



## **ACADEMICS**



## Student Retention by class

	2020	2019	2018	2017	2016
<b>Matriculation</b>	117	114	115	123	115
<b>Graduation</b>	TBD	105	106	117	111
<b>Diplomas award</b>	TBD	TBD	96	108	108



## Teaching Staff Information (regions, gender and years of service)

Category	Groups	2018-19	2017-2018	2016-2017	2015-2016	2014-2015
Regions	US	15	15	18	15	15
	Africa & Middle East	4	4	4	4	4
	Asia & Pacific	6	5	2	2	2
	Caribbean & Latin America	1	2	1	1	2
	Europe	3	4	5	4	5
	North America	2	2	1	1	0
	<b>Total</b>	<b>31</b>	<b>32</b>	<b>30</b>	<b>29</b>	<b>28</b>
Gender	Female	13	17	13	14	12
	Male	18	15	17	15	16
Years of service	21+	3	5	4	5	7
	11 - 20	5	5	5	6	6
	5 - 10	4	3	4	6	5
	<5	19	19	16	12	10



## **ADMISSIONS & COLLEGE COUNSELING**



## Class of 2019 College/University Matriculation List

American University  
Brown University  
Clark University  
Colby College (3)  
College of the Atlantic (2)  
Colorado College  
Columbia University  
Columbia University / Sciences Po Dual Degree Program  
Cornell University  
Dominican University of California  
Duke University (2)  
Earlham College  
Emerson  
Erasmus University College Rotterdam (2)  
Gap Year (Global Citizen Year -3)  
George Washington University  
Georgetown University  
Goucher College  
Harvard University  
Howard University  
Lawrence University  
Lehigh University  
Leiden University (2)  
Lewis and Clark College  
Macalester College (4)  
Methodist University (2)  
Middlebury College  
New South Wales Australia  
Northeastern University  
NYU  
Pitzer College (2)  
Princeton University  
Queen's University Belfast  
Reed College  
Royal Holloway University London  
Semester at Sea/Jacobs University Bremen  
Semester at Sea/University of Aberdeen

Skidmore  
SOAS  
St. John's College (Annapolis Campus)  
St. Lawrence University (4)  
St. Olaf College (5)  
The College of Idaho (5)  
University of California - Berkeley  
University of California - Los Angeles  
Universidad de los Andes - Medical School  
University in El Salvador  
University in Finland TBD  
University of Amsterdam  
University of British Columbia - Vancouver Campus  
University of California - Riverside  
University of Florida (2)  
University of Manchester  
University of Oklahoma  
University of Pennsylvania  
University of Richmond  
University of Rochester (2)  
Universtiy of Bristol  
Utrecht University College  
Washington & Lee University (2)  
Wellesley College (4)  
Williams  
Yale



## College Acceptances - Three-year comparison

Category	2018-19	2017-18	2016-17
Highly selective (non Davis schools)	48	39	57
Highly selective (Davis schools)	91	103	56
Less Selective (Davis Schools)	80	61	50
Other	86	117	118

### All College Acceptances 2018-19

Aberdeen  
Aberswith University  
American University of Beirut  
Bennington (2)  
Brandeis  
Brown University  
Bryn Mawr  
Bucknell  
Case Western Reserve (2)  
Clark University (2)  
Colby (2)  
College of the Atlantic (2)  
Colorado College (2)  
Columbia University  
Cornell University  
DePaul  
Duke  
Dundee  
Earlham  
Emerson  
Emory  
Erasmus  
Fresno State University  
George Washington University (4)  
Georgetown University  
Gettysburg  
Global Citizen Year (3)  
Goucher  
Harvard University  
Howard University (2)  
Hult Business School  
IE University (2)  
Iowa State University  
Jacobs University Bremen (2)  
Kenyon  
King's College London (3)  
Lake Forest College (2)  
Lawrence University  
Lehigh (IDEAS Program)  
Leiden University College  
Lewis & Clark (4)  
Loyola Chicago  
Loyola Marymount  
Luther College  
Macalester (5)  
Massachusetts School of Art and Design

McGill University (2)  
Methodist (2)  
Middlebury (3)  
Mount Holyoke  
New Mexico Highlands University  
New School  
Northeastern University  
NYU (3)  
Oberlin (2)  
Pitzer  
Princeton University  
Queen Mary  
Queen's University - Belfast  
Randolph Macon  
Reed  
Rotterdam  
Royal Holloway University London (2)  
SCAD (2)  
School of the Art Institute of Chicago  
Sciences Po/Columbia Dual Degree  
Simon Fraser  
Skidmore (2)  
SOAS (2)  
Spelman  
St. Andrews University  
St. John's College (Annapolis)  
St. Lawrence (5)  
St. Olaf (10)  
Stanford University  
Temple University  
The College of Idaho (11)  
The College of William & Mary (3)  
Trinity College  
Tufts University  
Ulster University  
UNC Chapel Hill  
United States Naval Academy  
University of Texas - PACE  
University College London (5)  
University College Utrecht  
University of Amsterdam  
University of Bath  
University of Birmingham  
University of Bristol (3)  
University of British Columbia (4)  
University of California - Berkeley (5)  
University of California - Davis (2)  
University of California - Irvine  
University of California - Los Angeles (3)  
University of California - Riverside  
University of California - San Diego  
University of California - Santa Cruz (2)  
University of California Long Beach  
University of Durham  
University of Edinburgh  
University of Exeter

University of Florida (3)  
University of Glasgow (7)  
University of Iowa  
University of Kent (2)  
University of Leeds  
University of Manchester (5)  
University of Michigan (2)  
University of New Mexico (2)  
University of New South Wales  
University of Notre Dame  
University of Nottingham (2)  
University of Oklahoma (6)  
University of Oregon Honors College  
University of Pennsylvania  
University of Queensland  
University of Richmond (3)  
University of Rochester (4)  
University of Rotterdam  
University of Tampa  
University of Texas - CAP  
University of Texas at Austin (McCombs School of Business)  
University of Warwick  
University of Washington  
University of Winchester  
University of Wisconsin (Medicine/Pre-business)  
University of York  
Utrecht (3)  
Wartburg (5)  
Warwick  
Washington and Lee University (2)  
Wellesley (5)  
Whitman  
Williams  
Yale University



## Admissions Summary Table - Year to Date

Details		<u>October 2018</u>			<u>May 2019</u>			
	Offers **	Accepted	Filled	Offers	Accepted	Filled		
<b>Fully Funded</b>	27	21		27	27	30	Includes 4 Dare to Dream Scholarships	
<b>Partially Funded</b>	43	43		43	40	37*	Includes 1 Dare to Dream; funding by college is partial	
<b>Unfunded</b>	14	13		17	17	17	Additional offers were requested, granted to several NCs	
<b>Total</b>	102	102		102	102	111		
<b>GSP (unfunded)</b>	18	12	5	18	12	6		
<b>Grand Total</b>	120	114		120	114	<b>117</b>	As of May 29; asking for 1 more GSP nominee	

**Notes**

Initial offers in October included 6 Dare to Dream Scholarships and 2 Horizon Foundation Funded

\*\*Does not include 27 US Davis Scholars in any offer/funding/filled



**RESIDENTIAL**



## Students at Risk Five-Year Trend

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



## **EXPERIENTIAL EDUCATION**



## Tracking of Signature Programming

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	Visiting 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			In Kind - NMSU Forestry appx. \$30,000 annually? Need to check w Ben	
		Contract with City \$11,000				
		Northern NM Regional Foundation \$3,000				
		NMSU Agriculture \$15,000 annually for 3 years				



**FINANCE, OPERATIONS & HR**



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

	FYE	FYE	VARIANCE	
	MAY 2019 APPROVED BUDGET	MAY 2019 ESTIMATE	2019 Projection vs 2019 Budget	
			%	\$
<b>Revenue</b>				
Tuition From Families and NC's	3,111,893	2,300,055	-0.26	-811,838
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	-1,400,000	-0.21	370,000
<b>Net Davis Revenue</b>	<b>1,620,585</b>	<b>1,990,585</b>	<b>0.23</b>	<b>370,000</b>
Davis Family Challenge Grant \$2MM	2,000,000	2,000,000	0.00	0
Summer Programs	248,027	184,239	-0.26	-63,788
Annual Fund Contributions	2,000,000	2,000,000	0.00	0
Endowment Transfer	3,496,824	3,962,824	0.13	466,000
<b>Total Revenue</b>	<b>12,477,329</b>	<b>12,437,703</b>	<b>0.00</b>	<b>-39,626</b>
<b>Operating Expenses</b>				
Academic, Student Life				
Instruction	2,378,778	2,470,126	0.04	91,348
Co-Curricular & Wilderness	898,237	911,551	0.01	13,314
Student Life	740,888	821,038	0.11	80,150
Library	64,689	61,700	-0.05	-2,989
<b>Subtotal</b>	<b>4,082,592</b>	<b>4,264,415</b>	<b>0.04</b>	<b>181,823</b>
Institutional Operations				
Executive Management	1,168,439	1,124,556	-0.04	-43,883
Admissions & College Counseling	434,575	381,718	-0.12	-52,857
General Admin	1,276,212	1,164,276	-0.09	-111,936
IT	493,872	493,569	0.00	-303
<b>Subtotal</b>	<b>3,373,098</b>	<b>3,164,119</b>	<b>-0.06</b>	<b>-208,979</b>
Facilities, Transportation & Food Service				
General Maintenance and Custodial	1,642,344	1,816,530	0.11	174,186
Security	296,649	331,996	0.12	35,347
Transportation and Vehicles	230,662	188,128	-0.18	-42,534
Food Service	1,030,000	956,686	-0.07	-73,314
<b>Subtotal</b>	<b>3,199,655</b>	<b>3,293,340</b>	<b>0.03</b>	<b>93,685</b>
Advancement	632,441	615,890	-0.03	-16,551
<b>Total Operating Expenses</b>	<b>11,287,786</b>	<b>11,337,764</b>	<b>0.00</b>	<b>49,978</b>
<b>Capital Purchases</b>	<b>750,000</b>	<b>1,290,380</b>	<b>0.72</b>	<b>540,380</b>
<b>Surplus / (Deficit) Changes to Reserve</b>	<b>439,543</b>	<b>-190,441</b>		
<b>Major Revenue Variances</b>				
	<b>Budget</b>	<b>Actual</b>	<b>Variance</b>	
# of Students	235	219	-16	
Gross Tuition	8,973,500	8,570,555	-402,945	
Scholarships	-3,418,407	-3,943,250	-524,843	
Davis	-2,443,200	-2,327,250	115,950	
<b>Net Tuition Revenue</b>	<b>3,111,893</b>	<b>2,300,055</b>	<b>-811,838</b>	



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

	FYE MAY 2019		FYE MAY 2020 2019-2020 PRELIMIN ARY	VARIANCE 2019 Projection vs 2020 Budget	
	2018-2019 ESTIMATE	APPROVED BUDGET		%	\$
<b>Revenue</b>					
Tuition From Families and NC's	\$3,111,893	APPROVED BUDGET	#REF!	#REF!	#REF!
Davis Scholar Endowment	\$2,390,585		2,365,972	#DIV/0!	2,365,972
Davis Scholar Supplemental	\$1,000,000	3,111,893	1,000,000	-67.87%	-2,111,893
Davis Scholar Abroad Expense	-\$1,770,000		-1,300,000	#DIV/0!	-1,300,000
<b>Net Davis Revenue</b>	\$1,620,585	2,390,585	2,065,972	-13.58%	-324,613
Davis Family Challenge Grant \$2MM	\$2,000,000	-1,770,000	2,000,000	-212.99%	3,770,000
Summer Programs	\$248,027	1,620,585	265,438	-83.62%	-1,355,147
Annual Fund Contributions	\$2,000,000		2,000,000	#DIV/0!	2,000,000
Endowment Transfer	\$3,496,824	2,000,000	3,751,676	87.58%	1,751,676
<b>Total Revenue</b>	\$12,477,329	248,027	#REF!	#REF!	#REF!
<b>Operating Expenses</b>					
Academic, Student Life					
Instruction	\$2,378,778		2,501,614	#DIV/0!	2,501,614
Co-Curricular & Wilderness	\$898,237		963,273	#DIV/0!	963,273
Student Life	\$740,888		961,860	#DIV/0!	961,860
Library	\$64,689	2,378,778	62,133	-97.39%	-2,316,645
<b>Subtotal</b>	\$4,082,592	898,237	4,488,880	399.74%	3,590,643
Institutional Operations					
Executive Management	\$1,168,439	4,082,592	1,147,302	-71.90%	-2,935,290
Admissions & College Counseling	\$482,493		490,358	#DIV/0!	490,358
General Admin	\$1,276,212		1,230,031	#DIV/0!	1,230,031
IT	\$493,872	1,168,439	559,034	-52.16%	-609,405
<b>Subtotal</b>	\$3,421,016	434,575	3,426,724	688.52%	2,992,149
Facilities, Transportation & Food Service					
General Maintenance and Custodial	\$1,642,344	3,373,098	1,763,532	-47.72%	-1,609,566
Security	\$296,649		390,067	#DIV/0!	390,067
Transportation and Vehicles	\$230,662		194,664	#DIV/0!	194,664
Food Service	\$1,030,000	1,642,344	1,008,000	-38.62%	-634,344
<b>Subtotal</b>	\$3,199,655	296,649	3,356,262	1031.39%	3,059,613
Advancement	\$589,437	1,030,000	620,608	-39.75%	-409,392
<b>Total Operating Expenses</b>	\$11,292,700	632,441	11,892,475	<b>1780.41%</b>	11,260,034
<b>Capital Purchases</b>	\$750,000	#REF!	#REF!	#REF!	#REF!
	\$0				
<b>Surplus / (Deficit) Changes to Res</b>	\$434,629		#REF!		



## Current Year Tuition Variances

	<b>Budget</b>	<b>Actual</b>	<b>Variance</b>
<b># of Students</b>	235	219	(16)
<b>Gross Tuition</b>	8,973,500	8,570,555	(402,945)
<b>Scholarships</b>	(3,418,407)	(3,943,250)	(524,843)
<b>Davis</b>	(2,443,200)	(2,327,250)	115,950
<b>Net Tuition Revenue</b>	3,111,893	2,300,055	(811,838)



## Tuition Entry 2019 Analysis

	<u>2nd Years</u> Class of 2020	<u>1st Years</u> Class of 2021
Int'l Student Count	92	95
Tuition Rate	38,650	39,450
Gross Tuition	3,555,800	3,747,750
Int'l Scholarships Awarded	(2,141,364)	(1,786,484)
(Int'l) Net Tuition	<b>1,414,436</b>	<b>1,961,266</b>
Davis Student Count	25.00	25.00
Tuition Rate	38,650	39,450
Gross Tuition	966,250	986,250
Davis Scholarships Awarded	(966,250)	(798,400)
Davis Net Tuition	-	<b>187,850</b>
<b>Net Tuition Rev</b>	<b>1,414,436.00</b>	<b>2,149,116</b>
<b>Combined Net Tuition Revenue</b>		<b>3,563,552</b>
Net Tuition Revenue Discounted by \$200,000 KJ		3,363,552
<b>Net Tuition Revenue Discounted by add'l 10% KC &amp; JE</b>		<b>3,027,197</b>

Offered Scholarships + 200K Reserve for Negotiations and mid-year changes

### Davis Scholar Merit Model

#	Schol Amt	Schol Total	Detail
25	25,000	625,000	Merit Schol
8	14,450	115,600	100% Add'l Schol
8	7,225	57,800	50% Add'l Schol
9	0	-	0% Add'l Schol
		798,400	Total Schol Awarded



## Revenue Variance Summary

SOURCE	2018-2019 PROJECTION	2019-2020 BUDGET	VARIANCE	%	EXPLANATION OF VARIANCES
Tuition	2,300,055	3,027,197	727,142	+31.6%	Details from Admissions on incoming class predict a 46% increase in net tuition revenue.
Davis Scholar Tuition	1,990,585	2,065,972	75,387	+3.8%	Merit based model implemented in Year 1
Davis Challenge Grant	2,000,000	2,000,000	-	-	-
Ancillary	184,239	265,438	81,199	+44.1%	Details from GLF on summer 2019 predict a 44% or 80K increase in net revenue
Annual Fund	2,000,000	2,000,000	-	-	-
Endowment	3,962,824	3,751,676	(211,148)	-5.3%	2018-2019 5% Draw + 270K rollover + 196K additional release for purchase of new vehicles
<b>Totals</b>	<b>12,437,703</b>	<b>13,110,283</b>	<b>672,580</b>	<b>+5.4%</b>	



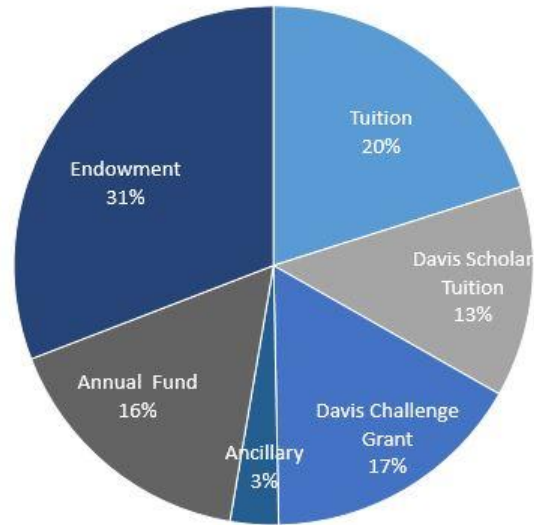
## Expense Variance Summary

SOURCE	2018-2019 ESTIMATE	2019-2020 BUDGET	VAR %	VARIANCE EXPLANATION
<b>Academic &amp; Student Life</b>	<b>4,264,415</b>	<b>4,488,880</b>	<b>224,465 +5.3%</b>	
Comp Study & Tiered Salary Increases		85,500		Comp Study and Tiered Salary Increases
General Instruction Programming		13,500		Changes in Curriculum for (3) Major Subjects
Farm PT to FTE Position		15,000		2nd Farm Position PT to FT
Arts & Culture Programming		49,000		Under Review with Melinda/Cesar. New programming proposed.
CEC Programming		(30,000)		Inclusion of \$30,000 grant revenue
Wilderness Programming		11,900		Proposed daily rate increase of \$10.00 for wilderness guides, from \$135 to \$145
Project Week & SWS Programming		9,000		Reserve for non fleet Vehicle rentals \$7,000, Add'l offsite meal purchases \$2,000
Residential Programming		57,000		Weekend Recreation Budget \$25,000, Professional Development \$7,000 Add'l RLC \$25,000
Student Health Insurance Increase		13,500		Student health insurance increase +5%
<b>Institutional Operations</b>	<b>3,164,119</b>	<b>3,426,724</b>	<b>262,605 +8.3%</b>	
Comp Study & Tiered Salary Increases		59,000		Comp Study and Tiered Salary Increases
General Admin Operations - Insurance Rates		19,000		5% Projected Increase
General Admin Operations - IO Membership Fee		11,000		1.9% of Calculated Operating Expense paid to IO
General Admin Operations - Retiree Benefit Expense		135,000		5% Projected Increase + \$115,000 additional actuarial reserve
General Admin Operations - Professional Services		13,000		Investment Management Fees, Credit Card Merchant Fees, Audit Fees, Increase reserve
General Admin Operations - Recruitment		12,500		Recruitment Expense Reserve - Non faculty placement fees, travel allowances, job postings
General Admin Operations - General Office		700		Postage increase, Telephone, Office Supplies,
General Admin Operations - CSO Operating		2,500		Placemaker for Supplies, Travel, Misc.
<b>Facilities, Transportation &amp; Food Service</b>	<b>3,293,340</b>	<b>3,356,262</b>	<b>62,922 +1.9%</b>	
Comp Study & Tiered Salary Increases		55,000		Comp Study and Tiered Salary Increases \$26,000 Reserve for Holiday, Overtime & On Call \$34,000
Maint & Custodial - Repair & Maint Reserve		(50,000)		Reduced non capital R&M from \$500,000 to \$450,000 - # of non-capital repairs needed expected to reduce
Maint & Custodial - Service Agreements		26,000		New Service Agreements - Systems Monitoring, Dishwasher, Field House Equip, Custodial Supplies
Maint & Custodial - Utilities		46,000		10% Projected Increase + \$12,000 additional costs for (4) new units
Transportation - General Operations		6,600		Reserve for fuel cost increases, GPS monitoring increases, general repair & maintenance
Security - General Operations		1,500		General Expenses, Uniforms, Training,
Food Service - General Operations		30,900		3% Proposed Increase
<b>Advancement</b>	<b>615,890</b>	<b>620,608</b>	<b>4,718 +0.8%</b>	
Comp Study & Tiered Salary Increases		2,500		Comp Study and Tiered Salary Increases
Benefit Savings		(11,600)		No 403B match during Year 1 for Dir. Of Adv.
Reunion - Programming		13,800		Reserve for 2nd Reunion Event Costs
<b>Capital</b>	<b>1,290,380</b>	<b>1,000,000</b>	<b>(290,380) -22.5%</b>	Although there have been \$810K in proposals for the FY, Management is actively working to prioritize projec

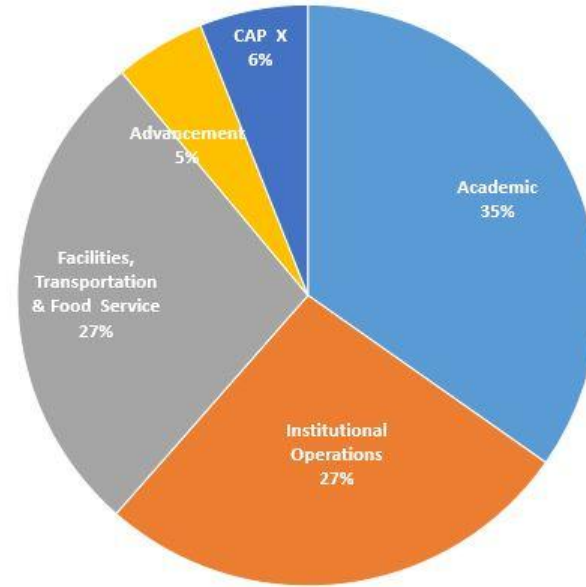


## Revenues and Expenses 2019-2020 (Chart)

Composition of Budgeted Revenue 2019-2020



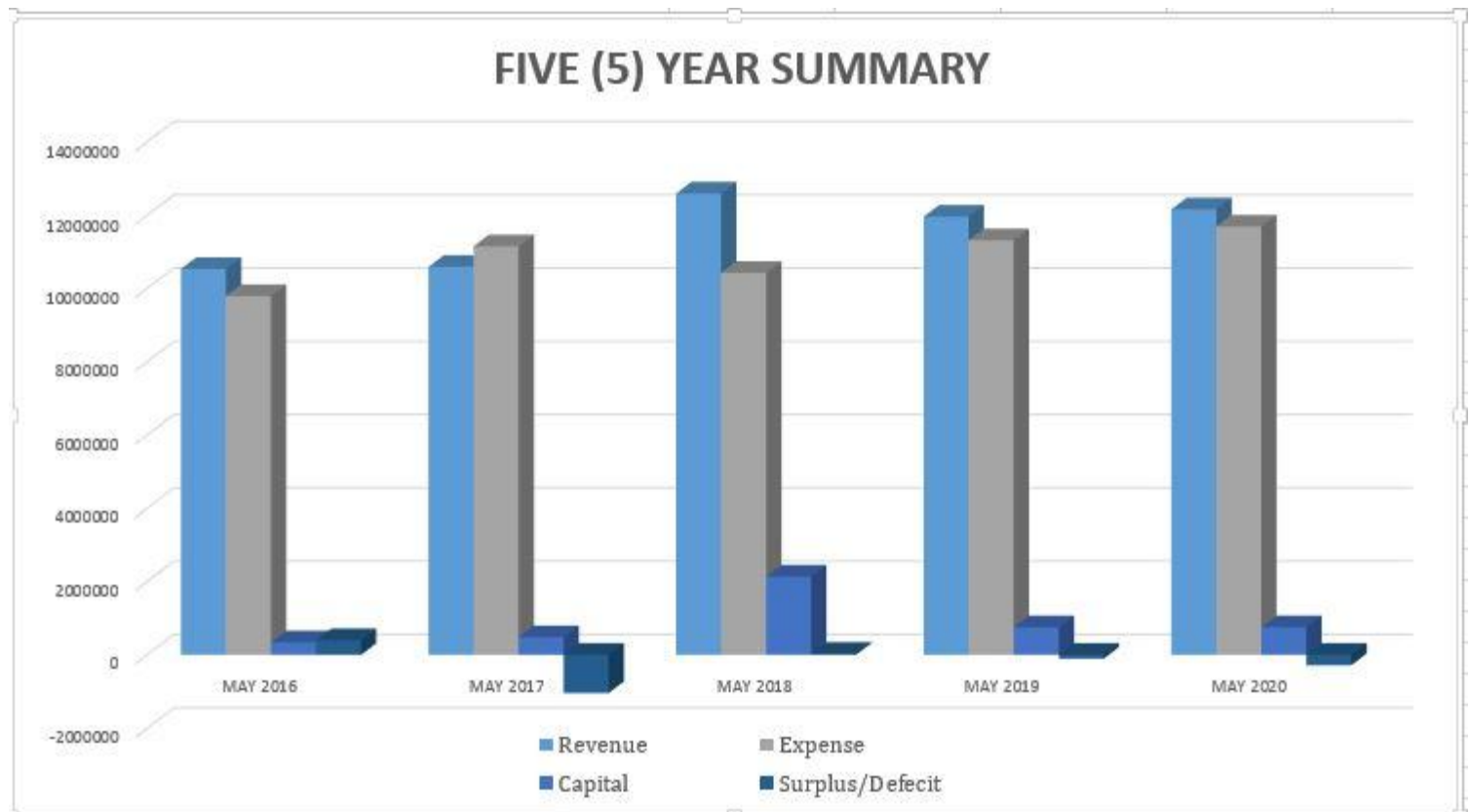
Composition of Budgeted Expense 2019-2020





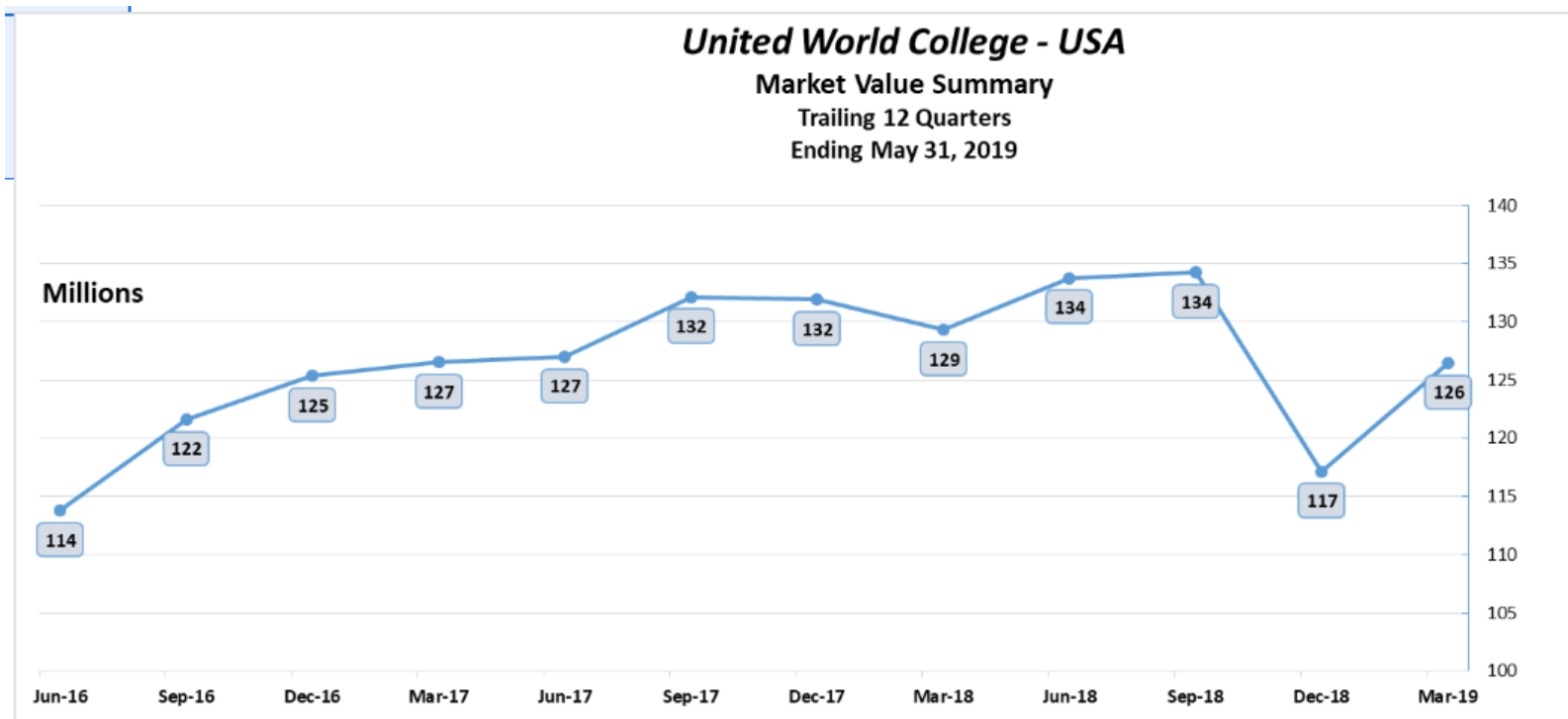
## Multi-Year Budget Projections as of December 30, 2019

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





# Market Value Summary as of May 31, 2019 (Chart)





## Davis Program/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 Cash balance of <b>\$2,000,000</b> held within Davis Initiatives Funds until earned.	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 @ 5/31/19: <b>\$ 2,391,000</b>	To Fund <b>110</b> Davis Scholars USA & Abroad at the lesser of \$28,000 or each schools stated tuition.	\$1,400,000	\$991,000
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 @ 05/31/19 <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	\$790,600 @ 05/31/19	
Davis Conflict Area Endowment	5% Annual Draw @ 5/31/19: <b>\$ 790,600</b>			
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.				
Davis Impact Fund	Balance: <b>\$843,563</b>	Matching Grant Funding for 17 Schools There are 4 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>\$119,558,346</b>	Funding for the "Dare to Dream" Initiative across the UWC Movement. Funds held at UBS	2018-2019 Scholarships Total: <b>\$174,761</b>	2018-2019 Scholarships Total: <b>\$1,981,534</b>
Davis Initiatives Fund	Balance: <b>\$916,507 + \$2,000,000 (Challenge Grant)</b>	Deferred and held for special projects and disbursed at Shelby Davis' request.	None	None
<b>Total Annual Impact</b>			<b>\$5,405,361</b>	<b>\$3,572,534</b>



# Capital Projects Proposed 2019-2020

Capital Projects 2019 - 2020	Budget
<b><u>Safety and maintenance necessary to prevent further deterioration</u></b>	
Castle - fire suppression system upgrade to replace failing lines	-
Castle fire system repipe/nitrogen injection system	-
Castle - damaged railing and woodwork around veranda	45,000
Castle - roof and gutter repair	50,000
Concrete - sidewalk and stair repair	60,000
Sasakawa - roof replacement	25,000
Erosion of road sides	15,000
Additional campus lighting	30,000
OSH -interior lighting upgrade	25,000
Castle, OSH, President's House - boilers	50,000
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	45,000
Old clinic building - re-stucco rotting siding on upper portion to prevent further damage	15,000
Pathway from lower to uppser campus - replace or repair lighting; fix uneven walking surface and wall	15,000
Sewage plant - fill in old aeration basin re-locate electrical from old clarifier	<b>5,000</b>
Dorm entrance cameras and software	30,000
<b><u>Student Experience</u></b>	
Bathroom refurbishment	<b>delay</b>
Carpet replacement	<b>delay</b>
Phased replacement of dorm heating units and or boilers	50,000
Furniture replacement for residence halls	25,000
Dorm network upgrade	5,000
Auditorium lights upgrade	14,000
Basic ropes course	15,000
Meters and displays for energy and water usage (this may be replaced by grant funds)	50,000
Rekey dorm rooms	17,500
Vehicle replacements	130,000
<b><u>Academic Support</u></b>	
Network server upgrades	12,000
Wifi upgrade	14,000
3 smartboard replacements	20,000
Student information system	75,000
Classroom expansion	20,000
Additional classroom furniture	15,000
<b><u>Other</u></b>	
Insurance projects - deductibles	<b>25,000</b>
Landscaping projects for high impact areas	<b>50,000</b>
Wayfinding (signage) contract - Phase 1	<b>17,500</b>
Farmhouse roof repair/replacement	<b>10,000</b>
Reserve	5,000
<b><u>Total budgeted for capital projects</u></b>	<b><u>1,000,000</u></b>



## Capital Projects (Expenditures) 2018-19

Project Vendor & Name	FYE 5/31/2017 Expensed (CIP)	FYE 5/31/2018 Expensed (CIP)	FYE 5/31/2018 Accrued	FYE 5/31/2019 Expensed	Total Project Cost To Date
Access Control - Keyless Entry		174,764	25,000	21,529	196,293
AOS - Master Planning		78,144	53,335	88,406	166,550
Northeastern - Pine Forest Housing	110,388	834,264	175,000	221,439	1,166,091
TRC/Molzin - Sewer Extension	105,421	346,383	224,000	559,841	1,011,645
Franken - Dwan Light Sanctuary	64,444	12,688	-	94,288	171,420
JAE - Monte Blanc Bathroom	45,038	45,038			90,076
JAE - IT Center Remodel	9,900	16,893			26,793
Gemini - Math Classroom		14,631			14,631
Ron's Flooring - Denali Carpet		32,830			32,830
Yearout - Pump Valves		18,916			18,916
Roofcare - Pres House Roof		23,548			23,548
Turnbo - Turret Refurbish		13,400			13,400
Vitality - Monitoring Meter		12,250			12,250
Ken Blake - Backhoe Purchase		20,000			20,000
Chardan - Boiler Repair Castle		16,356			16,356
Tenrec/Right Hat - Website				152,295	152,295
Creative Bus - Fleet Vehicle Purchase				261,058	261,058
Comdata/Cragin - Sound Equipment				12,311	12,311
Genesys-Network Switch Upgrades				11,534	11,534
Hay's - Pump Installation				26,875	26,875
IT Connect - Smart Boards				16,224	16,224
JAE - Trujillo House Demo				15,175	15,175
James Cooke - Water Pumps				28,000	28,000
N-Demand - Hot Water System Repairs				58,387	58,387
New Image - Pine Forest Fire Hydrants				41,483	41,483
RD Wildlife/S&R - Bat Mitigation				127,833	127,833
Surroundings - Landscape Master Plan				31,037	31,037
<b>TOTALS</b>	<b>335,191</b>	<b>1,660,105</b>	<b>477,335</b>	<b>1,767,715</b>	<b>3,763,011</b>
			<b>2,137,440</b>	<b>1,290,380</b>	
			<b>SUMMARY 05.31.18</b>	<b>05.31.19</b>	
			Cash Expense	1,660,105	1,767,715
			Accrued	477,335	(477,335)
			Total Reported	2,137,440	1,290,380



## **ADVANCEMENT**

# Fundraising Results by Constituency FYE 19 and FYE 18

Constituency	-----FYE 19-----		-----FYE 18-----		% Change	% Change	FYE 19
	*as of 4/30/2019		*as of 4/30/2018				
	\$ Raised	# Donors	\$ Raised	# Donors	\$ Raised	# Donors	% of Tot
<b>ANNUAL FUND</b>							
Foundation	\$ 676,085	9	\$722,127	6	-6%	50%	28%
Alumna/us	\$ 244,829	542	\$320,222	719	-24%	-25%	10%
Individual	\$ 266,761	241	\$191,400	275	39%	-12%	11%
Board Member	\$ 56,950	10	\$211,647	17	-73%	-41%	2%
Distinguished	\$ 942,488	5	\$55,087	6	1611%	-17%	39%
Parent of Alum	\$ 109,148	90	\$112,905	109	-3%	-17%	5%
Company/Org	\$ 47,826	26	\$47,977	28	0%	-7%	2%
Current Parent	\$ 35,851	39	\$50,234	57	-29%	-32%	1%
Faculty/Staff	\$ 10,069	41	\$7,795	42	29%	-2%	0%
Alum other	\$ 4,206	11	\$11,552	22	-64%	-50%	0%
	<u>\$ 2,394,213</u>	<u>1014</u>	<u>\$1,730,946</u>	<u>1,281</u>	<u>38%</u>	<u>-21%</u>	

\*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 \$770,501.

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

<b>ENDOWMENT &amp; OTHER</b>	Unique		Unique		% Change	% Change	FYE 19
*Individual +	\$73,450	6	\$8,750	4			
Distinguished	\$100,000	1	\$500,000	1	-80%	0%	54%
Board Member	\$10,000	1	\$0	0	n/a	n/a	5%
Alumna/us	\$825	3	\$1,355	6	-39%	-50%	0%
	<u>\$184,275</u>	<u>11</u>	<u>\$510,105</u>	<u>11</u>	<u>-64%</u>	<u>0%</u>	

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

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

<b>ALL GIFTS</b>					% Partic.		% Change	
Individual	\$ 337,811	245	\$196,500	277	72%	-12%		
Foundation	\$ 676,085	9	\$722,127	6	-6%	50%		
Distinguished	\$ 1,042,488	5	\$55,087	6	1792%	-17%		
Alumna/us	\$ 245,654	548	\$321,577	724	21%	-24%	-24%	
Board Member	\$ 66,950	11	\$211,647	17	94%	-68%	-35%	
Parent of Alum	\$ 109,148	90	\$114,555	110	-5%	-18%		
Company/Org	\$ 48,226	27	\$47,977	28	1%	-4%		
Current Parent	\$ 35,851	39	\$50,234	57	-29%	-32%		
Faculty/Staff	\$ 12,069	42	\$9,795	43	43%	23%	-2%	
Alum other	\$ 4,206	11	\$11,552	22	-64%	-50%		
Current	\$ 1,761	190	\$1,004	99	45%	75%	92%	
	<u>\$ 2,580,249</u>	<u>1217</u>	<u>\$1,742,055</u>	<u>1389</u>	<u>48%</u>	<u>-12%</u>		

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



# UWC-USA Alumni Dashboard

	FY19 (5/10/2019)	FY18 (5/1/2018)	% Change
<b>DATA</b>			
Total Living Alumni	3,569	3462	3%
No Valid Address	621	515	21%
Inactive	3	3	0%
Have LinkedIn Record	1,300	1056	23%
*Address Changes	1,874	1790	5%
Total Alumni with Business Information	1,689	1642	3%
Total Alumni with Education Information	891	771	16%
Visits to Campus	60	72	-17%

\*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>	FY19 (5/10/2019)	FY18 (5/1/2018)	% Change
#	8	9	
Average # Recipients	2,674	3,031	-12%
Average Open Rate	38%	27%	41%
Average Click-through Rate	11%	8%	38%

<b>ALUMNI BIRTHDAY NOTES</b>	FY19 (5/10/2019)	FY18 (5/1/2018)	% Change
#	12	10	
Average Recipients	221	248	-11%
Average Open Rate	47%	45%	4%
Average Clickthrough Rate	12%	29%	-59%

<b>LYBUNT EMAILS</b>	FY19 (5/10/2019)	FY18 (5/1/2018)	% Change
#	5	2	60%
Average Recipients	73	110	-51%
Average Open Rate	52%	50%	4%
# of Transactions	11	5	55%
\$ Raised	\$4,995	\$832	

<b>ALUMNI VOLUNTEERS</b>	FY19 (5/10/2019)	FY18 (5/1/2018)	% Change
Annual Fund	44	49	-10%
Class Agents	7	10	-30%
Reunion Committee	17	10	70%
U.S Selection Committee	5	4	25%
Mentors (YEP)	0	1	

<b>UWC HUB MEMBERS</b>	FY19 (5/10/2019)	FY18 (5/1/2018)	% Change
Alumni	811	711	12%
Current Students	186	97	48%
Employees	67	60	10%
Vounteers	34	31	9%
Former Employees	11	10	9%
Total	1097	909	17%



# Communication Dashboard

## Web Metrics: January 2019 - April 2019

Data	Current Month	Previous Month	Previous Year-2018
<b>JANUARY</b>			
<b>total new visitor sessions</b>	<b>8,248</b>	<b>\$5,436</b>	<b>9,096</b>
<b>total sessions</b>	<b>12,831</b>	<b>8,155</b>	<b>13,637</b>
<b>total users</b>	<b>9,196</b>	<b>\$6,180</b>	<b>10,102</b>
<b>FEBRUARY</b>			
<b>total new visitor sessions</b>	<b>6,681</b>	<b>\$6,658</b>	<b>10,633</b>
<b>total sessions</b>	<b>11,046</b>	<b>10,379</b>	<b>15,488</b>
<b>total users</b>	<b>7,720</b>	<b>\$7,525</b>	<b>11,808</b>
<b>MARCH</b>			
<b>total new visitor sessions</b>	<b>7,214</b>	<b>\$6,681</b>	<b>9,699</b>
<b>total sessions</b>	<b>11,665</b>	<b>11,046</b>	<b>15,307</b>
<b>total users</b>	<b>8,439</b>	<b>\$7,720</b>	<b>10,862</b>
<b>APRIL</b>			
<b>total new visitor sessions</b>	<b>6,411</b>	<b>\$7,214</b>	<b>8,791</b>
<b>total sessions</b>	<b>10,858</b>	<b>\$11,665</b>	<b>14,472</b>
<b>total users</b>	<b>7,646</b>	<b>\$8,439</b>	<b>10,171</b>

## Social Media Followers:

	May 1, 2019	May 1, 2018
<b>Twitter Followers</b>	<b>2,702</b>	<b>\$2,139</b>
<b>Instagram Followers</b>	<b>10,400</b>	<b>\$8,345</b>
<b>YouTube Subscribers</b>	<b>1,085</b>	<b>\$791</b>
<b>Facebook Followers</b>	<b>21,212</b>	<b>\$17,260</b>

## Press Mentions

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

April 30, 2019 Las Vegas optic coverage of Las Vegas pride parade and UWC-USA: <https://www.lasvegasoptic.com/content/first-pride-parade-city-draws-thousands-las-vegas>

April 27, 2019 Pride Parade covered by Santa Fe New Mexican: [https://www.santafenewmexican.com/news/local\\_news/las-vegas-n-m-celebrates-inaugural-pride-parade/article\\_ce08e9c8-83cd-57bd-b88d-381eedea9624.html](https://www.santafenewmexican.com/news/local_news/las-vegas-n-m-celebrates-inaugural-pride-parade/article_ce08e9c8-83cd-57bd-b88d-381eedea9624.html)

April 22, 2019 In two pieces, podcast featuring Santa Fe radio personality Richard Eeds' visit to campus: <https://santafe.com/ktrc/podcasts/united-world-college-hour-1-with-the-president-wilderness-leadership-s>

<https://santafe.com/ktrc/podcasts/united-world-college-hour-2-with-the-bartos-institute-president-mora-with-i>

April 18, 2019 Las Vegas optic coverage of student art exhibit: <https://www.lasvegasoptic.com/content/couple-trash>

April 17, 2019 Sentient Blue coverage: <https://www.governor.ny.gov/news/governor-cuomo-announces-1-million-grand-prize-winner-genius-ny-worlds-largest-uas-business>

April 11, 2019 ThinkAdvisor coverage of Doug Lynam and UWC-USA retirement plan: <https://www.thinkadvisor.com/2019/04/11/monk-finds-spiritual-pain-is-often-financial-becomes-an-advisor/?sreturn=20190410131406>

April 2, 2019 Santa Fe New Mexican coverage of Mark Hodde's appointment as Chief Advancement Officer: [https://www.santafenewmexican.com/news/business/business-people-april/article\\_220835d4-935f-5fee-8ffa-b87beb6fa7ee.html](https://www.santafenewmexican.com/news/business/business-people-april/article_220835d4-935f-5fee-8ffa-b87beb6fa7ee.html)

March 16, 2019 Plansponsor coverage of UWC-USA retirement plan: <https://www.plansponsor.com/magazine/dc-plans-slow-adopt-hybrid-qdias/>

March 8, 2019 Las Vegas Optic coverage of Academic WorldQuest winners: <https://www.lasvegasoptic.com/content/uwc-advances-national-competition-0>

March 7, 2019 Santa Fe New Mexican coverage of AcademicWorldQuest winning students: [https://www.santafenewmexican.com/news/briefs/a-quest-for-knowledge/article\\_d1cdc21a-bd4c-5fd5-ba16-17ded817e683.html](https://www.santafenewmexican.com/news/briefs/a-quest-for-knowledge/article_d1cdc21a-bd4c-5fd5-ba16-17ded817e683.html)

February 28, 2019 Las Vegas optic coverage of Ndaba Mandela visit: <https://www.lasvegasoptic.com/content/united-world-college-visit-descendant-legend>

February 26, 2019 Albuquerque Journal coverage of Ndaba Mandela's visit: <https://www.abqjournal.com/1285350/mandela-grandson-visits-school.html>

February 26, 2019 Santa Fe New Mexican coverage of Ndaba Mandela visit to school: [https://www.santafenewmexican.com/news/local\\_news/nelson-mandela-s-grandson-shares-inspirational-stories-about-south-african/article\\_649188ce-390b-51a6-ac63-470b8e59eddd.html](https://www.santafenewmexican.com/news/local_news/nelson-mandela-s-grandson-shares-inspirational-stories-about-south-african/article_649188ce-390b-51a6-ac63-470b8e59eddd.html)

February 23, 2019 Emma Smith being named to Forbes' 30 under 30: <http://www.islandssounder.com/life/emma-smith-named-to-forbes-30-under-30-list/>

February 20, 2019 Emma Smith on Forbes' 30 under 30: <https://www.forbes.com/under30/list/2019/europe/technology/#2a77226c5f19>

February 16, 2019 KQRE coverage of students and a rescue dog: <https://www.krqe.com/news/mornings/pet-of-the-week-15/1784992383>

February 10, 2019 Coverage of Ndaba Mandela's visit to UWC-USA: <https://www.pressreader.com/usa/albuquerque-journal/20190210/282656098709030>

February 8, 2019 Coverage of Cisarua refugee initiative and UWC-USA's involvement (Los Alamos): <https://www.ladailypost.com/content/afghan-students-visit-los-alamos-screening-%E2%80%98staging-post%E2%80%99>

February 7, 2019 Ted Lockwood obituary – Union: <https://www.union.edu/news/stories/201902/Former-Dean-Theodore-Lockwood-mourned>

February 6, 2019 Las Vegas Optic coverage of Ted Lockwood – Obituary: <https://www.lasvegasoptic.com/content/uwc-advances-national-competition-0>

February 3, 2019 Santa Fe new Mexican coverage of grant awarded to UWC-USA: [https://www.santafenewmexican.com/life/celebrations/celebrations-feb/article\\_d1fd8abb-4587-50d7-b59c-5e06b398197b.html](https://www.santafenewmexican.com/life/celebrations/celebrations-feb/article_d1fd8abb-4587-50d7-b59c-5e06b398197b.html)

February 4, 2019 Santa Fe New Mexican coverage of Cisarua refugee students and UWC-USA involvement in the program: [https://www.santafenewmexican.com/news/local\\_news/afghan-teens-get-taste-of-life-learning-in-santa-fe/article\\_e33bc0ec-e395-5c29-8fac-ad875134fef3.html](https://www.santafenewmexican.com/news/local_news/afghan-teens-get-taste-of-life-learning-in-santa-fe/article_e33bc0ec-e395-5c29-8fac-ad875134fef3.html)

February 4, 2019 Coverage of students and locals and the Hot Springs: <https://www.abqjournal.com/1276343/students-locals-diving-into-montezuma-hot-springs-issues-ex-nonprofit-may-play-a-role-in-future-of-soakers-paradise.html>

February 4, 2019 Coverage of Hot Springs story by Albuquerque Journal: <https://www.abqjournal.com/1276342/three-deaths-in-a-decade-at-hot-springs-ex-safety-issues-inform-plans-for-the-popular-area.html>

February 2, 2019 Hartford Courant obituary for Ted Lockwood: <https://www.courant.com/obituaries/hc-obituary-theodore-d-lockwood-20190202-story.html>

January 30, 2019 Santa Fe New Mexican obituary for Ted Lockwood: [https://www.santafenewmexican.com/news/local\\_news/founding-president-of-united-world-college-usa-dies/article\\_ed8eb10a-2059-5eab-a068-db7fc3fe2df3.html](https://www.santafenewmexican.com/news/local_news/founding-president-of-united-world-college-usa-dies/article_ed8eb10a-2059-5eab-a068-db7fc3fe2df3.html)

January 30, 2019 Afghan Cisarua student to visit Los Alamos: <https://www.ladailypost.com/content/afghan-refugee-students-visit-los-alamos-feb-2>

January 29, 2019 Las Vegas Optic coverage of grant received by UWC-USA: <https://www.lasvegasoptic.com/content/l-v-community-foundation-makes-its-first-grants>

January 28, 2019 Albuquerque Journal coverage of Ted Lockwood obituary: <https://www.abqjournal.com/1273400/founding-president-of-world-college-dies.html>

January 25, 2019 Hartford Courant obituary for Ted Lockwood: <https://www.courant.com/community/hartford/hc-news-hartford-trinity-lockwood-20190124-wxhdpayesrfppcdfj3g2rz4lcm-story.html>

January 15, 2019 UWC-USA student advances to semifinalist stage of major scholarship: competition: <https://www.lasvegasoptic.com/content/uwc-student-semifinalist-major-scholarship>



# Davis Scholar Parent Giving Report

<b>Constituency</b>	<b>FYE 2019</b>				<b>FYE 2018</b>				<b>% Change \$ Raised</b>	<b>% Change # Donors</b>
	<b>\$ Raised</b>	<b># Donors</b>	<b>%</b>		<b>\$ Raised</b>	<b># Donors</b>	<b>%</b>			
Current Davis Scholar Parents	\$37,163	34	31%		\$45,613	54	50%		-18.5%	-37%
Davis Scholar Parents of Alumni	\$105,956	81	12%		\$200,286	99	17%		-47%	-18%