

SNAPSHOT OF THE SCHOOLS

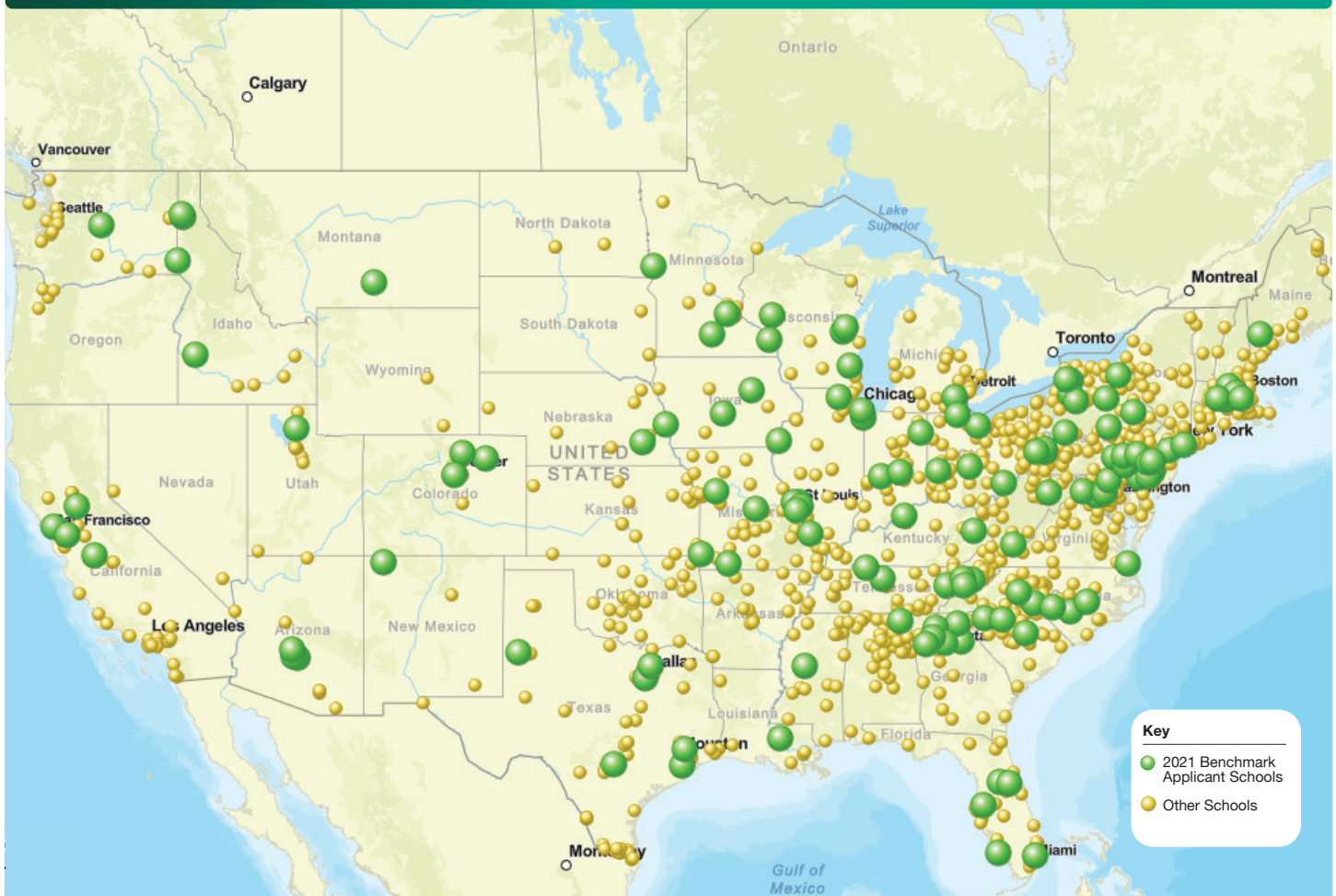
COLLISION REPAIR EDUCATION™
FOUNDATION
I-CAR

2021 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 the 2021 study, over 500 collision repair schools responded, representing over 54 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

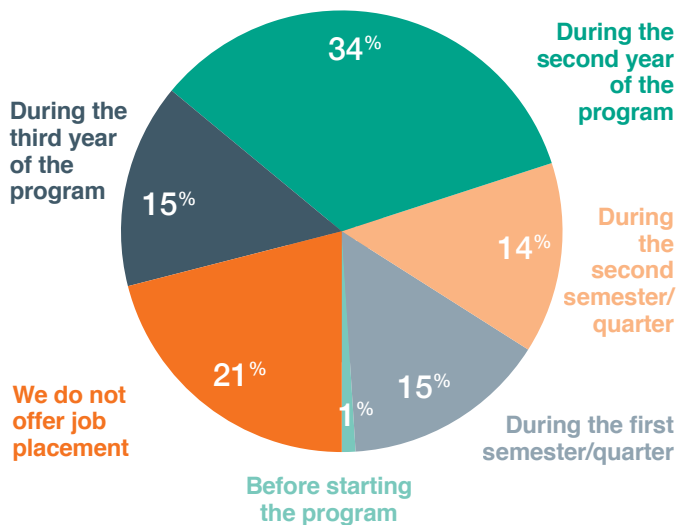
The **table below** details key statistics tracked by the Foundation's research on the number of schools, students and specific attributes of their programs. As the table indicates, the total number of schools has declined over the past six school studies.

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.

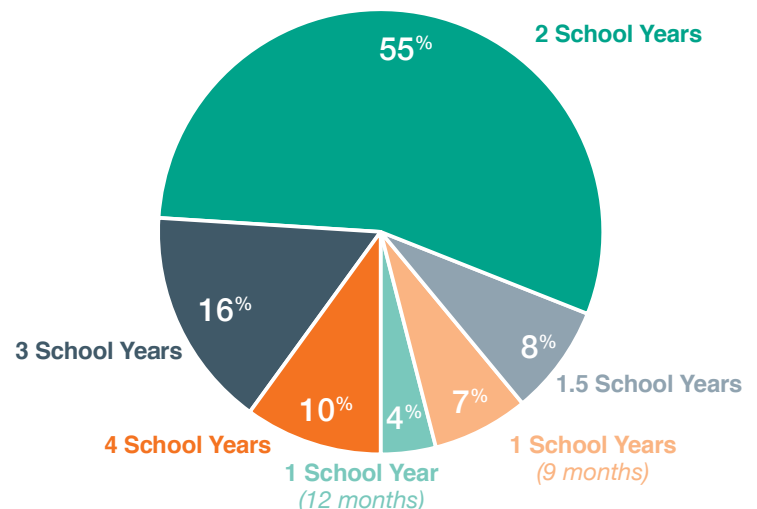
The Collision Repair Education Foundation has grown the number of schools it supports with grants and in-kind donations, with a decrease in the 2020-21 school year due to COVID.

SCHOOL STATISTICS						
	2015-2016	2016-2017	2017-2018	2018-2019	2019-2020	2020-2021
Number of Students	47,866	46,759	42,927	38,943	36,200	34,837
Number of Schools	1,115	1,081	1,032	1,019	999	970
Number of Schools CREF Supported	524	577	599	600	627	504
Percent that are High Schools	61%	63%	64%	66%	67%	66%
Percent that are Colleges	28%	25%	23%	20%	20%	21%
Percent that are Both (High Schools and Colleges)	11%	12%	13%	14%	13%	13%
Percent of Schools Applied for Benchmark Grant	11%	11%	16%	16%	16%	15%
Percent that Participate in SkillsUSA	81%	84%	83%	83%	84%	84%
Percent that are ASE Certified	N/A	N/A	50%	50%	49%	46%
How Many More to Accommodate	16	14	15	13.5	12	12
Average Female Enrollment	5	4	4	5	4	4

At what point in the program does job placement begin?



In general, how long do students study collision repair in your program?



SCHOOL NEEDS

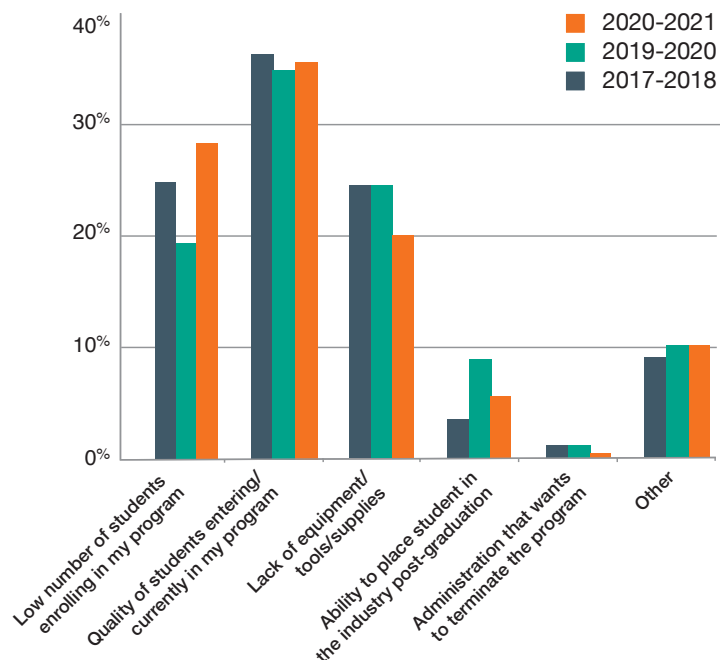
For the past three surveys, we have asked respondents what the biggest challenge facing their collision program is today. The biggest concern expressed by instructors the quality of the students entering the program, followed by low enrollment.

Teaching collision repair involves a large amount of consumables as well as equipment needs. There is also a large need to ensure equipment is being updated and maintained. The chart below outlines the average amount Collision Programs spend on these items.

Average Spent Per Year

Paint	\$5,577
Sandpaper	\$1,246
Parts	\$859
Whole Cards	\$682
General Supplies	\$774
Shop Supplies	\$2,074

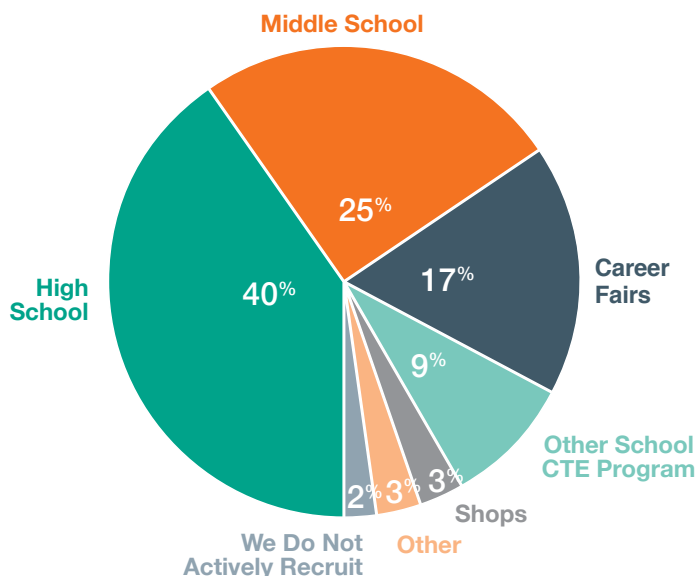
Collision Repair Program Challenges



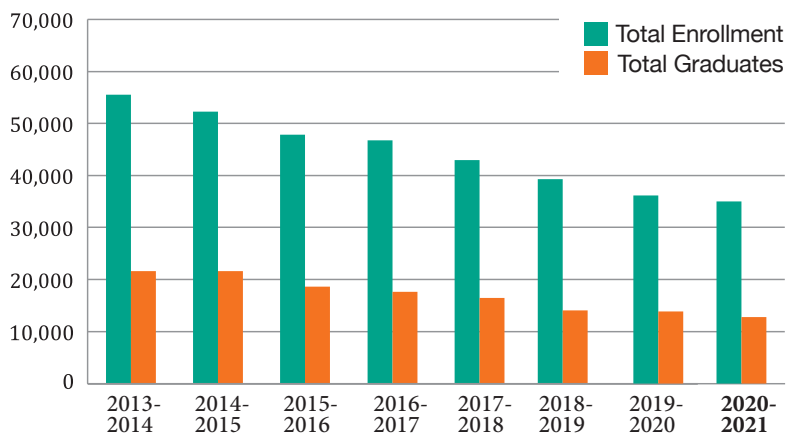
ENROLLMENT & GRADUATION

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.

Where are your students recruited from?



Enrollment Vs. Graduation



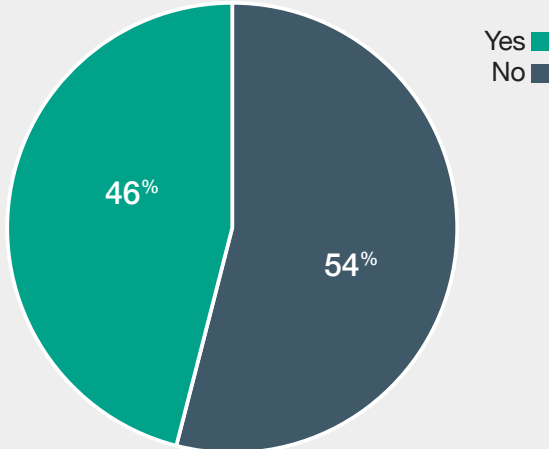
TRANSITION TO EMPLOYMENT

The number of schools offering a connection to employers at some level is 85%. For those operating an on the job training program or apprenticeship program 41% have a clear structure to their program this is inclusive of registered apprenticeship programs.

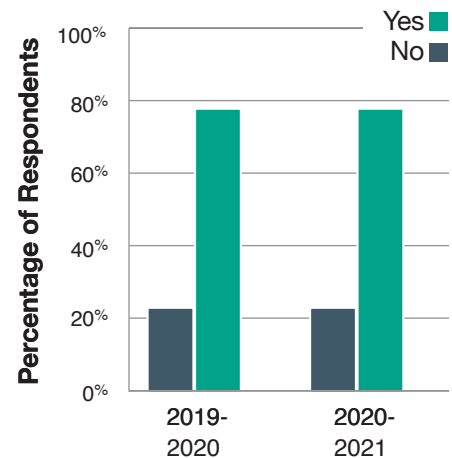
Students Receiving Live Production Experience

	2017-2018	2018-2019	2019-2020	2020-2021
Internship – Work Study/ Apprenticeships/Job Shadowing	85%	87%	87%	85%
None	15%	13%	13%	15%

Do you have a qualification process or vetting program for the Employer when helping with job placement?



Does your school offer job placement or career counseling for collision students?

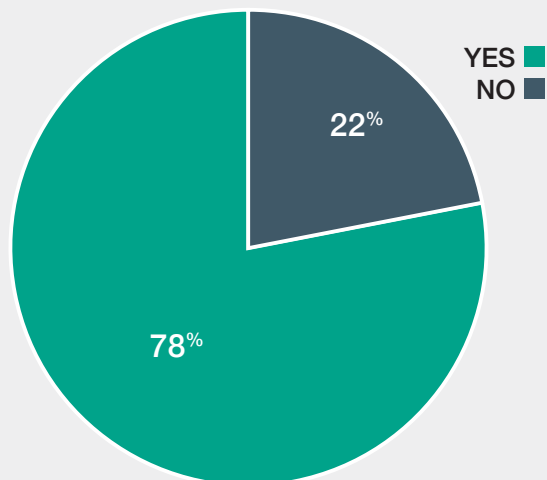


Which of the following best describes the school's collision program?

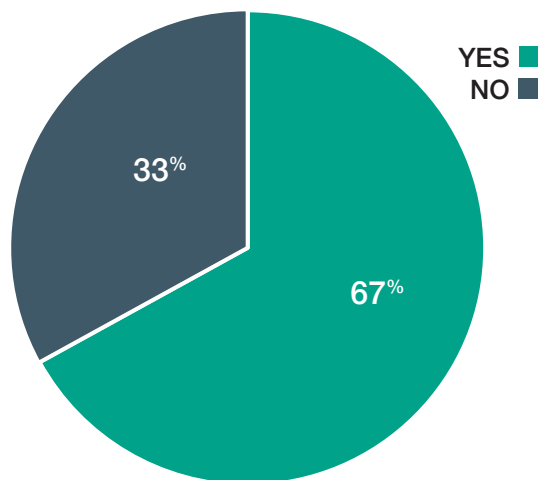
Answer	
We are a Registered Apprenticeship Program with the Department of Labor	6%
We have clear guideline for on the job training and a curriculum that correlates to our internship/apprenticeship program	35%
We have loose guidelines/framework for on the job training and a curriculum that correlates to our internship/apprenticeship	9%
We have structured employer partnerships in place	20%
We have the beginning of employer partnerships in place	11%
We do not offer an internship/apprenticeship program	12%
We want to offer an internship/apprenticeship program	9%

TRANSITION TO EMPLOYMENT

Does the Collision Program offer shop tours as a regular part of the education experience?



Do students utilize portfolios documenting their work?



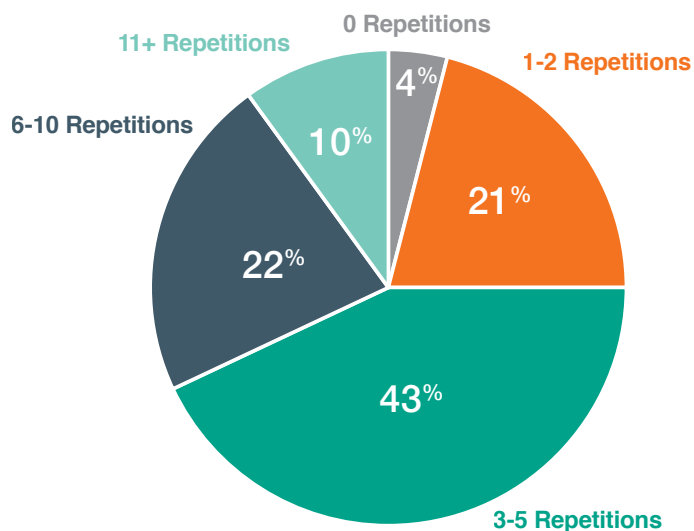
8 TASKS ON THE SURVEY

1. Prep for paint
2. R&R bolted parts
3. Repair steel metal dents
4. Final detailing
5. Repair plastic
6. Use MIG welder
7. Basic business skills

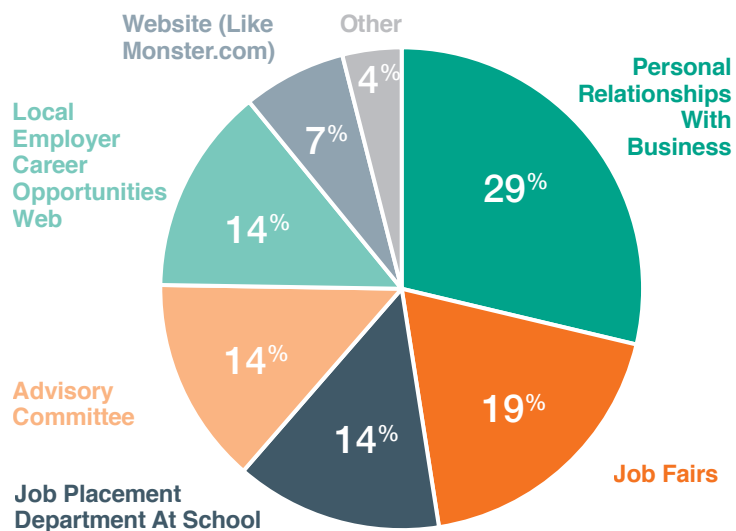
QUESTION

	Year	Yes	No
Do you feel the 8 tasks outlined on the survey are accurate expectation of entry-level technicians?	2020-2021	91%	9%
	2019-2020	91%	9%
Do you feel that upon graduation, your students are proficient in the 8 tasks?	2020-2021	72%	28%
	2019-2020	77%	23%
Do you measure proficiency in these or other tasks?	2020-2021	96%	4%
	2019-2020	96%	4%

What is the general number of repetitions each student gets for each of the 8 tasks on the Industry Snapshot Survey?



How do you help find your students jobs in the collision industry?



COLLISION SCHOOL CAREER READINESS BENCHMARK PROGRAM

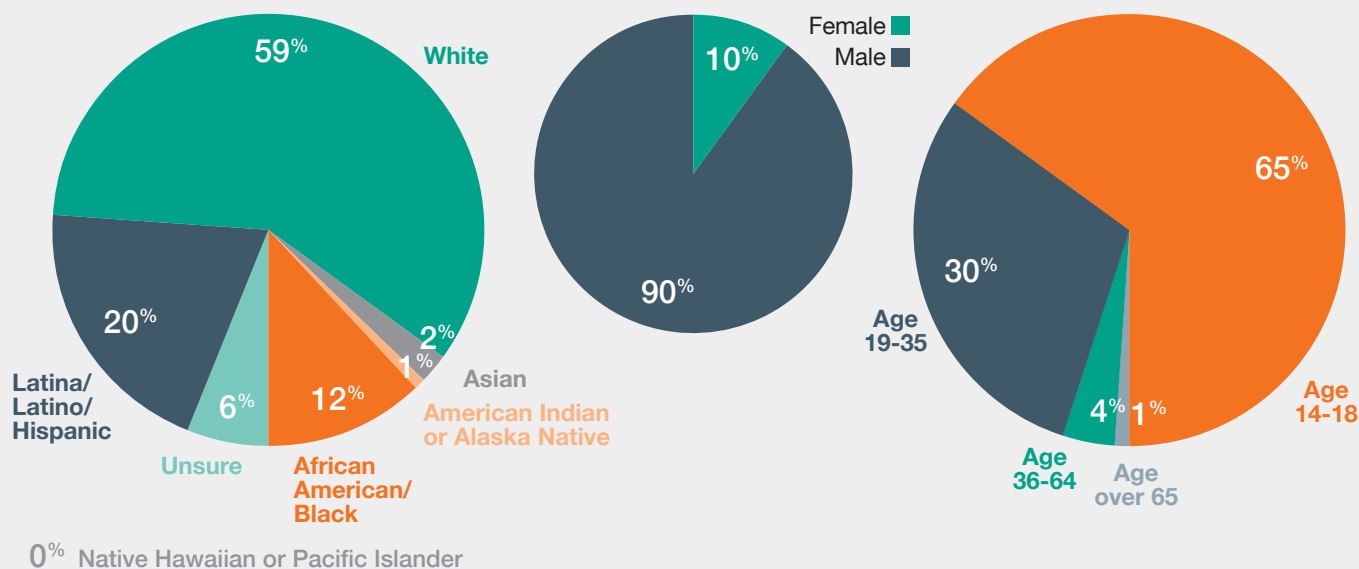
Since 2009, schools have been able to apply for the Benchmark School Grant to get much needed tools, equipment, and supplies for their school. However, after hearing feedback from donors/industry about an immediate need for entry-level staff, the Foundation created a designation system for schools. Each school that applies for the grant is given one of the following Collision School Career Readiness Benchmark designations: Tier 1: Advanced, Tier 2: Proficient, and Tier 3: Developing.

The designation is determined by how the school answers certain questions on the Benchmark application.

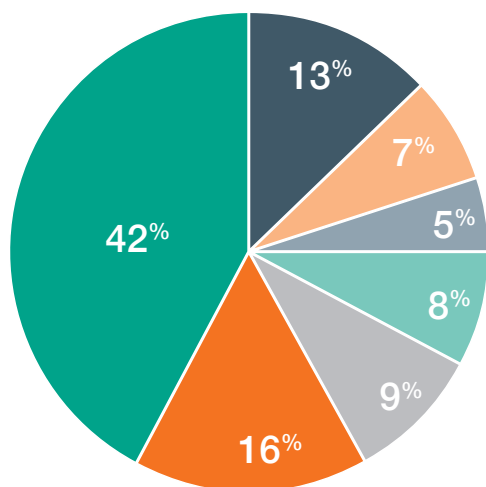
The goal is to get EVERY school to become a **Tier 1: Advanced School**.

Applicant Schools	2016-2017	2017-2018	2018-2019	2019-2020	2020-2021
Tier 1: Advanced	8%	10%	13%	23%	24%
Tier 2: Proficient	66%	68%	64%	54%	41%
Tier 3: Developing	26%	21%	22%	23%	13%

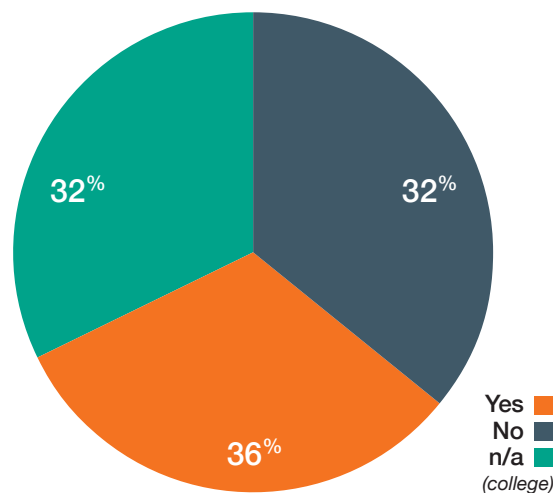
2021 Benchmark Grant Applicants Demographics



What Percentage of Your Student Population is Eligible to Receive Free and Reduced Meals Services?



Does Your School Receive Title 1 Federal Funding?



BUDGETS

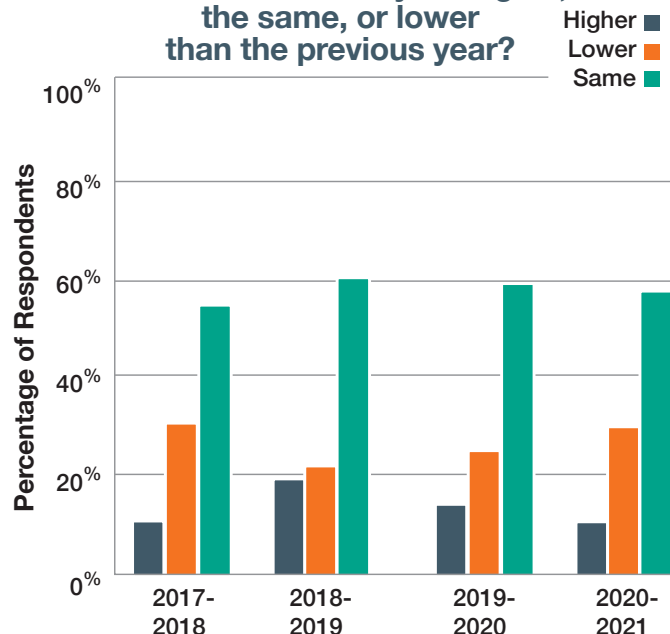
Both the median budget and number of students enrolled remained steady through turbulent times between the 2019-2020 and the 2020-2021 school year.

MEDIAN	2017-2018	2018-2019	2019-2020	2020-2021
All schools	\$10,000	\$14,000	\$15,592	\$16,119
Budget (High School)	\$7,000	\$10,500	\$10,227	\$10,867
Budget (College)	\$21,487	\$24,500	\$31,838	\$30,469
Budget (High School & College)	\$15,000	\$15,500	\$16,918	\$17,383
Number of Students (High School)	32	40	39	41
Number of Students (College)	22	32	32	32
Number of Students (High School & College)	23	27	29	29

Nearly half of respondents, report their budgets were lower than they requested in the past survey.

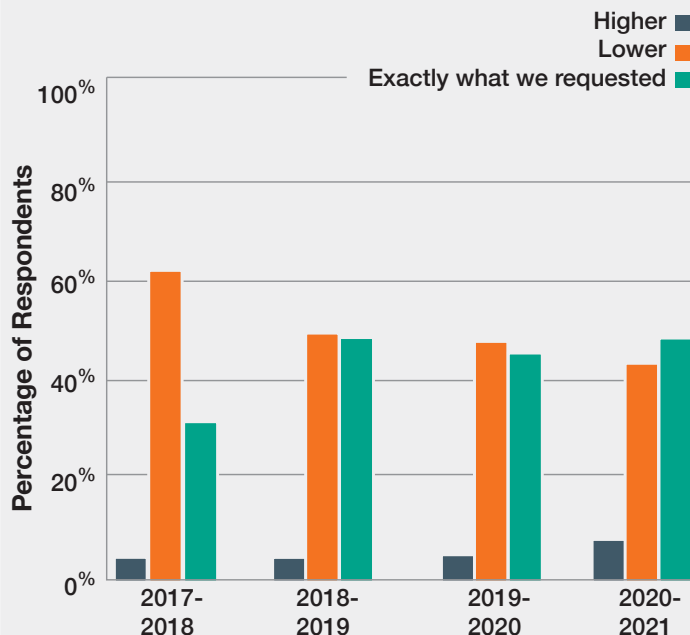
The majority of schools, at 60 percent indicated their budgets were the same as the previous year. Those reporting a decline totaled 24 percent and those who received a higher budget were 16 percent in the 2018-2019 study.

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

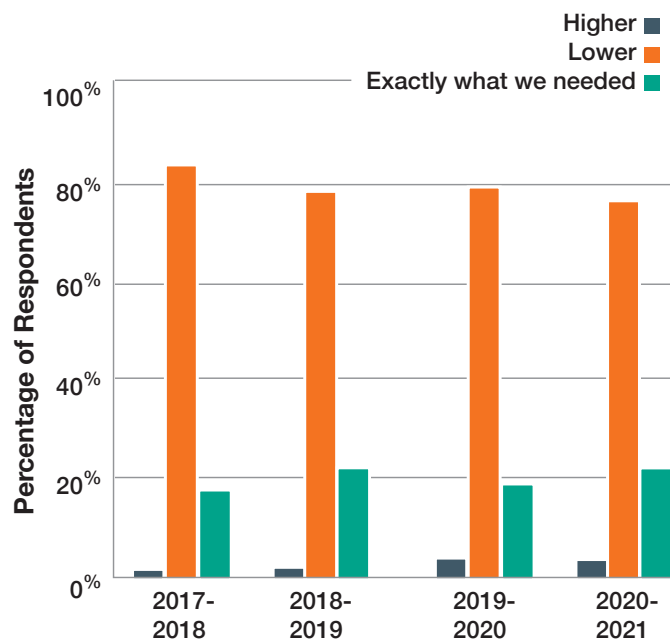


When asked about whether the budgets they had were sufficient to effectively teach their programs, 77 percent said they were lower than what was necessary, down slightly from the 81.17 percent in the previous year.

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



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



STUDENT PERCEPTIONS

The Foundation conducted two different surveys of students studying for a career in the collision industry. The surveys were conducted to better understand three factors: interest, expectations and decision-making. The Foundation received over 3,000 responses from both surveys.

The most important aspect students indicated driving the decision to pursue training for a career in the collision industry maintains steady from prior surveys and is by far, their love of working on cars. As the chart below shows, fully 61 percent of respondents indicated it was the most important aspect that influenced the respondents' decision.

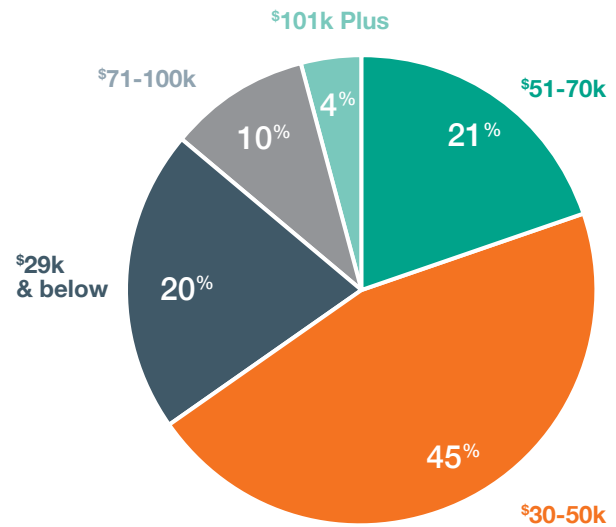
Top Factors When Deciding to Pursue Training for a Career in the Collision Industry

Answer	
Love Working on Cars	61%
Number of Job Openings	8%
Starting Pay for Collision Industry Employees	3%
Opportunities for Career Advancement After Employment	9%
Pay Top Level Technicians Receive	3%
Had a Parent/Relative who was in the Industry	7%
Had a Friend in the Industry	2%
Challenge Working with New Vehicle Technology	7%
Other	3%

Top Factors When Considering a Future Employer

Answer	
Wages	37.1%
Work-Life Balance	21.72%
Potential for Advancement	25.79%
Insurance Benefits	26.7%
Retirement Savings Plan	31.67%
Tuition Reimbursement	47.6%

Expected Starting Salary



To further research on decision making factors when looking for employment wages came in as the top factor. Both work life balance and the potential for advancement were also top influencers.

Although wages were a top factor for selecting an employer 45% of those surveyed noted the expected starting salary was between \$30,000 and \$50,000 which equates to \$14-\$24 an hour.

These insights will provide direction for marketing efforts to students, guide employers on best ways to showcase employment opportunities and further research for student expectations.

What Students are Saying...

"After retiring from the military, I have chosen the auto technician, welding, and collision repair industry to learn the trades. I want to put all of them together for building a drift car to raise money for autism awareness."

"I have a great desire to paint and own my current shop. My 1 yr. old daughter is my greatest motivation to go through school and make something of myself!"

"Want to have a good job with something I love. Want to remake a childhood car in memory of my grandparents."