

Ceramic Tile Education Foundation

2019 Annual Report

Overview

From 2008 to 2018, CTEF has been in startup mode proving the Certified Tile Installer (CTI) concept and convincing 1600 of the best installers in the country to embrace the program.

At the same time, installation has increasingly been cited as a tile industry vulnerability by competitive products. This is due not just to the lack of available qualified installers, but also to the increasing requirements for craftsmanship as tile technology becomes more advanced.

Certification is more important now than ever before. It's time for the CTI program and advanced installation certifications to dramatically ramp up. This requires a different level of commitment in terms of people and resources, and a different level of industry ownership from everyone involved.

The 2019 CTEF Annual Report details a strategic vision that the NTCA, TCNA, CTDA, Ceramics of Italy and Tile of Spain – all owners of Coverings – believe in and have committed to.

Bringing the CTEF Mission to Life

The Mission of the Ceramic Tile Education Foundation (CTEF) is as follows:

CTEF will expand the knowledge of professional ceramic tile installation through training, education, and certification.

CTEF will promote the applicable industry standards to new and experienced tile installers, architects, designers, builders, and tile industry related people.

The overall goal of CTEF's activities is to raise the quality of ceramic tile installation.

CTEF brings the mission to life through training courses, certification programs and by raising awareness of those programs, thanks to the support of its sponsors which represent all segments of the ceramic tile industry.

Building from 2018 milestones in certifications, expanded training and raised awareness of and interest in Qualified Labor, CTEF has implemented several changes in 2019 to significantly grow CTEF programs in 2020 and beyond. These include:

- Certification Programs – CTI and ACT
 - Significantly grow the number of Certified Tile Installers (CTI) by 30% by the end of 2020
 - Formalize the ACT program as the next level of certifications for CTIs
- Training and Education
 - Expand CTEF-based education programs

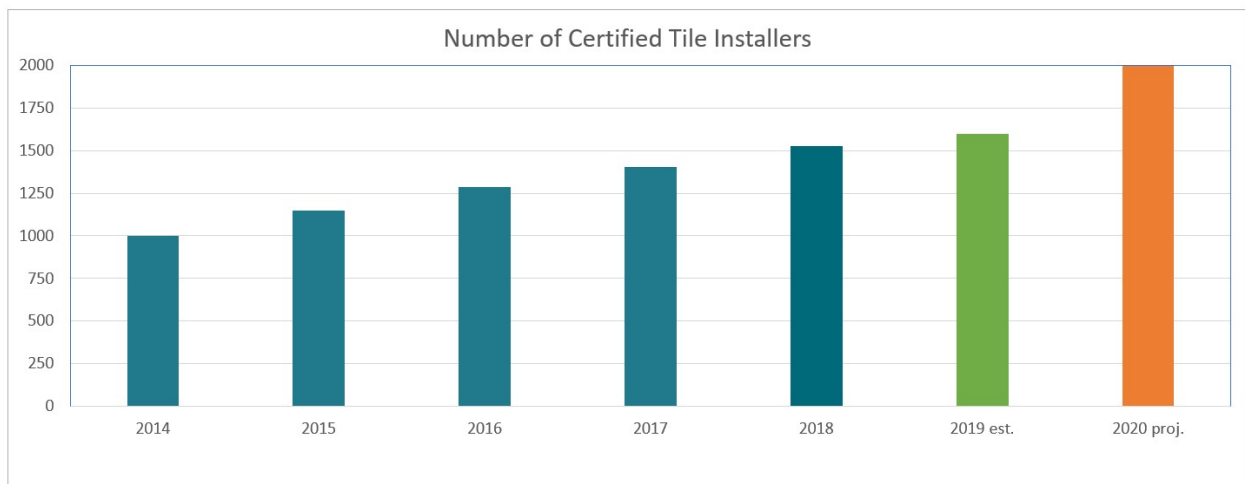
- Develop regional programs
- Increase Industry Involvement in Certifications, Training and Education

CTEF offers two tile installation certification programs: The Certified Tile Installer (CTI) and the Advanced Certifications for Tile Installers (ACT).

The Certified Tile Installer (CTI) Program

Established in 2008 to create a pool of recognized high-quality tile installers and combat poor installation, and with strong support from leaders of the National Tile Contractors Association (NTCA) and Tile Council of North America (TCNA) to promote this to their members, the CTI program has grown from 1000 certified installers in 2014 to over 1500 in 2018.

Growing the program to 2000 by the end of 2020 requires a new approach for implementing the hands-on portion of the certification test.



The CTI exam includes both an online knowledge test and a physical skills assessment conducted in regional warehouses across the United States.

Certified Tile Installers are Qualified Labor who install tile correctly, delivering beautiful installations. In the process, they become lifelong learners as they realize how much tile products and standards continue to evolve and how critical up-to-date technique is to a quality installation. Finally, they form a strong commitment to the industry volunteering to help the next generation of installers become Qualified Labor.

The Advanced Certifications for Tile Installers (ACT) Program

NTCA, TCNA, and CTEF with the leaders of the International Union of Bricklayers and Allied Craftworkers (IUBAC), International Masonry Institute (IMI), and signatory contractors of the Tile Contractors Association of America (TCAA) have created the **Advanced Certifications for Tile Installers program**, known as ACT.

To date, there are seven specific advanced certification tests offered in the ACT Program. To qualify for ACT, installers must have either completed and passed the CTI test administered by the CTEF, or successfully completed the three-year Apprenticeship Program administered by the IUBAC.

ACT language is now included in Master Spec. This development, along with the passing of standards for gauged porcelain tile and porcelain tile panels, creates a need for ramping up the ACT Certification tests. These certifications also represent a natural next step in expertise for CTIs; they need to be more readily accessible around the country and consistently scheduled.

CTEF also offers tile installation training and education.

CTEF Training Courses

CTEF regularly offers four training programs that Scott Carothers teaches at its training headquarters in Pendleton, SC. In 2019, these programs include:

- Understanding and Installing Ceramic Tile – 75 attendees
- Mortar Shower Base and Waterproofing – 30 attendees
- Ceramic Tile Inspection – 25 attendees
- Manufacturer training programs – 525 attendees

Given the importance of training newcomers to the tile industry as well as veterans about how to install, specify and sell tile especially given the threat posed by LVT, CTEF is expanding programming beyond Pendleton, SC.

CTEF Is the Result of Tile Industry Collaboration

As a reminder, CTEF is a non-profit 501c 3 Foundation that utilizes its resources to promote the education and certification of tile installers. The Board of Directors of COVERINGS, the international tile and stone show held annually in North America, provides much needed support to the Foundation, contributing over \$1,000,000 over the past eight years toward the operation and expansion of the CTEF programs. The owners of the COVERINGS show that have generously provided this support include:

- Ceramics of Italy
- Ceramic Tile Distributors Association (CTDA)
- National Tile Contractors Association (NTCA)
- Tile Council of North America (TCNA)
- Tile of Spain

Fundraising mutually supported and promoted by the TCNA and the NTCA, with levels of sponsorship - including the new Elite Level in recognition of Coverings Support - that offer value and benefits in return for that support, further support the CTEF Mission.

Readers will find listed in this report the generous and valued 2019 sponsors who make the work of CTEF possible. **CTEF thanks each sponsor for their unwavering support and dedication to the betterment of the tile industry.**

Achieving CTEF's aggressive goals by the end of 2020 will require even more industry participation.

In fact, to accomplish these aggressive goals, CTEF has implemented the following steps.

1. Reorganize People and Priorities

Up to this point, CTEF has operated with two full-time employees, some contract support and many volunteers. Achieving a 30% increase in CTIs in 18 months is not possible without additional resources. For that reason, the NTCA has committed two members of its staff to CTEF's success:

- **Jim Olson**, NTCA Assistant Director, will spend significant time to support CTEF certification program organizational logistics and fundraising.
- **Mark Heinlein**, NTCA Training Director, will spend significant time as 'boots on the ground' to prepare NTCA workshop and regional training participants to become CTIs. He will also be involved in 'train the evaluators' programs to expand CTI hands-on testing evaluators to industry and contract evaluators.
- CTEF has hired industry veteran **Heidi Cronin** as CTEF Industry Liaison and Promotions Director to promote CTEF certification and training programs. Her role includes getting installers to take the test as well as driving manufacturer and distributor engagement & contractor passion. This translates to identifying hosts for testing events and key influencers/spokespeople for the program as well as pursuing sponsorship, scholarship and fundraising opportunities.
- **Scott Carothers**, CTEF Director of Certification and Training, will ensure program integrity as 'train the evaluator' programs expand those involved in certification. He will focus on ramping up a sustainable ACT program and expanding tile installation education programs.

2. Train the Evaluators for CTI & ACT

Growing the number of CTIs by 33% by the end of 2020 and maintaining the integrity of the program is critical and requires a consistent and repeatable process that current and future CTIs will respect.

CTI Program

To grow the CTI Program to a much larger level of influence requires more evaluators than are currently available via the previous Regional Evaluators program. For that reason, it is being expanded to include Industry Evaluators and Contract Evaluators. CTEF is training tile industry volunteer representatives – whose companies have committed them to support CTEF - and subcontracted evaluators to perform testing and help promote, market and fill the schedule.

The first Evaluator Training programs took place in early July 2019. Three more are scheduled for October and December.

Note that this represents a significant commitment on the part of tile industry companies which subsidize travel expenses and their employees' time in support of CTEF.

The other challenge relates to the CTI hands-on testing pass rate statistics which have decreased over time, indicating the importance of providing additional training and counseling to less experienced installers. This underscores the importance of promoting certification during NTCA Workshops and Regional Training programs.

CTI Hands-On Testing Pass Rate Statistics



ACT Program

Although secondary to the growth of the CTI program, the testing for the ACT program needs to ramp up as these certifications represent a natural next step in expertise for CTIs.

To make them more readily accessible around the country and consistently scheduled, CTEF will identify hosts on the West Coast, the East Coast and in Kansas City for 1-week intense testing schedules in 2020.

The modules for this program cannot easily travel and be transferred from location to location as do the CTI test modules. For that reason, the three hosts will also need to store them.

CTEF plans to involve manufacturers to support ACT module development, storage, training and schedule development as well as fill the tests.

3. Ramp up CTI Certification Testing and Expand Education Programs

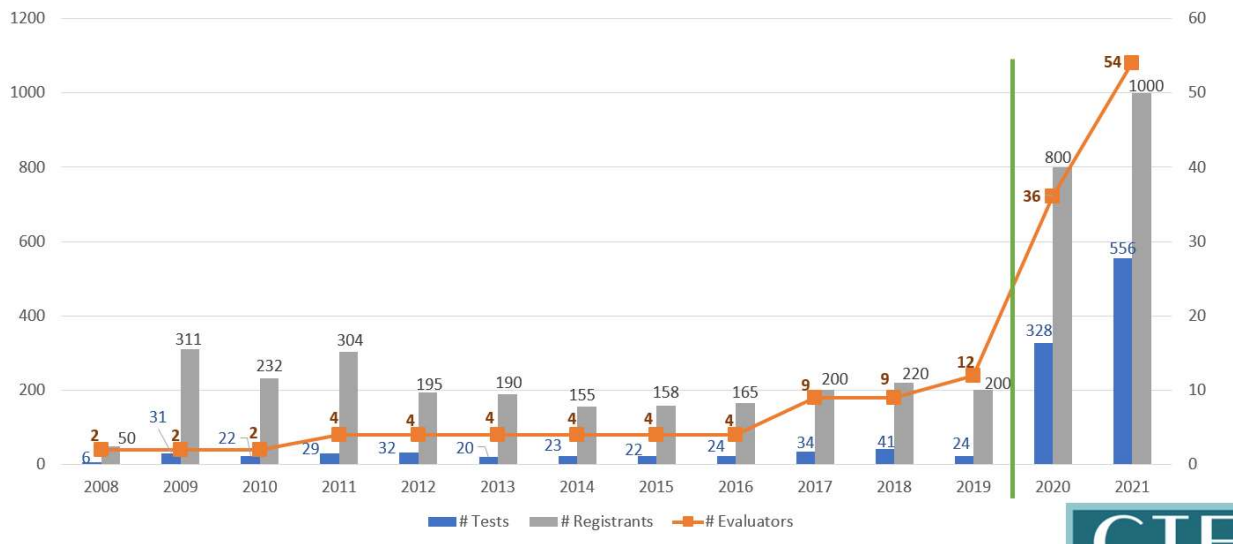
Ramp Up CTI Testing

Ramping up CTI testing to achieve a 30% increase in CTIs by end of 2020 requires careful planning, aggressive promotion and focused time management.

The roadmap includes:

- 40 to 50 evaluators
- 12 testing sessions each per year
- 5 registrants per session
- Assumes a 50% pass rate

Number of Hands-on Testing Sessions



Expand Education Programs

Because of Mark Heinlein’s involvement, Scott Carothers can focus on further developing the CTEF Education Programs, an important part of CTEF’s mission and vision.

Programs offered at CTEF Headquarters in Clemson, SC.

In addition to the current curriculum, CTEF is developing educational content for installers, distributors, manufacturer representatives, etc. These can be installation based or sales-based training programs and will help promote tile vs. competitive products such as LVT.

Programs around the country

Tile industry education programs shouldn’t be limited to Pendleton, SC. Rather, they should be available around the United States and at manufacturer, distributor, and contractor hosts in regional markets.

These can be sales based and be offered to dealers, retailers, builders, remodelers, designers, architects, installers, etc.

These programs offer the industry to opportunity to promote certification and Qualified Labor to influencers who can require or specify this on their jobs.

4. Increase Industry Participation

CTEF completed another successful fundraising outreach of \$331,000 for 2019 with record participation and donations.

In addition to industry sponsorship, CTEF has reached out to all levels of the tile industry to help with CTI and ACT certification evaluation, event hosting, supporting the work of the foundation, promoting Qualified Labor and more. CTEF is grateful and excited about the enthusiastic response.

As mentioned earlier in the report, the long-term support from Coverings and its joint sponsors has helped the Foundation reach many important goals. With a new commitment from NTCA in staff and financial resources, a sense of urgency exists to create a stronger pool of certified installers to market to consumers and industry professionals. With a strong program now in place, it is essential that the industry supports this program with financial and volunteer support.

There continues to be strong marketing campaigns in competitive industries citing quality installation as a weakness in the tile industry. We beg to disagree. **Ceramic tile installation is a highly skilled craft**, and recent comparisons to the cost of installation of our products compared to those of other industries indicate that **ceramic tile compares quite favorably when you factor in care, maintenance, and eventual replacement of the material due to wear and tear and performance**. This is only true, however, if ceramic tile is installed correctly by a trained and qualified craftsman.

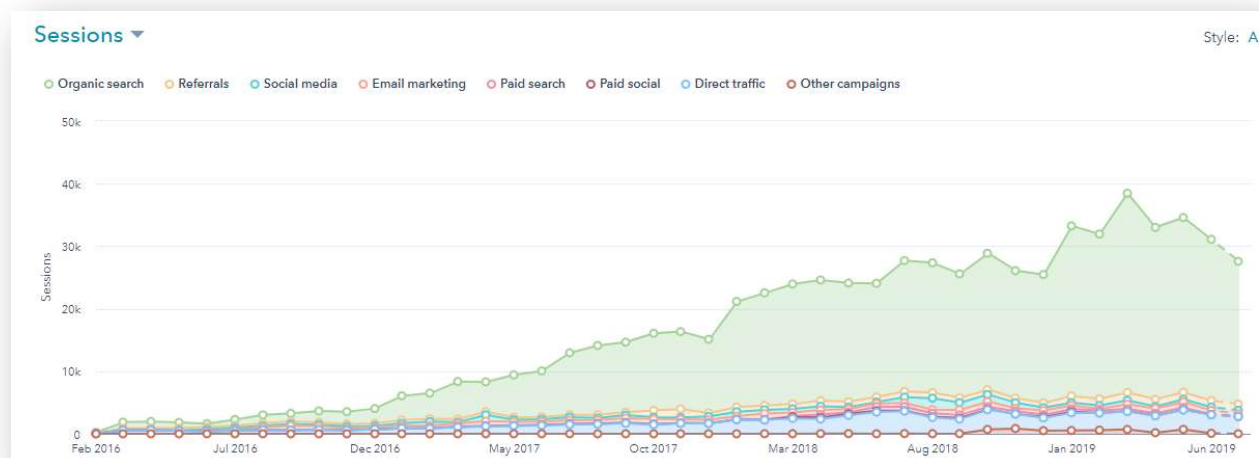
In order for consumers to have continued confidence in our industry, it is becoming increasingly imperative that a strong pool of industry recognized, certified tile installers be made available in all markets in the United States. CTEF has the ability to meet this need, but needs industry support to make it happen.

This is truly a tile industry endeavor.

5. Maintain Marketing Momentum to Raise Awareness of CTEF and Qualified Labor

CTEF kicked off a new era of awareness-raising in 2016 with the launch of the new CTEF website which enabled the implementation of a strong, educational content-based marketing strategy. The result has been a dramatic yet consistent increase in the number of visits to the CTEF website to learn more about Qualified Labor and to sign up for additional updates.

When the site launched, CTEF averaged under 2000 sessions per month. This doubled to 4000 by the end of 2016, 15,000 by the end of 2017, and has been over 30,000 sessions per month since January 2019.



Website audiences include contractors, distributors, dealers, industry insiders, remodelers, homeowners, and specifiers.

In 2019, CTEF continued the online advertising program launched in 2018 to specifically reach specifiers and homeowners. Educating specifiers to educate about Qualified Labor and Homeowners About the CTI zip-code locator on the CTEF website has been accomplished via:

- Banner ads in monthly ASID newsletters
- Google Adwords
- Facebook Lead Ads

In support of these programs, CTEF has developed in-depth web-based educational resources.

To raise awareness with new dealer/distributor and specifier audiences, CTEF regularly submits content in exchange for advertising to Premier Flooring Retailer magazine, Floor Focus Magazine, the Tile Files column, Floor Covering Weekly, Floor Covering Installer Magazine, Tile Magazine, and Tile Letter Magazine.

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