

# Updated Snapshot: Costa Rica (CRC)

## Statement

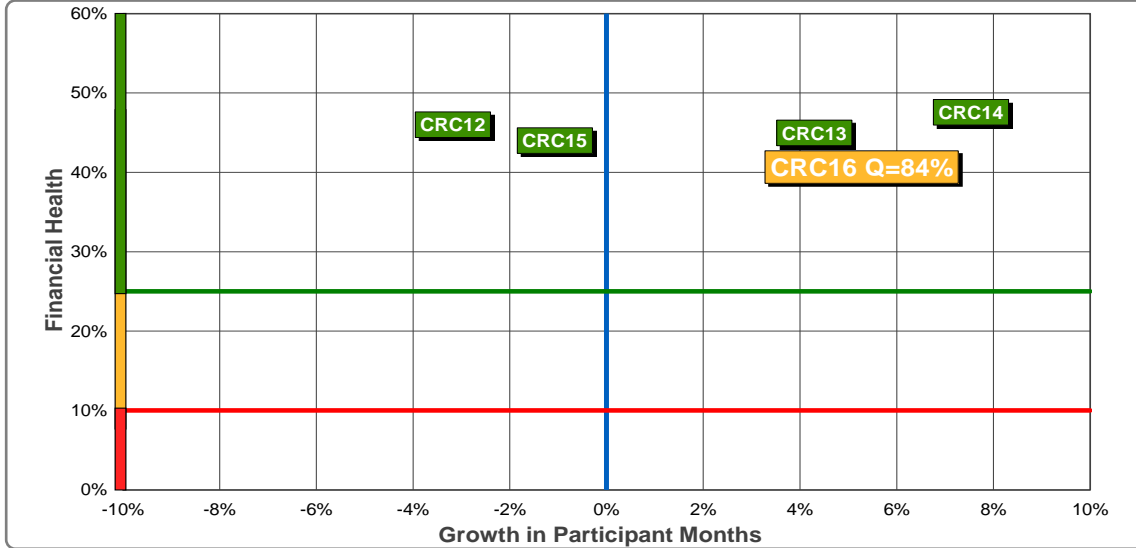
During 2015-2016 we saw a continued pattern of growth in our 18+ sending numbers, while the traditional program numbers remained stable at best, and the organization faced challenging hosting placement seasons, particularly in NH16. Finances are tight and new revenue streams are needed. An all-important agreement of cooperation with the national Ministry of Education was signed, and a new strategic plan was approved in late 2015, setting direction for the next five years.

## Partner Organizations 2016

ARG	AUS	AUT	BFL	BFR	BIH	BOL	BRA	CAN	CHI
CHN	COL	CRC	CRO	CZE	DEN	DOM	ECU	EGY	ESP
FIN	FRA	GER	GHA	GUA	HKG	HON	HUN	INA	IND
ISL	ITA	JPN	KEN	KOR	LAT	MAS	MEX	NED	NOR
NZL	PAN	PAR	PER	PHI	POL	POR	RSA	RUS	SLO
SRB	SUI	SVK	SWE	THA	TUN	TUR	USA	VEN	

■ Sending to: 21 
 ■ Hosting from: 26

## 3D Health Indicators 2012-2016



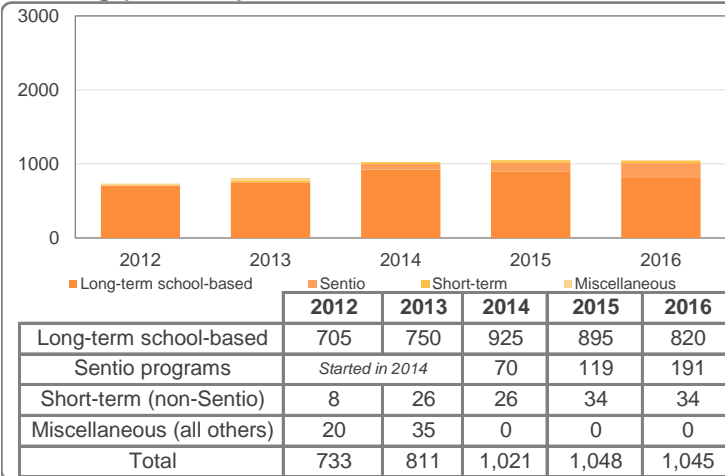
## KPIs

Yr	Growth	Finances	Quality
16	+3%	41%	84%
15	-2%	44%	88%
14	+7%	48%	90%
13	+3%	45%	86%
12	-4%	46%	89%

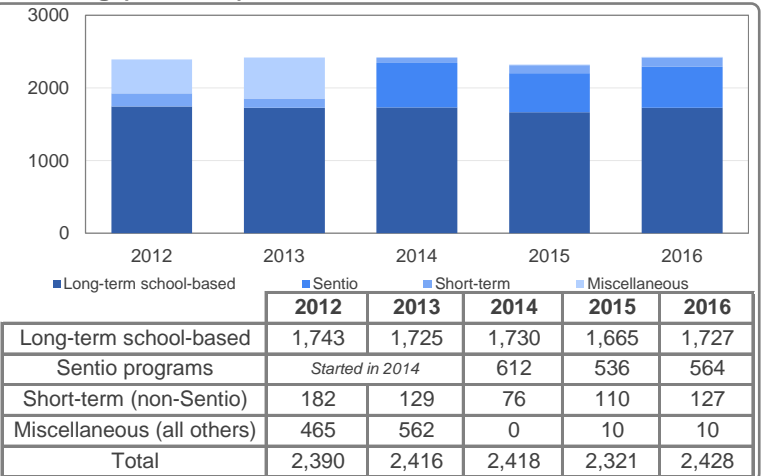
## NPPR Status

Yr	Phase
16	No phase
15	No phase
14	No phase
13	No phase
12	No phase

## Sending (Pax Mos) 2012-2016



## Hosting (Pax Mos) 2012-2016



## Quality Assessment 2014-2016

Quality	Hosting CSE				Sending CSE				PSE	Overall Eval Score	Bonus/ Penalty	Final Quality Score
	host fam	school	other stu	other nat fam	stu	nat fams	other host fams	other schools				
2016 Network Total	78%	85%	94%	92%	94%	92%	78%	85%	92%	88%	-1%	87%
2016 (CSE16, PSE16-15)	76%	84%	92%	91%	97%	90%	72%	78%	96%	86%	-2%	84%
2015 (CSE15, PSE15-14)	84%	85%	89%	90%	92%	94%	82%	82%	96%	88%	0	88%
2014 (CSE14, PSE14-13)	82%		87%	83%	92%	96%	77%	86%	100%	88%	+2%	90%

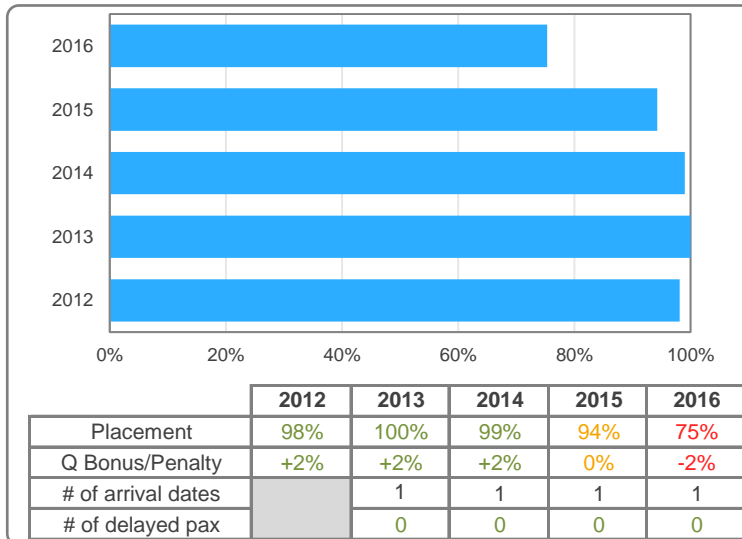
## Key Financial Numbers in Effective USD 2013-2015

Finances	Annual Turnover	% of total	Total Expenses	% of total	Net Results	% of unr. net assets	Current Assets	% of expenses	Unr. Net Assets	% of expenses
2015 Network Total	183,453,070	100%	178,003,152	100%	5,449,918	8%	116,051,027	65%	70,545,137	40%
2015	2,098,708	1%	2,102,596	1%	-3,887	***	719,795	34%	855,171	41%
2014	2,083,464	1%	2,016,033	1%	67,431	8%	812,323	40%	887,141	44%
2013	1,895,444	1%	1,843,078	1%	52,367	6%	848,622	46%	876,951	48%

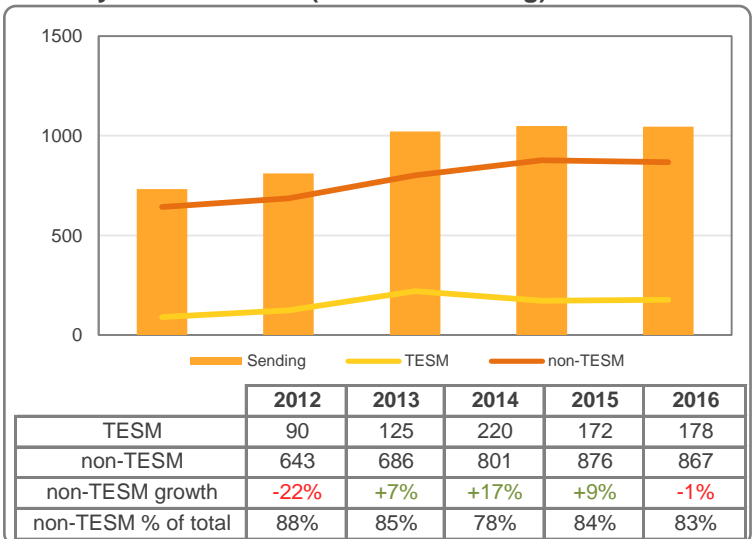
\*\*\*Unrestricted Net Assets is meaningless because these are negative

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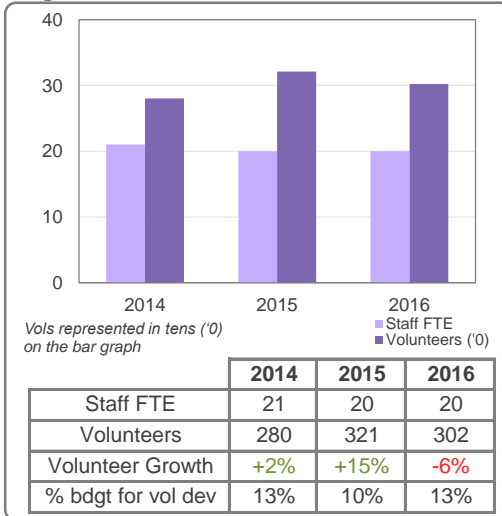
## On-time Placement Performance



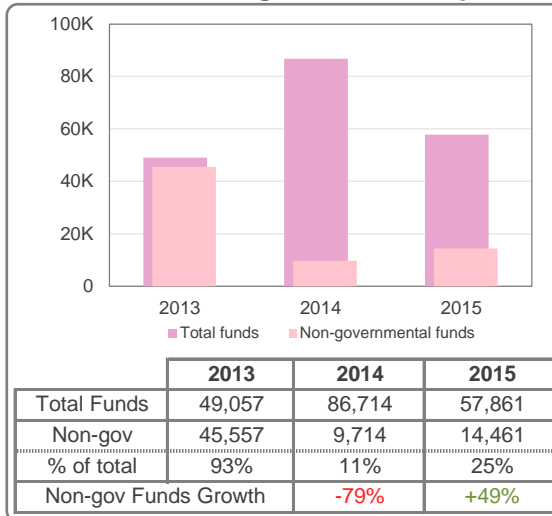
## Country Diversification (Pax Mos Sending)



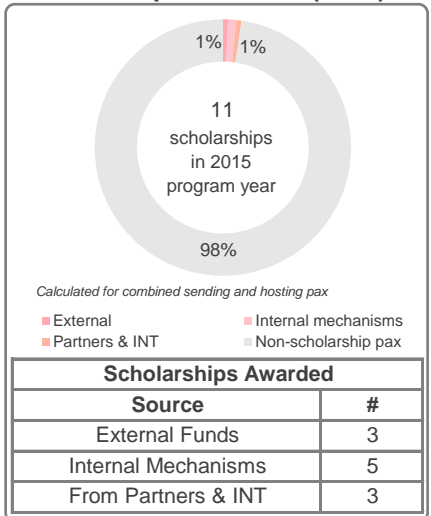
## Organizational Structure



## External Fundraising for Scholarships



## Scholarships Awarded (2015)



## Education and ICL

Learning Program Participants (started and completed)			
Level	W	1 - 3	QT
Staff & Vols	138	40	17
% of Total	42.9%	12.4%	5.3%

W = What Every AFSer Should Know About Intercultural Learning.  
1 - 3 = LP levels 1, 2, and 3; QT = Qualified Trainers

Orientations								
	PD	A	PA	MS	PR	EOS	PoR	Other
Pax	●	●	●	●		●	●	
Host Fams		●	●	●		●		
Nat Fams	●							
Sch/CPOs								
Attendance:	0% (blank)	1-25% ●	26-50% ●	51-75% ●	76-100% ●			

PD = pre-departure, A = arrival, PA = post-arrival, MS = mid-stay, PR = pre-return, EOS = end-of-stay, PoR = post-return, Oth = other

## AFS Market Share and Competitor Landscape

Estimated Market Share (Latest Year Available)		
Outbound	Inbound non-fee paying	Inbound fee & non-fee
82.5%	73.0%	59.7%

Non-fee paying = not paying tuition and hosted in volunteer host families;  
Fee paying = paying tuition and often hosted in paid host families

Competitors	
Sending (sc programs)	Hosting (sc programs)
EF, Schools, CISV	YFU, Intercultura, small hosting providers
Sending (18+ programs)	Hosting (18+ programs)
ICYE, CISV, Christian churches, AIESEC, Language schools	ICYE (ACI CRC), Christian churches, AIESEC, EF, "Package" travel agencies, Language schools

## Educational System and Accreditation

Educational Designation & Credit Agreement	
Designated as an Educational Entity	
(Full) Credit Agreement	
(Partial) Credit Agreement	

## Ties to the World around AFS

International Exposure and Collaboration with Others	
Joint project/new affiliation	
External forum or event	

## Market Environment

**Market Trends and Forecasts**  
The exchange industry is predominantly inbound, comprising a very fragmented market with multiple operators of various programs (mostly short). Sending is strongly dependent on the financial capacity of families and geared towards career development and language skills acquisition. This year the attitudes towards outbound programs are influenced by a sense of lack of safety in certain European countries. A lot of small operators and local schools offer short term outbound experiences (camps, language, and bilateral school exchanges).