

CIC – Pittsburgh I-CAR Update

July 21, 2022



About I-CAR

CREATED BY THE INTER-INDUSTRY FOR THE INTER-INDUSTRY

- Founded in 1979 – International Not-for-Profit Organization
- Neutral Partner with Strong Support from All Segments of the Inter-Industry



VISION

That **EVERY** person in the collision repair industry has the information, knowledge and skills required to perform complete, safe and quality repairs for the ultimate benefit of the consumer.

MISSION

To deliver increasingly accessible, on-demand and relevant education, knowledge, services and solutions for the Collision Repair Inter-Industry.

3 Key Service Offering Pillars:

EDUCATIONAL PROGRAMMING
TECHNICAL INFORMATION
TECHNICAL SERVICES

Industry Educational Programming

1

PROTOCOL

Baseline Industry Standard for Knowledge & Skills



I-CARTrainToGain.com/Protocol

2

CREDENTIALING

Baseline Industry Credentialing



INDIVIDUALS

- Platinum is Achieved at ProLevel 3
- Maintained with Annual Training



BUSINESSES

- Gold Class for Repair Facilities achieved when 50% of a shop's Estimators / Non-Structural / Refinish and 100% of Structural Technicians achieve ProLevel 2

3

COURSES

DELIVERY FORMATS: Online / Live Classroom / Web-based Instructor Led – Virtual / In-Shop Hands-On Skills

I-CAR COURSE PORTFOLIO ▾



Featuring New
ADAS & EV
Courses

319 Total Courses Available!

Technical Information & Technical Services

I-CAR
REPAIRABILITY
TECHNICAL SUPPORT®

LEADING THE INDUSTRY FORWARD WITH
ADAS and EV EDUCATION

INFORMATION



RTS Portal: I-CAR.com/RTS

REAL-TIME TECH SUPPORT



REPAIR SUMMITS



Solving Industry Problems

RESEARCH



New Solutions

I-CAR Industry Report Card

- **8,898 Gold Class Shops**
 - *Up 3x from 2,661 end 2012*
 - **11,018 Total Shops Training with I-CAR**
 - **76,534 Students Training with I-CAR**
 - **25,132 Platinum Technicians**
 - **483 Fixed Training Sites**
 - **653 Schools using PDP-EE**
 - *65% of total school population*
 - **614,311 RTS Portal Users**
 - **4,602 Ask I-CAR Inquiries**
 - *34,320 answered since 2014*
 - **38 OEM/Insurer Repair Network Programs**
 - **49 Sustaining Partners**
-
- **Instructors / Assessors – 306** (and still hiring!)
 - **Staff Team – 204**
 - **Volunteers/Committees – 810 Volunteers, 145 Committees**
 - **Total Resources – 1,320**
-
- **Training Courses**
 - **Total: 319 / Average Portfolio Aging: 2.5 Years**
 - Skills: 16 / Live Classroom: 7 / Virtual Classroom: 27 / Online: 269
 - **Key Initiatives Supporting Industry/ Improving Programming & Execution**
 - **Chicago Tech Center for ADAS/EV leadership**
 - **Lean & Quality systems including IACET accreditation**
 - **Enhanced LMS & myI-CAR functionality**
 - **Course portfolio maintenance, maintain 4 yrs average max age**
 - **Ongoing Educational Programming PDCA, including VOC**



Announcing New I-CAR/CREF Initiative

Industry Talent Programming

*Now our 4th Pillar, this new Service Offering represents an
Expansive, Integrated and Collaborative Approach to
Addressing the Industry's Technician Shortage*



The Collision Repair Industry's Most Challenging Problem

THE TECHNICIAN SHORTAGE SITUATION & CONTRIBUTING FACTORS



TALENT ATTRACTION

- Lack of public awareness
- Fragmented industry approach lacks scale and industry branding consistency
- Talent recruitment and associated marketing often not a core Repairer/School Competency
- School enrollment below optimal level
- Repair facilities recruiting with minimal tools / support

ENTRY-LEVEL EDUCATIONAL PROGRAMS

- School programs need to better align with shop needs for Entry-Level ready Techs
- Not enough equipment and coached hands-on touch time opportunities
- Schools not yielding enough grads to fill needs requiring Repair Facilities to recruit from other sources
- Repair facilities are thus required to train their own Techs, and often retrain school grads

CAREER DEVELOPMENT & RETENTION

- Need for quality Mentors in Shops
- Opportunities for better HR Approach
- Compensation, Career Pathing, Recognition, Rewards not aligned with competitive offers in other fields
- Losing new hires early and after training, actual experience in Shop not aligned with expectations
- Repair Facilities also losing tenured Techs to other career opportunities, retirements, and competitors

**Extended Repair Times - Longer Rentals - Higher Storage Costs - Higher Insurance Premiums
Lower Customer Satisfaction - Repair Facility Management Challenges**

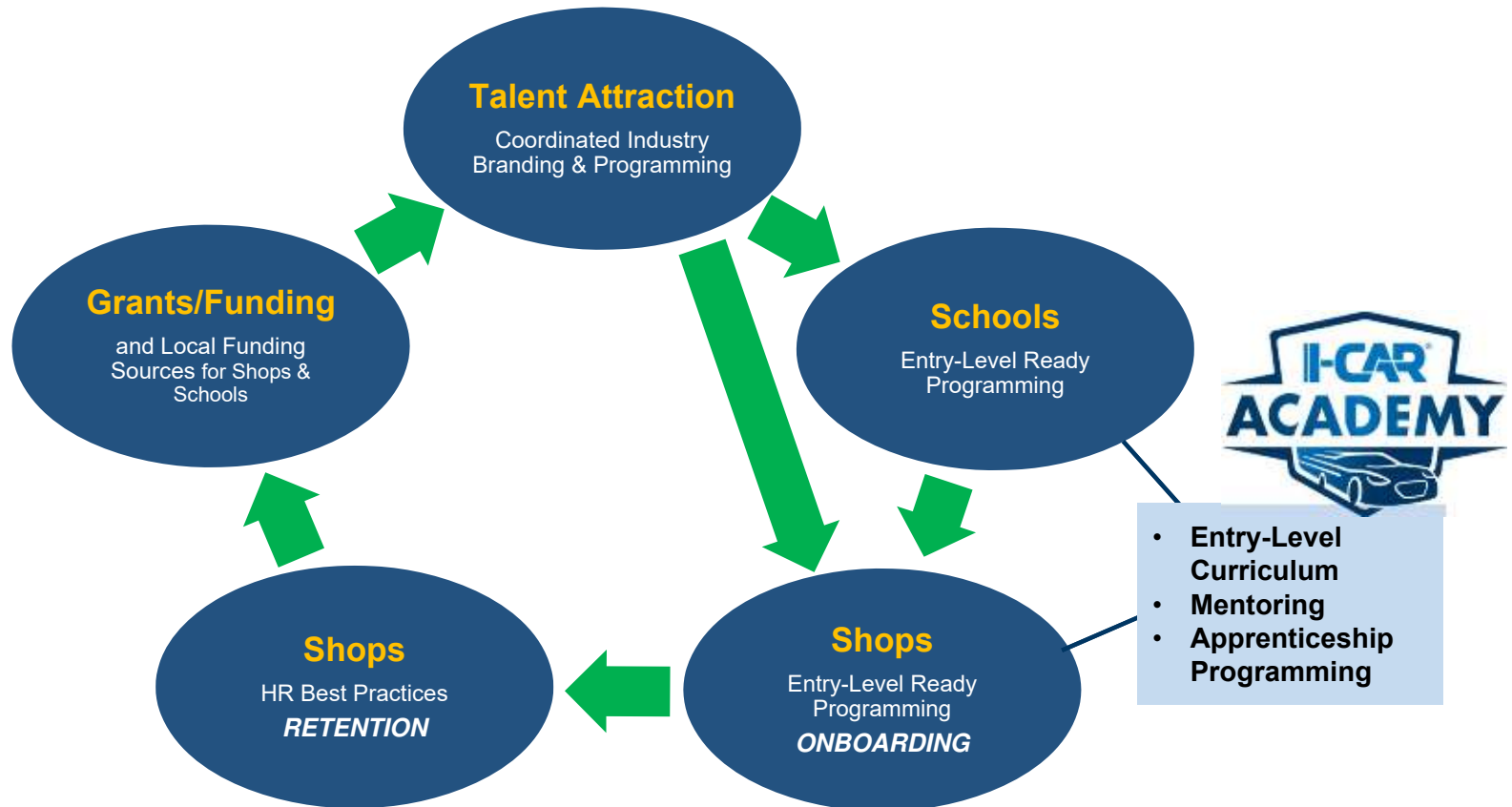
Program Objectives & Primary Solution Components

Purpose:

Help industry attract, develop and retain more entry level talent to fill capacity needs, with initial focus on technicians.

Objective:

I-CAR and CREF team to build upon good CREF work to date, scale it up with new success measures, and expand scope to also recognize the bulk of new talent is not coming from Schools today.



How this Solution is expected to help the industry

PROGRAM COMPONENT

TALENT ATTRACTION

FEATURES

- Quarterback Industry Brand and Website
- Drive Industry Collaboration to sync/multiply impact
- Industry Level Visibility to Public
- National & Local Campaigns
- Connect Talent Pools with Schools & Shops

BENEFITS

- Increase Outreach to Candidate Pools:**
- New School Student Candidates
 - New Shop Entry-Level Candidates

SCHOOLS

- New & Enhanced Entry-Level Curriculum
- Educator Best Practices & Mentoring
- Apprentice Program Option
- Academy Schools gain access to Talent Pools
- Other Qualification Benefits + CREF Funding

- Increase CTE School Student Onboarding, better school performance, student entry-level readiness with successful school/work transition**

SHOPS

- New Entry-Level Curriculum
- Apprenticeship Option & Mentoring Program
- HR Training & Best Practices
- Gold Class Academy Shops gain Access to Talent Pools

- Increase Entry-Level Tech Onboarding, improve Productivity & Retention effectiveness**

GRANTS/ FUNDING

- Govt/Foundation/Large Donors
- State/Local funding opportunities for Shops
- Keep Cost Low for Repair Facilities / Schools
- Sustaining Partner program enhancements

- Incremental Funding to support program, minimizing price impact on Schools & Shops**

Progressive Build & Roll-Out of Solutions 2022-2025

- First priority, building out Team (if interested, contact me – dara.goroff@i-car.com)
- Now beginning build of all components
- Initial Talent Attraction Website – 2022YE
- New Entry-Level Curriculum – Schools 2023/24 Academic Year, Shops 2H 2023
 - Also, a “Quick Hit” for Shop Use – Guidelines & Best Practices for use of current Industry Curriculum as bridge to new Entry-Level – ready soon!
- Additional components will progressively launch in the 2023/2024 timeframe



I-CAR & CREF are Uniquely Positioned to Help the Industry

VISION & MISSION DRIVEN PURPOSE

For the Benefit of the Industry, by the Industry



OPERATIONAL SCALE & SCHOOL/SHOP RELATIONS

- 11,018 Total Repair Facilities Training with I-CAR, ~9,000 Gold Class Shops
- 76,534 Students Training with I-CAR
- 653 Schools using PDP-EE, ~65%
- 510 Staff Team/ Instructors / Assessors, +810 Volunteers = **1,320 Total Staff**

COLLISION REPAIR EDUCATION FOUNDATION I-CAR

- Managing Charitable Donations and Grants
- School and Industry Relationships
- Program aligns with CREF's Vision and Mission

CONNECTED, COLLABORATIVE & NEUTRAL BUSINESS MODEL

I-CAR SUSTAINING PARTNER PROGRAM (49)



OEM / INSURANCE "GOLD CLASS" REPAIR NETWORKS (38)



I-CAR EDUCATIONAL PROGRAMMING



Industry feedback indicates we can do better in certain areas, and we are actively working to address

- **Several Voice of Customer sessions held this year**
 - PDAC (Product Development Advisory Committee)
 - Repairer feedback sessions
 - I-CAR Instructor/Volunteer meetings
 - General feedback
- **Specific areas we are currently reviewing/working on include:**
 - Placement of certain new **Skills requirements/courses** – Considering proper relevancy for Tenured techs vs. Entry Level techs. Placement within Platinum/Gold Class Pro Level 1-3 requirements vs. new Entry Level programming. 5 courses not yet required under review.
 - **“Gap Courses”** – certain new and significantly updated courses are currently required – deemed by some to be low value (time/benefit) – potential to shift to optional status
 - **Training Alliance** – engage more OEMs who offer training to reduce redundant training requirements and better international alignment (Canada, Australia, New Zealand), with linkage to Sustaining Partner program refinements
- **Please know we are listening and acting; work is in process and more to come soon**

Educational Programming – 2022 YTD Releases and More

- Kia Lane Keep Assist System
- GMC Hummer Electric Vehicle
- FCA Diagnostic Data Recording with wiTECH
- FCA wiTECH ECU Flashing
- FCA wiTECH Scan Tool Fundamentals
- FCA Driver Assistance Systems for Chrysler, Dodge, Jeep, RAM, Alfa Romeo and FIAT Vehicles
- FCA Service Library
- FCA Marketing Your Certification
- FCA Creating Compelling Messaging
- FCA Grand Cherokee WL
- Ford IDS for Collision Repair
- Ford Diagnosis and Repair System (FDRS) for Collision Repair
- Ford ADAS Repair Calibration
- Ford Advanced Driver Assistance Systems
- Ford Diagnosing ADAS-Related Concerns
- Repair Efficiency by Successful Damage Analysis
- ADAS Calibration 2-Day HOSD (@ CTC)
- Electric Vehicle Safety 5-Day HOSD (@ CTC)
- *Plus...* new ADAS Technician Role – Optional



***THANKS FOR YOUR
SUPPORT!***

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