

# Updated Snapshot: Germany (GER)

## Statement

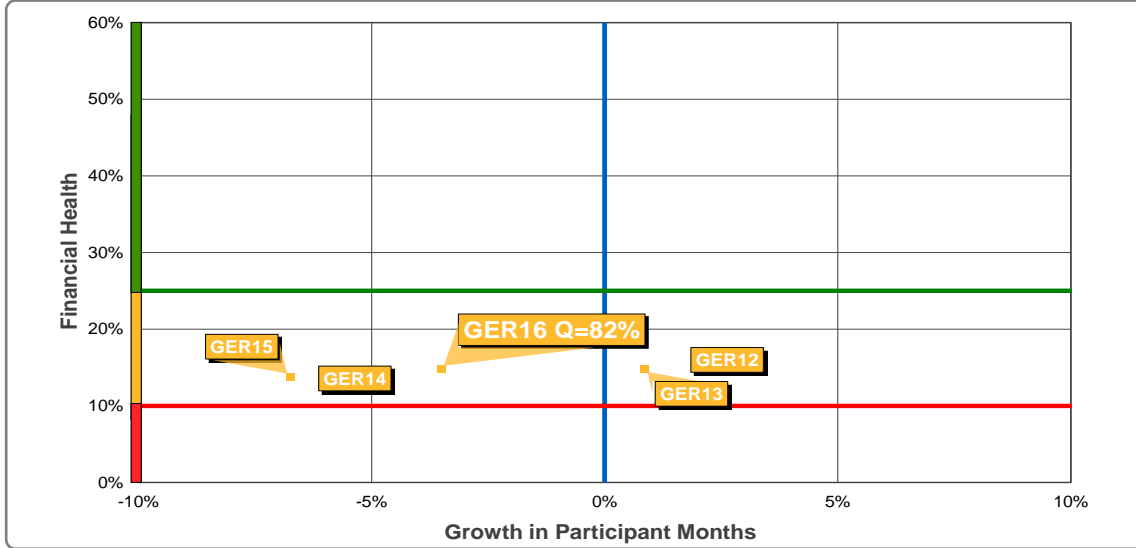
We are happy that we can report growth of hosting opportunities in Germany again. Three years ago we had to cut on our school based long-term hosting commitments. We are grateful to all Partners supporting us and understanding the need for a mark-up on our transfer-price. Thank you! – In 2016 we could offer increased hosting opportunities with Volunteer Abroad postings in GER and with our Global Prep Summer Camps. We will grow these offers further and project to compensate the decreases of our high-school hosting program. Please stay tuned and consider these new opportunities!

## 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: 46
 ■ Hosting from: 51

## 3D Health Indicators 2012-2016



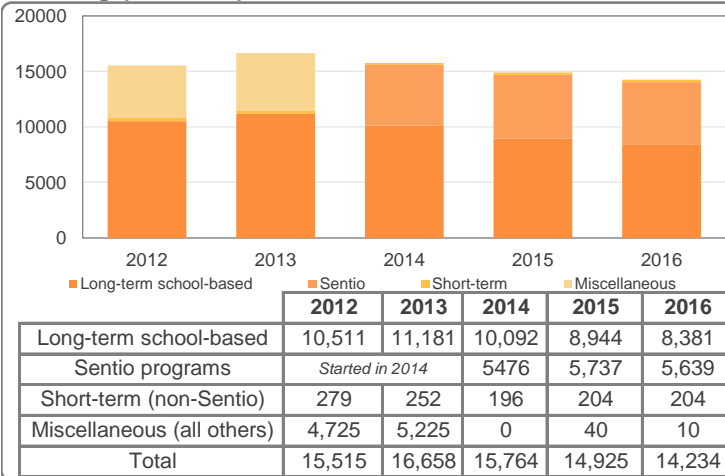
## KPIs

Yr	Growth	Finances	Quality
16	-3%	15%	82%
15	-7%	14%	83%
14	-6%	14%	80%
13	+1%	15%	78%
12	+2%	16%	83%

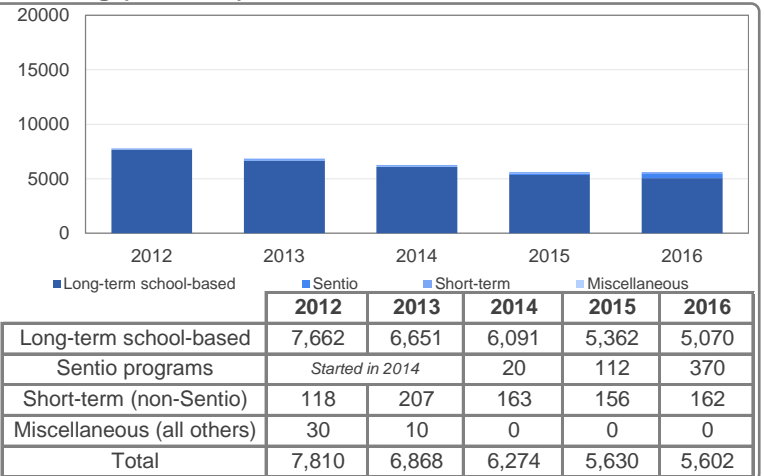
## NPPR Status

Yr	Phase
16	Phase I
15	Phase II
14	Phase II
13	Phase I
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)	74%	68%	88%	94%	92%	94%	83%	87%	85%	85%	-3%	82%
2015 (CSE15, PSE15-14)	74%	73%	94%	89%	91%	90%	79%	90%	80%	84%	-1%	83%
2014 (CSE14, PSE14-13)	78%	69%	93%	93%	86%	89%	81%	83%	63%	82%	-2%	80%

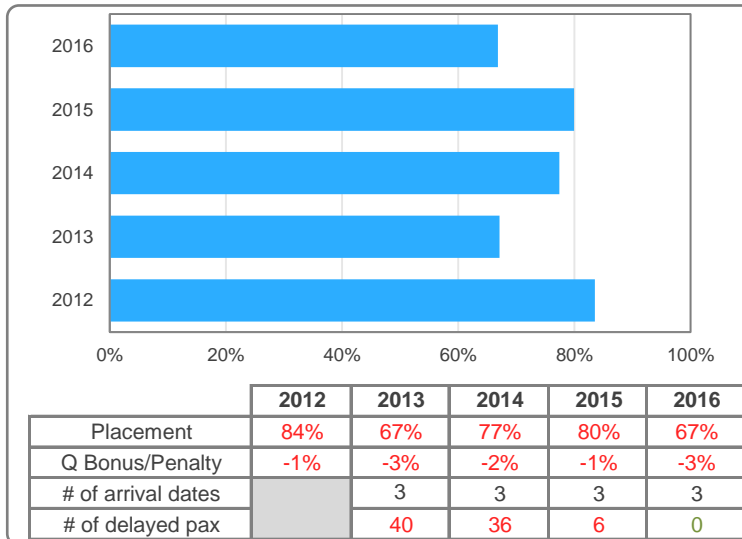
## Key Financial Numbers in Effective USD 2013-2015

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	18,233,019	10%	18,128,122	10%	104,897	4%	14,109,932	78%	2,674,171	15%
2014	22,604,858	12%	22,449,497	13%	155,361	5%	17,974,609	80%	3,072,870	14%
2013	21,342,106	12%	21,517,998	12%	-175,892	***	17,154,946	80%	2,918,671	14%

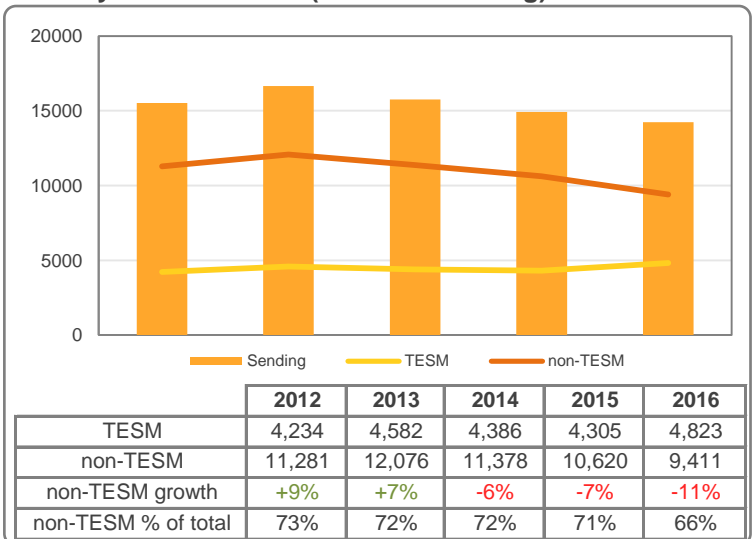
\*\*\*Unrestricted Net Assets is meaningless because these are negative

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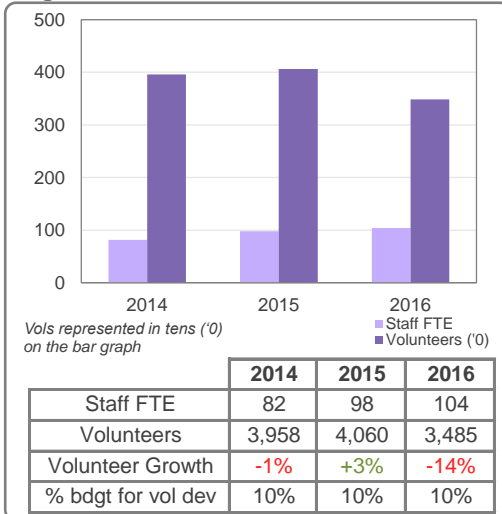
## On-time Placement Performance



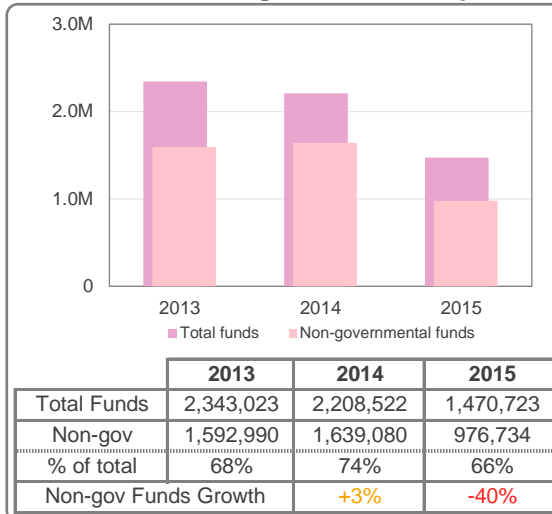
## Country Diversification (Pax Mos Sending)



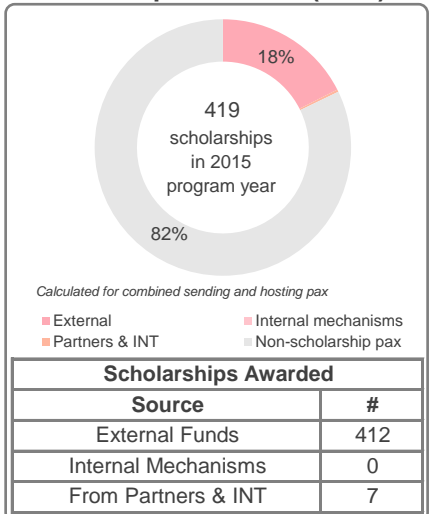
## Organizational Structure



## External Fundraising for Scholarships



## Scholarships Awarded (2015)



## Education and ICL

Learning Program Participants (started and completed)			
Level	W	1 - 3	QT
Staff & Vols	252	88	3
% of Total	7.0%	2.5%	0.1%

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
5.4%	29.3%	20.7%

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)
YFU, iSt, EF	YFU, Rotary, Experiment
Sending (18+ programs)	Hosting (18+ programs)
Churches, Freunde d. Erziehungskunst, Via e.V.	Churches, Red Cross GER, Freunde der Erziehungskunst

## 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	
In 2015/16 the outbound school not-for-profit market is further declining, especially to the USA, while the private sector (also offering boarding school and fee-paying programs) remains stable. Demand is on the rise for Great Britain and Ireland.	