



## May Board Meeting - Appendices

### **ACADEMICS**



## Student retention by class

	2019	2018	2017	2016	2015
<b>Matriculation</b>	114	115			
<b>Graduation</b>	TBD (113)	107	117	111	
<b>Diplomas awarded</b>	TBD	TBD	108	108	



## Teaching Staff Information

Category	Groups	2017-2018	2016-2017	2015-2016	2014-2015	2013-2014
Regions	US	15				
	Africa & Middle East	4				
	Asia & Pacific	5				
	Caribbean & Latin America	2				
	Europe	4				
	North America	2				
	Total	32				
Gender	Female	17				
	Male	15				
Years of service	21+	5				
	11 - 20	5				
	5 - 10	3				
	<5	19				



## IB Curriculum and Subject availability

Groups	Subjects offered	Comments
(1) Studies in Language & Literature	English A HL/SL	
	French A HL/SL	
	German A HL	(Second year only)
	Spanish A HL/SL	
	Mother tongue SSST SL	(Over 55 languages available)
(2) Language Acquisition)	English B HL/SL	
	French B HL/SL	
	Spanish B HL/SL	
	Arabic Ab initio SL	
	French Ab initio SL	
	German Ab initio SL	(Second year only)
	Spanish Ab Initio SL	
(3) Individuals & Societies	Economics HL/SL	
	Global Politics HL/SL	
	History HL/SL	
	Social & Cultural Anthropology HL/SL	
(4) Sciences	Biology HL/SL	
	Chemistry HL/SL	
	Computer Science SL	
	Design Technology SL	
	Environmental Systems & Society SL	
	Physics HL/SL	
	Sports, Exercise & Health Science HL/SL	
(5) Mathematics	Mathematics HL / SL	
	Mathematical Studies SL	(Last exams May 2020)
(6) The Arts & Electives	Dance HL/SL	
	Music HL/SL	
	Theatre HL/SL	
	Visual Arts HL/SL	



## UWC-USA IB scores

	2017	2016	2015	2014	2013
<b>School average</b>	33	33	35	34	34
<b>High Score</b>	43	40	45		
<b>40+</b>	6				
<b>36+</b>	36	31	49	37	38
<b>35-36</b>	31				
<b>30-34</b>	45				
<b>24-29</b>	29				
<b>&lt;24</b>	7				



## May Board Meeting - Appendices

### **RESIDENTIAL**



## May Board Meeting - Appendices

### **FINANCE, OPERATIONS & HR**



## Current Year's Budget versus End of Year's Outlook

	FYE May 2018 <i>BUDGET</i>	FYE May 2018 <i>OUTLOOK</i>	VARIANCE 2018B vs 2018O	
			%	\$
<b>REVENUE</b>				
Tuition	3,444,195	3,044,169	-12%	-400,026
Davis Supplemental Grant \$1MM	1,000,000	1,000,000	0%	-
Davis Family Challenge Grant \$2MM		2,000,000	100%	2,000,000
Summer Programs	450,000	381,000	-15%	-69,000
Annual Fund Contributions	1,750,000	2,000,000	14%	250,000
Endowment Transfer	5,752,674	6,507,573	13%	754,899
<b>TOTAL REVENUE</b>	<b>12,396,869</b>	<b>14,932,742</b>	<b>20%</b>	<b>2,535,873</b>
<b>OPERATING EXPENSES</b>				
<b>Academic, Student Life</b>				
Instruction	2,757,546	2,673,981	-3%	-83,565
Co-Curricular & Wilderness	514,075	574,639	12%	60,564
Student Life	376,987	389,031	3%	12,044.33
Library	55,920	55,920	0%	-
<b>Subtotal</b>	<b>3,704,527</b>	<b>3,693,570</b>	<b>0%</b>	<b>-10,957</b>
<b>Institutional Operations</b>				
Executive Management	1,666,027	1,479,403	-11%	-186,624
Admissions & College Counseling	399,227	378,756	-5%	-20,471
General Admin	1,239,795	1,297,890	5%	58,095
IT	472,494	472,494	0%	0
<b>Subtotal</b>	<b>3,777,544</b>	<b>3,628,544</b>	<b>-4%</b>	<b>-149,000</b>
<b>Facilities, Transportation &amp; Food Service</b>				
General Maintenance and Custodial	1,554,006	1,640,256	6%	86,250
Security	281,238	313,238	11%	32,000
Transportation and Vehicles	217,483	242,502	12%	25,019
Food Service	1,000,000	1,000,000	0%	-
<b>Subtotal</b>	<b>3,052,728</b>	<b>3,195,996</b>	<b>5%</b>	<b>143,269</b>
Advancement	648,054	598,031	-8%	-50,023
Davis Scholars Abroad	1,425,000	1,680,000	18%	255,000
<b>TOTAL OPERATING EXPENSES</b>	<b>12,607,853</b>	<b>12,796,141</b>	<b>1%</b>	<b>188,289</b>
<b>Capital Purchases</b>	<b>750,000</b>	<b>2,020,000</b>	<b>169%</b>	<b>1,781,190</b>
<b>SURPLUS/DEFICIT (CHANGE TO RESERVE)</b>	<b>-960,983</b>	<b>116,601</b>		<b>566,389</b>



## UWC-USA 8-Year Fundraising Summary

	<b>FY11</b>	<b>FY12</b>	<b>FY13</b>	<b>FY14</b>	<b>FY15</b>	<b>FY16</b>	<b>FY17</b>	<b>FY18 to 4/30/18</b>	<b>Increase Since FY11</b>
<b>Annual Operations</b>	\$1,499,791	\$1,337,342	\$1,123,605	\$1,253,112	\$1,612,259	\$1,876,830	\$1,875,862	\$1,871,115	25.00%
<b>Endowment</b>	\$949,809	\$64,828	\$3,021,765	\$912,772	\$2,159,691	\$402,509	\$1,065,513	\$9,355	-99.00%
<b>Other</b>	\$0	\$22,010	\$10,000	\$0	\$461,538	\$580,000	\$542,857	\$470,000	
<b>Total Donors</b>	1,166	1,260	1,065	1,327	1,422	1,888	1,527	1,387	19.00%
<b>Annual Fund Donors</b>	1,153	1,241	1,052	1,192	1,222	1,868	1,540	1,376	19.00%
<b>Endowment Donors</b>	30	32	19	205	298	34	14	13	-57.00%
<b>Other Donors</b>	0	2	1	0	1	1	3	1	
<b>Total Raised</b>	<b>\$2,449,600</b>	<b>\$1,424,180</b>	<b>\$4,155,370</b>	<b>\$2,165,884</b>	<b>\$4,233,488</b>	<b>\$2,859,339</b>	<b>\$3,484,232</b>	<b>\$2,350,470</b>	<b>-4.00%</b>



## UWC-USA Capital Improvement Projects For The Year Ending May 31, 2018

Completed Projects	Approved Project & Cost	Additional Costs	Total Project Costs	YTD Payments	Balance	Complete (Y or N)
Presidents House Re-roof/other upgrades	23,548		23,548	23,548	-	Yes
IT Center Remodel	16,893		16,893	16,893	-	Yes
Monte Blanc Dorm Bathroom Remodel	45,038		45,038	45,038	-	Yes
Math Classroom OSH Conversion	14,631		14,631	14,631	-	Yes
Castle Turret Reurbish	13,400		13,400	13,400	-	Yes
Castle Boiler Repair	16,356		16,356	16,356	-	Yes
Re-carpet Denali Dorm	32,829		32,829	32,829	-	Yes
Vulcan De Scalers (Three/Dorms)	12,556		12,556	12,556	-	Yes
Smart Boards x 2	10,508		10,508	10,508	-	Yes
Backhoe Vehicle	20,000		20,000	20,000	-	Yes
INFOCUS IN555L Auditorium Projector	8,954		8,954	8,954	-	Yes
24' Enclosed Trailer for Storage	7,000		7,000	7,000	-	Yes
Ramboll Corportation - Bat Mitigation Survey	3,500		3,500	3,500	-	No - Final Project Out for Bid
Pine Forest Faculty Housing	888,555	25,400	913,955	689,307	224,648	No
Dwan Light Sanctuary Repairs & Upgrades	23,632	37,000	60,632	10,632	50,000	No Defer to 05.31.19
Sewer Extension	650,000	10,407	660,407	346,383	314,024	No
Access Control Keyless Entry Exterior Doors	158,868	35,000	193,868	156,564	37,304	No
AOS Master Planning	130,300	29,000	159,300	59,708	99,592	No
	<b>2,076,567</b>	<b>136,807</b>	<b>2,213,374</b>	<b>1,487,805</b>	<b>725,569</b>	



## Davis Programs / Fund report

Fund Name	Balance or Annual Distribution	Use of Funding	Impact to UWC USA	Impact to Movement
Davis Family Matching Grant	Pledged: <b>\$10,000,000</b> over 5 years Balance: <b>\$2,000,000 UBS Money Market Saving</b>	To be used for strategic initiatives and possible replacement of the \$1MM Davis Supplemental Grant which will end 05/31/19	\$2,000,000 annual match distribution	
Davis Scholars Endowment	Balance: <b>\$49,000,000</b> 5% Annual Draw @ 5/31/18: <b>\$2,387,000</b>	To Fund <b>110</b> Davis Scholars USA & Abroad at the lesser of \$28,000 or each schools stated tuition.	\$1,400,000	\$987,000
Davis Supplemental Grant	Balance: <b>\$1,000,000</b>	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 @ 05/31/18 <b>No End Date</b>	
<b>Davis Other Endowments</b>	Balance: <b>\$15,000,000</b>	To fund International Scholarships & Expenses as directed by each Fund	\$758,600 @ 05/31/18	
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.	5% Annual Draw @ 5/31/18: \$758,600			
Davis Impact Fund	Balance: <b>\$4,524,970 + Net Earnings</b>	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: <b>\$640,000</b>	\$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: <b>\$73,000,000 + Net Earnings</b>	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: <b>\$638,428</b>	Deferred and held for special projects and disbursed at Shelby Davis' request.	None	None
<b>Total Annual Impact</b>			<b>\$4,740,000</b>	<b>\$6,327,000</b>



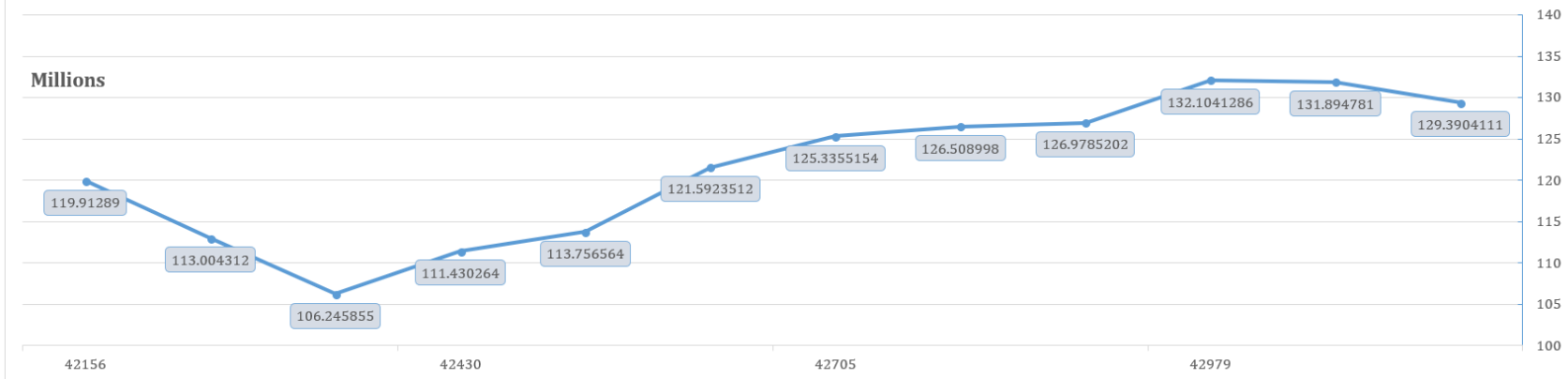
## UWC USA Market Value Summary as of March 31, 2018

	30-Jun-17		30-Sep-17		31-Dec-17		31-Mar-18	
	Market Value	%	Market Value	%	Market Value	%	Market Value	%
<b>Cash-Silver Point Redemption</b>	\$ -	0.00%	\$ -	0.00%	\$ -	0.00%	\$ -	0.00%
<b>Domestic Broad Equity</b>								
Davis NY Venture Renaissance (RIEF-Series C)	49,718,260	39.20%	52,061,165	39.40%	53,247,831	40.40%	52,122,019	40.30%
<b>Small Cap Broad Equity</b>								
State Street Russell 2000	5,171,788	4.10%	5,467,208	4.10%	5,650,660	4.30%	5,647,871	4.40%
<b>High Yield</b>								
Shenkman Primus High Yield	-	0.00%	-	0.00%	-	0.00%	-	0.00%
<b>Alternative Investments</b>								
Commonfund Alternative Fund	148,411	0.10%	146,013	0.10%	146,013	0.10%	146,013	0.10%
Commonfund Endowment Fund	843,297	0.70%	770,359	0.60%	770,359	0.60%	770,359	0.60%
Marathon Special Opportunity Fund	143,019	0.10%	142,638	0.10%	143,126	0.10%	113,447	0.10%
Silverpoint Offshore Fund	32,957	0.00%	2,154	0.00%	2,590	0.00%	-	0.00%
<b>International Equity</b>								
State Street MSCI EAFE	31,203,027	24.60%	32,893,913	24.90%	34,297,212	26.00%	33,781,518	26.10%
<b>Emerging Markets</b>								
GMO Emerging Country Debt Fund	14,666,410	11.60%	15,151,429	11.50%	15,154,718	11.50%	14,940,683	11.50%
<b>Domestic REIT</b>								
Davis RE	7,694,476	6.10%	7,881,774	6.00%	7,692,565	5.80%	7,235,789	5.60%
<b>Short Term Bond ETF</b>								
Vanguard-UBS	17,356,875	13.70%	17,587,476	13.30%	14,789,707	11.20%	14,632,711	11.30%
<b>Total Market Value</b>	<b>\$126,978,520</b>		<b>\$132,104,129</b>		<b>\$131,894,781</b>		<b>\$129,390,411</b>	



# UWC USA Market Value Summary Chart

**United World College - USA**  
Market Value Summary  
Trailing 12 Quarters  
Ending May 31, 2018





## UWC-USA Alumni Dashboard

	FY17 (5/1/17)	FY18 (5/1/18)	% Change
<b>DATA</b>			
Total Living Alumni	3,232	3,462	7%
No Valid Address	443	515	16%
Inactive	4	3	-25%
Have LinkedIn Record	831	1,056	27%
*Address Changes	2239	1,790	-20%
Total Alumni with Business Information	1439	1,642	14%
Total Alumni with Education Information	740	771	4%
Visits to Campus	36	72	100%

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

<b>ALUMNI E-NEWSLETTERS</b>			
#	9	9	0%
Average # Recipients	2,919	3,001	3%
Average Open Rate	32%	27%	-15%
Average Click-through Rate	15%	8%	-47%

<b>ALUMNI BIRTHDAY NOTES</b>			
#	12	10	-17%
Average Recipients	241	248	3%
Average Open Rate	45%	45%	0%
Average Clickthrough Rate	36%	29%	-19%

<b>ALUMNI VOLUNTEERS</b>			
Annual Fund	50	49	-2%
Class Agents	22	10	-55%
Reunion Committee	6	10	67%
U.S Selection Committee	6	4	-33%
Mentors (YEP)	1	1	0%

<b>UWC HUB MEMBERS</b>		
Alumni	n/a	711
Current Students	n/a	97
Employees	n/a	60
Vounteers	n/a	31
Former Employees	n/a	10
Total		909



## Students at risk

Categories	Actions	2013-14	2014-15	2015-16	2016-17	2017-18
<b>Medical</b>	Conditional return	3	7	3	7	2
	Displinary probation	12	3	12	3	8
<b>Mental health</b>	Conditional return	3	1	3	1	2
	Left during school year	1	5	1	5	0
<b>Discipline</b>	Displinary probation	12	3	12	3	8
	Withdraw from school	1	3	1	3	1
<b>Restorative</b>	Restorative Circles	-	-	-	-	12

### Notes

\*5 FOR ALCOHOL 3/2018 (ALEKA GROUP)

\* 2 FOR FIGHTING (MONTY & CHANGMIN)

\*1 FOR STEALING (BELA)

\*1 MONTY WITHDRAW FOR DRUGS



## Davis Scholar Parent Giving Report

<b>Constituency</b>	<b>FY17 as of 4/30/17</b>			<b>FY18 as of 4/30/18</b>			<b>% Change</b>	<b>% Change</b>
	<b><u>\$ Raised</u></b>	<b><u># Donors</u></b>	<b>%</b>	<b><u>\$ Raised</u></b>	<b><u># Donors</u></b>	<b>%</b>	<b><u>\$ Raised</u></b>	<b><u># Donors</u></b>
Current Davis Scholar Paren	\$15,004	44	42%	\$51,185	43	40%	241%	-2%
Davis Scholar Parents of Alu	\$114,541	85	16%	\$112,265	83	14%	-2%	-2%



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

	FYE May 2018 OUTLOOK	FYE May 2019 PRELIM BUDGET	VARIANCE 20180 vs 2019B	
			%	\$
<b>REVENUE</b>				
Tuition	3,044,169	3,111,893	2%	67,724
Davis Supplemental Grant \$1MM	1,000,000	1,000,000	0%	-
Davis Family Challenge Grant \$2MM	2,000,000	2,000,000	100%	-
Summer Programs	381,000	248,027	-35%	-132,973
Annual Fund Contributions	2,000,000	2,000,000	0%	-
Endowment Transfer	6,507,573	5,887,409	-10%	-620,164
<b>TOTAL REVENUE</b>	<b>14,932,742</b>	<b>14,247,329</b>	<b>-5%</b>	<b>-685,413</b>
<b>OPERATING EXPENSES</b>				
Academic, Student Life				
Instruction	2,673,981	2,378,778	-11%	-160,203
Co-Curricular & Wilderness	574,639	855,559	49%	163,920
Student Life	389,031	740,888	90%	36,857
Library	55,920	64,689	16%	8,769
<b>Subtotal</b>	<b>3,693,570</b>	<b>4,039,914</b>	<b>9%</b>	<b>49,344</b>
<b>Institutional Operations</b>				
Executive Management	1,479,403	1,168,439	-21%	-201,965
Admissions & College Counseling	378,756	482,493	27%	103,737
General Admin	1,297,890	1,276,212	-2%	184,322
IT	472,494	493,872	5%	3,378
<b>Subtotal</b>	<b>3,628,544</b>	<b>3,421,016</b>	<b>-6%</b>	<b>89,473</b>
<b>Facilities, Transportation &amp; Food Service</b>				
General Maintenance and Custodial	1,640,256	1,642,344	0%	2,089
Security	313,238	296,649	-5%	-16,589
Transportation and Vehicles	242,502	230,662	-5%	-11,840
Food Service	1,000,000	1,030,000	3%	30,000
<b>Subtotal</b>	<b>3,195,996</b>	<b>3,199,656</b>	<b>0%</b>	<b>3,659</b>
<b>Advancement</b>				
Davis Scholars Abroad	598,031	589,437	-1%	-8,594
<b>Subtotal</b>	<b>1,680,000</b>	<b>1,770,000</b>	<b>5%</b>	<b>90,000</b>
<b>TOTAL OPERATING EXPENSES</b>	<b>12,796,141</b>	<b>13,020,023</b>	<b>1.70%</b>	<b>223,882</b>
<b>Capital Purchases</b>	<b>2,020,000</b>	<b>750,000</b>	<b>-63%</b>	<b>-1,270,000</b>
	-	-		
<b>SURPLUS/DEFICIT (CHANGE TO RESERVE)</b>	<b>116,601</b>	<b>477,306</b>		<b>360,705</b>



## Fundraising Results through December 31

### Annual Fund

<b>Constituency</b>	<b>FY17 as of 12/31/16</b>		<b>*FY18 as of 12/31/17</b>		<b>% Change</b>	<b>% Change</b>
	<b>\$ Raised</b>	<b># Donors</b>	<b>\$ Raised</b>	<b># Donors</b>	<b>\$ Raised</b>	<b># Donors</b>
Foundation	\$815,736	8	\$673,638	5	-17%	-38% **
Alumna/us	\$175,409	421	\$190,594	479	9%	14%
Individual	\$185,034	153	\$179,626	245	-3%	60%
Distinguished Trustee	\$83,957	5	\$189,357	5	126%	0%
Board Member	\$77,742	9	\$117,572	13	51%	44%
Parent of Alum	\$106,960	77	\$109,567	94	2%	22%
Company/Org	\$4,837	13	\$27,632	19	471%	46%
Current Parent	\$18,665	62	\$38,384	48	106%	-23%
Alum other UWC	\$40,856	11	\$11,239	21	-72%	91%
Faculty/Staff	\$7,802	62	\$7,375	39	-5%	-37%
	<u>\$1,516,998</u>	<u>821</u>	<u>\$1,544,984</u>	<u>968</u>	<u>2%</u>	<u>18%</u>

NB: The above figures do not include current student donors

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

\*\*The decrease in foundation giving is due to decreases from MECT, Velux, and Horizon.

### Endowment and Other

<b>Constituency</b>	<b>FY17 as of 12/31/16</b>		<b>FY18 as of 12/31/17</b>		<b>% Change</b>	<b>% Change</b>
	<b>\$ Raised</b>	<b># Donors</b>	<b>\$ Raised</b>	<b># Donors</b>	<b>\$ Raised</b>	<b># Donors</b>
Davis - Other	\$500,000	1	\$500,000	1	0%	0%
Individual	\$275,600	3	\$5,100	2	-98%	-33%
Board Member						
Alumna/us	\$11,365	8	\$1,118	6	-90%	-25%
Faculty/Staff	\$2,000	1	\$2,000	1	0%	0%
Parent of Alum	\$275	2	\$525	1	91%	-50%
	<u>\$789,240</u>	<u>15</u>	<u>\$508,743</u>	<u>11</u>	<u>-36%</u>	<u>-27%</u>

### Alumni % Participation

	<b>FY17</b>	<b>FY18</b>
As of 12/31	13%	14%
as of 5/31	27%	20% as of 5/6/18



## UWC-USA Trustee Giving

Level	2014-15			2015-16			2016-17			2017-18 as of 5/4/18			% Increase
	#	\$	Avg	#	\$	Avg	#	\$	Avg	#	\$	Avg	
\$100,000+	1	\$125,000	\$125,000	1	\$125,000	\$125,000	0			0			
\$50,000-\$99,999	0			0			0			2	\$100,000	\$50,000	
\$25,000-\$35,000	2	\$50,000	\$25,000	2	\$50,000	\$25,000	3	\$75,000	\$25,000	2	\$60,000	\$30,000	
\$10,000-\$24,999	3	\$37,500	\$12,500	2	\$27,510	\$13,755	3	\$54,344	\$18,115	2	\$20,500	\$10,250	
\$5,000-\$9,999	4	\$24,110	\$6,028	3	\$22,637	\$7,546	2	\$13,892	\$6,946	2	\$12,840	\$6,420	
\$1,000-\$4,999	6	\$9,715	\$1,619	9	\$17,205	\$1,912	8	\$15,806	\$1,976	8	\$19,350	\$2,419	
Below \$1,000	2	\$1,250	\$625	2	\$1,000	\$500	3	\$1,757	\$586	0			
Didn't Give	2			1			1			1			
<b>Total</b>	<b>20</b>	<b>\$247,575</b>	<b>\$12,379</b>	<b>20</b>	<b>\$243,352</b>	<b>\$12,168</b>	<b>20</b>	<b>\$160,799</b>	<b>\$8,040</b>	<b>17</b>	<b>\$212,690</b>	<b>\$12,511</b>	<b>32%</b>
% who gave			90%			95%			95%			94%	
*Average			\$13,754			\$12,808			\$8,463			\$13,293	
*Median			\$3,750			\$2,500			\$3,000			\$3,500	

\*of those who gave