about managing the job and managing people
- They need to be aware of contracts as these are the rulebooks of the job
- Leadership skills are missing. The guys need to be able to take 2 or 3 guys under their wing
- Accountability: they don't realise how close to the bone costing is and what needs to be done to meet costing
- Ability to run to budget & time constraints
- It's best if you take on an apprentice, train them and then can keep them as they know how the business runs
- A need to understanding quoting system
- Need to be able to train people
- Communication skills for communicating with clients
- Need to understand how much an error can hurt financially
- None have been trained as project managers
- None have been trained as estimators

- High drop out rate of apprentices so the numbers of qualified people coming through is small
 - They need to know what to do
 - They need a good work ethic
 - I'm a good landscaper but not a good businessman
 - I'm self-trained in people management and business management & plenty to learn
 - The association needs to provide courses in estimating, people management, project management, contract management - all the ins and outs of it and how it works
 - All of us want to get our Class 10 building certificate.
2. What higher-level technical skills do you think are lacking?
- They need the above higher level technical skills so they can supervise the job
 - Project management
 - Time management
 - General technical skills – understanding the building codes etc
 - People management
 - We are external workers – so need timber skills, hydraulic skills, concrete skills
 - Even if they are using a sub-contractor to do the concrete work, the project manager still needs a basic knowledge of the skills involved
 - Ability to interpret financial information
 - Financial management
 - Contracts management
 - Computer skills
 - Tendering
 - Running and managing projects
 - Cost control
 - Tool management, maintenance and respect
 - Estimating
 - Need a Cert IV in building and construction
 - Engineering, plumbing, electricity
 - It means a move from a landscaping tradesman to being a builder
 - Cost control
 - Estimation including the labour content
 - OH&S
 - Public liability
 - On-site management
 - Costing, tendering, using an estimating package – a Skill Set would be good
 - Understanding of contracts and their management – Skill Set re contract management
 - Understanding of plants and how they grow and conditions needed
 - Advanced stonemasonry
 - Drainage
 - Tree doctors
 - Structural foundations for building
 - Project management
 - Engineering

- Understanding specifications
 - Reading plans
 - Technical carpentry etc
 - Knowledge about handling plants
 - Design interpretation
 - Excel spreadsheets
 - Maths skills
 - Knowing how to find info when you need it
 - Time management
 - Record keeping
 - Keeping on top of legislation
 - Communication skills are really needed
 - How to read people & pass on skills
 - How to coordinate subcontractors
 - How to fire staff
 - There's not enough horticultural knowledge - we know how to build but we don't have enough plant knowledge. It's the biggest problem in the whole industry
 - Soils, soil analysis, pest & diseases, drainage, plant maintenance,
 - The plant knowledge of recently completed apprentices is atrocious.
 - The mentality of the industry is "it'll do" when it comes to plants.
 - We're disillusioned with the training system here - it's a very serious problem.
 - Tassie landscapers have been left behind.
3. How can we overcome this barrier?
- On the job training but the down side is they learn the bad habits as well
 - Learn the ways of the particular landscaper
 - Landscapers must learn to adapt to change
 - To do government jobs, standards must be met so this has led to policies and procedures which make things a little more standardised
 - Need to start when kids are in Year 11 & 12 – change the perception that landscaping is not a good career choice and is only for the slower learners
 - TAFE needs to get its backside into gear
 - Decrease the bureaucracy at TAFE so they can attract good industry people to be trainers – you shouldn't need a Cert IV Training and Assessment if you have had experience managing staff and training on the job in industry
 - Government contracts should include an amount of money that must be allocated to training. If the contractor can show that they have spent this on training, they get paid it – otherwise they do not get this payment
 - There are no short courses on how concrete works – suppliers used to run workshops but no more – but these got better results for industry than TAFE courses
 - TAFE trainers are failed landscapers – they are so poorly paid, that good people aren't attracted to being a trainer
 - There has been an influx of private trainers
 - Need a diploma in high level project management skills for the landscape industry
 - Building industry has a career path in place – Cert III apprenticeship to get a trade, Cert IV to get your builder's licence. Landscapers are outside builders but we have only the Cert III and nothing after.

- Skill set on costing, tendering, estimating and using estimating software into the training package
 - There are lots of courses such as Front Line Management and Project Management but the cost is prohibitive
 - Why should we have to pay for these courses for our people? If you work in other industries, you have to pay for your own courses if you want to advance. So why do our employees expect us to pay?
 - In-house mentoring
 - Mentoring within the association – the association to set up a group of mentors to work across businesses
 - We can't find the courses or the courses aren't relevant – we need training by the association and then it would be relevant and industry specific
 - With Gen Y employees, partnering with and experienced buddies will help but Gen Y want everything now
 - Industry apprentices are not the sharpest tools - we get the bottom feeders - they are directionless and have no idea - we need to attract a better standard of apprentices
 - We need to develop & promote career paths - more training, move up the ladder
 - We need to sell the real job - promote what it is really like, the opportunities and the skills needed e.g. maths skills
 - The current focus of the apprenticeship system is to do as little as possible and sign them off. It's not focussed on being as good as possible.
 - TAFE is broke - they just want to tick things off.
 - Need to go back to then old fashioned apprenticeship system where they work 4 days and go to TAFE on the 5th day & the government needs to pay us for the 5th day
 - No knowledge of the on-the-job system where the trainer comes and does training in the business. Didn't know it was possible. We have no other choice other than what TAFE offers.
 - We need the association to run courses, as we don't know where to find them.
 - The association has no funding to run courses. Looking to approach mining companies to sponsor the organisation.
 - We need a full time paid CEO and funding to pay for training.
 - All participants keen to do a one-day course to get a class 10 building certificate. The association is looking to offer the opportunity.
 - If skill sets in costing and contract management were available, I'd do them. I'd get something out of that.
 - Registered training organisations should come to businesses to see what we need.
4. How do we get landscaping people to gain supervisory skills?
- Get recognition from the government for the industry so TAFE gets funding to train people in this industry properly. Landscaping is an extra room on the house or business so landscaping people need proper funding so they can pay better wages
 - Bring in a consultant to do an in-house leadership course tailored to the business – not accredited but very useful and will help with succession planning
 - The association should offer courses in people skills

5. Is it about encouraging business owners to sponsor their employees to do a course where they will gain these skills (such as Front Line Management)?
 - No as it is about having the technical skills to be able to supervise the work.
 - The industry is a poor industry and doesn't really have \$ to put into training. Construction industry needs to recognise the landscaping industry as a viable part of any project.
6. Is it about owners getting skills in 'train the trainer'? Will this increase on-the-job learning?
 - Yes – owners and managers would like a short course in mentoring and coaching so they can pass on their skills
 - Owners would benefit from this but courses need to be funded and offered after hours
 - Yes
 - Employers take on apprentices because they are cheap and get them to do basic work rather than rotate them around the business and let them experience all areas of the business – so they need training in how to pass on their skills
 - Yes but also about putting effort into selecting the right people at the start
 - No owners and managers are already too busy & cannot take on role of trainer
 - To start a business people should have to do Cert IV in Small Business Management
 - Yes, if run as a workshop over a few sessions and was practical – we could all do with this to help us pass on our skills
 - Yes, this would be very helpful – a few of us did it a while back and it was really helpful
 - Landscaping is not a 'knowledge' industry so people in the industry don't value knowledge and are not prepared to pay for it or put time into gaining it
 - The industry only spends money on the necessary skills to do the job
 - Lots of apprentices have literacy and numeracy issues
 - Everyone in favour of a 'train the trainer' skill set being available to the industry
 - Doing it (Train the trainer) was a really empowering process for the whole company- it improved the culture of the whole company – helps you to communicate and transfer information to other employees
 - Yes, but not how to be a teacher or trainer in a classroom, rather how to pass on the skills on the job and communicate better with people - communication skills are the key. Practical skills not so much theory.
 - Short courses should be offered on communication by RTOs in conjunction with associations
 - The old 'train the trainer' type program on how to mentor, coach, and pass on your skills and how to communicate better. Not how to teach in a classroom. Short courses only.

B. Apprentices

1. The survey shows that industry feels the best way to increase skill levels is by taking on apprentices but 27% have had no apprentices since 2008.
2. Why is this?
 - There's a lack of knowledge in the industry on apprenticeships
 - TAFE system has too much bureaucracy
 - The industry is not seen as a viable industry
 - The apprenticeship in landscaping is not seen as worth doing by young people

- No idea why – it makes no sense at all
- It's cheap labour
- Are they really cheap – it costs you money to train them, to fix their mistakes etc?
- If you put an ad for apprentice on SEEK, will get 80 responses but 20% have no idea what the industry involves and will only last 2 days
- I have been putting people through a Cert III but I didn't know there are incentives for taking on apprentices
- People don't know about the incentives
- You get 40 applications for an apprenticeship but none can show any evidence that they are really interested in the industry – they haven't tried to train themselves ready for a job
- You have to interview the parents as well and if the young person has a good family relationship, then you have a better chance that they will be a good employee
- TAFE is not teaching anything that is relevant – they use failed landscapers as trainers
- TAFE is a fantastic organisation & I really like my apprentices having a day away at TAFE and learning from 5 or 6 industry experts in their field
- The apprentices need to know theory as well as practical skills
- We have TAFE come to our office to train our apprentices – they won't go to TAFE lectures so that didn't work – now with the training onsite, it works
- Failed nursery people are not good trainers at TAFE – our businesses are better trainers
- Many don't understand the benefits – apprentices are committed and want a career path – they will stick at it if they have an apprenticeship
- It's hard to get good quality apprentices
- I'll hire a foreign worker compared to an Aussie any time as they have a better work ethic and better attitudes
- Most businesses don't understand the incentives that are available
- The long term commitment of an apprentice is difficult for a lot of the smaller businesses so many don't take them on
- There's an issue with drugs and alcohol with young people which is a WH&S issue especially when operating machines
- We need industry to promote the industry at school so we have a better pool to select from – parents think landscaping is a good option for slower students when the industry needs good kids
- Everyone here is aware of the apprentices and knows how to get one!
- The system is too complicated.
- Having an apprentice is hard work.
- Apprentices don't finish. They drop out.
- It's a generational issue. They are only interested in technical things not practical things.
- They expect everything to come easy and want to be boss after 3 weeks.
- We get 20 or 30 responses to an ad. Always getting resumes dropped in or emailed to me but you'd eliminate 95% on first read
- Applicants have no attributes.

3. Is it because no one wants to do a landscaping apprenticeship or because managers don't know how to go about it or they don't understand the benefits of employing apprentices?
 - There's a lack of security in the industry – so many peaks and troughs – makes it hard to sign on an apprentice and have ongoing work for them
 - Businesses receive letters from people wanting to do an apprenticeship all the time – the difficulty is choosing the right one to sign on
 - People are not interested in the industry
 - Businesses are not aware of incentives
 - 70 to 80% of businesses are small teams and very time poor so no time to train apprentices
 - Real businesses running as a business will take on apprentices – not those which are just 'lifestyle businesses'
 - Really hard to get good apprentices.
4. What needs to be done to fix this?
 - Information on apprenticeships and incentives needs to get out to businesses – state bodies need to get involved and promote traineeships to the businesses giving details of incentives and processes etc
 - Encourage 16 year olds to do a trade
 - Get kids into a school-based apprenticeship
 - Both TAFE and industry associations need to promote apprenticeships
 - Industry associations need to sell the idea of signing on apprentices and inform businesses on how to go about it and what the incentives are
 - Group training schemes make it easier and take the paperwork burden away
 - Government contracts say that you must have a certain percentage of apprentices but this is not enforced – it needs to be enforced
 - We have a formal mentoring process in our business. Master landscapers are buddied up with a trainee – we 'hot-house' skills, we train people twice as fast as other businesses – empowerment happens – we don't pay them to do their Cert III – they are not apprentices & do not do apprenticeships – we call them trainees. We encourage them to do Cert III in their own time at their own cost so they are committed to it – they don't drop out. We pay them a proper rate from day 1. We place no value on the apprenticeship program. Two of our trainees have now become mentors for new trainees. Training them in leadership is difficult but we are training them to think in 7-day cycles not just day by day.
 - The industry must promote itself as a good career option
 - We must market the industry – used to have TV ads doing this but perhaps could use the current renovation programs
 - The official industry classification code must be changed and the different levels in the career should be promoted
 - Need to promote the career paths within the industry
 - Apprenticeships contracts are not audited sufficiently and the system is lax
 - Promote career paths
 - Promote the industry
 - The profile of the industry has risen with Jamie Durie etc. But we are caught between Jim's Mowing and the construction industry
 - We can't afford to employ people with the skills we need

- Affiliation with the building industry rather than horticulture will help to raise the profile
 - People need to see value in the landscape product
 - We're frustrated with our place in the market
 - We want an accreditation program in place for the industry and are putting it in place
 - We need to elevate the public's perception of our industry
5. How can we encourage the signing on of more apprentices?
- Industry associations should inform members about incentives and what's available – they need to get solidly into this area.
6. What would you go about signing on an apprentice – what are the steps – what incentives exist for employers?
- Go to the TAFE and ask them to recommend students that would be suitable
 - Put current staff with no qualifications through a traineeship
 - Through a trade association who would help with the paperwork
 - I'd call the TAFE or a private training organisation
 - I employ them first and if they show potential, offer an apprenticeship
 - I'd go to TAFE or the Group Training Scheme.

C. Mature workers

There are also some government incentives for hiring and re-skilling mature workers

1. What do you know about them?
- You can employ mature aged workers and have their wages subsidised and their training funded – have used this
 - Trouble is the industry is fairly physical so not necessarily suitable for mature aged workers
 - Not a lot
 - Nothing
 - Not one of 7 people knew anything about this
 - No knowledge of this at all
 - Nothing
 - Nothing.
2. Would you see this as an opportunity to gain people who already have supervisory skills from their experience in other industry sectors?
- No, supervisors must have the industry experience – must have at least 5 years experience working in the industry. If they'd been in the industry and shown potential they would have been promoted up through the ranks to supervisor anyway.
 - No – the industry is too physical and once you reach 40, you don't want to be doing the physical work.
 - Keep my guys over 60 on and they mentor the young guys sharing the info that is in their head.
 - There are roles for older guys.
 - Could take on someone from another sector and upskill them – use their problem solving skills, negotiation skills, and to train young fellows.
 - There's an opportunity to hire mature people from another industry with supervisory skills and retrain them to this industry.
 - Salary is an issue.
 - Don't want older people on the job.

- Big businesses might be able to use them in specific roles but it is too physical to have people over 50 on the site.
 - There are limited businesses big enough to hire people into specialist roles.
3. What do you know about “experience +”?
- Heard of it but that’s all
 - Not much
 - Nothing
 - Nothing

D. Social media in attracting staff

Social media, a preferred method of communication by young people is not used by the employers who responded to our survey when looking to attract new staff. (Facebook: 76.9% were extremely unlikely to use it. Twitter: 87.5% were extremely unlikely to use it.)

1. How do you currently find new staff when you need them?
- Word of mouth
 - Using the TAFE register
 - Through the industry association
 - SEEK really works
 - Word of mouth
 - Need to get the youngest person on your staff to do the web page, Facebook page, Twitter – this is today’s word of mouth
 - SEEK
 - Word of mouth
 - Networking
 - Within own staff – offer current staff and incentive if they find a new staff person
 - Facebook – have just started using it and it is the way of the future
 - The industry is slow to take up new technology and this is a problem for us
 - Career One and SEEK
 - Through our clients
 - Word of mouth
 - Through a recruitment company
 - Yes, it would help
 - No, I don’t want to be there - it is too dangerous
 - I advertise in the paper
 - Ask around
 - Word of mouth
 - Use a job agency
 - I go to the high school and take interested kids on work experience and choose my apprentices that way
 - People chase me for jobs. I don't have to go looking.
2. Would it help if businesses increased their skills in this area so they could adopt these new technologies for gaining staff and also for marketing the business?
- Absolutely – the state organisations must get marketing for the industry into the social media sites
 - Possibly but we don’t have time to twiddle with it
 - Would prefer one-on-one contact with staff and clients
 - Yes but we don’t know how

- Yes, but the industry is slow to adopt new things
 - Yes
 - It would help if you were in to it
 - You'd need to get the right person to do it for you
3. What do you understand about how you would use these tools?
- You'd have a web site with a Facebook link and staff and their friends would like the page – the word would spread – like word of mouth – so a job vacancy would spread to friends of friends etc
 - The state association needs an online facility so that all members can showcase their completed jobs and jobs that have won awards – everything needs to be linked
 - I know enough to avoid it – I don't want to have my details being broadcast across the world
 - Don't like the lack of human contact
 - OHS is more important than having Facebook page etc so I will have my people doing that
 - I don't think Facebook and twitter will bring me business so I won't use
 - They will bring business though, they are modern word-of-mouth
 - The industry association needs to promote the uptake of new technology
 - I don't understand it
 - Could use Facebook to market our business by showcasing projects undertaken – before, during and after pictures
 - Could also show on You Tube
 - When the next generation has money, we'll put our mind to it but gen Y don't have money for landscaping yet
 - Could use a blog to show what we do
 - Filmed 'a day in the life of...' and will put this on our web site
 - By linking to other sites
 - I have just set up a Facebook site
 - Need to do a day's training
 - Not a lot
 - Can spell it but not use it.

E. Gaining higher level skills

The survey showed that owners and managers want to increase their skills in (amongst other skills):

- Green walls and roofs
- Advanced concrete finishes
- Advanced stonework
- Operating in a carbon economy.

(Plant skills needed are plant identification, basic botany, drought tolerance, knowledge of plant variety rights and building connections with nurseries for supply.)

Their preferred method of learning is on-the-job.

1. Is it possible to learn these skills on the job?

- No
- Some – yes
- No – will learn them at conferences

- Would like to use webinars but we can't get them to work – need training in doing this – our association has new web site and the web designers could run a program on this for members
 - No
 - No.
2. If not, how can we assist you to gain these skills?
- Associations must organise workshops (that are not free so people value them) on these higher-level skills – e.g. one day a week for 5 weeks
 - Industry organisations and suppliers must run workshops with theory and practice
 - The guys with the technical knowledge should run courses for us
 - Workshops with mix of theory and practical organised by industry organisations
 - Need to formalise professional development. To keep registration, need to do 4 sessions a year of professional development to stay current – this should be compulsory if you want to call yourself a Master Landscaper
 - Networking at functions is good too
 - Mentoring is great
 - You need to know about these skills so that you can manage your sub-contractors properly – you don't necessarily be able to do the concreting but you need to be able to ensure that the job is done to your standards and industry specifications.
 - Industry organisations need to take responsibility for organising and coordinating this training.
 - They wouldn't be hard to learn – just Google them and find a course and go and do it.
 - An industry workshop wouldn't work – the skilled people come to the association, unskilled people don't.
 - Supplier and industry association work together to run workshops with specific content.
 - Project management off the job by registered training organisations.
 - Mentoring across organisations setup by the industry organisation.
 - Employers must invest in their people and it isn't necessary to seek a government handout for everything
 - For a concreting workshop, you'd work with the concreting association
 - The industry association needs to be the disseminator of information
 - Suppliers should do workshops
 - Industry association should run industry nights
 - Government should subsidise industry bodies to offer training
 - You just Google what you need to know.
3. Who are the possible trainers? (Training organisations such as TAFE or a private provider, your landscaping association, product suppliers?)
- Difficult to find trainers – the association would need to source them – suppliers would be involved – may sponsor the training but they couldn't do it all
 - Suppliers will come out to site and show you how to use their product
 - Associations and suppliers need to run two-day workshops – practical and theory
 - Architects are designing using new ideas so contractors need to know how to build them
 - Industry specialists and suppliers – organised by industry association
 - TAFE doesn't teach this stuff and couldn't

- Industry nights with suppliers
- You don't need to be an expert on the skills but you need to know enough to be able to understand what the subbies should be doing
- Input costs are going up so we need to run our machinery in a way that reduces costs.

F. People management skills

People management skills in demand were:

- Motivating your people
 - Providing feedback to staff
 - Having a clear succession plan for your workers
 - Providing and promoting a clear career path for your staff.
1. How can training in these people management skills be provided on-the-job?
 - Must be classroom based – train the trainer type stuff so that they understand the theory
 - Larger businesses will hire a HR manager
 - A combination of workshops and mentoring
 - Night courses
 - Mentoring
 - No - not online
 - Would be interested in learning about webinars.
 2. Mentoring?
 - Yes, mentor the owners
 - Use a business coach
 - Good businesses all have business coaches
 - Be part of forum group for peer support
 - Everyone managing a small business is time poor so mentoring or coaching in the business is most practical.
 3. By whom?
 - TAFE & private providers
 - Association needs to sell the benefits of working on not in the business
 - It's a struggle to find courses especially on communication and delegation – you go to a communication seminar and are pumped up for a couple of weeks but it doesn't last – you need a regular mentor
 - We need local short courses coordinated by the association
 - Mentoring would be good.

The 2nd preference for gaining new skills is through face-to-face learning in a classroom

1. How likely are you to go to class to do a course in these technical skills or the management skills?
 - Currently doing a uni degree full time after having done a Diploma in Garden Design
 - I wouldn't do this
 - Content of current courses is not good for our industry
 - Positively yes
 - No
 - If I needed it, without a doubt.
2. So, thinking about all of the above what do you think the best training method would be so that employers in the industry can gain these skills?

- The industry must upskill – it has no choice – it is critical – the associations must run workshops
- Classroom followed by mentoring on-the-job
- Training to be tailored to the industry – industry-specific training
- Need skill sets in the training package tailored to the sector
 - Costing, tendering, estimating, using estimating packages
 - Contract management – with multiple levels for those just beginning to manage projects up to experienced people wanting to gain higher-level skills.

G. Planning, financial management & marketing skills

Financial skills identified included preparing tenders especially government tenders, costing a job and using an estimating software package.

1. How would you see people gaining these skills?

- A skill set on costing and tendering needs to be developed and offered to the industry
- TAFE
- Industry organisations to get 3 or 4 software suppliers to a workshop and give them all a chance to demonstrate their product so people can see what would work for them
- Should have learnt it on the job when doing apprenticeship
- If you can't count it, you can't manage it – everyone needs to understand balance sheets and P&L statements
- Very few businesses use estimating software - most use excel - need training in excel
- We need a skill set around these skills.

60% of respondents wanted to improve their skills in terms of identifying and maintaining a competitive advantage.

52% wanted to learn how to measure the effectiveness of their advertising.

55% want to better understand their legal responsibilities and risk levels

46% want to identify business risk but only 28% want to improve their skills in managing that risk. This seems a little strange that people want better skills to identify risks to their business but feel they have the skills to manage the risks once they have identified them.

2. How do you feel about that?

- The industry is moving so quickly that you must continually identify and manage your risk or you are really in danger and your liability is huge. (The head contractor ensures that all the liability lies with you.) This is really lacking in the industry – some contractors don't even use contracts, especially the small guys, so they really need to be brought up to speed
- Certificate IV in Small Business Management should be compulsory for all people wanting to start a small business
- Certificate IV in Small Business Management should be targeted to landscaping industry
- There is so much focus on WHS now – it is too generic and is one of the major problems for the industry
- Cert IV in Small Business Management should be compulsory for anyone starting a business

- Everyone starting a business should have to do a Company director's course – it is scary but you come away knowing what you need to manage and you understand the risks
- Industry association should run a company directors targeted at the industry – it should be run so you are working on your own business in the workshop – it can be very useful and you go away with a plan to implement to protect you and your business
- Cert IV in Small Business Management should be compulsory for all people starting a small business
- A 2-day basic company director's course targeted at the industry and working on your own business should be organised and offered by the association
- I'd like to do a course in strategic management to help me find a niche in the market place
- Managing cash flow is the greatest risk - businesses go down because of not managing cash flow
- Lack of communication with the client and managing the contract & variations is an issue
- Need skills in contract management
- Contract management is a big risk
- Cash flow is the biggest issue for most businesses
- Legal responsibilities need to be understood
- We need to manage all the red tape issues.

H. Business qualifications

The survey shows that there is a strong demand for business management skills. About 16% of respondents indicated that they have a business qualification (Certificate IV in Small Business Management; University degrees in Business etc.)

1. If you don't have such a qualification, how would you feel about completing one such as the certificate IV in Small Business Management?
 - I'm doing a Diploma in Business Management online currently – but you really have to work hard to find these opportunities – they are not promoted to you – the association needs to identify all these opportunities and sell them to members
 - If I were younger, I would – in the conventional way in the classroom, short sessions over time
 - Depends how long you've been in business – mainly you pick up these skills by workshops and short courses as you go
 - All should be encouraged to use a business coach or mentors and take part in forums
 - All well and good but why would you
 - People we are quoting against should do the course
 - Yes, I would
 - I would have seen value in it a few years ago
 - Don't need it now as I have specialists to manage all those areas
 - I have survived for 17 years so don't need it now
 - People should have to do Cert IV in Small Business Management before they start a business
 - People do need to do some business subjects now to get their licence

- The small guys are often the best tradesmen but they lack the business skills and so they go bust
 - Great if I could find the time
 - You should do it before you start your business
 - It would be all right if I had time.
2. If you were going to do that, how would you like to do it? (classroom, mentoring, distance learning using electronic tools such as webinars?)
- Classroom, one night a week for 2 years after work – tough going but learnt such a lot
 - Mentoring
 - Business coach. (Our business coach does the employee appraisals and helps staff identify the training they want and where to get it.)
 - Forum of other business people
 - Cert IV in Small Business Management should be mandatory for those starting a small business
 - More schools should teach small business management skills at school as everyone manages a small business – a family is a small business
 - Distance learning through online and webinars
 - Mentoring by experienced business people is the best option
 - Business coaches are good
 - A weekend workshop once a month is good for single guys
 - Just do ongoing short courses, as you need them
 - Yes, if it were specifically targeted at our industry and offered one night a week, locally
 - Yes, it is important. Would be great to get the Certificate IV in Small Business Management
 - I'd just do the bit that was relevant at the time.
3. If you are not interested in completing a business qualification, would you be more likely to do some short courses, say one three-hour session per week for three weeks on marketing or tendering or ?Or a two-day session?
- Absolutely – yes
 - Yes, if I needed skills I would do this
 - Yes, the qualification means nothing. It's the skills that count
 - I'll do what I need now, not sign up for a qualification.
4. How important do you think it is for people in the industry to gain a qualification? How important is it for people to gain a set of skills that will help them to do a better job?
- Very important – the industry has high standards and to compete you need a qualification
 - Very important and easy – everyone should just get off their backside, find the opportunities and just do it
 - Is time consuming but will give you a competitive advantage
 - Qualifications are important for employees but not for employers
 - Very important.

I. IT skills

The IT skills most in demand in the survey are

- CAD design
- Using project management software

- Using smart phones, tablets, laptops etc in-field
- Using spread-sheeting programs such as Excel.

Apart from using smart phones and tablets, these skills are fairly traditional IT skills. Little interest has been shown in learning how to use the latest technology to grow the business and do business better.

5. Is there a need for the industry to adopt the latest technology in order to do business better?
 - CAD is an expensive outlay and it needs to be upgraded each year
 - It's hard to tell which software is most useful – there are so many new programs coming on board
 - Residential landscapers must catch up or be left behind
 - The technology will give a competitive edge
 - Increases profit margin
 - Yes, especially the on-site equipment as you don't need to go to the office to contact suppliers – you can do it onsite
 - But smart technology is not construction friendly unless you buy really expensive gear
 - Yes, benchmarking etc
 - All foremen need smart tools in field
 - Foreman enters all hours for each person in his team each afternoon on his iPhone and it goes straight to pay system – very quick and easy to use –minimal training needed
 - In my business, mobile phones are banned – not allowed on the job
 - Owner must want to do it
 - Hard to find products which do exactly what you need them to do
 - Yes, it is so easy and affordable now and it often comes with training that is OK
 - The industry is slow to pick up technology
 - Yes, all agreed
 - An excel course would be great
 - Can't get the kids off their phones.
6. If so, how can the industry be encouraged to adopt more of the latest technology such as social media, web pages etc?
 - Most residential landscapers do paperwork after hours and have families so really difficult to find extra time for training – is a big issue
 - Suppliers need to market onsite – go out to site and show landscapers what their product can do
 - Industry associations should be involved too
 - Industry organisations need to run workshops which shows us what the options and opportunities are – what is available for the landscape industry and how can it be used – what will it do for us? They would need to invite along the IT specialists to show the options.
 - Through the association and having industry people show the advantages and benefits. (But people don't want to share as they see this as part of their competitive advantage.)
 - Run an association expo with suppliers sponsoring and showcasing the options and opportunities
 - Demonstrate to us how technology can enhance our job

- The association should run courses showing us how to use technology and what the benefits are e.g. Smart phones
- An excel course would be attended by all.

J. Outcomes from training

The survey showed that putting skills to work immediately is the most desired outcome from training – just getting the skills you need to do the job now. However, there were many comments in the survey that the industry is suffering because there are too many unqualified, unregistered people in the industry. It was said that they do shoddy work, undercut prices and generally disadvantage the industry.

1. Surely to upskill your industry and overcome this problem, it is necessary for people to become qualified, accredited and registered. How do you feel about that?
 - Very strongly – but we have no recourse for businesses that aren't members
 - Members have code of ethics and code of practice
 - Industry gives out too many awards and they lose their value, which reduces the effectiveness
 - Industry needs to be regulated
 - True – government licensing authorities need to get tough on shoddy operations – this needs to be a rigorous process
 - Government should promote to consumers that they should complain about shoddy jobs
 - When complaints received, government should have tough penalties
 - Industry associations should have a process in place whereby you need to get a licence and renew it every 10 years and this should require passing a test
 - Qualifications are important for employees
 - Accreditation is important
 - Whose responsibility is it with regards to ticketing for machinery and chemicals etc – why should employer pay – employees should come with this? (White card is now available online).
 - Employers want experience – that means they can do the job. Often the qualification is meaningless – doesn't mean they have the skills at all
 - Have own skill book and as people gain skills and get experience in using the skills, their immediate supervisor signs off on it – so they can take it to the next employer or use to get pay rise in the business
 - Yes
 - Sure
 - Definitely
 - Agreed by all
 - The majority of landscapers do not belong to an association – approx 20% do
 - It's not the qualifications that make a good tradesman but they need to do it as well
 - The training is just at the base level. Whether they are good at the job is determined by their experience and interest
 - Having a qual shows that they are motivated and attitude is important
 - The quality of training in the past has been atrocious
 - True.
 - 100%.
 - It is an unregulated industry - you just need to get a ute and a dog and you are in business!

- Many designers were in construction 25 years ago and use prices that are 25 years out of date when they give clients an estimate of what the project should cost so they think we are ripping them off when we give them our quote
- We need to raise the barriers to entry. Checks and balances are needed
- Designers need a skill set in construction so they better understand what they are asking us to do
- The public needs to demand a qualified landscaper. The association needs to educate the public.
- Absolutely, we are adopting an accreditation program and hope to have it fully operational in 2 years. How do we get everyone to come on board? Should the Cert IV in Small Business Management be part of the process?

The survey indicated that about 87% of employers think that it is extremely important that the outcome from training for employees is that the employees feel valued by the employer and can transfer the learnings straight into the business and do their job better. Only 43% think it is extremely important that the employee gain a qualification. Other research shows that gaining a qualification is important to employees and increases their satisfaction at work, making them feel more valued. How do you feel about that?

- People definitely need a qualification. If you want to tender for government jobs, you need qualifications now – you have to go through a process to meet pre-qualification criteria
- It is true that gaining a qual makes people feel valued – if your people are given the opportunity to gain a qual it shows that the company is interested in them and isn't just using them
- Seeing people moving up the company structure and being upskilled is good for all workers
- Skilling staff is very important for the succession of the business
- Qualifications are very important even if it is only Cert III level
- The quality of people that we start with – that are attracted to the industry needs to be improved first
- When hiring you have an obligation to hire carefully, to pay your tax, to do your BAS etc
- We need to reframe the industry and promote it better
- It is important for employers that their employees are gaining qualifications, as it is a selling tool for the business when looking to hire
- Helping your staff get qualifications shows a commitment to your staff
- We want them to finish their apprenticeship. A qualification makes them feel good.
- You want your staff to reach a certain level but not too high as then they'll leave. That's the reality in all jobs.
- If I train them up and they leave to start their own businesses then I have a pool of skilled subcontractors to use.

K. Apprenticeships & skilling up new people to the industry

Responses in the survey indicated that the best way to upskill the industry is to employ more apprentices. However, completing your apprenticeship means gaining a certificate III qualification.

1. The skills identified as being needed here are all above that basic certificate III level so we need to encourage people to keep on learning once they have become a tradesman. How can that be done?
 - We are putting existing employees through traineeships – one doing Cert IV in Project Management and one doing Cert IV in Horticulture- under funding and support from government.
 - Industry organisation needs to encourage people to keep learning after apprenticeships.
 - Associations need a full time development officer to work on this area.
 - Industry associations & training providers need to market the opportunities to businesses.
 - The association needs to develop and update opportunities for support that are available to industry.
 - Owners should provide an incentive for workers who gain qualifications – pay rise.
 - Other staff will be encouraged by seeing those who have qualifications move up the ladder.
 - Industry association needs to make sure the necessary training is available and accessible by industry.
 - Need to build this into appraisals – employees understand that to get pay rise, they need to gain the next skill or do the next course – they are given a choice of courses to gain the skills they need and need to be encouraged to do them. Employer needs to understand that sometimes circumstances mean that they can't do the course – e.g. family commitments.
 - Employ a better standard of person in the first place
 - You can't start with rubbish and expect to get something worthwhile.
 - You have to understand the career paths within the industry and promote those career paths – businesses must do this and so must the association.
 - By offering step-by-step career path to those who want it.
 - Career paths do exist in some businesses – mainly the larger ones.
 - By mentoring
 - We have people who started on the shovel but are now in managerial roles – they mentor others.
 - We need to showcase those who have worked their way up through companies.
 - Industry association should promote career paths and profile those who've come up through the industry.
 - Use You Tube clips showing the career path
 - Once they complete their apprenticeship, they should join the association. The industry is looking to have a special membership for them. Currently it is only for owners but they are able to bring their staff to events and workshops.
 - Offer short, sharp courses
 - Maybe after they finish apprenticeship they need to do skill sets on costing & contract management to become a master landscaper?
 - Registered training organisations should promote further training to completing apprentices.
 - Need to keep learning to keep licence. Compulsory ongoing professional development.
 - The industry should be in the construction industry not horticulture.

- The industry is about both construction & horticulture. It is too broad. You need to create sub groups that match the industry.
- The industry needs a fully funded CEO and a fully funded development officer.
- We need to work with HAL to get funding.

L. Choosing a training provider

1. If you decided you wanted to increase your skills, how would you choose the training organisation to use?
 - Go to open days
 - Talk to lecturers
 - Look for opportunity to articulate to university
 - Check the course format
 - Availability of recognition of prior learning and the ease of getting it
 - Check the content
 - By trial and error – try one of an organisations courses – if good, do another
 - Speak to the trainers
 - Check their track record
 - Check that the course leads to accreditation
 - Trainer must have industry credibility
 - Must be accredited
 - Must be value for money
 - You meet the trainer and need to be convinced that they can add value to your people.
 - Get referrals from within the industry
 - Look at the organisation's track record within the industry.
 - Credibility of the trainer
 - The relevance of the course content
 - The organisation needs to have finger on the pulse of the industry.
 - They need to get something at the end to show participation.
 - Trainer needs current industry knowledge.
 - Organisation and trainer need to be well respected in the industry.
 - Need to be able to choose exactly what you need
 - Need to know the specific information to be covered
 - I'd check with the industry association.
 - Needs to add value
 - Needs to be specific to the industry.
 - Closeness to business to minimise down time
 - Ask around to see what experiences others have had.
 - The flexibility of the timing and what they will do for you.
 - What it involves
 - I only know one training provider.
 - The trainers need to know what they are talking about.
 - Trainers have current industry knowledge.
 - Training is comprehensive and covers understanding and 'how to'.
 - Must cover the design side as well.
2. What would be important to you?
 - Feedback from others who had used the course
 - Trainers must be skilled and have current industry experience

- Trainers must have industry background and professional industry experience
 - That the training is industry specific so I can discuss it with my peers and learn from them
 - Training offered as a series of workshops
 - The quality of the trainers
 - Flexibility in timing of training, on-site or off-site, duration
 - What streams are available?
3. If you wanted to train your staff, how would you choose a training organisation? What would be important to you?
- Don't like fast tracking – you need to do a lot of different projects to get the full experience
 - But what if he does pick it up and is keen and motivated and can show the skills especially if he is a mature guy, he should be finished sooner
 - We keep those who complete their apprenticeship, as they often become the best blokes
 - There's a lot of variability at sign-off – in the past, it had not been trade qualified, people would be signed off when they couldn't do the job but now the employer has to sign off as well so that shouldn't happen.
 - Cost isn't important
 - Appropriate and applicable to our needs
 - Trainer must have specific industry experience.
 - Mobility – whether they'll come on the job
 - Whether the course is relevant to the business
 - Industry relevance
 - I'd get feedback from current students
 - Check the opportunity to access recognition of prior learning and how well the process is offered
 - The flexibility of the offering.

M. Best time for courses to be held?

What time best suits the industry to attend training?

1. Months of the year?
2. Days of the week?
3. Time of day?
 - Breakfast
 - Tuesday to Thursday – never Monday or Friday
 - Not December
 - January and February are good. (SA)
 - Not December
 - February if it is a really hot spell
 - Monday or Friday – not Tuesday, Wednesday or Thursday
 - Afternoon or evening
 - Early morning for owners/managers but late afternoon for employees with a beer
 - Midweek not Monday or Friday except perhaps Friday afternoon
 - Winter is the best time for training to happen
 - Autumn or winter – not November, December, January
 - Tuesday, Wednesday or Thursday

- You get more commitment to the program if you get them in first thing and they aren't distracted by what's happening on the job so 8am
- Doesn't matter – really only matters that the guys get something out of it
- In Qld the busiest months are mid-year – so offer training in the wet season when you can't work.
- Not Monday or Friday
- During work hours
- Afternoon so can finish with a few beers
- A one-day solid session rather than having two shorter days.
- January to June
- Not Friday afternoon
- Not Saturday morning
- Early morning is best say 7 o'clock
- Short bursts
- Country people prefer afternoons not requiring an overnight stay
- Mums prefer school hours
- The winter months in Tassie in the evenings starting at 5 on Tuesdays, Wednesday's, Thursday's.

Other comments

- Newcomers need to be taught the right attitude
- Can't teach attitude – need to model it
- Industry must promote itself as a technical industry to attract a better style of candidate
- Business owners must make time to go to TAFEs and schools to tell the kids about the industry and the opportunities it provides and offer work experience to students.
- We need to target people with the skills we need – e.g. target someone with the skills to be an estimator – not necessarily someone from within the industry.
- As a business owner, you're a footy coach, you need to watch your people, identify their strengths and promote them into that area with training – do 6 monthly appraisals to identify what your people want to learn.
- To get the right young people into the business, businesses need to be taught to ask the right questions at interview and to do a proper induction process – spend 3 months hiring the right person rather than 6 months trying to get rid of them.
- The industry and employers should promote World Skills – it needs to be highlighted – these young people are representing Australia – it is important but no one knows about it – there is no funding for promotion but it needs it. Businesses should encourage their apprentices to participate.
- Industry associations should use participation in projects like this and the outcomes from it in their promotion of membership. To join people need to see there is a benefit from membership and if the industry implements the recommendations from this project, people will see a reason to join. If they run courses, promote to whole industry but charge considerably more for non-members. This will give people a reason to join and the association might become a more representative body of the industry.
- Is there sufficient incentive for people to rise up in a company? It's not about the money. People just like to rise up in the company. They feel they can commit to a long-term career.

- This is a cottage industry that can't afford to pay higher wages for foremen.
- Most businesses provide in-house training to assist people to progress through the organisation.
- Public perception is that landscaping is not worth anything.
- Barriers to entry for the organisation are so low – people think you just need a ute, a shovel and a wheelbarrow.
- The steps to becoming a better tradesman need to be promoted.
- Industry needs to participate in career nights, as currently the industry is not represented at these.
- The industry struggles for recognition on a building site, as it is not seen to be part of the construction industry – we are perceived as gardeners when really we are the outdoor builders and are part of the construction industry.
- We would get better \$/hour rate as construction tradesmen – now the rate is compared to that of the lawnmower man.
- It is the industry association's role to raise the profile of the industry.
- If businesses understood their financial situation better, they wouldn't be going in at such a rate – they think you just need a barrow and a ute to establish your own business – they definitely need more training.
- Uniform licensing is coming across the country in 2017 – all states are working together and taking the Qld model. BSA will manage the construction part and industry will need to manage the horticulture part. This will provide a professional standing for the industry. BSA has now endorsed a landscaping contract for use across the industry.
- We'd get new blood into the association by running industry nights – providing social interaction – get tradies and apprentices along.
- Provide forums where you can discuss and go into detail about the opportunities – run these after work so people can come in their work gear.
- The best way to improve your people is to choose the right people in the first place.
- We need to breed leaders – empower them so they all know they have the ability to lead – whether a small team of 2 or working they way up to project manager or operations manager.
- The biggest problem we have is communication – we don't have it as a life skill – we need to do training so it becomes second nature. It's hard to find a course to teach communication. (There was no knowledge about the Front Line Management qualifications in the group.)
- The industry has no public relations problem in terms of sustainability. It is seen as a green industry and as improving the environment.
- No one wants to pay extra to be green – the industry has options that it can offer to provide its services in a more sustainable way but consumers are not prepared to pay extra for that.
- We should be under the building training package as hardscape is 80% of what we do. It would be easier to promote careers.
- We've had a lot of frustration with the training system for a long time and it's good to be able to voice it.

Appendix 3

Employer and employee responses at one-on-one discussions

Meetings in Perth, Adelaide & Sydney

Responses of landscaping business owners and managers

1. How comfortable are you that you have the skills and knowledge that you need to lead your business into the next ten years?
 - Very comfortable
 - Not really but probably have them – would like more
 - Training is available across all the skills we need but the courses are never landscaping specific – we need specific courses for our sector. Industry goes across horticulture, civil work and building so training needs to be specific for our sector.
 - Very comfortable
 - Very comfortable but always looking for further opportunity for development and training for us and staff
 - Reasonably but as industry changes, I notice deficiencies.
2. What problems do you see arising for your business over the next five years?
 - Compliance with legal responsibilities, OHS etc
 - Continuity of work in uncertain economy
 - Shortage of skilled supervisors
 - Shortage of people with contract administrations skills
 - Lack of skills – people going to the mining industry so we have to employ people not suited to our industry
 - A general lack of people
 - Lack of skilled senior management
 - There's a lack of large sub-division jobs so the bigger guys are moving into residential, cutting process and making it hard for the smaller guys
 - Unqualified people coming in and cutting prices
 - Working in a carbon economy – input costs going higher.
 - Mining boom is driving wages higher and salary expectations
 - Cost of living rising so clients less likely to have funds to do a proper landscape job
 - Cash flow due to downturn in the industry
 - Flexibility of workplace agreements
 - It's very hard to borrow now and expect it to be the same in the future
 - A shortage of skilled people – lack of both supervisory skills and technical skills
 - Lack of skilled people especially machinery operators, horticultural staff and supervisors
 - Cashflow is always an issue as we are always on a 45-day contract as a sub-contractor but they are always stretched to 60 days. We can't change this and get no support at all.
 - Safety regulations are a constant battle and it costs a fortune to stay up-to-date – it's out of control
 - Industry needs to position itself to be a greener industry – what do clients expect of us and how can we respond
 - Safety and OH&S

- The staff expect different things today so need to have skills to deal with this
 - Getting good skilled experienced people who can cope with the industry of today which is much broader and needs a broader range of skills
 - Need to upskill our people – our good blokes have reached a plateau and we need to get them to the next level of skills
 - The inflexibility of banks and difficulty to access capital
 - The industry is so over-regulated – you can't do anything without the government having their hands in your pocket or their nose in your business.
3. Are you confident that you will have the skills and knowledge you need to overcome those issues?
- Yes.
 - No
 - Yes, I'm confident but subject to economic climate, government etc
 - Yes, but I'd like more support through regulations to protect sub-contractors
 - Need to keep abreast of Safety & OH&S – need to keep up with best practice
 - No
 - No.
4. What skills do you think you will need to develop?
- Would like to develop my business skills and negotiation skills
 - Accounting skills and day to day financial management, taxation
 - Interpreting financial information and using that information to make decisions
 - Financial skills to set the business up to avoid cash flow problems
 - Managing cash flow risk – understanding how much to extend ourselves to buy new machinery or put on more staff
 - Understanding decision making processes – doing a sensitivity analysis
 - OH&S updates
 - How to meet requirements of being a green industry
 - Company director's course – protecting yourself and protecting your company
 - Keeping up with Industrial Relations best practice and legislation -how to meet statutory requirements
 - Business skills – HR, Industrial relations
 - Estimating skills.
5. How would you like to gain those skills?
- Through a university course – or maybe a vocational education and training diploma – possibility of recognition of prior learning
 - By doing courses but I need direction as to where to find the courses
 - Workshops, short courses – perhaps run by Business SA or TAFE or University – I'd rather not do this in a room full of competitors
 - Mentoring is the key but I'd be very selective as to who I'd use as a mentor – perhaps a retiree who had run a successful small business
 - Focused workshops
 - Short courses
 - One of two days if content matches what I need
 - We need practical workshops for owners and managers
 - Short, sharp focused sessions of training.
6. How do you best learn new things?
- By working with competent people I respect

- Through mentoring
 - Hands on, one-on-one, mentoring, someone to sit beside me at my computer and talk it through
 - Face-to-face.
7. How do you choose a training organisation or trainer through which to learn? What is important to you?
- Content of course; send one person along and if OK send others
 - Through their track record
 - The qualifications and capability of the individual trainer
 - Understanding the content and making sure it is applicable to my people and the industry
 - Cost of the course
 - Timing suiting the workplace
 - Accredited enough to provide right training
 - Not necessarily in the landscaping industry – not industry specific necessarily for business skills
 - Content of course
 - Experience of the trainer
 - Facilities and equipment of the trainer
 - Would be comfortable with a uni or a TAFE
 - Efficiency of delivery
 - Sort, sharp, interesting course
 - Must take something away that I can refer back to later
 - Trainer must have current, direct industry knowledge
 - Must be able to see a straight connection from training to the job
 - Trainer must be enthusiastic to keep audience interested
 - The format of the learning – I want real skills that are needed now by good speakers on a topic relevant to me in a workshop
 - Also like to learn from having the right people working around me
 - The availability of the course and accessibility
 - Length of course
 - Cost
 - Content – knowing what you will walk away with
 - The trainer’s experience and currency – must have real industry experience
 - Timing of the course
 - Whether specialists are being brought in to offer their specialists
 - TAFE is too unwieldy - too much bureaucracy.
8. The survey identified that there is a shortage of people with supervisory skills in the industry. What skills do you think people need to be a good supervisor, foreman or leading hand?
- Ability to manage staff
 - Ability to liaise with clients & staff & sub contractors
 - Ability to set out jobs
 - Having an understanding of levels and set-downs and of how projects are built
 - Negotiation skills
 - Leadership skills
 - Common sense and life skills

- Communication skills (2 way)
 - Ability to provide positive reinforcement and negative feedback when required
 - An eye for quality
 - Building skills
 - Horticultural skills
 - Planning, scheduling and project management
 - Personal relationship skills with peers and employees
 - Understanding of technical landscaping skills such as irrigation, planting, quality assurance, machinery operation, OHS, environmental impacts, minor civil construction and minor building construction
 - On-site experience to be able to manage the job
 - Communication skills to manage the people
 - Good understanding of the tasks & processes necessary to keep the quality up
 - Ability to lead and direct staff & sub-contractors
 - Ability to liaise with clients
 - Ability to read plans, lay out job
 - Ability to manage the budget and time frames
 - Cert III and Cert IV are basic level skills – need a lot more to be a supervisor
 - Labour, plant and equipment organisation
 - Scheduling and programming of the job or jobs
 - Focus on efficiency and financial management – they must understand the \$ and manage their budget
 - Must be personable and keep the client happy
 - Communication skills to liaise with the client
 - They must know how to build the project
 - Communication to deal with tradesmen, clients & the range of ages represented in the team – liaising, listening, negotiating, giving clear directions
 - Setting out/surveying
 - Understanding plans and specifications
 - Coordinating ingredients – scheduling, programming
 - Managing the project budget.
9. It also identified that there is a shortage of people with higher-level technical skills. What higher-level technical skills do your staff lack?
- CAD
 - Irrigation design skills
 - Maths ability and literacy to do calculations and identify quantities
 - Plant identification
 - Vertical walls
 - Project management
 - Understanding the financial side of things – being able to read the financial numbers of the business and the project
 - Managing workers compensation for the business.
 - Computer skills
 - Using in-field technology especially laptops
 - All the skills identified in the survey
 - Financial management and budgeting
 - Contractual understanding – variations etc

- Must be able to assess risks
 - Must have a customer service focus for both internal and external clients
 - Survey & set out levels
 - Need more skills in understanding the level of engineering needed in building the structure
 - Have to be able to read and interpret the plans prepared by the architect of designer
 - Must be able to interpret specifications
 - Must understand the materials being used and how to work with them
 - Current knowledge of new technologies – TAFE trainers are way out of date.
10. How can Landscaping Australia assist the industry to attract and retain people with supervisory and higher level technical skills?
- By getting the industry onto the Occupations-in-demand list
 - People drop out of apprenticeships because the system is ‘crap’ – fix the system
 - By continuing to promote the industry as innovative, and as a professional career path.
 - Educate the public on the cost of a landscape and the benefits of using a qualified professional landscaper and that they need to spend money up-front on a landscape architect or designer so that they get a good long-term product.
 - Reinforce to the public that a good garden adds 10% to the value of a home
 - Educate members as to what government support and training is available for a business- both in terms of landscaping skills and business skills.
 - Improve the wage classification as landscaping is currently one of the lowest paid
 - Provide supervisory and management courses for supervisors within the association – not external
 - Provide a range of other workshops to enhance technical and supervisory skills – we need a lot more of them
 - By offering workshops
 - Go back to proper apprenticeships not traineeships – those doing a builder’s apprenticeship learn a lot more in-depth theory – we need that
 - Would prefer on-the-job training rather than send people away for a month
 - They must raise community awareness of the industry and of what the industry involves
 - They must promote the career paths within the industry
 - They must support the industry to take more specialised training
 - Help people understand that there are skill sets needed and the job is more than just gardening
 - Put together workshops on the skills identified in the project – noone else will do it
 - Need to get industry involved
 - Need to assist the industry to get a better understanding of the opportunities and options being offered in the training world – need to build relationships with AgriFood and State organisations
 - Must be the conduit between the government and members & coordinate information flow both ways.
11. How many staff have left your business over the last 12 months? Why do you think they left?

- Labourer churn approx 25%; leading hand and above <5%. Leave because of too much pressure, they go overseas or have babies. Some go to the mines but they have returned to the business. Some start own business but then are employed as subcontractors to the company.
- Little churn – only 7%. Mainly leave to go to get a better deal, say at the mines, some return. Or to start own business.
- We put off about 15 due to the downturn – none just left
- Don't lose many – one moved interstate – but have let a few go who weren't satisfactory
- We don't lose many
- One because of health issues.

12. What do you think you could do to encourage your staff to stay with you longer (Or what do you currently do)?

- Have great culture – good working environment
- Appropriate salaries, offer bonuses, profit share
- Offer training and promotion opportunities – career path
- Commitment to safety
- Strong incentive schemes
- Good management team who mentor staff
- We treat the company as a family and they are all part of the family
- Win the top innovative jobs so people want to work with us to get the experience and do great stuff
- Flat management structure so they are closer to decision making
- Great working environment – office, equipment, systems
- Always striving to do things better
- We're very fussy when we employ people (use SEEK) so we get the right people
- We encourage open and honest communication
- Pay above industry rates
- Good industry reputation- we set industry standards – people want to work here
- We have bi-monthly staff BBQs and a social club
- We offer a career path and training opportunities
- A family company – offering support when needed
- We recognize skilled interested people early and promote them quickly
- Offer a good working environment
- The directors are young so relate well to team
- Pay well above the award
- We've been in an exciting position, expanding rapidly and getting good projects
- We give the guys ownership of the company and we are all staff
- WE make it clear that there is a career path within the company and promote from within so people have the opportunity to rise as far as they have the skills for
- We support employees with training opportunities
- We pay well compared to the industry
- Pay well
- Give a variety of work – don't expect them to do the same thing every day
- Let them use all the skills they have
- Give them flexibility where possible

- Provide good working facilities – clothing, equipment, vehicles etc
 - Provide a good working environment.
13. Other issues:
- Unqualified people is major issues for the industry, shoddy work, driving prices down
 - Very difficult to attract apprentices
 - WE struggle to get good machine operators – they go to civil and mining which pay more
 - Company director's course is needed as the duties and responsibilities of being a director are a real challenge.

Staff Responses

1. How confident are you each day as you come to work that you have all the skills and knowledge that you will need to do your job really well?
 - 85% - every once in a while there's something new
 - 75% - but there's always someone to ask for help
 - Confident
 - Pretty confident
 - Fairly confident
 - Pretty confident – I've been here for 20 years – worked my way up from apprentice to management.
2. How confident are you each day as you come to work that the people you work with have the skills, knowledge & experience they need to ensure that the job is completed on time, on budget and in such a way that the boss & the client will be extremely happy?
 - About 70% - a few have TAFE qualifications but most do not – I have to do on-the-job training
 - 75% - just lack of knowledge around some issues – no contract management person in the business
 - Not really confident
 - Sort of confident – they could have a lot of training though
 - 100% confident about the tradesmen
 - TAFE needs to be more focused with apprenticeship training – they need to set and meet standards – they are too lax now so can't be confident about apprentices
 - Reasonable confident – there's a good group of people and we work closely together.
 - Staff have come up through the business and are coached by their supervisors.
3. Thinking about the owner/manager of the business, what skills or knowledge do you think would improve the way he/she does their job? How good are they at supervising the work? How up-to-date is their industry knowledge and familiarity with new techniques?
 - A few supervisors have great experience but no qualifications and so are not able to explain why you do things – makes it hard.
 - Departmental heads are learning all the time – the manager is not so hands-on. Every time we do a build we learn new things
 - Supervisors in field really know their stuff. They have been promoted in-house – come up through the ranks and learnt on-the-job.
 - Communication is lacking – it's a massive problem
 - Getting the right people for the job
 - They need to know everything and are pretty good here
 - Communication – just how to communicate to the blokes on site – providing relevant, specific details that gives the guys knowledge of what needs to happen
 - Used to have poor communication skills but has worked massively on this and is now much better and much calmer - He now talks things through
 - His knowledge and skills are incredible – all gained from years on the job
 - Pretty good – the GM regularly attends workshops so understands the industry and has lots of business experience

- Perhaps some business development skills especially marketing in order to differentiate us in the market place & rebuild brand recognition.
4. Thinking about your workmates, what skills or knowledge do you think they are lacking?
- Irrigation skills
 - Timber working skills – decking, building shelters
 - Tiling – bbqs, pools, outdoor kitchens (This is not included in the apprenticeships so skills are lacking)
 - Just basic skills
 - Contract management skills
 - Landscape drafting is missing from the team
 - It's not skills they are lacking – it's being able to do the job to the client's satisfaction
 - They need a better understanding of the job specifications and this needs to come from site supervisor
 - Definite lack of communication skills at management and site supervisor level
 - Need to get skills in giving and understanding directions and making sure they are understood
 - Labourers don't understand the importance of doing jobs properly and how it will come back to bite them if not done well
 - Just experience and getting they knowledge they will get over time on the job
 - Understanding the sequencing of the work
 - Skills are good but the attitude is all wrong – they all want to be boss
 - All the knowledge is available in the business and we feed off each other
 - Need contract management – understanding specifications, managing the budget
 - IT literacy is lacking – need the basics Word, Excel Email etc
 - Coaching skills – train the trainer
 - Communication skills – listening – dealing with people – understanding personalities
 - At foreman level, contract management
 - Costing, tendering, estimating especially government tenders
 - Need to understand new advances in techniques
 - Budgeting, estimating.
5. Thinking about yourself, in what areas would you like to improve your skills and knowledge?
- More computer literacy – quoting, tendering, pricing, management skills
 - Using iCAD
 - Using tablets, smart phones etc in field
 - Digital photography
 - Using quoting software
 - Project management – managing time, managing budgets
 - Some people management skills
 - Communication skills – giving clear directions
 - Giving feedback to staff
 - Contract management – all the legal requirements
 - Contract management
 - Business skills

- Really want to study design
 - More plant knowledge – developing a different palate and understanding how a plant will grow into the future
 - People management
 - Detailing and construction drawing
 - Computer technical skills – CAD, PowerPoint, Excel, smart technology in-field – would really like to do a course in this
 - Time management
 - Chemical knowledge – both the science and the application
 - Communication skills
 - I want to keep learning everything and build up my skills in landscaping
 - Irrigation skills
 - Just want to learn more and know more
 - With more time in the trade, I will see and learn more things – will do more diverse jobs
 - Environmental drainage
 - Plant ID and working with plants – just from my local area – not the whole of Australia
 - General landscaping skills
 - Time management
 - Contract management – get a firmer grasp
 - OH&S laws
 - CAD
 - Computer skills – excel etc
 - Using technology in field.
6. How would you like to gain those skills?
- Would like to do Cert IV and Diploma
 - Face-to-face with on-the-job practical tuition
 - Hands-on-tuition – not sitting in a room
 - If it needs to be in a classroom still need to apply practically
 - Through part-time study
 - Would like on-the-job training but how would that work?
 - By working with people who know what they are doing
 - Good to do a course to understand why we do things a certain way
 - Just through time on the job and experience
 - Would be interested in after hours, practical workshops or short courses
 - TAFE or uni but I can't travel a long way to a course after work 3 nights a week – not practical with a young family
 - Industry bodies run workshops and show new products and techniques
 - Formal face-to-face learning
 - Have done some higher-level qualifications by RPL and has been beneficial but would have learnt more by actually doing the course – would carry more weight.
7. How would you feel about undertaking an evening course, say one night a week for a year to increase your skills?
- Yes!
 - Possibly if it were really relevant and enjoyable and had no projects or assignments unless they were actually on my work at the time.

- Yes
 - No – wouldn't want to do that - I like my free time too much
 - Yes, so long as it wasn't too intrusive on my life
 - One night a week I could manage with distance education support
 - Need to learn about webinars – I need to move into the future with technology
 - I'd need to look at the content but would prefer mentoring or coaching.
8. If you decided to sign up for such a course, would you be prepared to pay for it?
- Employer should pay but if I left within 6 months I should have to pay it back
 - If it was for me, I'd pay but if it improved my ability to do my job, employer should pay, especially if it was expensive
 - IF it was tax deductible or if I got reimbursed in some way
 - No, the boss should pay
 - Would depend on the price but if I paid for it, I'd want to have control over what is covered
 - If it was an industry recognized course
 - Yes, the more I bring to the company, the more I am worth to the company and it would benefit me
 - I'd expect the business to pay but it would be a risk for the business.
9. Would you expect your boss to give you time off on pay to do your study?
- Yes, if it improves my effectiveness at work
 - Yes
 - This is not a realistic expectation but it would be good if it happened
 - If the course were paid for, I wouldn't mind not getting paid while I was doing it.
 - No, but if they could see the business would benefit, I think they would pay
 - No, not really
 - Probably – would need to be negotiated.
10. If you did a course, how important would it be that you gained a qualification when you completed and passed the course?
- The main reason you would do it is to get the qualification for when you change jobs
 - Very important- most important in terms of feeling valued by the business
 - It is very important – currently doing a Cert III traineeship on-the-job and the only reason is to get the piece of paper to help me get another job or do better
 - Very important – it's something to put next to your name
 - Yes, very important the client will look for the qualification on the quote and it will give me the edge
 - If it is an industry standard, then you need a qualification to add to the CV when quoting for a job but otherwise not super important.
11. How likely are you to stay with this business for the next 12 months?
- Highly likely to stay – feel valued by the business – incentive program, car and family support when needed
 - Very likely
 - Happy to stay for 12 months
 - Really likely
 - Very likely
 - Very likely
 - Very likely.

12. If you're planning a move, why is that? Would you go to another landscaping business or another industry altogether?

- Money is a reason to move, but I would really only move when I get to the stage where I don't want to be in the field so much and am looking for a job with the opportunity for some office work and some field work. I want to do some management training to make this possible.
- Really enjoy working here and with the people here – my hard work is acknowledged and appreciated.
- The only reason I'd change would be for a change in company management
- I'd want another landscaping job
- Another landscaping job
- Same industry – we really like the industry
- Would go to another industry if this weren't a family business – probably the police.

Other comments

Foremen need training in

- Survey and set out
- OH&S
- Environmental management
- Quality management and records.