

Updated Snapshot: United States (USA)

Statement

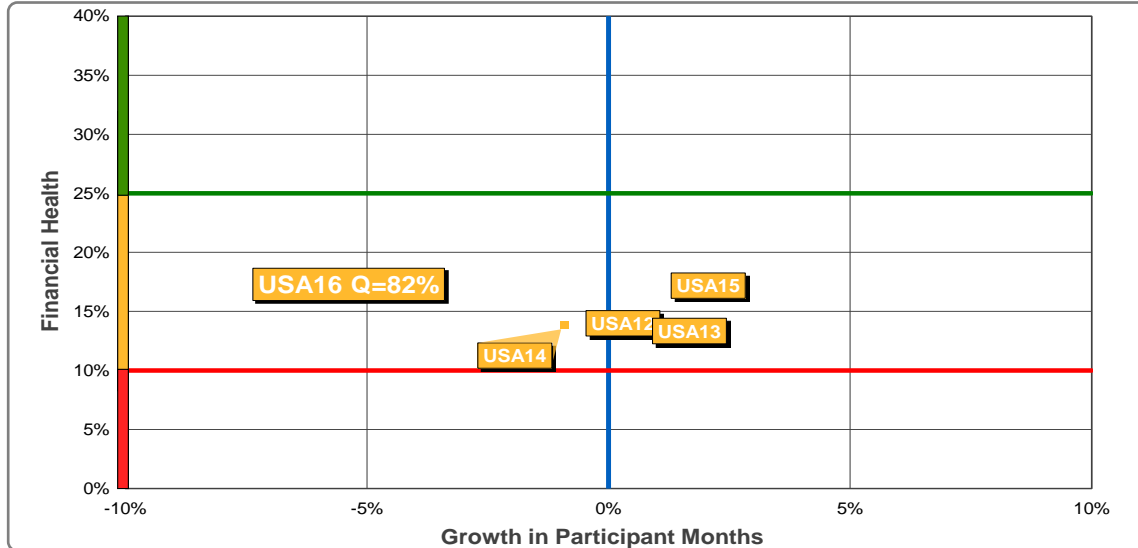


Partner Organizations 2016

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: 47
 ■ Hosting from: 55

3D Health Indicators 2012-2016



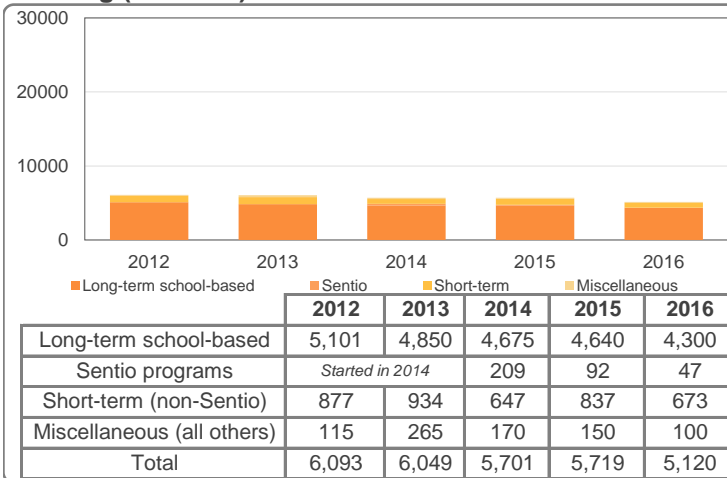
KPIs

Yr	Growth	Finances	Quality
16	-8%	17%	82%
15	+1%	17%	81%
14	-1%	14%	80%
13	+1%	13%	79%
12	-1%	14%	78%

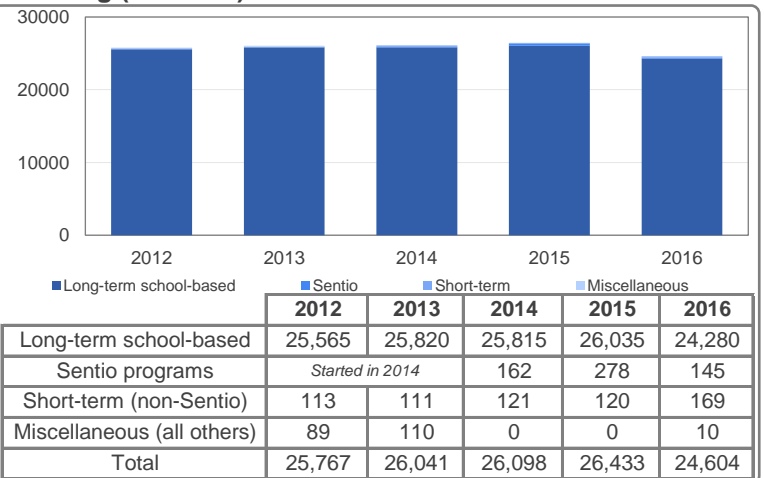
NPPR Status

Yr	Phase
16	Phase I
15	No phase
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)	72%	93%	95%	94%	90%	89%	71%	79%	86%	85%	-3%	82%
2015 (CSE15, PSE15-14)	69%	91%	96%	94%	87%	87%	78%	80%	85%	85%	-4%	81%
2014 (CSE14, PSE14-13)	72%	92%	94%	93%	87%	79%	69%	77%	85%	83%	-3%	80%

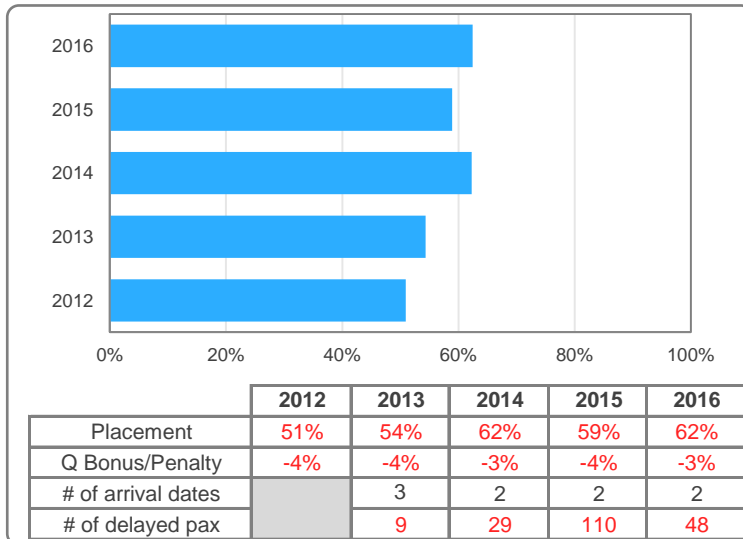
Key Financial Numbers in Effective USD 2013-2015

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	36,408,234	20%	36,657,891	21%	-249,657	***	11,012,499	30%	6,340,615	17%
2014	36,753,399	20%	35,517,873	20%	1,235,526	20%	11,343,412	32%	6,103,498	17%
2013	35,943,468	20%	35,582,225	20%	361,243	7%	9,552,247	27%	4,919,450	14%

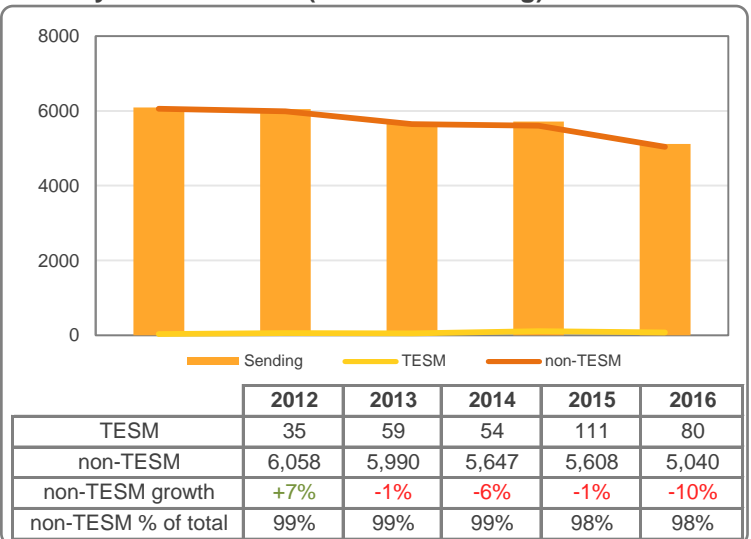
***Unrestricted Net Assets is meaningless because these are negative

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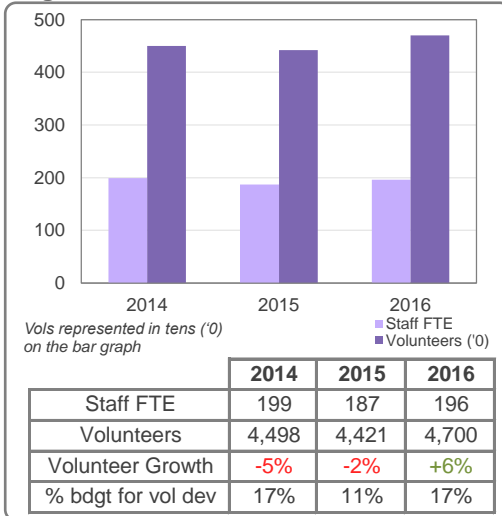
On-time Placement Performance



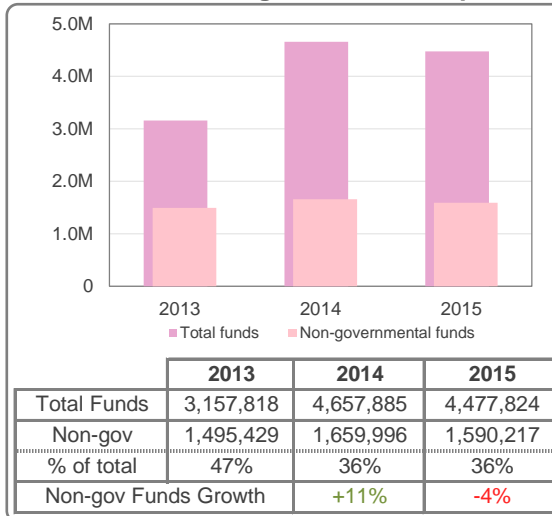
Country Diversification (Pax Mos Sending)



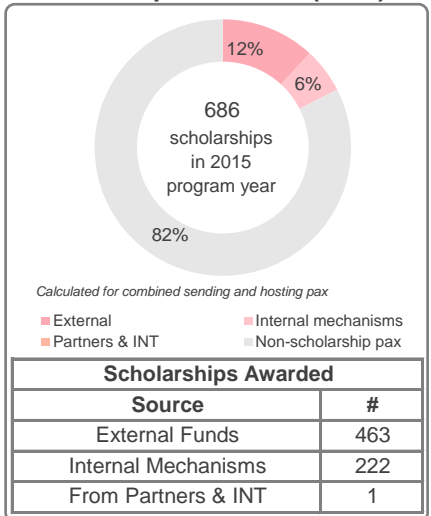
Organizational Structure



External Fundraising for Scholarships



Scholarships Awarded (2015)



Education and ICL

Learning Program Participants (started and completed)			
Level	W	1 - 3	QT
Staff & Vols	282	14	20
% of Total	5.8%	0.3%	0.4%

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
42.0%	10.7%	2.3%

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, ASSE	YFU, CIEE, Ayusa
Sending (18+ programs)	Hosting (18+ programs)
EF, GLA, Rustic Pathways, Cultural Vistas, Global Experiences, YFU, Spi	-

Educational System and Accreditation

Educational Designation & Credit Agreement	
<input type="checkbox"/>	Designated as an Educational Entity
<input type="checkbox"/>	(Full) Credit Agreement
<input type="checkbox"/>	(Partial) Credit Agreement

Ties to the World around AFS

International Exposure and Collaboration with Others	
<input type="checkbox"/>	Joint project/new affiliation
<input type="checkbox"/>	External forum or event

Market Environment

Market Trends and Forecasts

Overall, in the past 9 years there have been fewer students seeking options to go abroad on long-term programs. Nevertheless, there was a marked increase last year due to increase in demand from a few key states. Demand for short-term programs (mostly volunteer-based or skill-building) is also on the rise. This year the fear of international terrorism has curtailed the sending capacity of the market overall. The inbound market has grown every year, however, the change is largely due to an increase in F-1 students. The number of J-1 students has remained relatively stagnant for the last few years, at roughly 25,000 nationwide while the F-1 sector has more than doubled. China remains the largest sending country of F-1 students.