



ACADEMICS



New Faculty Resumes

Brent Whitted

Elise Peeren

Alfonso Leon



ADMISSIONS & COLLEGE COUNSELING



Class of 2019 College/University Matriculation List

Clark University (\$25,000 in scholarships)
College of Idaho
Colorado College
Georgetown
Harvard University
IE University
King's College London
Royal Holloway University London (2)
SOAS
St. Lawrence (full ride)
University College London
University of Bath
University of Bristol
University of Edinburgh
University of Florida
University of Glasgow (6)
University of Leeds
University of Manchester (5)
University of Nottingham (2)
University of Pennsylvania
University of Rotterdam
University of Rochester
University of Texas at Austin
University of Warwick (3)
University of Winchester
Wartburg College



Entry 2019 - Rolling Snapshot

	<u>September 2019</u>			<u>May 2019</u>			<u>October 2018</u>		
	Offers	Accepted	Filled	Offers	Accepted	Filled	Offers	Accepted	Filled
Fully Funded							27*	21	
Partially Funded							43	43	
Unfunded							14	13	
Total							102	102	
GSP (unfunded)							18	12	5
Grand Total							120	114	

Notes *includes 6 Dare to Dream Scholarships and 2 Horizon Foundation Funded
**Does not include 25 US Davis Scholars in any offer/funding/filled



Final Yield on NC Offers Five-Year Trend

	<i>Final</i> Entry 2018		<i>Final</i> Entry 2017		<i>Final</i> Entry 2016		<i>Final</i> Entry 2015	<i>Final</i> Entry 2014	
	<i>NC Offers</i>	<i>Enrolled</i>	<i>NC Offers</i>	<i>Enrolled</i>	<i>NC Offers</i>	<i>Enrolled</i>	<i>NC Offers</i>	<i>NC Offers</i>	<i>Enrolled</i>
Fully Funded	20	23	N/A*	N/A	N/A	N/A	N/A	N/A	N/A
Partially Func	72	57	63	41	41	39			
Unfunded	28	16	26	15	47	20			

**Not available. This is first time we have calculated this data.*



College/University Visits as of 1/16/19

Babson College
Bard- Berlin
Bennington
Bowdoin College
Brandeis University
Colby College
Colgate
Connecticut College
Davidson College
Duke University
Earlham College
Gettysburg College
Harvey Mudd College
IE University (Spain)
Kenyon College
Lewis & Clark College
Macalester
Middlebury College
MIT
Mount Holyoke
Northwestern University
NYU
Oberlin College
Olin College
Pitzer College
Prescott College
Princeton University
Reed College
Scripps College
Skidmore College

Skidmore College
St. Lawrence University
St. Olaf College
Swarthmore College
The George Washington University
The University of Oklahoma
Trinity College
University of British Columbia
Union College
University of Oklahoma
University of Richmond
University of Rochester
University of Wisconsin Madison
Vanderbilt University
Vassar
Washington & Lee University
Wellesley College
Westminster College
Wheaton College
Williams College
Worcester Polytechnic Institute of Technology (WPI)



RESIDENTIAL



Students at Risk Five-Year Trend

Categories	Actions	2018-19	2017-18	2016-17	2015-16	2014-15
Medical	Conditional return	0	2	7	3	
	Left for medical reasons	1	0			
Mental health	Conditional return	0	2	1	3	
	Left during school year	0	0	5	1	
Restorative	Restorative circles	10	14	-	-	-
	Negotiated resolutions	10	-	-	-	-
Discipline	No contact agreement/other	2	2			
	Disciplinary probation	10	13	3	12	
	Suspension	0	2			
	Withdrew from school	0	3	3	1	
	Dismissal	3				



EXPERIENTIAL EDUCATION



Signature Programs, ExEd Overview

Signature Programs:	Arts and Culture	Constructive Engagement		Sustainability		Wilderness
		Conflict	Community	Personal	Campus	
Activities	Cultural Days (3/yr), music, dance, theatre, jewelry making	CEC Leadership Training; Local School Partnerships, Youth Detention Center, CARE Unit, NMBHI, Animal Shelter, Homeless Shelter, San Miguel County Detention Center,		Variety of individual athletic and mindfulness activities, including dance, soccer, yoga, squash,	Farm, Tree Thinning, Library, Dining Hall, Tech, other facility support	Wilderness I, II, III & IV; 10 day leadership expedition; guiding during Orientation
Appx 4 hours weekly or 282 Baseline Hours Per Student over Two Year Program	Appx. 35 hours (at least 15 hours per cultural day participation + 20 hours)	Orientation Workshops + CEC first year retreat + Annual Conference + Post Grad week = appx 44 hours	1.5 hour/student/week for 1 year (30 weeks) + 6 hours (3 weeks of rotations) + UWC Day/MLK Day at 4 hours = 55 hours each	appx 45 hours over course of 3 semesters = 45	1.5 hour/student/week for 1 year (30 weeks) plus 12 hours (6 weeks (Farm and Campus Service) of rotations) = 57 hours each	appx. 46 hours (over 2 overnight expeditions + rotations)
Impact	Community celebration, visibility, public relations	Primarily serving local youth, homeless, mental health and juvenile justice populations; animal shelter		Wellness support; stress relief; community building	10,000 lbs food served in Dining Hall	All students gain basic Wilderness skills; close to half the of each class completes Wilderness Leadership 14 day expedition
	Cross-cultural education, diversity, equity and inclusion	Students volunteering in 7 schools and multiple classrooms impacting some 500 local youth weekly		Skill development, teamwork, personal challenge	Fire risk mitigation	
Partners	Visitng Artists/Residencies, Adjunct Musicians; Flamenco, Dance organizations	20 local and regional schools; 15 local organizations		Community instructors, Aspen Santa Fe Ballet, Colorado Ballet, Millenium Dance Complex, National Dance Institute, NMHU, Performance Santa Fe	EarthCare, Forest and Watershed Restoration Institute, NMHU, NMSU, Hermit's Peak Watershed Alliance, Sodexo	NOLS, Apache, Santa Fe, Carson, Corando, Grand Staircase National Forest Service
\$150,000+ Income Generated Annually	NM Arts Grant \$2,700	SF Community Foundation \$5,000				
		Contract with City \$11,000				
		Northern NM Regional Foundation \$3,000				
		NMSU Agriculture \$15,000 annually for 3 years			In Kind - NMSU Forestry appx. \$30,000 annually? Need to check w Ben	



Spring 2019 Project Week

Bisbee Border, Sustainability and Art - Bisbee, AZ - Travis & Luis -

Bisbee will focus on three different themes: Mexican/American border issues, Sustainability, and Art. Some of the activities that we'll do are:

- 1) Go to the border, get a brief tour of the wall, hear personal stories about the experience of living on the border as an American and as a Mexican
- 2) Meet students who have to cross the border from Mexico to the US every day to go to school.
- 3) Work on projects using straw bale, paper crate, and earth
- 4) Visit a ranch that is entirely running off the grid and using renewable and clean energy

And more...

Capacity: 12 students; estimated cost: \$0 per person

Border Ethnographies- El Paso, TX - Doug & Andy

This UWC-USA Project Week aspires to expose students to the diverse narratives surrounding the physical construction of the border marking the separation of the nation-states of Mexico and the United State of America. Furthermore, this Project Week hopes to afford students an opportunity to carry out an exercise in ethnographic research, field work, observations, interviews, and reporting on their experience with the border. In doing so, we have the goal of generating media that might help our partner institutions in their respective missions and may serve as a living document for what UWC-USA students encounter on this particular project.

Throughout the course of this week, we hope to meet with scholars, students, teachers, artists, activists, humanitarian workers, governmental employees, and security forces to help us develop, in the time allotted, as comprehensive a picture as possible of the rationalizations of what the border signifies as well as its myriad challenges and limitations and how those affect all who live near the border. While the Project Week's primary work will occur during the scheduled time, we also hope to meet both before and after for several meetings to discuss readings and films and create the media project our work aspires to create.

Capacity: 13 students; estimated cost: \$0 per person

Bueno Para Todos - Villanueva, NM- Tara & Denika

Nurturing the Matriarch Connection in northern New Mexico: We will explore the relationship between food, land, water, and personal healing by learning the teachings from matriarchal leaders from northern New Mexico tribes and the importance of understanding the sacredness of land and identity. We will learn more about the land that UWC-USA occupies and how we can recognize the tribes this land once served before colonization. We will visit with artists, poets, activists, and social justice advocates as part of our learning and processing what we learn with the goals of creating personal art to express this awareness. Our service work will be intensive gardening and reinforcing the acequias in Villanueva for the Bueno Para Todos Collaborative that serves this beautiful community. We will eat very well.

Capacity: 12 students; estimated cost: \$0 per person

Dance Denver, CO - Judi, Gwen, Yaka, & Amy

Dance Denver is the perfect trip for those who love to dance, want to become better dancers, or want to learn to dance! Most likely we will all be staying in an AirBNB house in the Denver area and will be taking daily classes at Colorado Ballet and Millennium Dance Complex. We will have dance classes every morning and afternoon, with instruction in various genres including hip hop, jazz funk, contemporary, leaps and turns, and ballet. We also will be doing service work at The Action Center, a locally operated non-profit that distributes food, clothing, and household goods to needy families. We also plan side trips to Casa Bonita, a Denver restaurant featuring cliff diving (to watch!) and to Denver's outdoor mile-long 16th Street Mall. Come and dance with us at Dance Denver!

Capacity: 32 students; estimated cost: \$120 per person to be paid by student

New Orleans Music

Melinda & ___ - IB Music Students will be studying the music of the Transatlantic Exchange and exploring the impact of slavery on musical developments across the Americas during second and third trimester. Students will explore the musical and social history of the region through informal and formal performance venues, museums, locations of historical significance for the development of jazz, and context for complex social histories and narratives of misappropriation and marginalization. This Project Week trip will offer an experiential window into the IB music curriculum and support the broader goals of the Arts and Culture program in offering an immersive experience in a vibrant, living musical tradition, as well exposure and meaningful social and emotional contexts for a layered history.

This trip is only open to Second-Year IB Music Students.

Capacity: 6 students; estimated cost: \$200 per person

Nguvu za Afrika- Silverton, CO - Eyad & Intesar, Student Leader Anabela

This trip focuses on providing African cultural, political, geographic and experiential education to middle school students in Silverton Public School in Colorado. The middle school students have the opportunity to learn in the first person about the the African Cultural diversity, underlying assumptions made about Africa, African Politics, extraordinary facts about many countries in Africa and much more! This trip will mainly depend on the African UWC students input, and for this reason, african students will be prioritized when signing up for this trip. However, non African Students are strongly encouraged to also sign up for this trip and any outside help and suggestions will also be crucial for a fully interactive experience.

Capacity: 12 students; estimated cost: \$0 per person

Tucson Border Trip - AZ- Alex & Sean

At the core of the UWC-USA Experiential Education program is this idea of exploring the various dimensions of power and privilege. At the same time, we stress the importance of place-based learning. The United States has faced scrutiny due to its recent stance on immigration.

This is a service trip intended to take a deep dive into the controversial border issue in the United States. We will be spending one week traveling near the Arizona border volunteering with organizations who provide aid to those who are crossing illegally. We will also gain perspective by talking with border patrol, former ICE workers, and an immigration lawyer.

This trip will be loaded with challenges, such as facing some of the hardest issues in this countries public sphere, touring a detention center for those caught crossing, and asking tough questions around this idea of border zones and cultural appropriation.

Capacity: 12 students; estimated cost: \$0 per person

Capacity: 12 students; estimated cost: \$0 per person

Wild Spirit Wolf Sanctuary - El Morro, NM - Erin, Ellen, & Michael

This will primarily be a service project trip consisting of physical labour such as building new habitats, landscaping, building cave houses, painting etc. It will also involve a tour of the sanctuary, a feeding tour, and an educational encounter with one of the wolf ambassadors. There will also be a day trip to the El Morro National Monument and tour the Zuni Pueblo to understand the history of the geographic location. There will be some downtime due to the wolf sanctuary's schedule which will allow for activities such as yoga, team building & bonding, arts and crafts projects, and some instruction of life skills.

Capacity: 18 students; estimated cost: \$0 per person

Capacity: 32 students; estimated cost: \$120 per person to be paid by student

Wilderness - Advanced Backpacking, Utah

The Southern Utah landscape is famous for its stunning red rock arches and spires, deep canyons, and wide expanses of slickrock. This year we will be offering two trips; Coyote Gulch and The Boulder Mail Trail. Both are unique and challenging in their own way. The focus of these trips will be to continue to develop your wilderness skills in areas of on and off trail travel and navigation through steep canyons, decision making and risk analysis, and a solo experience. After demonstrating mastery in navigation, cooking, risk management, leadership, and facilitation students will get 'checked off' for April Finals. In addition, students will have the opportunity to complete a 24-hour solo experience. This trip is only open to second year wilderness leaders.

Capacity: 20 students; estimated cost: \$0 per personCapacity: 32 students; estimated cost: \$120 per person to be paid by student

Wilderness - Advanced Backpacking, Blue Range- 1 trip, wilderness instructors

Experience the new (to some of you) and rarely visited Blue Range Primitive Area, a rugged and undeveloped stretch of wilderness on the New Mexico and Arizona border. The focus of the 5 days will be to continue to develop your wilderness skills in areas of on and off trail travel and navigation through steep canyons, decision making and risk analysis, and a solo experience. You will travel in both large and small groups and cook in small groups. By the end of the week, if you have demonstrated mastery in navigation, cooking, risk management, leadership, and facilitation of the group process you will get 'checked off' for April Finals. This trip is only open to second year wilderness leaders.

Capacity: 10 students; estimated cost: \$0 per person

Capacity: 20 students; estimated cost: \$0 per personCapacity: 32 students; estimated cost: \$120 per person to be paid by student

Wilderness - Open Blue Range Backpacking, Blue Range Primitive Area, AZ - Wilderness Instructors, 2 trips

"Experience the new (to some of you) and rarely visited Blue Range Primitive Area, a rugged and undeveloped stretch of wilderness on the New Mexico and Arizona border. The focus of the 5 days will be to continue to develop your wilderness skills in areas of on and off trail travel and navigation through steep canyons, decision making and risk analysis, and a solo experience. You will travel in both large and small groups and cook in small groups. By the end of the week, if you have demonstrated mastery in navigation, cooking, risk management, leadership, and facilitation of the group process you will get 'checked off' for April Finals. This trip is only open to second year wilderness leaders.

Capacity: 10 students; estimated cost: \$0 per person

Capacity: 20 students; estimated cost: \$0 per personCapacity: 32 students; estimated cost: \$120 per person to be paid by student

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Capacity: 20 students; estimated cost: \$0 per personCapacity: 32 students; estimated cost: \$120 per person to be paid by student

Wilderness - Rock Climbing Trip & Natural History - AZ- Evan & 2 Wilderness Instructors

Students choosing the Rock Climbing and Natural History project week trip will journey to southeastern Arizona—to Cochise Stronghold and the Santa Catalina Mountains—for a week of camping, rock climbing, exploration, and learning about the natural environment. These magnificent parcels of Wilderness and National Forest host a dozen different bioregions—from lower Sonoran Desert, to Canadian Zone woodlands—each with a unique colony of flora, fauna, and geologic formations ideal for rock climbing. Students will push their limits, both physically and mentally, and come away with a greater understanding of what it means to try hard and be part of a community. Preference given to those who have participated in the climbing program this year.

Capacity: 12 students; estimated cost: \$0 per person

2018 YEP+ Entrepreneurs Project Week Trip - New Mexico - Roy Montibon & Dr. Sam

This trip will focus on the entrepreneurial ecosystem across New Mexico from Las Vegas/Santa Fe down through Albuquerque to the Borderplex Region (Las Cruces/El Paso/Juarez). The trip has a science/technology/arts/agricultural focus. Students will meet entrepreneurs at tech and non-tech companies; scientists and tech transfer experts at National Laboratories; art and agricultural entrepreneurs; visit major US land art and scientific sites; and the best fab labs and entrepreneurial programs in the state, from the Sangre de Cristo mountains to The Chihuahuan Desert. Students will have multiple opportunities to pitch their project concepts to significant business and economic leaders across the state. Students are expected to prepare and conduct some research in advance of each visit. The trip will be packed and intense. You will meet hard working, inspiring people, make valuable contacts and experience New Mexico's unique natural and business ecosystems. The trip is open to all YEP participants, plus students who have an interest in a business and/or an entrepreneurial future.

Capacity: 12 students; estimated cost: \$0 per person



FINANCE, OPERATIONS & HR



Current Year's Budget vs. End-of-Year Projection

	1	FYE	FYE	VARIANCE	
		MAY 2019	MAY 2019	2019 Projection vs 2019 Budget	
		APPROVED BUDGET	2018-2019 ESTIMATE	%	\$
		RECLASSIFIED			
Revenue					
Tuition From Families and NC's		3,111,893	2,324,423	-0.25	-787,470
Davis Scholar Endowment		2,390,585	2,390,585	0.00	0
Davis Scholar Supplemental		1,000,000	1,000,000	0.00	0
Davis Scholar Abroad Expense		-1,770,000	-1,770,000	0.00	0
Net Davis Revenue		1,620,585	1,620,585	0.00	0
Davis Family Challenge Grant \$2MM		2,000,000	2,000,000	0.00	0
Summer Programs		248,027	248,027	0.00	0
Annual Fund Contributions		2,000,000	2,000,000	0.00	0
Endowment Transfer		3,496,824	3,766,824	0.08	270,000
Total Revenue		12,477,329	11,959,859	-0.04	-517,470
Operating Expenses					
Academic, Student Life					
Instruction		2,378,778	2,378,778	0.00	0
Co-Curricular & Wilderness		898,237	911,237	0.01	13,000
Student Life		740,888	789,912	0.07	49,024
Library		64,689	64,689	0.00	0
Subtotal		4,082,592	4,144,616	0.02	62,024
Institutional Operations					
Executive Management		1,168,439	1,087,937	-0.07	-80,502
Admissions & College Counseling		482,493	482,493	0.00	0
General Admin		1,276,212	1,131,212	-0.11	-145,000
IT		493,872	493,872	0.00	0
Subtotal		3,421,016	3,195,514	-0.07	-225,502
Facilities, Transportation & Food Service					
General Maintenance and Custodial		1,642,344	1,792,344	0.09	150,000
Security		296,649	345,570	0.16	48,921
Transportation and Vehicles		230,662	189,462	-0.18	-41,200
Food Service		1,030,000	1,030,000	0.00	0
Subtotal		3,199,655	3,357,376	0.05	157,721
Advancement		589,437	615,437	0.04	26,000

Total Operating Expenses	11,292,700	11,312,943	0.00	20,243
Capital Purchases	750,000	750,000	0.00	0
Surplus / (Deficit) Changes to Reserve	434,629	-103,084		

1 2018-2019 Approved budget was reclassified to reflect the net of all Davis revenue including expense for Davis Scholars Abroad listed within the Revenue section of this summary.

Major Revenue Variances

	Budget	Actual	Variance
# of Students	235	221	-14
Gross Tuition	8,973,500	8,589,880	-383,620
Scholarships	-3,418,407	-3,938,207	-519,800
Davis	-2,443,200	-2,327,250	115,950
Net Tuition Revenue	3,111,893	2,324,423	-787,470



Current Year's Budget and Next Year's Preliminary Budget

	FYE	FYE	VARIANCE	
	May 2019	May 2020	2019 Projection vs 2020 Budget	
1	2018-2019 ESTIMATE	2019-2020 PRELIMINARY	%	\$
Revenue				
Tuition From Families and NC's	2,324,423	2,444,423	5.16%	120,000
Davis Scholar Endowment	2,390,585	2,365,972	-1.03%	-24,613
Davis Scholar Supplemental	1,000,000	1,000,000	0.00%	0
Davis Scholar Abroad Expense	-1,770,000	-1,770,000	0.00%	0
Net Davis Revenue	1,620,585	1,595,972	-1.52%	-24,613
Davis Family Challenge Grant \$2MM	2,000,000	2,000,000	0.00%	0
Summer Programs	248,027	365,438	47.34%	117,411
Annual Fund Contributions	2,000,000	2,000,000	0.00%	0
Endowment Transfer	3,766,824	3,751,676	-0.40%	-15,148
Total Revenue	11,959,859	12,157,509	1.65%	197,650
Operating Expenses				
Academic, Student Life				
Instruction	2,378,778	2,413,360	1.45%	34,582
Co-Curricular & Wilderness	911,237	975,620	7.07%	64,383
Student Life	789,912	869,440	10.07%	79,528
Library	64,689	64,470	-0.34%	-219
Subtotal	4,144,616	4,322,890	4.30%	178,274
Institutional Operations				
Executive Management	1,087,937	1,114,340	2.43%	26,403
Admissions & College Counseling	482,493	482,493	0.00%	0
General Admin	1,131,212	1,220,992	7.94%	89,780
IT	493,872	506,310	2.52%	12,438
Subtotal	3,195,514	3,324,135	4.03%	128,621
Facilities, Transportation & Food Service				
General Maintenance and Custodial	1,792,344	1,782,066	-0.57%	-10,278
Security	345,570	378,116	9.42%	32,546
Transportation and Vehicles	189,462	194,664	2.75%	5,202
Food Service	1,030,000	1,060,900	3.00%	30,900
Subtotal	3,357,376	3,415,746	1.74%	58,370
Advancement	615,437	626,782	1.84%	11,345

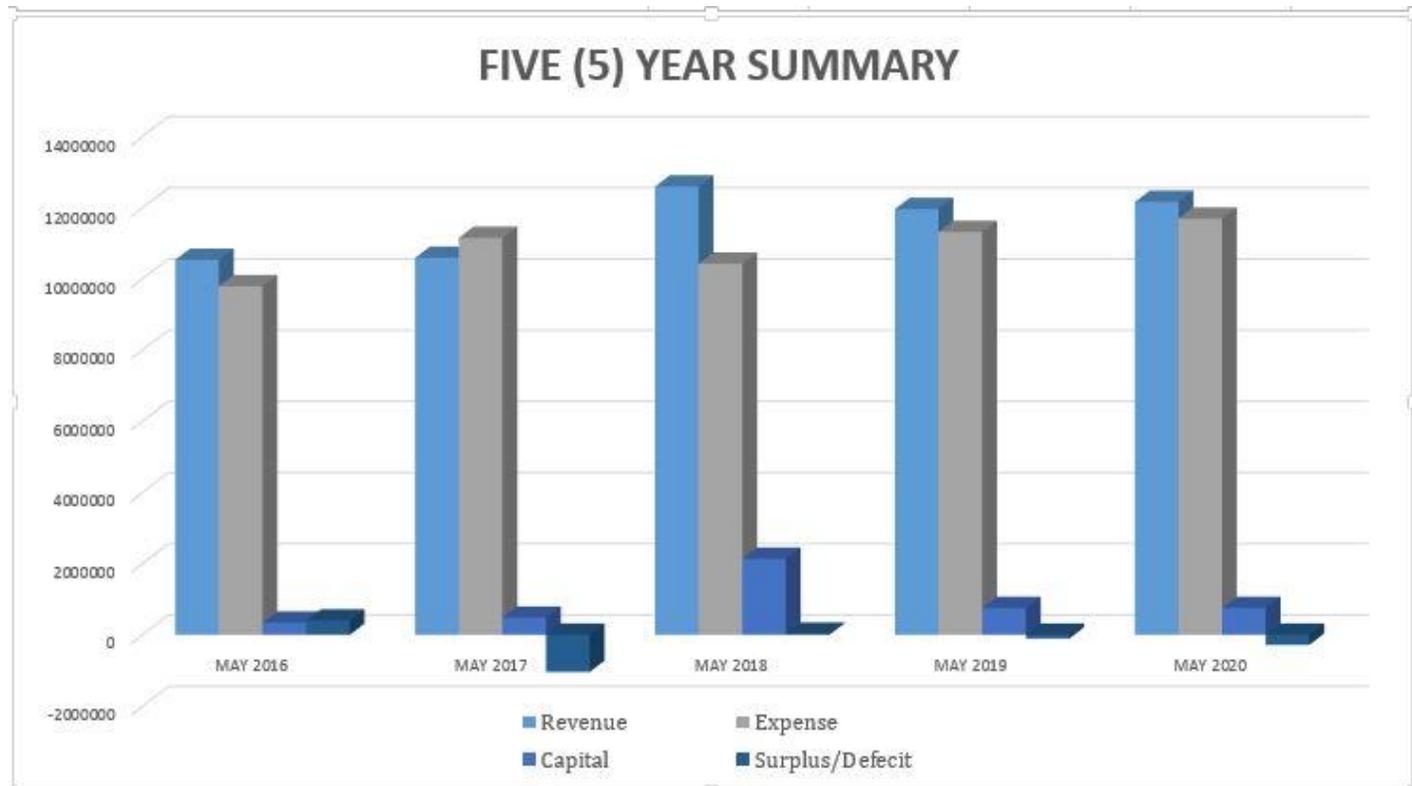
Total Operating Expenses	11,312,943	11,689,553	<u>3.33%</u>	376,610
Capital Purchases	750,000	750,000	0.00%	0
Surplus / (Deficit) Changes to Reserve	-103,084	-282,044		

1 2018-2019 Approved budget was reclassified to reflect the net of all Davis revenue including expense for Davis Scholars Abroad listed within the Revenue section of this summary.



Multi-Year Budget Projections as of December 30, 2018

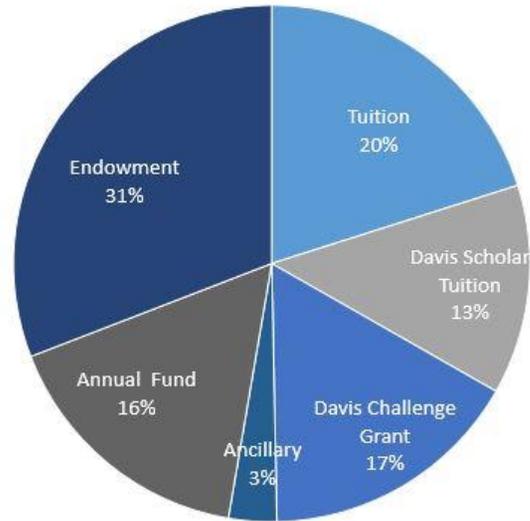
	MAY 2016	MAY 2017	MAY 2018	MAY 2019	MAY 2020
Revenue	10,531,485	10,588,195	12,591,834	11,959,859	12,157,509
Expense	9,793,864	11,149,282	10,424,463	11,312,943	11,689,553
Capital	338,827	482,918	2,137,438	750,000	750,000
Surplus/Defecit	398,794	-1,044,005	29,933	-103,084	-1,093,088



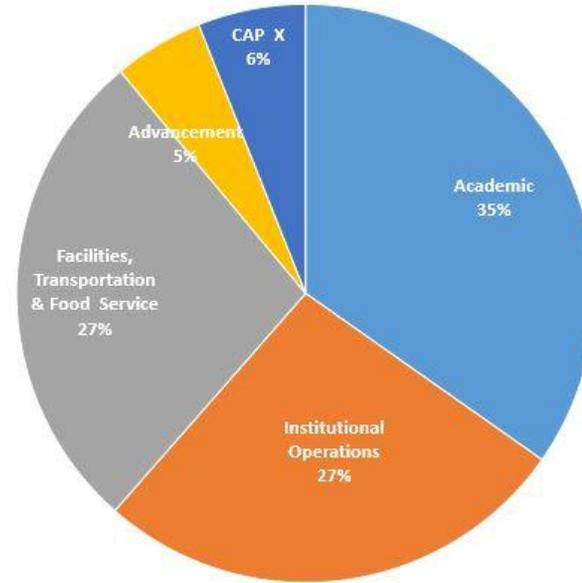


2019-20 Revenues and Expenses (Chart)

Composition of Budgeted Revenue 2019-2020



Composition of Budgeted Expense 2019-2020





Budget Projections Five-Year Trend

Cash Sources,Uses	Projected EOY 2018-19	Preliminary 2019-20	Projected 2020-21	Projected 2021 - 22	Projected 2022-23	Projected 2023-24
Students (Note 1)	221	230	230	230	230	230
% Tuition Increase (Note 2a)	2.00%	2.00%	2.50%	2.50%	2.50%	2.50%
Net Tuition Revenue (Note 2b; 2c)	2,324	2,444	2,493	2,543	2,594	2,646
Non-Diploma Programs (Net revenue)	248	365	375	382	390	398
Subtotal	2,572	2,810	2,868	2,925	2,984	3,043
Contributions						
Annual Fund	2,000	2,000	2,060	2,122	2,185	2,251
Endowment Funds (Note 5)	6,157	6,118	5,965	6,084	6,206	6,330
Davis Supplemental Grant	1,000	1,000	1,000	1,000	1,000	1,000
Davis Challenge Matching Grant (Note 4)	2,000	2,000	2,000	2,000		
Davis Scholar Abroad Expense reclassified from an Operating Cost to a negative Revenue)	-1,770	-1,770	-1,770	-1,770	-1,770	-1,770
Subtotal	9,387	9,348	9,255	9,436	7,621	7,811
Total Revenues	11,960	12,158	12,122	12,361	10,605	10,854
Operating Costs	11,313	11,690	12,040	12,401	12,773	13,157
Net Operating (Revenue minus Expenses, prior to capital expenditures)	647	468	82	-41	-2,169	-2,303
Campus Improvements - including one-time projects	750	750	750	750	750	750
(Decrease) or increase of reserves needed to balance budget	-103	-282	-668	-791	-2,919	-3,053
Reserve Fund Starting Balance	2,406	2,302	2,020	1,353	562	-2,357
Reserve Fund Closing Balance	2,302	2,020	1,353	562	-2,357	-5,409

Assumptions:

1. Enrollment goal has been agreed to by the Admission and Business Office, with the understanding that it may change
- 2a. Tuition will increase only for first year students at a rate of 2.5% annually. Tuition means testing will be implemented for entering class in 2019-20, which is anticipated to increase net tuition over what is currently being shown.
- 2b. Includes estimated \$120,000 additional tuition projected from implementation of the Davis hybrid scholarship model
- 2c. Does not include additional tuition from participating in the Global Selection Process at this time
3. Davis Challenge Matching Grant - The Davis family has offered a matching grant of \$2 million per year for five years, beginning in FY 2018
4. 2.0% appreciation in draw, though endowment is expected to grow at a higher rate.
5. Endowment in 2018-2019 and 2019-2020 includes \$270,000 each year in rollover funds

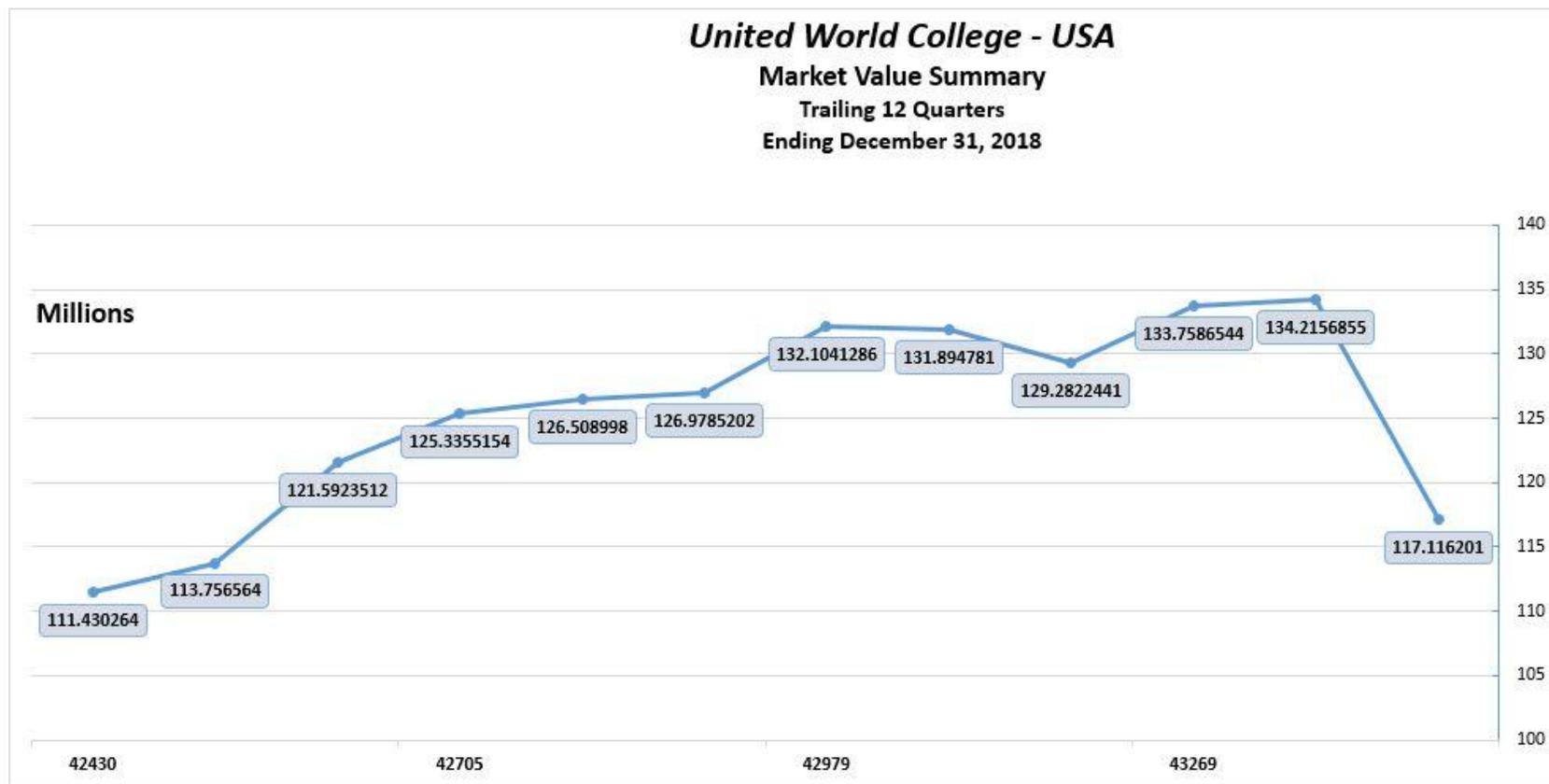


Market Value Summary as of December 31, 2018 (chart)

		31-Mar-18		30-Jun-18		31-Sept. 18		31-Dec-18	
		Market Value	%						
Cash-Silver Point Redemption		\$ -	0.00%	\$ -	0.00%	\$ -	0.00%	\$ -	0.00%
Domestic Broad Equity									
	Davis NY Venture Renaissance (RIEF-Series C)	52,122,019	40.30%	50,798,430	38.00%	50,615,866	37.70%	38,247,156	32.70%
Small Cap Broad Equity									
	State Street Russell 2000	5,647,871	4.40%	6,084,477	4.50%	6,302,389	4.70%	5,709,208	4.90%
High Yield									
	Shenkman Primus High Yield	-	0.00%	-	0.00%		0.00%		0.00%
Alternative Investments									
	Commonfund Alternative Fund	129,055	0.10%	129,055	0.10%	119,352	0.10%	119,352	0.10%
	Commonfund Endowment Fund	679,150	0.50%	679,150	0.50%	632,055	0.50%	632,055	0.50%
	Marathon Special Opportunity Fund	113,447	0.10%	115,717	0.10%	115,016	0.10%	114,891	0.10%
	Silverpoint Offshore Fund	-	0.00%	-	0.00%		0.00%		0.00%
International Equity									
	State Street MSCI EAFE	33,781,518	26.10%	33,364,591	24.90%	33,811,962	25.20%	31,076,564	26.50%
Emerging Markets									
	GMO Emerging Country Debt Fund	14,940,683	11.60%	14,606,739	10.90%	14,532,647	10.80%	14,093,386	12.00%
Domestic REIT									
	Davis RE	7,235,789	5.60%	7,876,040	5.90%	7,881,774	5.90%	6,931,909	5.90%
Short Term Bond ETF									
	Vanguard-UBS	14,632,711	11.30%	20,104,455	15.00%	20,204,624	15.10%	20,191,680	17.20%
Total Market Value		\$129,282,244		\$133,758,654		\$134,215,685		\$117,116,201	



Market Value Summary as of December 31, 2018 (Graph)





UWC-USA Davis Programs & Fund Report

Davis Scholars Endowment	Balance: \$49,000,000 5% Annual Draw @ 5/31/19: \$ \$2,391,000	To Fund 110 Davis Scholars USA & Abroad at the lesser of \$28,000 or each schools stated tuition.	\$1,400,000	\$987,000
Davis Supplemental Grant	Balance: \$1,000,000	To Supplement the Endowment for Davis Scholars USA & Abroad. Currently there are 60 Davis Scholars Abroad and 50 Davis Scholars USA. Funds distributed to UWC-USA in Sept 2017	\$1,000,000 @ 05/31/19 No End Date	
Davis Other Endowments Davis Conflict Area Endowment Davis African Scholarship Endowment Davis Asian Scholarship Endowment Davis Eastern Europe Schlr Endowment Davis Latin American Schlr Endow Davis Middle East Schlr Endowment Davis Davis - Faculty/Staff Dev.	Balance: \$15,000,000 5% Annual Draw @ 5/31/19: \$ \$790,600	To fund International Scholarships & Expenses as directed by each Fund	\$790,600 @ 05/31/19	
Davis Impact Fund	Balance: \$843,563	Matching Grant Funding for 17 Schools There are 7 schools with remaining funds to be allocated. Funds held at UBS	No Further Income to UWC-USA	\$1,000,000 earned FYE 05/31/16
Davis-Mahindra Grant	Balance: \$640,000	\$40,000 Awarded to each Sister School with 2nd year Davis Scholars (16 Schools) Funds were distributed in Sept 2017	\$40,000 per annum provided annual gift continues	\$ 640,000 per annum provided annual gift continues
Davis Forever Fund	Balance: \$117,451,249	Funding for the "Dare to Dream" Initiative across the UWC Movement. Funds held at UBS	10 annual scholarships Total: \$300,000	10 annual scholarships per school; Total: \$4,700,000
Davis Initiatives Fund	Balance: \$916,507 + \$2,000,000 (Challenge Grant)	Deferred and held for special projects and disbursed at Shelby Davis' request.	None	None
Total Annual Impact			\$4,740,000	\$6,327,000



Capital Projects Proposed 2018-19

Capital Projects 2018 - 2019	Projected	Final	Notes
<u>Energy or Sustainability Related</u>			
Field House HVAC system		21,000	ongoing
Landscape Master Plan (Surroundings)		28,000	complete
<u>Financial Savings and Safety (prevention of future damage)</u>			
Pumps and controls for campus water system		55,000	complete
Fire Protection & Future Water Supply - Pine Forest		40,000	complete
<u>Student Experience</u>			
Student Center repair and renovation (due to waste overflow)		24,000	balance to be paid by insurance
Castle bat mitigation (removal of bats; sealing entry points)		128,000	\$103,000 to be paid by insurance
<u>Academic Support</u>			
Vehicle replacements - minibus		65,000	complete
Sound Equipment (Auditorium) Upgrades		12,000	complete
Network switch upgrades		11,500	complete
3 smartboard replacements		16,000	complete
<u>Other</u>			
Master planning study (balance of payments)		75,000	complete
Website		149,000	complete
Keyless entry control system		21,500	complete
Off-site data storage for disaster recovery		12,000	Spring 2019
Waste water treatment system		560,000	complete - final payment under review
Dwan Light Sanctuary - roof; windows; repair leaks		95,000	complete - \$100,000 donation offsets costs
Pine Forest housing development		220,000	complete
Trujillo House Demolish		15,000	complete
Prior year accrual		(477,000)	
Insurance reimbursement		(103,000)	
Donation for Dwan Light Sanctuary		(100,000)	
<u>Total net cash for capital projects</u>		868,000	



Capital Projects Proposed 2019-20

Capital Projects 2019 - 2020	Projected
<u>Safety and maintenance necessary to prevent further deterioration</u>	
Castle - fire suppression system upgrade to replace failing lines	75,000
Castle fire system repipe/nitrogen injection system	23,000
Castle - damaged railing and woodwork around veranda	45,000
Castle - roof and gutter repair	80,000
Concrete - sidewalk and stair repair	60,000
Sasakawa - roof replacement	25,000
Erosion of road sides	15,000
Additional cameras and software	25,000
Additional campus lighting	30,000
OSH -interior lighting upgrade	25,000
Castle, OSH, President's House - boilers	80,000
Fix ditch on side of the President's House	5,000
Reservoir - inspection of lining and repair	10,000
Reservoir - backfill dirt areas	5,000
Faculty housing- re-stain wood siding to prevent further weather damage	55,000
Old clinic building - re-stucco rotting siding on upper portion to prevent further damage	20,000
Pathway from lower to upper campus - replace or repair lighting; fix uneven walking surface and wall	20,000
Sewage plant - fill in old aeration basin re-locate electrical from old clarifier	25,000
<u>Student Experience</u>	
Bathroom refurbishment	delay
Carpet replacement	delay
Phased replacement of dorm heating units and or boilers	35,000
Furniture replacement for residence halls	25,000
Auditorium lights upgrade	14,000
Basic ropes course	15,000
Vehicle replacements	130,000
<u>Academic Support</u>	
Network switch upgrades	12,000
Wifi upgrade	14,000
3 smartboard replacements	16,000
Classroom expansion	20,000
Additional classroom furniture	10,000
<u>Other</u>	

Crear two new offices in Advancement	unknown at present
Insurance projects - deductibles	50,000
Assessment and repair of irrigation system	unknown at present
Farmhouse roof repair/replacement	10,000
Total budgeted for capital projects	974,000



ADVANCEMENT



Fundraising Results by Constituency FYE 19&FYE 18

Constituency	-----FYE 19-----		-----FYE 18-----		% Change % Change		FYE 18
	*as of 12/31/2018		*as of 12/31/2017				% of Tot
	\$ Raised	# Donors	\$ Raised	# Donors	\$ Raised	# Donors	
ANNUAL FUND							
Foundation	\$539,022	5	\$673,638	5	-20%	0%	25%
Alumna/us	\$172,444	401	\$190,594	479	-10%	-16%	8%
Individual	\$204,433	136	\$179,626	245	14%	-44%	10%
Board Member	\$44,500	10	\$117,572	13	-62%	-23%	2%
Distinguished Trustee	\$942,388	4	\$189,357	5	398%	-20%	44%
Parent of Alum	\$104,473	78	\$109,567	94	-5%	-17%	5%
Company/Org	\$89,444	18	\$27,632	19	224%	-5%	4%
Current Parent	\$25,851	34	\$38,384	48	-33%	-29%	1%
Faculty/Staff	\$4,950	47	\$7,375	39	-33%	21%	0%
Alum other UWC	\$4,681	10	\$11,239	21	-58%	-52%	0%
	\$2,132,186	743	\$1,544,984	968	38%	-23%	

*NB: The above figures do not include current student donors

FY19 includes four gifts from Shelby Davis which we will not count toward the Davis match. They total \$770,50:

FY18 includes three gifts from Shelby Davis which did not count toward the Davis match. They total \$139,270.

ENDOWMENT & OTHER		Unique #		Unique #			
*Individual + Other	\$73,350	6	\$7,625	4	862%	50%	11%
Distinguished Trustee (Davis+Othe	\$100,000	1	\$500,000	1	-80%	0%	88%
Board Member	\$10,000	1	\$0	0	n/a	n/a	1%
Alumna/us	\$505	3	\$1,118	6	-55%	-50%	0%
	\$183,855	11	\$508,743	11	-64%	0%	

*Individual includes Faculty/Staff, Organization, Parent of Alum.

Shelby Davis has not given an endowment gift in FY19, hence the decrease in Distinguished Trustee endowme

ALL GIFTS			% Partic.			% Partic.	
Individual	\$275,483	140		\$184,726	247	49%	-43%
Foundation	\$539,022	5		\$673,638	5	-20%	0%
Distinguished Trustee	\$1,042,388	5		\$689,357	6	51%	-17%
Alumna/us	\$172,949	404	9%	\$191,712	485	14%	-17%
Board Member	\$54,500	11	65%	\$117,572	13	76%	-54%
Parent of Alum	\$104,473	78		\$110,092	97		-5%
Company/Org	\$89,744	19		\$27,632	19		225%
Current Parent	\$25,851	34		\$38,384	48		-33%
Faculty/Staff	\$6,950	48	48%	\$9,375	40	40%	-26%
Alum other UWC	\$4,681	10		\$11,239	21		-58%
Current Student	\$1,714	185	83%	\$1,004	99	45%	71%
	\$2,317,755	939		\$2,054,731	1080		13%

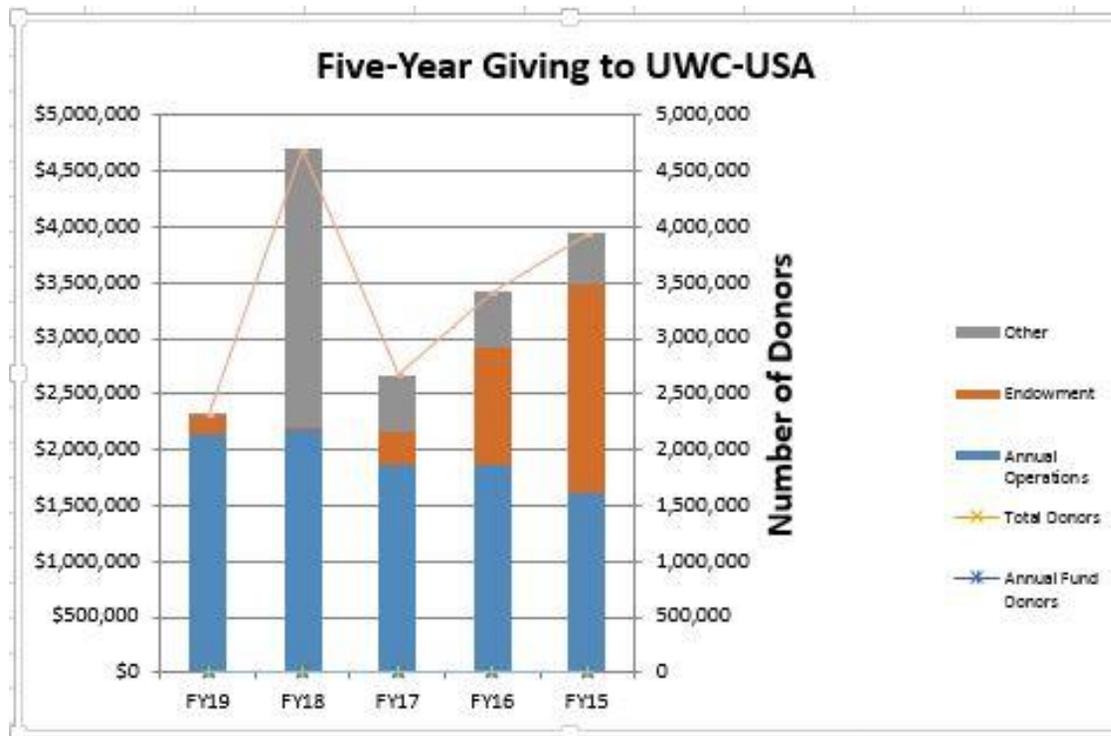
NB: Alumni who are board members or faculty are counted on the board and faculty lines.



Fundraising Summary Five-Year Trend

*FYE19 as of 12/31/2018

	FYE 19	FYE 18	FYE 17	FYE 16	FYE 15
Annual Operations	\$2,133,899	\$2,183,209	\$1,873,357	\$1,871,878	\$1,612,259
Endowment	173,855	9,665	290,243	1,037,460	1,865,095
Other	10,000	2,500,500	503,107	502,325	461,538
Total Donors	939	1,838	1,577	1,896	1,406
Annual Fund Donors	928	1,823	1,565	1,891	1,222
Unique Endowment Don	\$11	\$13	\$11	\$18	\$199
Unique Other Donors	\$0	\$2	\$1	\$2	\$0
Total Raised	2,317,754	4,693,374	2,666,707	3,411,663	3,938,892



Alumni Survey Executive Summary

[Alumni Survey Executive Summary](#)



UWC-USA Alumni Dashboard

	FY19 (9/15/2018)	FY18 (12/31/17)	% Change
DATA			
Total Living Alumni	3,569	3,462	3%
No Valid Address	600	487	23%
Inactive	3	3	0%
Have LinkedIn Record	1,130	1,038	9%
*Address Changes	1,706	1,495	14%
Total Alumni with Business Information	1,666	1,631	2%
Total Alumni with Education Information	871	769	13%
Visits to Campus	28	36	-22%

*Our database measures updates in contact information as any update done to the address tab which includes fields like email, phone, and LinkedIn

ALUMNI E-NEWSLETTERS	FY19 (1/21/2019)	FY18 (12/31/17)	% Change
#	6	5	
Average # Recipients	2,684	3,031	-11%
Average Open Rate	31%	24%	31%
Average Click-through Rate	13%	11%	14%

ALUMNI BIRTHDAY NOTES	FY19 (1/21/2019)	FY18 (12/31/17)	% Change
#	8	6	
Average Recipients	221	251	-12%
Average Open Rate	47%	44%	7%
Average Clickthrough Rate	12%	37%	-68%

LYBUNT EMAILS	FY19 (1/21/2019)	FY18 (12/31/17)	% Change
#	5	0	100%
Average Recipients	73	N/A	
Average Open Rate	52%	N/A	
# of Transactions	11	N/A	
\$ Raised	\$4,995.00	N/A	

ALUMNI VOLUNTEERS	FY19 (1/21/2019)	FY18 (12/31/17)	% Change
Annual Fund	35	42	-17%
Class Agents	7	12	-42%
Reunion Committee	5	n/a	
U.S Selection Committee	5	5	
Mentors (YEP)	0	n/a	

UWC HUB MEMBERS	FY19 (1/21/2019)	FY18 (12/31/17)	% Change
Alumni	808	711	12%
Current Students	179	97	46%
Employees	65	60	8%
Vounteers	34	31	9%
Former Employees	11	10	9%
Total	1097	909	17%



Communication Dashboard

Web Metrics: Sept. 2018-December 2018

Data	Current Month	Previous Month	Previous Year-2017
SEPTEMBER			
total new visitor sessions	6,658	7,407	7,598
total sessions	10,379	11,423	11,357
total users	7,525	8,303	8,501
OCTOBER			
total new visitor sessions	6,401	6,658	7,772
total sessions	10,591	10,379	12,524
total users	7,354	7,525	8,876
NOVEMBER			
total new visitor sessions	6,298	6,401	6,739
total sessions	9,761	10,591	10,497
total users	7,234	7,354	7,819
DECEMBER			
total new visitor sessions	\$5,436	6,298	7,018
total sessions	8,155	9,761	10,660
total users	6,180	7,234	7,942

Social Media Followers:

	January 1, 2019	January 1, 2018
Twitter Followers	\$2,643	2,369
Instagram Followers	\$10,500	8,345
YouTube Followers	\$1,063	887
Facebook Followers	\$20,670	14,313

Press Mentions: (NB: Las Vegas Optic stories require a login to read the full story. Username: publications@uwc-usa.org, Password: Montezur

10/4/2018 Albuquerque Business Journal: Sending students to Harvard, MIT, Princeton: <https://www.bizjournals.com/albuquerque/news/>

11/9/2018 Santa Fe New Mexican: In the crosshairs: "American Hate: Survivors Speak Out"

http://www.santafenewmexican.com/pasatiempo/books/in-the-crosshairs-american-hate-survivors-speak-out/article_f0571a6c-d6e0-5df7

11/13/2018 Las Vegas Optic: UWC to host first TedTalks event

<https://www.lasvegasoptic.com/content/uwc-host-first-tedtalks-event>

12/6/2018 KQRE News: United World College Using Education to Unite People Across the Globe

<https://www.krqe.com/news/mornings/united-world-college-using-education-to-unite-people-across-the-globe/1641207812>

12/18/2018 Ciston PR Newswire: Santa Fe Firm Launches Innovative, Environmentally Responsible Retirement Plan

<https://www.prnewswire.com/news-releases/santa-fe-firm-launches-innovative-environmentally-responsible-retirement-plan-300767890>

1/4/2019 Planadvisor: This Plan Sponsor Is All-In on ESG TDFs

<https://www.planadviser.com/exclusives/plan-sponsor-esg-tdfs/>

1/7/2019 CASE: Currents/School Ties: How international schools develop lasting bonds with their alumni (featuring contributions from Jose

<https://www.case.org/currents/school-ties>

1/12/2019 Santa Fe New Mexican: Margaret Mertz, who dies from cancer, shined in fundraising, academia, volunteering (obituary)

http://www.santafenewmexican.com/news/local_news/margaret-mertz-who-dies-from-cancer-shined-in-fundraising-academia/article_40e

1/15/2019 Las Vegas Optic: UWC student a semifinalist for major scholarship

<https://www.lasvegasoptic.com/content/uwc-student-semifinalist-major-scholarship>