

# SNAPSHOT

## OF THE SCHOOLS

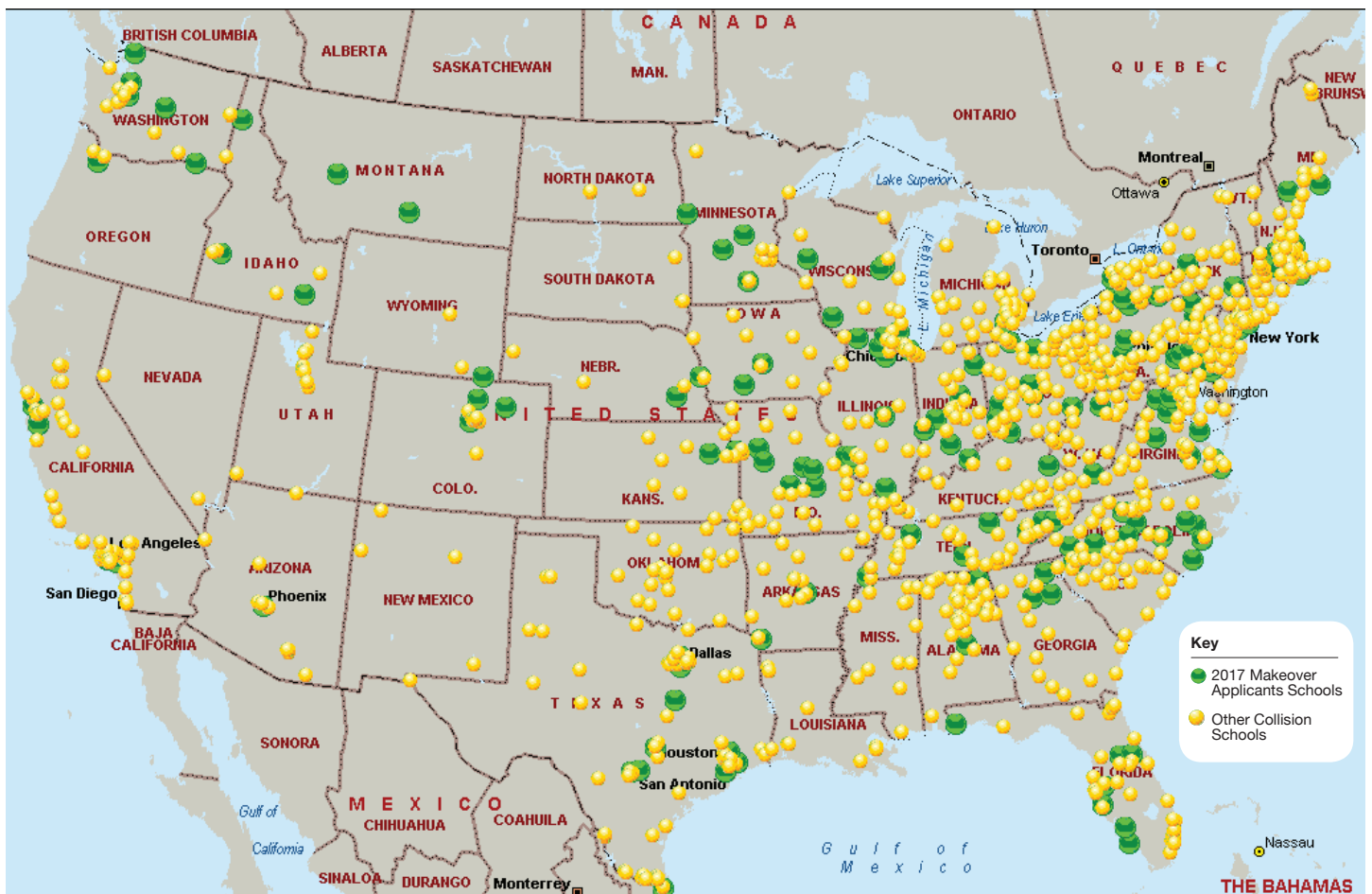
COLLISION REPAIR EDUCATION™  
**FOUNDATION**  
ICAR

## 2017 SUMMARY OF SCHOOL SOLUTIONS SURVEY

The Collision Repair School Solutions Survey is a longitudinal study conducted every year by the Collision Repair Education Foundation to establish and monitor the state of the pre-employment collision repair educational system.

The study is conducted through an online survey set up to collect information about both the school environment and the student population in collision repair programs. In 2017-18 study, over 400 collision repair schools responded, representing over 36 percent of the projected students training for a career in the collision industry. The survey provides a wealth of data that helps the Foundation and its industry partners to understand how and where to invest in school improvement programs and the effectiveness of those efforts.

### LOCATION OF COLLISION SCHOOLS



## KEY STATISTICS

The **table below** details key statistics tracked by the Foundation's research on the number of schools, students and specific attributes of their programs. As the table indicates, the total number of schools has declined over the past five school studies.

The decline in the number of schools has resulted in a decline in the total number of students. This decline comes at a time when demand for collision repair technicians has increased due to higher levels of new vehicle ownership and increased traffic volume over the past several years.

The Collision Repair Education Foundation has grown the number of schools it supports with grants and in-kind donations during the 2013-18 period from 443 schools in 2013-14 to nearly 600 in 2017-18. There was a spike in schools in 2014-15 due to a large one-time in-kind product donation from an industry partner.

The Foundation has also been able to grow the percentage of schools that applied for its Ultimate Makeover Collision Education Grant from nine percent in 2013-14 to 16 percent in the most recent school year. The makeover grants were started in 2009 providing one school a \$50,000 grant. The program has expanded to provide grants up to \$50,000, but includes many smaller grants designed to improve the level of capabilities of the schools as measured by Tiers in the Foundation's Collision School Career Readiness Benchmark.

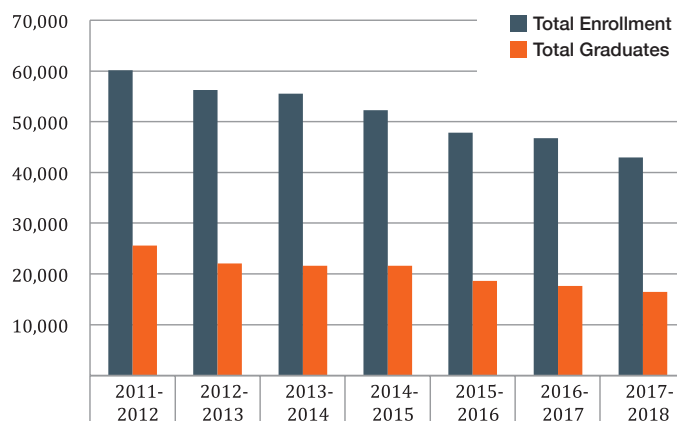
## SCHOOL STATISTICS

	2013-14	2014-15	2015-16	2016-17	2017-18
Number of Schools	1,165	1,156	1,115	1,081	1,032
Number of Students	55,526	55,247	47,866	46,759	42,927
Number of Schools CREF Supported	443	610	524	577	599
Percent that Applied for Makeover Grant	9%	11%	11%	11%	16%
Percent that are High Schools	59%	59%	61%	63%	64%
Percent that are Colleges	28%	28%	28%	25%	23%
Percent that are Both (High Schools and Colleges)	13%	13%	11%	12%	13%
Percent that Participate in SkillsUSA	80%	80%	81%	84%	83%
Percent that are NATEF Certified	N/A	N/A	N/A	N/A	50%
Average Class Size	19	19	17	18	17
How Many More to Accommodate	18	16	16	14	15
Average Female Enrollment	n/a	7	5	4	4

## ENROLLMENT & GRADUATION

As mentioned previously, as the number of collision programs decrease, the number of collision graduates is also decreasing. The **chart** details the Foundation's projection for both total enrollment and the number of students who have graduated each school year.

Enrollment Vs. Graduation



## STUDENT PLACEMENT

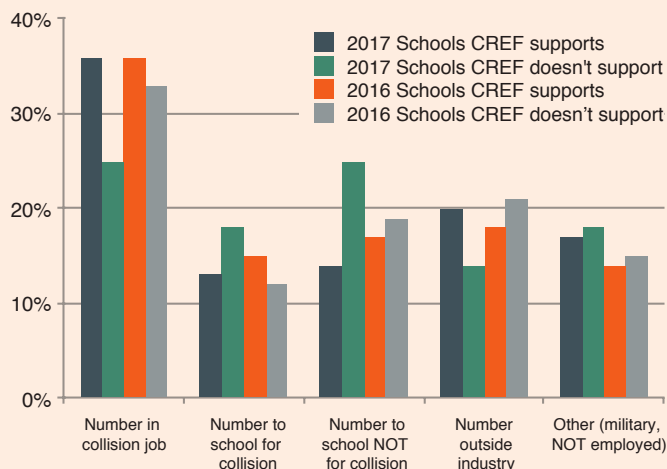
The **table below** compares the placement rates based upon three specific attributes at the school and the various combinations that are possible:

- NATEF (ASE) School Certification
- SkillsUSA Participation
- I-CAR PDP Education Edition Curriculum

Schools that included all three elements as part of their education program had the highest rate of placement into jobs in the collision industry at 44.7 percent versus 27.75 percent for schools that included none of the elements.

	NATEF/ Skills/I-CAR	NATEF/ I-CAR	NATEF/ Skills	All CRSSS Schools	Skills/ I-CAR	NONE
Placement Rate for Job in Collision Repair	45%	42%	39%	37%	33%	28%
Going on to College for Collision Repair	13%	10%	14%	13%	15%	8%
Going to a Job NOT in Collision Repair	19%	18%	20%	20%	19%	16%
Going on to College but NOT for Collision Repair	13%	17%	12%	16%	18%	32%
In the Military	4%	4%	4%	6%	7%	8%
Currently NOT Employed	6%	9%	10%	8%	7%	8%

Student Placement CREF Supported Schools

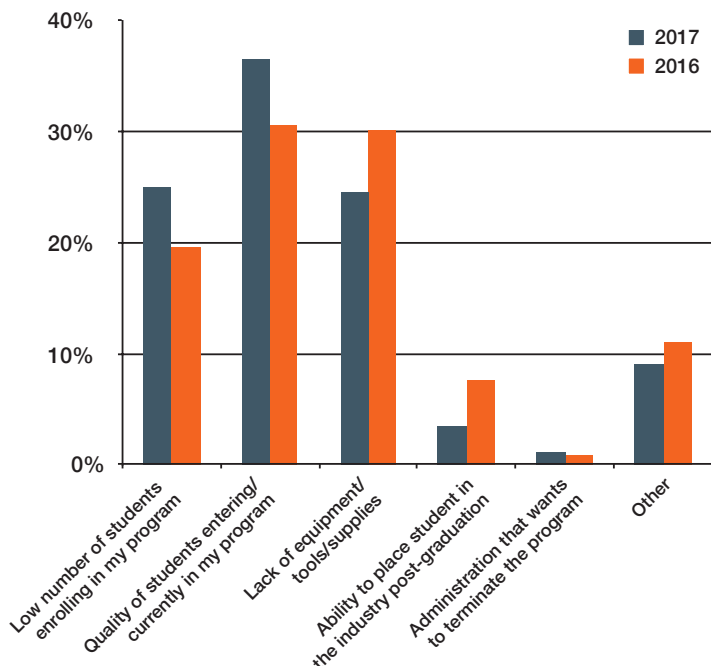


While there appears to be a clear signal of higher placement in the collision industry at schools we support, other categories are mixed. For example, in the 2017 study, fewer students went on to another school to study collision at schools supported by the Foundation, but the opposite was true in 2016. The **table at right** shows the placement rates for schools supported by the Foundation compared to those who do not receive support. In many cases, high school programs supported by the Foundation likely provide a more comprehensive training experience that prepares them for a job without the need for further education. Further data will be required to confirm any trends.

## SCHOOL NEEDS

For the past two surveys, we have asked respondents what the biggest challenge facing their collision program is today. The biggest concern expressed by instructors is the quality of the students entering their program, followed by concerns about declines in the number of students entering their program. Both have grown in the most recent survey versus the previous study.

**Biggest Collision Repair Program**



As part of the school makeover grant application schools are required to identify the tools they have and ones that they need for the NATEF/ASE collision tool list.

### Most Needed Required Tools and Equipment from the NATEF 2016 Collision Repair & Refinish Program Standards<sup>1</sup>:

1. Lineman Gloves (for use with hybrid vehicles)
2. Heat Monitoring Crayons
3. Electronic Dry Film Thickness Gauge with a + or - of 1/10<sup>th</sup> of a mil thickness capabilities
4. Parts Cart
5. Mini Belt Sander for removal of plug welds
6. Windshield wiper removing tool
7. Welding Safety Equipment: Skull Cap
8. Color-matching Light System
9. Laptop with applicable Diagnostic Software and Tools
10. Hood Props
11. Overhead Ventilation - for welding area
12. Infrared Contact Thermometer

<sup>1</sup>Data from the 2017 Ultimate Collision Education Makeover Grant Application

## INTERNSHIPS AND APPRENTICESHIPS

The number of schools offering some form of internship, apprenticeship or other experience in an actual employer environment shown in the **chart** is high at 85 percent in the most recent survey. This is up slightly from 82 percent in 2015-16 survey.

	2015-16	2016-17	2017-18
Internship – Work Study/ Apprenticeships/Job Shadowing	82%	84%	85%
None	18%	16%	15%

## COLLISION SCHOOL CAREER READINESS BENCHMARK PROGRAM

Since 2009, schools have been able to apply for the \$50,000 Ultimate Collision Education Makeover Grant (CREF school grant) to get much needed tools, equipment, and supplies for their school. However, after hearing feedback from donors/industry about an immediate need for entry-level staff, the Foundation created a new designation system for schools. Each school that applies for the Makeover program is given one of the following Collision School Career Readiness Benchmark designations:

- **Tier 1: Advanced**
- **Tier 2: Proficient**
- **Tier 3: Developing**

The designation will be determined by how the school answers certain questions on the Makeover application.

The goal is to get EVERY school to become a **Tier 1: Advanced School**.

	2016	2017
Applicant Schools	121	163
Tier 1: Advanced School	10	16
Tier 2: Proficient School	80	111
Tier 3: Developing School	31	35

SCHOOL REQUIREMENTS	TIER 1 Advanced	TIER 2 Proficient	TIER 3 Developing
Makeover Application	X	X	X
Collision Repair School Solutions Survey	X	X	X
NATEF (or equivalent)	X*	X*	X*
Contact Hours (for the entire program)	720	346	180
Active Advisory Committee	X	X	X
Required Tool List	100%	75%	50%
Curriculum (I-CAR PDP-EE or other that is approved by the state/district)	X**	X	X
Teach At Least 54 Basic Tasks	X	X	
Teach Soft Skills	X	X	
Teach Safety Program	X	X	X
Teach Estimating Program	X	X	
Instructor Continuing Education Hours (per year)	20	10	10
Established Internship/Apprenticeship Program	X		
SkillsUSA Participation/Service Learning Projects/Community Projects	X		

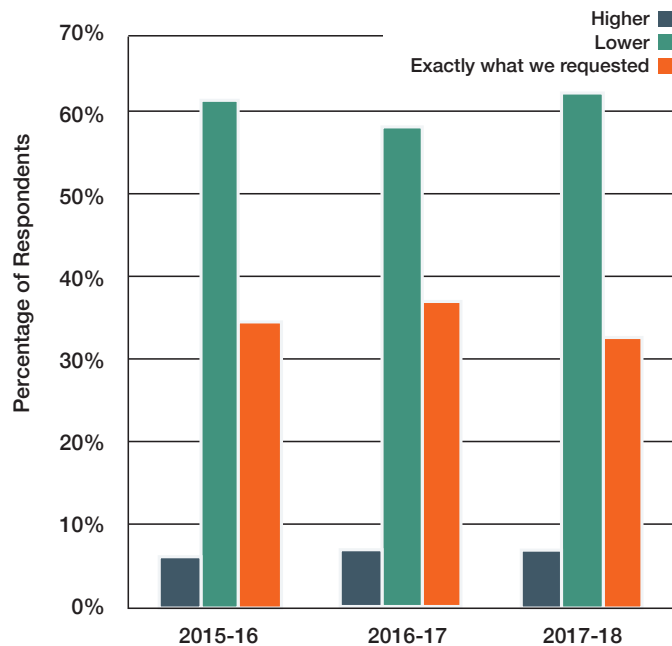
## BUDGETS

The median budgets across all schools has been flat in the three years this has been studied by the Foundation. Colleges have seen some growth in their budgets, but high schools have been flat. With declining enrollments, however, the median budget amount per student enrolled has increased slightly.

MEDIAN	2015-16	2016-17	2017-18
All schools	\$10,000	\$10,000	\$10,000
Budget (High School)	\$7,000	\$7,500	\$7,000
Budget (College)	\$20,000	\$20,000	\$21,487
Budget (High School and College)	\$11,730	\$12,769	\$15,000
Number of Students (High School)	35	35	32
Number of Students (College)	25	24	22
Number of Students (High School and College)	26	25	23
Amount per Student (High school)	\$200	\$214	\$219
Amount per Student (College)	\$800	\$833	\$976
Amount per Student (High school and College)	\$452	\$511	\$652

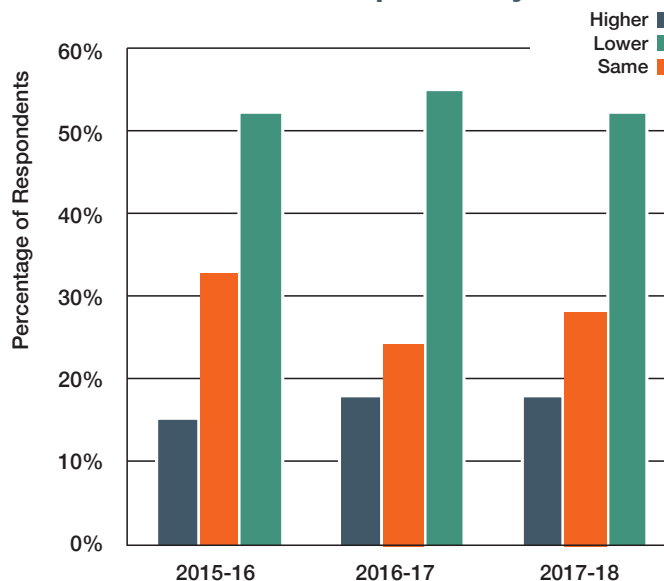
Nearly two thirds of respondents, at 61.73 overall, report their budgets were lower than they requested in the 2017-2018 survey. Nearly a third received what they requested.

### Was your budget higher, lower, or the same as what was requested?



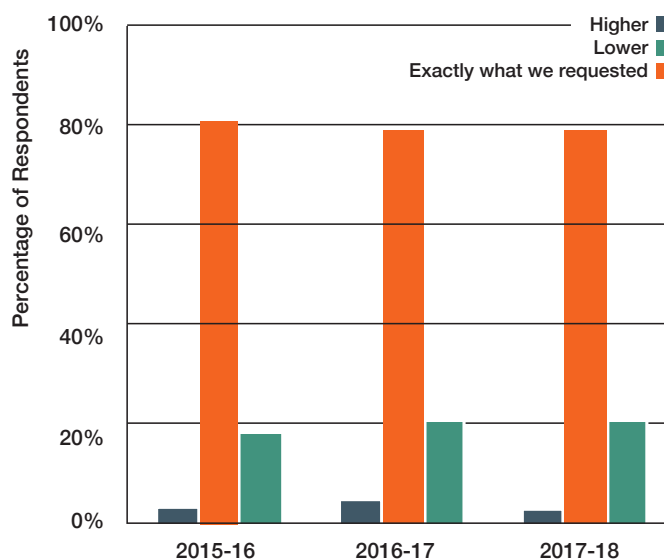
The majority of schools, at 52.34 percent indicated their budgets were the same as the previous year. Those reporting a decline totaled 28.51 percent and those who received a higher budget were 19.14 percent in the 2017-2018 study.

### Was your actual budget for the current school year higher, the same, or lower than the previous year?



When asked about whether the budgets they had were sufficient to effectively teach their programs, 79.23 percent said they were lower than what was necessary, down slightly from the 81.17 percent in the 2015-2016 survey.

### Was your actual collision budget higher or lower than what you feel is necessary to effectively teach your program?





I-CAR continues to expand the number of collision repair schools using the Education Edition of its Professional Development Program (PDP-EE) instruction materials and curriculum framework. As of April 2018 there are 650 schools using PDP-EE after adding 75 new schools to the program during calendar year 2017.

## Map of 238 School Fixed Training Sites



*In 2017, I-CAR worked closely with partners in the technical school and supplier segments to identify qualified neutral fixed-site locations for training, called I-CAR Official Training Sites. Official training sites were formed as a means to ensure consistent and effective live course delivery, providing a better learning environment and training regimen for students.*

### Platinum Grads by Academic Year

Acedemic Year	Course	Students
2013-14	Non-Structural	206
	Refinish	185
	Total	391
2014-15	Non-Structural	361
	Refinish	357
	Total	718
2015-16	Non-Structural	489
	Refinish	560
	Total	1049
2016-17	Non-Structural	779
	Refinish	876
	Total	1655
GRAND TOTAL		3,813

### Welding Certifications by Academic Year

Paid Year	ETP Code	Grand Total
2012	Aluminum	304
	Steel	658
	Total	962
2013	Aluminum	9
	Steel	330
	Total	339
2014	Aluminum	8
	Steel	304
	Total	312
2015	Aluminum	15
	Steel	225
	Total	240
2016	Aluminum	10
	Steel	226
	Total	236
2017	Aluminum	29
	Steel	244
	Total	273
GRAND TOTAL		2,363

## STUDENT AND PARENT PERCEPTIONS OF CAREERS IN THE COLLISION INDUSTRY

In the fall of 2017, the Foundation conducted a survey of students studying for a career in the collision industry to better understand what aspects of the industry led them to their choice of career. The Foundation received over 1,100 responses from students to this study.

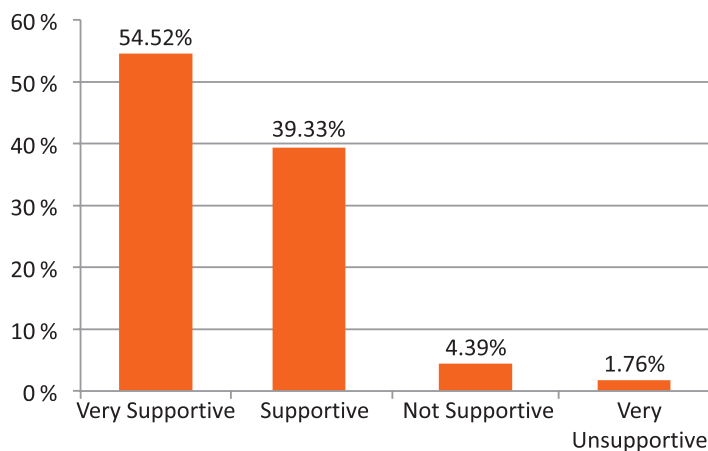
The most important aspect that students indicated drove students' decision to pursue training for a career in the collision industry was, by far, their love of working on cars. As the **chart below** shows, fully 60.54 percent of respondents indicated it was the most important aspect that influenced the respondents' decision. The next highest choice was the opportunity for career advancement after employment at a distant 8.57 percent and the number of job openings at 7.61 percent.



We also asked students if their family was supportive of their career choice and why they supported the choice or did not.

Those respondents who indicated that their families were very supportive totaled more than half of respondents.

### Is Family Supportive of Career Choice



As the **chart above** shows, those students who indicated their families were very supportive totaled 54.52 percent, followed by 39.33 percent who indicated their families were supporting. Just 4.39 percent were not supportive and 1.76 percent indicated their families were very unsupportive.

While the universe of respondents, students who were actively training or who had recently graduated training, is likely to skew the results more positively for the industry, we used the opportunity to ask what it was that parents supported or why they did not support the choice. This insight will provide direction for both marketing efforts to students and their influencers, but also further research.

Among the comments received from students who indicated their families were not supportive, common concerns were that families wanted the students to attend college and pursue a traditional four-year degree. Also mentioned were concerns about health and safety issues for employees and low starting pay for entry-level employees.

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