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Cleaning Services Sector Skills Summary



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Hinonga Kōkiri/Head Start Project

The Hinonga Kōkiri/Head Start Project is an initiative from ServiceIQ that brings together service sector stakeholders from industry, employers, schools, tertiary education providers, and iwi throughout Aotearoa New Zealand to reflect on the impacts of COVID-19.

The purpose of the project is to hear stakeholder perspectives on:

- how COVID-19 has reshaped vocational pathways and business, and
- what people and skills, training, and learning pathways are needed to get a head start to COVID-19 recovery.

The stakeholder consultation began in August 2021 and concluded in October 2021 via industry focus groups. Their perspectives shaped the creation of this sector skills summary, and what support is needed for recovery.

The consultation results have been combined with industry insights, data and forecasting to produce

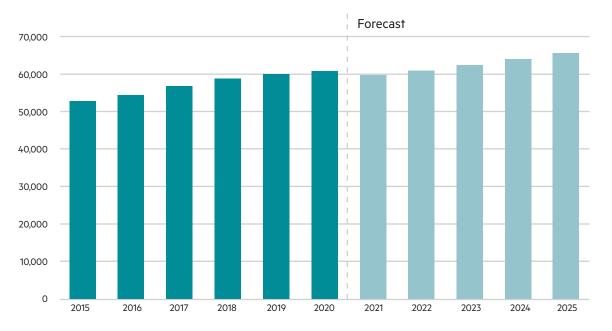
sixteen sector skills summaries, one for each sector represented by Ringa Hora Services Workforce Development Council. This skills summary is for the Cleaning Services sector. There are 15 other summaries for the accommodation, aviation; cafés, bars and restaurants; catering; clubs; contact centres; financial services; local government; public services; quick service restaurants; real estate; retail and retail supply chain; security services; travel; and tourism sectors.

From this research ServicelQ will produce a workforce strategy for Ringa Hora Services Workforce Development Council. The strategy will include industry, employer, schools, provider, and iwi voices. In this way the project gives service sector stakeholders an opportunity to shape vocational education in Aotearoa New Zealand.

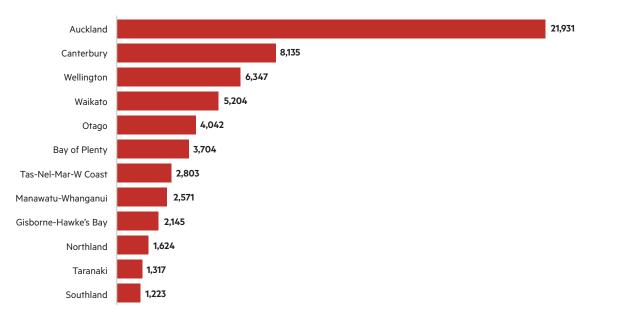
The report is structured into five main areas to show what impacts COVID-19 has had on the sector; the sector response to COVID-19; key drivers of future success; skills needed to support sector recovery; and skills initiatives and strategies.

Cleaning Services Sector Snapshot

Cleaning Services sector jobs

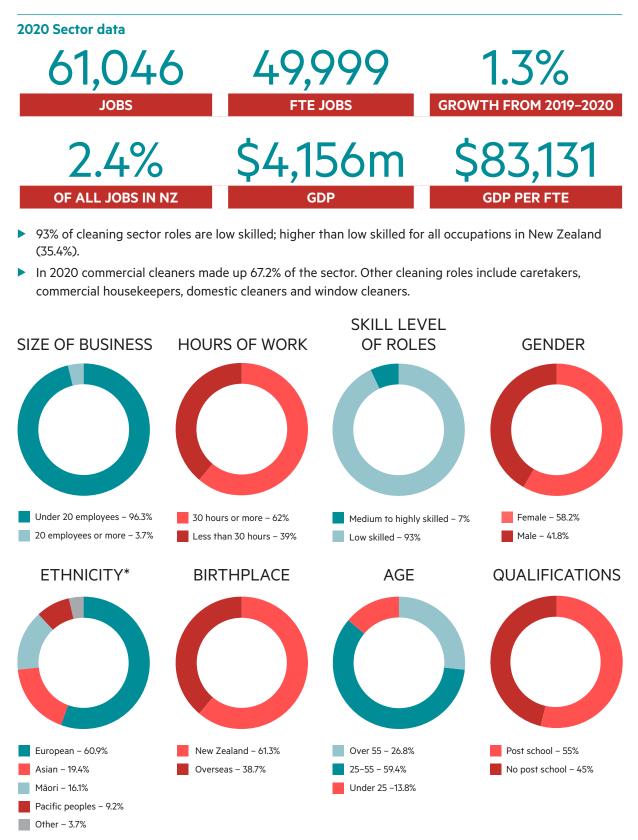


Prior to COVID-19 there were 61,046 jobs in the cleaning sector and the sector was forecast to grow by 5.3% between 2020 and 2025. Infometrics now forecasts job losses of 1,077 jobs or 1.8% of the sector workforce in the year to March 2021, then 1.9% growth (1,120 jobs) in the year to March 2022 and 2.5% growth (1,514 jobs) the following year.



2020 Regional employment

- In 2020 there were 4,125 business units employing one or more people, with an average of 4.4 people per business unit (compared to 4.4 people per business in the overall economy).
- The cleaning sector self-employment rate in 2020 was 17.4%; higher than the overall economy which was 16.8%.



*Ethnicity percentages may add up to more than 100% as people may identify with more than one ethnicity.

- According to the Census data, the share of cleaning sector workers born overseas increased from 34.9% to 38.7% between 2013 and 2018. Workers born in Asia have increased by 3,003 over five years from 12.7% in 2013 to 15.8% in 2018.
- > 24.5% of the sector is under 30 years old compared to 25.9% of the overall workforce.
- > 19.7% of the cleaning sector workforce hold a Bachelor Degree or higher.



Cleaning Services Sector Skills Summary

Context

The industry body

Building Service Contractors New Zealand (BSCNZ) is the industry body for the cleaning service sector, representing about 36 employers, mostly commercial cleaning owner operators. There are approximately 26,000 commercial cleaners in New Zealand and BSCNZ's membership companies cover around 15,000 of those employees. The majority of their members employ directly, although there are a small number of franchise operators as members. When new members join, they are taken though a comprehensive audit, developed in conjunction with MBIE and the Labour Inspectorate, to ensure that all members are compliant with New Zealand's labour laws.

BSCNZ reports to a Council, which has a good mix of different size companies, and a wide geographical spread. This ensures that when the organisation lobbies government: *'all voices and needs come to the table'*. BSCNZ runs industry events and awards, and initiated 'Thank Your Cleaner Day', as a way of recognising and valuing the work of cleaners, which is now celebrated in over 20 countries.¹

https://www.thankyourcleanerday.co.nz/

Training

BSCNZ originally ran the industry training organisation responsible for cleaning and was instrumental in developing the qualifications. As part of a wider review of industry training, in 2012 the cleaning and urban pest management qualifications moved to Careerforce. Careerforce now offers a range of qualifications and on-the-job training opportunities for cleaners, whether entry level or in specialist areas like healthcare facilities cleaning, carpet and textiles, contagion and specialised infection control, hard floor surfaces, food production and high-risk environments.²

In 2020, Careerforce unsuccessfully lobbied the Tertiary Education Commission (TEC) to have enrolment fees for cleaning and business qualifications covered by the Targeted Training and Apprenticeships Fund (TTAF). Despite the lack of success, as a gesture of goodwill, Careerforce waived enrolment fees on their cleaning and business qualifications from 1 July to 31 December 2020:

- NZ Certificate in Cleaning (Level 2)
- NZ Certificate in Cleaning (Level 3)
- NZ Diploma in Business and Management (Level 5)
- NZ Diploma in Business and Management (Level 6).³

BSCNZ reports that the content of the qualifications is well-used by businesses but there is less engagement and interest in qualification completion.

Fair Pay Agreement system

BSCNZ is party to the longest standing collective agreement in New Zealand. The Commercial Cleaners multi-employer collective agreement (MECA) currently covers 19 employers in the cleaning industry. There is also a District Health Board MECA for cleaners. The current arrangement is set to change as in April 2021 the Government announced the design of the Fair Pay Agreement (FPA) system. The design was informed by the Fair Pay Agreement Working Group and public consultation, as well as involvement from the New Zealand Council of Trade Unions (NZCTU) (representing unions) and Business New Zealand (representing employers and industry sectors). Current planning is that the Bill will be introduced in November 2021 and that the first agreement negotiations will be initiated in early 2022.

Part 6A of the Employment Relations Act

Subpart 1 of Part 6A of the Employment Relations Act provides specified employees who are affected by certain restructuring situations, such as a company being sold or a contract being transferred, with the option to transfer to the new employer on the same terms and conditions.

These employment protections apply to cleaning, catering, security and some laundry and caretaking workers under the Act when an employer's business is restructured.



³ http://www.bsc.org.nz/news/careerforce-training/



Careerforce now offers a range of qualifications and on-the-job training opportunities for cleaners, whether entry level or in specialist areas.



Around 240 employers pay the living wage, ranging from large organisations such as AMP, Westpac, and councils, to smaller companies.

The Living Wage

The Living Wage is the hourly wage a worker needs to pay for the necessities of life and participate as an active citizen in the community. It reflects the basic expenses of workers and their families such as food, transportation, housing, and childcare, and is calculated independently each year by the New Zealand Family Centre Social Policy Unit. The New Zealand Living Wage hourly rate for 2021/22 is \$22.75. It came into effect on 1 September 2021.⁴ Around 240 employers pay the living wage, ranging from large organisations such as AMP, Westpac, and councils, to smaller companies.⁵

Other research

The Workplace Team of the Auckland Regional Public Health Service undertook a project to **explore health and wellbeing in the cleaning industry**. This work was prompted by the COVID-19 spotlight placed on cleaning services, with the report being published in April 2021. Key insights were:

- COVID-19 has magnified the importance of cleaning services and has had an impact on the health and wellbeing of those in the industry.
- Stakeholders share a common view paying a fair income and making cleaners feel valued would make the biggest difference to their health and wellbeing.
- Cleaning is an essential service and occupation but continues to be undervalued.
- Cost-focused contracts are a problem "It's a race to the bottom".
- Factors associated with high retention rates include job stability, pay rates, work location and team culture.
- Inadequate on-the-job training and equipment present a risk to health and wellbeing.
- Access to Careerforce qualifications and other career progression opportunities varies across the sector.
- The design and management of cleaning work carries risk to the wellbeing, health and safety of cleaners.⁶

Where appropriate, insights from this report are incorporated in the following sections.

5 https://www.livingwage.org.nz/living_wage_rises_to_22_75_an_hour_in_september

⁴ https://www.livingwage.org.nz/

Auckland Regional Public Health Service. (2021) The Cleaning Industry in Tāmaki Makaurau - Insights into Health and Wellbeing.

Figure 1: Employment by ethnicity in the Cleaning Services Sector in New Zealand							
Ethnicity	Cleaning Services				Growth		
	Employment		Share of total				
	2013	2018	2013	2018			
European	33,392	35,960	84.3%	80.3%	7.7%		
Asian	7,929	11,438	9.1%	13.5%	44.3%		
Māori	6,655	9,480	6.8%	8.5%	42.4%		
Pasifika	3,838	5,458	2.3%	2.8%	42.2%		
MELAA	744	1,450	0.6%	0.9%	94.9%		
Not elsewhere included	235	0	0.4%	0.0%			
Other	833	713	2.1%	1.2%	-14.4%		

Māori in the Cleaning Services workforce

Ethnicity percentages may add up to more than 100% as people may identify with more than one ethnicity.

According to census data, while overall employment in the cleaning sector increased by 18.8 percent between 2013 and 2018, the increase in those identifying as Māori employed in the cleaning sector was 42.4 percent. Māori in 2018 accounted for 8.5 percent of the cleaning sector workforce, compared with 6.8 percent in 2013 (Māori accounted for 13.5 percent of the total workforce in 2018). Please see the Cleaning Sector Snapshot (p.2) for post-COVID-19 workforce forecasts.

The increase of the number of Māori in the cleaning sector reflects the overall growth of nearly 50 percent in the number of working Māori between 2013 and 2018, which accounted for more than a quarter of the growth across the total labour market. The total Māori population also grew substantially, with 180,000 additional Māori living in Aotearoa New Zealand. BERL suggests some possible explanations for the level of growth: Māori returning from overseas; actions taken by Statistics New Zealand to remedy the low response rates of Māori in the 2018 census; and the possibility that more people chose to identify as Māori in 2018 (BERL, 2020).



Sector consultation insights

1. The impacts of COVID-19 on the Cleaning Services Sector

This section discusses the immediate impacts of COVID-19 on the cleaning services sector, providing both the employer and employee perspective. COVID-19 has highlighted the importance of cleaners and the key role they play in keeping us safe and helping to prevent the spread of infectious diseases. This was acknowledged by Prime Minister, Jacinda Adern, in an April 2020 daily media briefing.⁷

Employer perspective

Employers report differences in the impact of COVID-19 on the demand for cleaning services. Some parts of the industry faced a surge in demand for cleaning services, such as more touch point cleaning and sanitising. Some businesses were able to recruit additional cleaning staff in order to meet this demand; however, many had to manage with their existing workforce, with cleaners varying their shift patterns to complete additional work. Conversely, some cleaning companies experienced a substantial drop in business during Alert Levels 3 and 4 as many buildings were closed. Company owners were concerned about uncertainty of contracts and the survival of their business. There was considerable uncertainty and anxiety; owners reported they felt a commitment to their cleaning staff and worked hard to keep their business afloat. Companies made use of Government wage subsidies.

For some businesses, the pandemic reinforced the need for a level of professionalism because of more stringent demands and the high stakes involved in delivering a quality service. There was a greater appreciation of the work that cleaners do, with occasions when cleaners were recognised as 'heroes' within their organisation for the critical role they play during the pandemic.

⁷ https://www.stuff.co.nz/life-style/well-good/inspire-me/121185634/coronavirus-prime-minister-jacinda-ardern-thankskiwi-cleaners-during-lockdown

Employee perspective

During COVID-19 many cleaners were at the 'front line' as essential workers, despite risks to themselves and their families. Some cleaners faced uncertainty about their jobs and income as the buildings they clean were closed during Alert Levels 3 and 4.

Initially there was significant stress and anxiety, with cleaners being concerned for their safety and that of their families. Policies and procedures were changing on a daily basis during the first lockdown. It was a rapidly evolving situation. In some workplaces (especially in the health sector) Personal Protective Equipment (PPE) training for infection control was already in place, but for others these were new processes to absorb. Some employees reported shortages with both PPE and appropriate cleaning products.

One supervisor spoke of the importance of her leadership role at the outset of the pandemic:

'If I go there, they will follow me. They think they are safe. And so I went there and all my team followed me'.

- FOCUS GROUP PARTICIPANT

Cleaners' 'work whanau' and union support became important as they checked amongst themselves about case locations and news updates. This collegiality was especially crucial for support and reassurance as cleaners gradually came back to work as alert levels decreased.

Employees also reported greater appreciation from clients:

'We're more close with the clients as well ... they appreciated us more than before'.

- FOCUS GROUP PARTICIPANT

Personal Protective Equipment (PPE) training for infection control was already in place, but for others these were new processes to absorb.





2. The response to date as a result of COVID-19

In this section we consider the ways in which the cleaning services sector is working differently in response to the impacts of COVID-19.

Recruitment/talent supply

Employers report that they have been struggling to find staff since the onset of COVID-19. This impacts on their ability to service clients or to take on new business, and means they need to be innovative in the way they look for staff, such as incentivising them or paying them more. Increased payment raises issues for some staff, however, as their cleaning job may be in addition to family or caring committments and an increase in wages would trigger benefit abatement levels. Small to medium-sized operators have found that their leadership teams who normally manage teams are now themselves cleaning 15–20 hours a week to make up for the shortfall, which impacts on companies' ability to take on new business. Border restrictions for temporary migrant workers are also a constraint on the labour supply.

Retention

There is a mixed pattern of retention across the cleaning industry. For some workers, the job is a life stage transition job, for example, students, people 'getting back on their feet' or parents fitting work in around child care commitments. Both employers and employees report that the workforce is also reasonable mobile within the sector, with some working multiple cleaning jobs. While both of these factors contribute to high turnover rates, there is also a core of stable employees, and one employer reported much lower staff turnover since COVID-19.

Business processes

Employers report that they are working much more flexibly since the outbreak of COVID-19. Support teams tend to work from home a lot more. Businesses also have more developed more operational flexibility and have learnt lessons from the speed of the move into the first lockdown. They are more agile and proactive with clients: 'We get on the front foot with the clients much faster. We've been quicker to have those conversations and be proactive'.

- FOCUS GROUP PARTICIPANT

To support this, quick response and business continuity planning has become more important.

The difficulties in recruiting new staff mentioned above has made some businesses more aware of the importance of an *'alignment of values'* with clients. When the ability to provide services is constrained, clients who appreciate their staff and who have done their best to honour contractual arrangements are valued:

'When you can't service everyone, you focus on the customers that value what you do'. - FOCUS GROUP PARTICIPANT

Technology

Clients now seek validation of the effectiveness of the cleaning that has been carried out. This has required the industry to adopt more sophisticated technlogy: *'it's lifted the game'*. Some businesses have developed new products, for example, micro-biolological testing, or are using exisiting technology like fogging machines and UV products. Cleaning practices and protocols from the health sector are also now being used more widely. The background information for the Cleaning Qualifications Pathway Review (2019) provided by Careerforce identified the following trends:

- Cleaning Methodologies:
 - Steam/non-chemical cleaning
 - Updates in chemical compositions to be more environmentally friendly.
- Technology:
 - 24-hour cleaning using 'robots' for light cleaning. It is not anticipated this will reduce the number of employees but change their roles and responsibilities
 - 'On demand' cleaning for intermittent high traffic areas, e.g. airports, instead of the 'scheduled' cleaning roster
 - Working in 'smart buildings'
 - Apps for managing workflow, time on job, incident reporting etc
 - Suppliers are familiar with new technologies as they are usually global organisations.

Training

In response to the current global COVID-19 pandemic Careerforce developed an online training module to educate individuals on the basics of this respiratory virus and to reinforce the measures that need to be taken to prevent its spread.⁸ This resource is available free to all businesses and has been picked up as a refresher in the current outbreak (August 2021).

Employees

Employees have also noticed the impact of staffing shortages, as they may provide cover when there are shortfalls, picking up extra tasks in their contracted hours, like training new staff, or working extra shifts. Cleaning can be physically demanding and increased workloads may contribute to injuries, back and shoulder pain, and musculoskeletal injuries.

⁸ Preventing the spread of infection and COVID-19 https://rise.articulate.com/share/Ynl9z99m3KqfW0G-3Bw5mGruwoQ7UZVy#/

Your body is aching from the rush although you're giving it all you can. We shouldn't be pushed like that, even when short, there's no one to fill, cutting hours back but expecting the same from you.

- AUCKLAND REGIONAL PUBLIC HEALTH SERVICE, 2021, P.24

Employees report that the experience of working throughout the impacts of the pandemic has empowered some cleaners, who have developed a greater understanding of their rights and the ability to say 'no' to unsafe practices or unreasonable requests. There is quite a high level of mobility between different cleaning companies and employees have a clear understanding of (what they consider to be) 'good' and 'rip-off' companies. But employees were also very clear that not all cleaners perceive that they have choices; those who are struggling financially or where the cleaning job is the only income may agree to incorrect practices or unrealistic hours of work.

3. Key drivers of future success for the Cleaning Services Sector

There are three factors that need to be taken into account when considering the drivers of future success for the cleaning services sector. These are:

- The contracting model, which in many cases works to drive down the price for services: 'the race to the bottom'
- The composition of business size within the industy, with the high proportion of selfemployed and small- to medium-sized businesses
- The image of the industry the need to professionalise the industry to support cleaning services and cleaners being more highly valued (both in terms of status and recompense).

Keeping these factors in mind, 'future success' may involve a virtuous circle, where fairer procurement practices enable employers (of all business sizes) to support more training, higher wages, and better workplace practices, that will in turn faciliate easier recruitment, better retention, and quality service delivery, which in turn will lead to a more skilled and valued workforce.

'Longer term, as we move to a living wage there will be less need for [cleaners] to work the kind of hours they have historically worked, which should in theory create more jobs. Looking further ahead there will be lots more roles out there because people will be looking for balance in their lifestyle other employees in the New Zealand economy enjoy'.

- FOCUS GROUP PARTICIPANT

It will be interesting to observe how the current supply constraints of cleaning services, the Fair Pay Agreement conditions that will eventually be negotiated and the expansion of the living wage, along with the longevity of the pandemic, will impact on the cleaning services sector over the next few years. The importance of training to this equation is discussed more fully in the last section.



4. Skills needed to support the Cleaning Services recovery

In this section, we discuss the skills that have come to the forefront since the onset of COVID-19. These are generally skill sets that were already identified and valued but the pandemic has shone a spotlight on their importance and intensified the need for greater development.

Digital/technology skills

The use of mobile devices has become more important because of COVID-19. With managers sometimes working remotely and the ongoing need for social distancing, mobile communication channels are vital. Employees also spoke of issues with the technology used for signing or logging in to some workplaces.

Communication skills

Different modes of communication also require a wider range of communication skills. There is an ability to tailor face-to-face communication to take account of (for example) English not being the first language. This is more difficult with text or email, leaving more room for misunderstanding and misinterpretation. It is also hard to 'check in' to ensure that instructions have been understood without the additional body language clues provided in the face-toface setting. Consistency of messaging is particularly important given the pervasiveness of social media misinformation.

Customer service skills

Since the onset of the pandemic, there is more demand for 'day' cleaning, as clients want to see that cleaning is taking place. This means that cleaners are no longer 'invisible' and there is a greater need for them to be able to interact professionally with clients.



The pandemic has intensified the need for effective team leaders and supervisors, something the industry acknowledges has 'always been a struggle'.

Team leadership/supervisory skills

The pandemic has intensified the need for effective team leaders and supervisors, something the industry acknowledges has 'always been a struggle'. While it's important that cleaners see there is a pathway to higher-skilled roles, the skills and characteristics that make a good cleaner do not always translate to good supervisory or management skills. This is perhaps less of an issue in larger companies who have in-house training capability but is a particular issue for small- to medium-sized companies, with flatter structures and less headroom for training.

'If we had good supervisory training it would help teach them to manage people, whether that's staff or client. The rest, technical skills around cleaning, we can teach... if you get good leaders, good first contact, jeez, it makes a difference!'

- FOCUS GROUP PARTICIPANT

One focus group participant mentioned a study conducted in 2015, which showed that the return on investment for training supervisors is far more than for training cleaners, because of the transient nature of the cleaning workforce. It was also noted that if supervisors move from one business to another, they may take staff with them because of the relationship they have with that supervisor.

Literacy and numeracy skills

Developing the skills above requires a sound base level of literacy, language and numeracy skills. Workforce demographics would suggest that a proportion of the cleaning workforce may have gaps in their literacy and numeracy skills such that they would benefit from extra support to develop these skills. English may also not be the first language for some. Of course, the development of new skills is only part of the issue; many aspects of cleaning require quite advanced literacy and numeracy skills, for example, health and safety documentation and procedures, measuring and mixing cleaning chemicals, financial literacy with pay slips etc. In addition to these standard requirements are the significant changes wrought by new COVID-19 response protocols.



5. Skills initiatives and solutions to support the sector over the next two years

As discussed in Question 3, training is vital to the success of the cleaning services sector over the next few years. It is important to note that a lot of training is carried out by companies; however much of it is in-house and does not result in a formal NZQA qualification:

We do train our staff. We all do it in-house. So, it doesn't show up in the official figures. But we all deliver fantastic services, with fantastic staff, it's just not in the figures.

- FOCUS GROUP PARTICIPANT

Nonetheless there are several areas where the ability for the cleaning workforce to achieve formal qualifications is, and will become, increasingly important.

Encouraging recruitment

Given the current constraints on labour supply, training could play a role in attracting people into the industry. Currently, BSCNZ in conjunction with the Ministry of Social Development (MSD), have developed a work broker program to assist individuals to find work within the commercial cleaning industry. While the programme has been successful, placing around 120 people, there has been little uptake of the opportunity to enrol in the Careerforce Level 2 qualification post-employment. BSCNZ explains this reluctance: 'they find it intimidating, the thought of an official qualification...'. There are also often undiagnosed literacy and language issues making new employees reluctant to engage.

Given the current constraints on labour supply, training could play a role in attracting people into the industry.

Supporting career pathways

A key part of increasing the appeal of the cleaning industry is enabling the industry to 'tell the story' of the career pathways and opportunities that are available. Training and qualifications, could play a key role in delineating those pathways and making the opportunities available more transparent:

'I don't believe our qualifications have touched on operations and what they look like in our industry. Career pathways could be clearer, to get from being a cleaner, through to customer facing, through to executing relationships internally and externally... and even through to owning a small business or manager in a larger company.'

- FOCUS GROUP PARTICIPANT

Validation of quality provision/'point of difference'

Training, and the formal credentialisation of that training, is an important way for companies to provide assurance to clients that they are doing a good job:

'A key driver is cleaning companies who can say 'our staff are qualified, they know what they are doing'.

- FOCUS GROUP PARTICIPANT

A qualified staff is also likely to become a key 'point of difference' for companies as wages increase and as (potentially) procurement requirements expand.

'If wages are increasing and we're asking our clients to pay more, there has to be perceived value for that - 'this is a higher standard cleaner'. That's the 'why?' from a client perspective ... Having the ability to link actual skills, and how we increase their wage shouldn't be a tick and flick thing, otherwise why would the client want to pay more?'

- FOCUS GROUP PARTICIPANT

Barriers to training

There are several barriers for both employers and employees to accessing formal training.

The nature of the work

For many companies, their contracts are multi-site and generally after hours, making any faceto-face training challenging.

The composition of businesses

Without dedicated training staff it is hard for small- to medium-sized businesses to engage in workplace-based training.

'What I've realised in starting my own business from scratch is that we want those smaller businesses to have trained staff and it's about supporting those smaller businesses to access training. It's a scale thing and a luxury. Now that I'm at the size I am it's great, but going up through the [business] sizes it was tough. We talk about the 'race to the bottom' and I think these things are connected.'

- FOCUS GROUP PARTICIPANT

The structure of the training

There is a feeling that the qualification is too long and delivery too inflexible for the structure of many cleaning services businesses. There are also pressure points around the availability of assessors. Shorter, 'bite-sized' training modules that are accessible online and supporting supervisors with a 'train-the-trainer' model were discussed as possible solutions.

Learner characteristics

There was recognition of the *'unique learning needs'* of cleaners. Many are working long hours and have multiple jobs, along with family and community responsibilities. The formal education system has failed many of them, so there is a fear of attempting qualifications, along with (in many cases) literacy, language and numeracy challenges.

'[We need] an online scenario, and flexibility to fit in to whatever hours the cleaner works. Bearing in mind, that often our staff are doing a second or third job, paid or unpaid. So, it's about offering them the opportunity to train where the gap occurs in their life. They all run a complex life.'

- FOCUS GROUP PARTICIPANT

'When you look at who our cleaners are – they have unique learning needs. But the qualification is the difference between having no qualification at all, and qualifications put pride in people's life, so as employers we have an opportunity to educate where the (education system) has failed.'

- FOCUS GROUP PARTICIPANT

Both employers and employees were passionate about the importance of training and the role it can play in improving working conditions, the quality of the service offered and ultimately the safety and well-being of New Zealanders.

Careerforce is currently updating their Cleaning Level 2 and Level 3 programmes and they will be available in 2022 as online and in paper based resources.



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