

# Updated Snapshot: South Africa (RSA)

## Statement

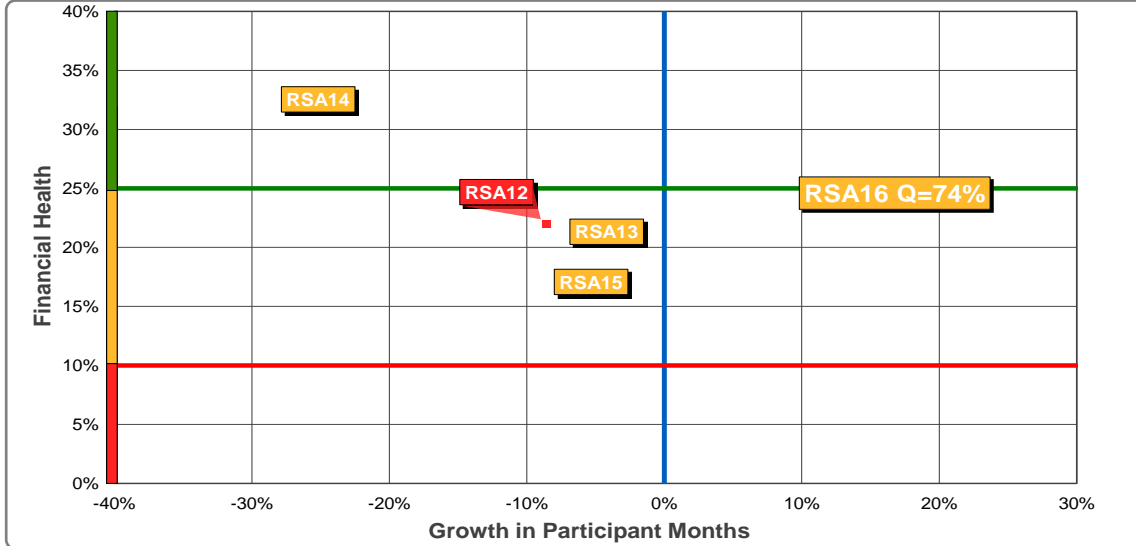
RSA is very pleased to note that we are no longer 'in a NPPR phase', there has been a lot of work over the past years (and a lot still remains to be done). Volunteer development and program growth continue to be essential prerequisites to improving our long-term sustainability.

## 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: 6 
 ■ Hosting from: 11

## 3D Health Indicators 2012-2016



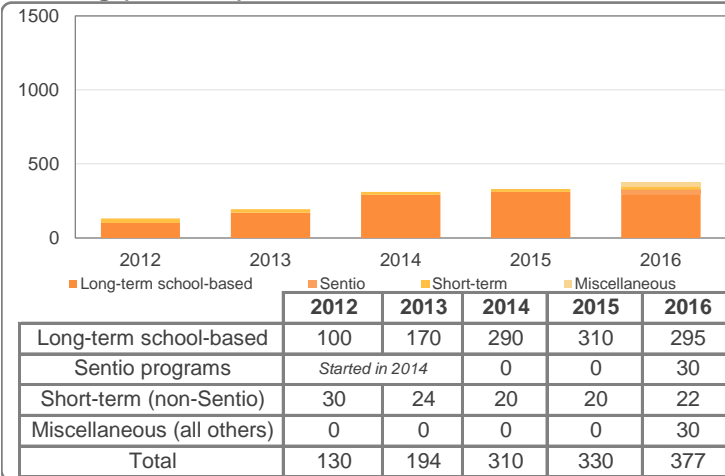
## KPIs

Yr	Growth	Finances	Quality
16	+9%	25%	74%
15	-9%	17%	76%
14	-34%	33%	72%
13	-8%	21%	71%
12	-9%	22%	66%

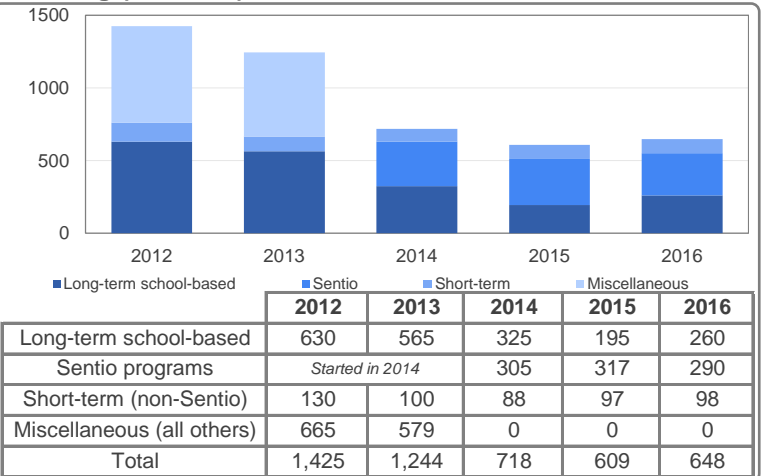
## NPPR Status

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

## 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%		90%	85%	100%		58%	90%	29%	72%	+2%	74%
2015 (CSE15, PSE15-14)	82%		73%	68%	93%		80%		50%	74%	+2%	76%
2014 (CSE14, PSE14-13)	52%		65%	78%	90%		91%		44%	70%	+2%	72%

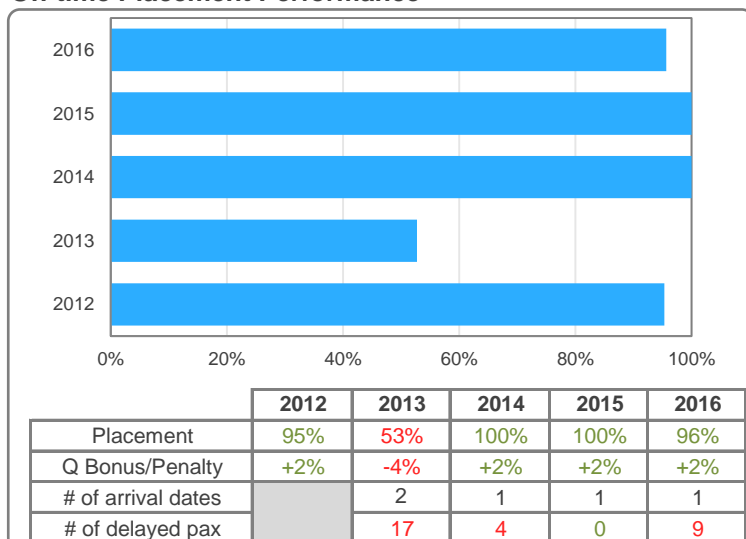
## Key Financial Numbers in Effective USD 2013-2015

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	532,595	0%	501,394	0%	31,201	25%	152,951	31%	123,353	25%
2014	569,851	0%	635,590	0%	-65,739	***	182,049	29%	108,523	17%
2013	666,223	0%	601,453	0%	64,770	33%	411,793	68%	195,673	33%

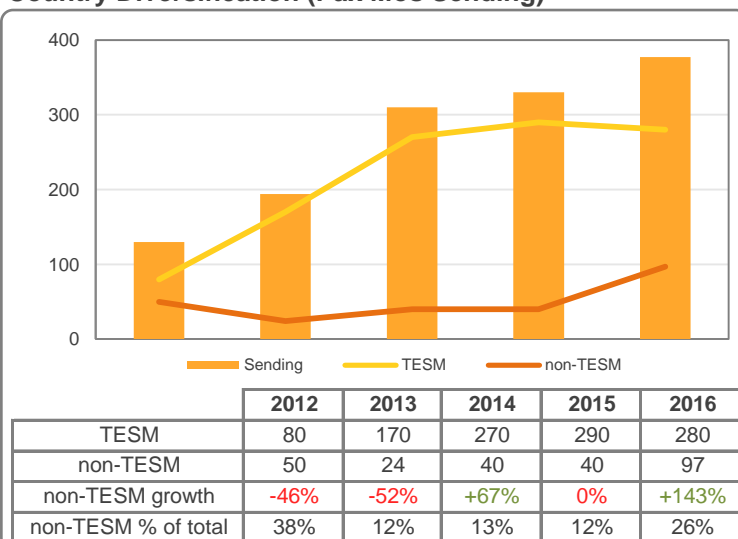
\*\*\*Unrestricted Net Assets is meaningless because these are negative

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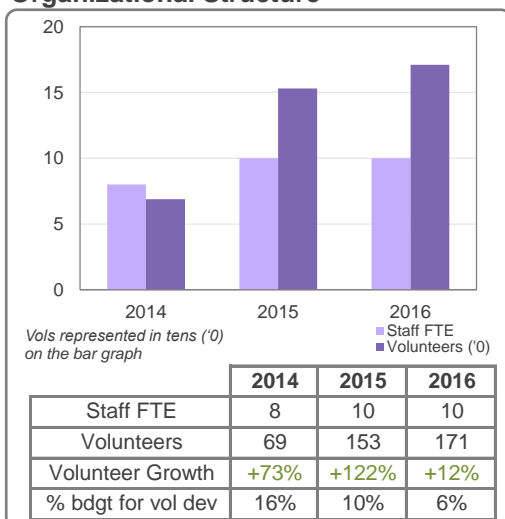
## On-time Placement Performance



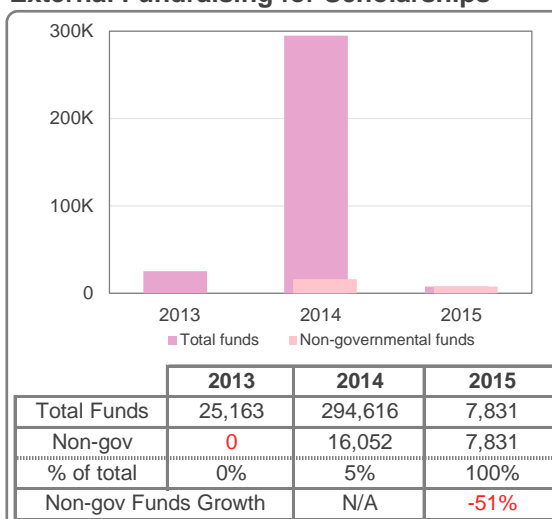
## Country Diversification (Pax Mos Sending)



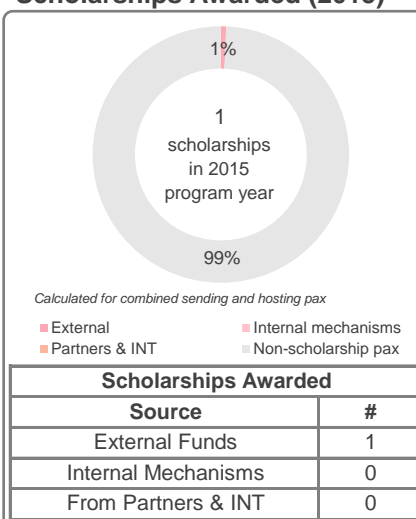
## Organizational Structure



## External Fundraising for Scholarships



## Scholarships Awarded (2015)



## Education and ICL

Learning Program Participants (started and completed)			
Level	W	1 - 3	QT
Staff & Vols	29	0	0
% of Total	16.0%	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
14.8%	21.1%	6.3%

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)
YFU, Rotary	You2Africa, International Experiences, YFU
Sending (18+ programs)	Hosting (18+ programs)
-	Global Visions International

## 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**  
On the hosting front AFS is still facing competition from organizations that pay host families and schools. On sending there is still great demand (as evidenced by the success of the "Africa scholarships") however, the cost of the programs are prohibitive to most South Africans.