

Updated Snapshot: Spain (ESP)

Statement

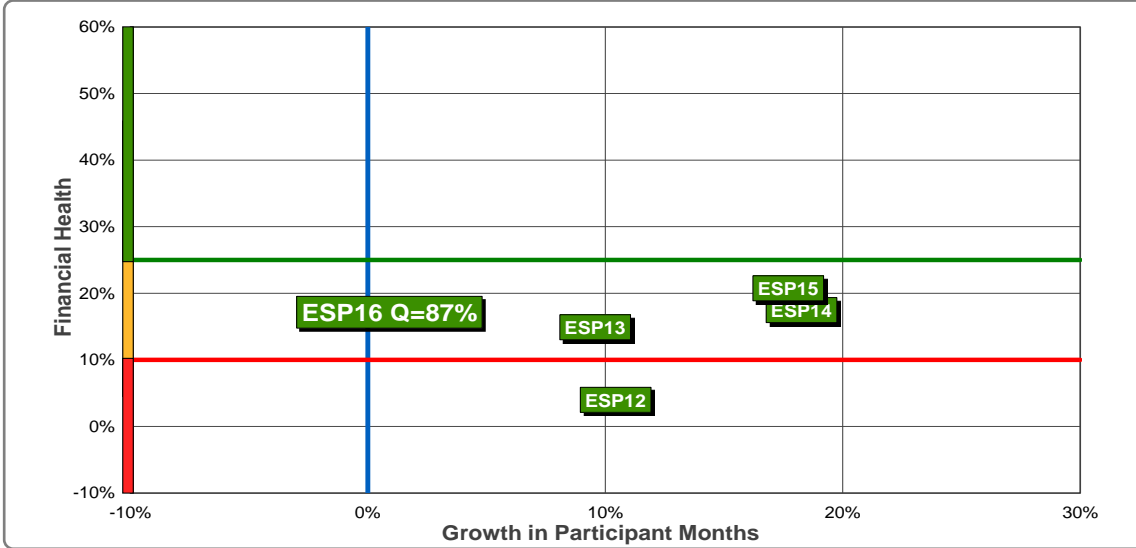
--

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: 26 ■ Hosting from: 33

3D Health Indicators 2012-2016



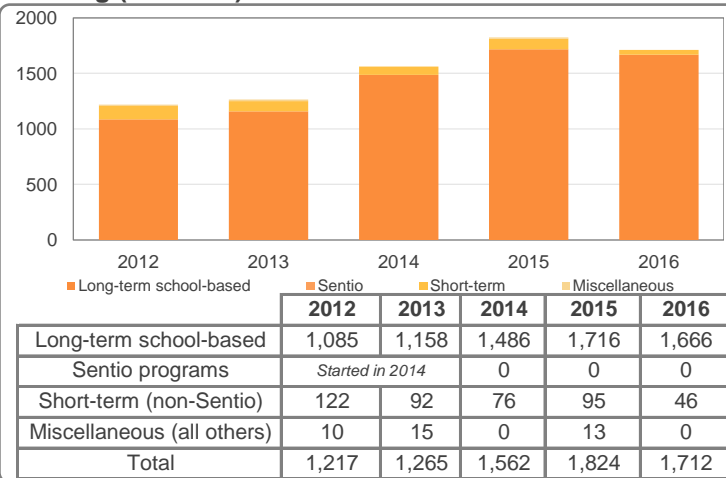
KPIs

Yr	Growth	Finances	Quality
16	-3%	17%	87%
15	+16%	21%	89%
14	+16%	17%	85%
13	+8%	15%	91%
12	+9%	4%	87%

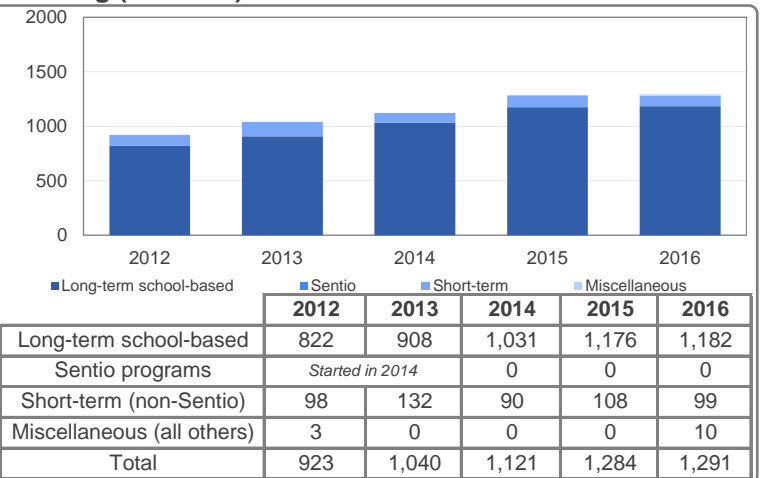
NPPR Status

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)	53%		94%	93%	94%	91%	74%	80%	97%	85%	+2%	87%
2015 (CSE15, PSE15-14)	71%		89%	93%	96%	93%	73%	84%	93%	87%	+2%	89%
2014 (CSE14, PSE14-13)	54%	71%	90%	93%	96%	90%	66%	92%	93%	83%	+2%	85%

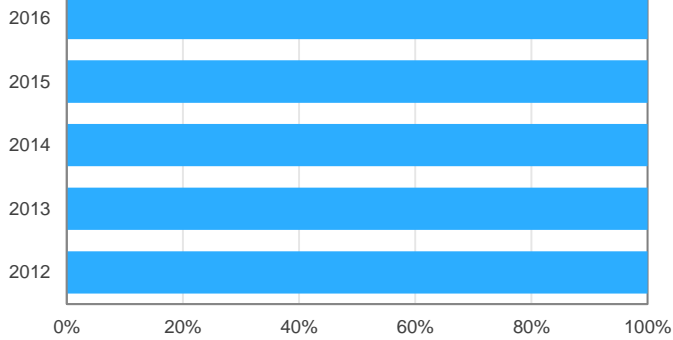
Key Financial Numbers in Effective USD 2013-2015

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	2,402,750	1%	2,400,819	1%	1,931	0%	1,334,572	56%	411,744	17%
2014	2,488,499	1%	2,361,350	1%	127,150	26%	1,340,520	57%	490,139	21%
2013	2,194,073	1%	2,078,476	1%	115,597	32%	883,590	43%	363,134	17%

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

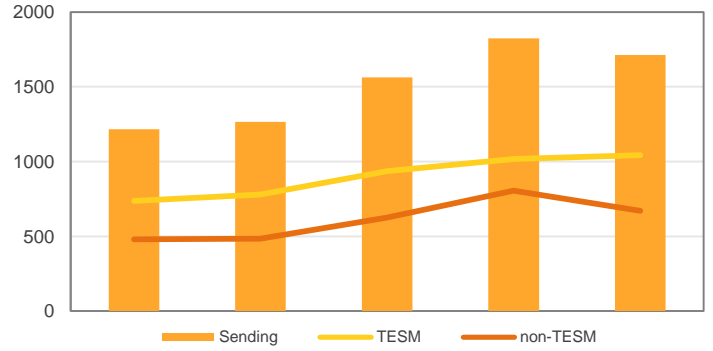
Updated Snapshot: Spain (ESP)

On-time Placement Performance



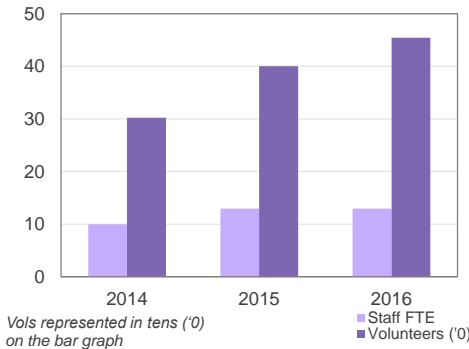
	2012	2013	2014	2015	2016
Placement	100%	100%	100%	100%	100%
Q Bonus/Penalty	+2%	+2%	+2%	+2%	+2%
# of arrival dates		1	1	1	1
# of delayed pax		0	0	0	0

Country Diversification (Pax Mos Sending)



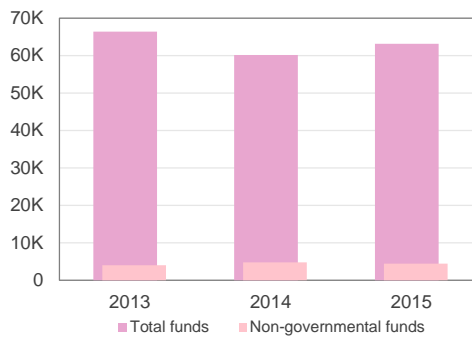
	2012	2013	2014	2015	2016
TESM	736	780	936	1,018	1,042
non-TESM	481	485	626	806	670
non-TESM growth	+34%	+1%	+29%	+29%	-17%
non-TESM % of total	40%	38%	40%	44%	39%

Organizational Structure



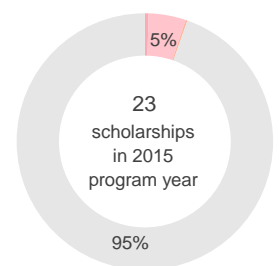
	2014	2015	2016
Staff FTE	10	13	13
Volunteers	302	400	454
Volunteer Growth	+50%	+32%	+14%
% bdgt for vol dev	15%	11%	18%

External Fundraising for Scholarships



	2013	2014	2015
Total Funds	66,374	60,115	63,110
Non-gov	3,982	4,796	4,477
% of total	6%	8%	7%
Non-gov Funds Growth		+20%	-7%

Scholarships Awarded (2015)



Calculated for combined sending and hosting pax

- External
- Partners & INT
- Internal mechanisms
- Non-scholarship pax

Scholarships Awarded	
Source	#
External Funds	2
Internal Mechanisms	20
From Partners & INT	1

Education and ICL

Learning Program Participants (started and completed)			
Level	W	1 - 3	QT
Staff & Vols	43	0	0
% of Total	9.2%	0.0%	0.0%

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

AFS Market Share and Competitor Landscape

Estimated Market Share (Latest Year Available)		
Outbound	Inbound non-fee paying	Inbound fee & non-fee
N/A	N/A	N/A

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

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

Competitors	
Sending (sc programs)	Hosting (sc programs)
EF, NACEL, YFU	EF, NACEL, YFU
Sending (18+ programs)	Hosting (18+ programs)
EU Programs, NACEL, EF, CLS, other NGO's	NACEL, CLS, CISV

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 F-1 (paid schools and host families in the USA) market is growing.	