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STATE OF NEW HAMPSHIRE

DEPARTMENT OF HEALTH AND HUMAN SERVICES

DIVISION OF PUBLIC HEALTH

Lori A. Weaver
Commissioner

Iain N. Watt
Director

29 HAZEN DRIVE, CONCORD, NH 03301
603-271-4501 1-800-852-3345 Ext. 4501
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www.dhhs.nh.gov

January 21, 2026

Her Excellency, Governor Kelly A. Ayotte
and the Honorable Council
State House
Concord, New Hampshire 03301

REQUESTED ACTION

Authorize the Department of Health and Human Services, Division of Public Health, to amend an existing contract with JSI Research & Training Institute, Inc. dba Community Health Institute (VC #161611), Bow, NH, to continue to provide training and technical assistance to the Department's Home Visiting programs by exercising a contract renewal option by increasing the price limitation by $550,000 from $760,000 to $1,310,000 and extending the completion date from June 30, 2026 to June 30, 2028, effective upon Governor and Council approval. 100% Federal Funds.

The original contract was approved by Governor and Council on April 10, 2024, item #9 and amended on November 13, 2024, item #17.

Funds are available in the following accounts for State Fiscal Year 2026 and 2027, and are anticipated to be available in State Fiscal Years 2028, upon the availability and continued appropriation of funds in the future operating budget, with the authority to adjust budget line items within the price limitation and encumbrances between state fiscal years through the Budget Office, if needed and justified.

See attached fiscal details.

EXPLANATION

The purpose of this request is to exercise a contract renewal option to continue providing training to the Department's Maternal, Infant and Early Childhood Home Visiting Program (MIECHV) contractors including the Healthy Families America (HFA) and Comprehensive Family Support (CFS) programs, Department staff, and to expand training services to Kinship Navigation Program contractors. Training will be delivered in a train-the-trainer format to promote sustainability and allow the Department to execute this function directly via State staff after the contract's conclusion. The Contractor has a proven track record of delivering statewide trainings for the target audience on topics that include improving referral processes, conflict resolution, and mental health first aid, among others.

The Contractor will deliver professional development and quality improvement training services that support the Department's MIECHV HFA and Kinship Navigation Program contractors, which serve 810 New Hampshire families annually. The Contractor will support approximately 115 home visiting professionals and Department staff through training in topics such as evidence-based home visiting models, everyday parenting, postpartum mental health,

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navigating special education services, and fostering positive parent-teen communication. These trainings will directly benefit participant families by enhancing the ability and knowledgebase of service providers on topics most relevant to positive familial outcomes. In addition, the Contractor will support the Department in completing a federally required needs and gap analysis. The analysis will allow the Department to identify which services are most in-demand by participating families, which are producing positive outcomes, and where program enhancements or additional services could better support families. Upon completion of the analysis, the Department will assess identified gaps, develop an action plan, and allocate resources to strengthen overall program performance. Finally, this amendment adds new funding for training to support implementation of the evidence-based Family Check Up (FCU) model among the state's eight CFS contractors who serve 1,056 New Hampshire families. The implementation of the FCU model will enhance the Department's home visiting services by adding an evidence-based service model for families with children over the age of 5 as well as bringing the state in alignment with national best practices.

The Department's home visiting programs are designed to provide preventative services such as household management, budgeting, positive parenting techniques, child development screenings, case management, and referrals to community resources. The Kinship Navigation Program supports kinship caregivers in meeting a variety of family needs and preventing more restrictive placements for children into the child welfare system. Together, these programs aim to strengthen family stability and promote the well-being of children by providing proactive support and reducing the need for out-of-home placements.

The Department will monitor services by conducting monthly meetings and reviewing reporting with the Contractor.

As referenced in Exhibit A Revisions to Standard Agreement Provisions of the original agreement, the parties have the option to extend the agreement for up to four (4) additional years, contingent upon satisfactory delivery of services, available funding, agreement of the parties and Governor and Council approval. The Department is exercising its option to renew services for two (2) of the three (3) years available.

Should the Governor and Council not authorize this request, Department, MIECHV, and Kinship Navigation staff will not have access to essential professional development resources needed to maintain and enhance the quality of family services.

Area served: Statewide.

Source of Federal Funds: Assistance Listing Number #93.870, FAIN #X10MC50315, Assistance Listing Number #93.870, FAIN # X10MC53631.

Respectfully submitted,

Lori A. Weaver
Commissioner

DEPARTMENT OF HEALTH AND HUMAN SERVICES
Home Visiting MIECHV Training and Technical Assistance (RFA-2024-DPHS-10-HOMEV-01-A02)
Fiscal Detail Sheet

05-95- 90-902010-5896 HEALTH AND SOCIAL SERVICES, DEPT OF HEALTH AND HUMAN SVS, HHS: PUBLIC HEALTH DIV, BUREAU OF FAMILY HEALTH AND NUTRITION, HOME VISITING FORMULA GNT
100% GENERAL FUNDS

State Fiscal Year	Class/Account	Class Title	Job Number	Current Modified Budget	Increase (Decrease) Amount	Revised Modified Amount
2024	102-500731	Contracts for Program Services	90005896	$175,000	$0	$175,000
2025	102-500731	Contracts for Program Services	90005896	$169,096		$169,096
			Subtotal	***$344,096***	***$0***	***$344,096***

05-95- 90-902010-5896 HEALTH AND SOCIAL SERVICES, DEPT OF HEALTH AND HUMAN SVS, HHS: PUBLIC HEALTH DIV, BUREAU OF FAMILY HEALTH AND NUTRITION, HOME VISITING FORMULA GRANT 100% FEDERAL FUNDS

State Fiscal Year	Class/Account	Class Title	Job Number	Current Modified Budget	Increase (Decrease) Amount	Revised Modified Amount
2026	074-500589	Grants for Pub Asst and Rel	90083212	$260,904	$20,000	$280,904
2027	074-500589	Grants for Pub Asst and Rel	90083212	$0	$45,000	$45,000
2027	074-500589	Grants for Pub Asst and Rel	90083213	$0	$235,000	$235,000
2028	074-500589	Grants for Pub Asst and Rel	90083213	$0	$45,000	$45,000
2028	074-500589	Grants for Pub Asst and Rel	90083214	$0	$205,000	$205,000
			Subtotal	**$260,904**	***$550,000***	***$810,904***

05-95-90-902010-70470000 HEALTH AND SOCIAL SERVICES, DEPT OF HEALTH AND HUMAN SVS, HHS: PUBLIC HEALTH DIV, BUREAU OF FAMILY HEALTH AND NUTRITION,COMMUNITY COLLABORATION 100% GENERAL FUNDS

State Fiscal Year	Class/Account	Class Title	Job Number	Current Modified Budget	Increase (Decrease) Amount	Revised Modified Amount
2025	102-500731	Contracts for Program Services	90070471	$105,000	$ -	$ 105,000
2026	102-500731	Contracts for Program Services	90070471	$50,000	$ -	$ 50,000
			Subtotal	**$155,000**	**$ -**	**$ 155,000**
			TOTAL	**$ 760,000**	**$550,000**	**$1,310,000**

State of New Hampshire
Department of Health and Human Services
Amendment #2

This Amendment to the Home Visiting MIECHV Training and Technical Assistance contract is by and between the State of New Hampshire, Department of Health and Human Services ("State" or "Department") and JSI Research & Training Institute, Inc. dba Community Health Institute ("the Contractor").

WHEREAS, pursuant to an agreement (the "Contract") approved by the Governor and Executive Council on April 10, 2024 (Item #9), as amended on November 13, 2024 (Item #17), Contractor agreed to perform certain services based upon the terms and conditions specified in the Contract as amended and in consideration of certain sums specified; and

WHEREAS, pursuant to Form P-37, General Provisions, the Contract may be amended upon written agreement of the parties and approval from the Governor and Executive Council; and

NOW THEREFORE, in consideration of the foregoing and the mutual covenants and conditions contained in the Contract and set forth herein, the parties hereto agree to amend as follows:

1. Form P-37 General Provisions, Block 1.7., Completion Date, to read:

   June 30, 2028

2. Form P-37, General Provisions, Block 1.8., Price Limitation, to read:

   $1,310,000

3. Form P-37, General Provisions, Block 1.9., Contracting Officer for State Agency, to read:

   Robert W. Moore, Director

4. Modify Exhibit A - Revisions to Standard Provisions, by adding Subsection 1.3., to read:

   1.3 Paragraph 6, Subparagraph 6.1., Compliance by Contractor with Laws and Regulations/Equal Employment Opportunity, is amended as follows:

   6.1 In connection with the performance of the Services, the Contractor shall comply with all applicable statutes, laws, regulations, and orders of federal, state, county or municipal authorities which impose any obligation or duty upon the Contractor, including, but not limited to, RSA 151:21 Patients' Bill of Rights, civil rights and equal employment opportunity laws, and the Governor's order on Respect and Civility in the Workplace, Executive Order 2020-01. In addition, if this Agreement is funded in any part by monies of the United States, the Contractor shall comply with all federal executive orders, rules, regulations and statutes, and with any rules, regulations and guidelines as the State or the United States issue to implement these regulations. The Contractor shall also comply with all applicable intellectual property laws.

5. Modify Exhibit B, Scope of Services, Section 1.1., to read:

   1.1. The Contractor must provide training and technical assistance to the Department's home visiting programs which includes, Maternal, Infant, and Early Childhood Home Visiting (MIECHV), Comprehensive Family Support (CFS), and Kinship Navigation programs, including their participating agencies.

6. Modify Exhibit B, Scope of Services, Section 1.4., to read:

   1.4. The Contractor must provide a broad range of home visiting and family support professional development opportunities and training to local implementing agencies (LIA) staff such as the Department's MIECHV, Kinship Navigation, and CFS program staff including, but not limited to:

7. Modify Exhibit B, Scope of Services, Section 1.6.,to read:

1.6. Needs and Gap Analysis and Program Support

1.6.1. NH Maternal Infant and Early Childhood Home Visiting (MIECHV) Program

1.6.1.1. The Contractor must work with the NH MIECHV program to complete a 2026 Needs Assessment.

1.6.1.2. The Contractor must work with the NH MIECHV program to conduct and complete an annual gap analysis of the NH MIECHV program's current service populations compared to the populations identified in the Needs Assessment, to identify opportunities for improved community outreach within the first 12 months of the resulting contract and annually thereafter.

1.6.1.3. The Contractor must, based on the findings of the gap analysis, support the MIECHV Program in all identified communities in conducting a minimum of two targeted outreach efforts annually to engage and recruit members of unserved or underserved by the NH MIECHV program.

8. Modify Exhibit B, Scope of Services, Section 1.7.1.2., to read:

1.7.1.2 The Contractor must provide coordination and logistical support to the Department for delivery of training to home visitors and Department staff in the Family Check Up (FCU) evidence-based home visiting model including motivational interviewing and the everyday parenting curriculum such as:.

9. Modify Exhibit B, Scope of Services, Section 1.7.1.2., by adding Section 1.7.1.2.1., to read:

1.7.1.2.1. Coordinating logistics with the Department and sub-contractors delivering the FCU training and ensuring home visiting staff and Department staff have access to all training, consultation support and coaching materials following the training.

10. Modify Exhibit B, Scope of Services, Section 1.13.1.4., by adding Section 1.13.1.4.6., to read:

1.13.1.4.6. Needs and Gap Analysis reporting and activities conducted.

11. Modify Exhibit C, Payment Terms; Section 1, to read:

1. This Agreement is funded by:

1.1 62% Federal Funds Maternal, Infant and Early Childhood Home Visiting Grant Program, as awarded on August 24, 2024 and August 11, 2025, by the Health Resources and Services Administration (HRSA), Home Visiting Formula Grant, ALN 93.870, FAIN X10MC53631 and X10MC55030.

1.2 38% General Funds.

12. Modify Exhibit C, Payment Terms; Section 3., to read:

3. Payment shall be on a cost reimbursement basis for actual expenditures incurred in the fulfillment of this Agreement and shall be in accordance with the approved line items, as specified in Exhibit C-1 Budget through Exhibit C-6, Budget - Amendment 2.

13. Modify Exhibit C-3, Budget Sheet- Amendment #1 by replacing it in its entirety with Exhibit C-3, Budget - Amendment 2, which is attached hereto and incorporated by reference herein.

14. Add Exhibit C-6, Budget – Amendment 2, which is attached hereto and incorporated by reference herein.

All terms and conditions of the Contract and prior amendments not modified by this Amendment remain in full force and effect. This Amendment shall be effective upon Governor and Council approval.

IN WITNESS WHEREOF, the parties have set their hands as of the date written below,

State of New Hampshire
Department of Health and Human Services

1/21/2026
Date

DocuSigned by:
Iain Watt
D778BB63F9704C7...

Name: Iain Watt
Title: Director - DPH

JSI Research & Training Institute, Inc. dba Community Health Institute

1/21/2026
Date

DocuSigned by:
Katie Robert
F850C21F46E9439...

Name: Katie Robert
Title: Director

The preceding Amendment, having been reviewed by this office, is approved as to form, substance, and execution.

OFFICE OF THE ATTORNEY GENERAL

1/22/2026

Date

DocuSigned by:
Robyn Guarino
748734844941460...

Name: Robyn Guarino
Title: Attorney

I hereby certify that the foregoing Amendment was approved by the Governor and Executive Council of the State of New Hampshire at the Meeting on: _____ (date of meeting)

OFFICE OF THE SECRETARY OF STATE

Date

Name:
Title:

New Hampshire Department of Health and Human Services	
Contractor Name:	JSI Research & Training Institute, Inc. d/b/a Community Health Institute
Budget Request for:	Home Visiting MIECHV Training and Technical Assistance
Budget Period	July 1, 2025 through June 30, 2026
Indirect Cost Rate (if applicable)	Up to 26.2% of all direct costs LESS equipment and subrecipient contracts
Line Item	**Program Cost - Funded by DHHS**
1. Salary & Wages	$62,989
2. Fringe Benefits	$29,838
3. Consultants	$5,000
4. Equipment Indirect cost rate cannot be applied to equipment costs per 2 CFR 200.1 and Appendix IV to 2 CFR 200.	$0
5.(a) Supplies - Educational	$3,000
5.(b) Supplies - Lab	$0
5.(c) Supplies - Pharmacy	$0
5.(d) Supplies - Medical	$0
5.(e) Supplies Office	$0
6. Travel	$2,000
7. Software	$1,500
8. (a) Other - Marketing/ Communications	$2,000
8. (b) Other - Education and Training	$36,000
8. (c) Other - Other (specify below)	$0
HFA-enrolled families participation expenses	$11,000
Other (please specify)	$0
Other (please specify)	$0
Other (please specify)	$0
9. Subrecipient Contracts	$6,501
Total Direct Costs	$159,828
Total Indirect Costs	$40,172
TOTAL	$200,000

Contractor Initials: DS kR Date: 1/20/2026

Exhibit C-6, Budget - Amendment #2

New Hampshire Department of Health and Human Services		
Contractor Name:	*JSI Research & Training Institute Inc, d/b/a Community Health Insitute*	
Budget Request for:	*Home Visiting MIECHV Training and Technical Assitance*	
Budget Period:	*7/1/2026-6/30/2027*	
Indirect Cost Rate (if applicable)	Up to 26.2% of all direct costs LESS equipment and subrecipient contracts, per current NICRA	
Line Item	**Program Cost - Funded by DHHS - SFY 27**	**Program Cost - Funded by DHHS - SFY 28**
1. Salary & Wages	$72,592	$67,215
2. Fringe Benefits	$34,387	$31,840
3. Consultants	$8,000	$8,000
4. Equipment	$0	$0
5.(a) Supplies - Educational	$0	$0
5.(b) Supplies - Lab	$0	$0
5.(c) Supplies - Pharmacy	$0	$0
5.(d) Supplies - Medical	$0	$0
5.(e) Supplies - Office	$0	$0
6. Travel	$2,000	$2,000
7. Software	$1,500	$1,500
8. (a) Other - Marketing/Communications	$0	$0
8. (b) Other - Education and Training	$30,000	$30,000
8. (c) Other - Other (specify below)	$0	$0
Family leadership and engagement activities	$10,000	$10,000
Other (please specify)	$0	$0
Other (please specify)	$0	$0
Other (please specify)	$0	$0
Other (please specify)	$0	$0
Other (please specify)	$0	$0
Other (please specify)	$0	$0
9. Subrecipient Contracts	$80,000	$60,000
Total Direct Costs	$238,479	$210,555
Total Indirect Costs	$41,521	$39,445
Subtotals	$280,000	$250,000
	TOTAL	**$530,000**

Contractor Initials: DS KR Date: 1/20/2026

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State of New Hampshire
Department of State

CERTIFICATE

I, David M. Scanlan, Secretary of State of the State of New Hampshire, do hereby certify that JSI RESEARCH & TRAINING INSTITUTE, INC. is a Massachusetts Nonprofit Corporation registered to transact business in New Hampshire on February 17, 2016. I further certify that all fees and documents required by the Secretary of State's office have been received and is in good standing as far as this office is concerned.

Business ID: **739507**

Certificate Number: **0007339680**

IN TESTIMONY WHEREOF,
I hereto set my hand and cause to be affixed
the Seal of the State of New Hampshire,
this 4th day of December A.D. 2025.

David M. Scanlan
Secretary of State

Docusign Envelope ID: 23616216-C20F-49FF-AB75-AEFBC6C18464

JSI Research & Training Institute, Inc.

Business ID

739507

Filing#	Filing Date	Effective Date	Filing Type	Annual Report Year
0007339679	12/04/2025	12/04/2025	Nonprofit Report	2025
0007157126	04/12/2025	04/12/2025	Change of Officer/Director	N/A
0006700865	05/20/2024	05/20/2024	Merger	N/A
0006335486	10/18/2023	10/18/2023	Change of Officer/Director	N/A
0004989959	08/31/2020	08/31/2020	Nonprofit Report	2020
0004772199	01/16/2020	01/16/2020	Annual Report Reminder	N/A
0003239394	02/17/2016	02/17/2016	Business Formation	N/A

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State of New Hampshire
Department of State

CERTIFICATE

I, David M. Scanlan, Secretary of State of the State of New Hampshire, do hereby certify that COMMUNITY HEALTH INSTITUTE is a New Hampshire Trade Name registered to transact business in New Hampshire on April 12, 2016. I further certify that all fees and documents required by the Secretary of State's office have been received and is in good standing as far as this office is concerned.

Business ID: **742096**
Certificate Number: **0007726729**

IN TESTIMONY WHEREOF,
I hereto set my hand and cause to be affixed
the Seal of the State of New Hampshire,
this 16th day of January A.D. 2026.

David M. Scanlan
Secretary of State

Docusign Envelope ID: 23616216-C20F-49FF-AB75-AEFBC6C18464

COMMUNITY HEALTH INSTITUTE

Business ID

742096

Filing#	Filing Date	Effective Date	Filing Type	Annual Report Year
0007318207	10/24/2025	04/12/2026	Trade Name Renewal	N/A
0007311984	10/14/2025	10/14/2025	Tradename - First Renewal Notice	N/A
0005334162	04/01/2021	04/12/2021	Trade Name Renewal	N/A
0005289216	03/13/2021	03/13/2021	Tradename - Final Renewal Notice	N/A
0005027821	10/14/2020	10/14/2020	Tradename - First Renewal Notice	N/A
0003296094	04/21/2016	04/21/2016	Change of Business Address	N/A
0003290473	04/12/2016	04/12/2016	Trade Name Registration	N/A

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JSI Research & Training Institute, Inc.
44 Farnsworth St
Boston, MA, 02210
+1 617 482 9485

CERTIFICATE OF AUTHORITY

I, Antonia Powell, hereby certify that:

1. I am a duly elected Assistant Clerk (Secretary) of **JSI Research & Training Institute, Inc.**

2. The following is a true copy of a vote taken at a meeting of the Board of Directors, duly called and held on **January 7, 2026**, at which a quorum of the Directors were present and voting.

VOTED: That the below listed individuals are duly authorized on behalf of **JSI Research & Training Institute, Inc.** to enter into contracts or agreements with the State of New Hampshire and any of its agencies or departments and further is authorized to execute any and all documents, agreements and other instruments, and any amendments, revisions, or modifications thereto, which may in his/her judgment be desirable or necessary to effect the purpose of this vote:

- Muka Chikuba-McLeod – President/Chief Executive Officer
- Janice Clark – Chief Finance & Operations Officer/Clerk
- Susan Longley – Executive Vice President, Health Services Division
- Robert Schlink – Vice President, Contracts & Compliance
- Laura McEvoy – Vice President, Program Finance & Operations
- Craig Enstad – Director, Awards Management & Compliance
- Ryan Macabasco - Director of Program Finance & Operations
- Katie Robert – Regional Director, Northern New England

3. I hereby certify that said vote has not been amended or repealed and remains in full force and effect as of the date of the contract/contract amendment to which this certificate is attached. This authority was valid thirty (30) days prior to and remains valid for thirty (30) days from the date of this Certificate of Authority. I further certify that it is understood that the State of New Hampshire will rely on this certificate as evidence that the person(s) listed above currently occupy the position(s) indicated and that they have full authority to bind the corporation. To the extent that there are any limits on the authority of any listed individual to bind the corporation in contracts with the State of New Hampshire, all such limitations are expressly stated herein.

Dated: Jan. 13, 2026

Name: Antonia Powell
Title: Assistant Clerk (Secretary)

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ACORD®

CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY): 11/14/2025

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER
The Baldwin Group Mid-Atlantic LLC
20 South King Street
Leesburg VA 20175

License#: CA#0658748

CONTACT NAME: Nikkia Summers
PHONE (A/C, No, Ext): 703-777-2341 **FAX (A/C, No):** 703-771-1852
E-MAIL ADDRESS: Nikkia.Summers@Baldwin.com

INSURER(S) AFFORDING COVERAGE	NAIC #
INSURER A : Federal Insurance Company	20281
INSURER B : ACE American Insurance Company	22667
INSURER C : Great Northern Insurance Compa	20303
INSURER D : Chubb Indemnity Insurance Comp	12777
INSURER E :	
INSURER F :	

INSURED
JSI Research & Training Institute, Inc.
44 Farnsworth Street
Boston MA 02210-1206

JOHNSNO-01

COVERAGES

CERTIFICATE NUMBER: 654713547

REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS	
C	X COMMERCIAL GENERAL LIABILITY	Y		35873320	10/1/2025	10/1/2026	EACH OCCURRENCE	$ 1,000,000
	CLAIMS-MADE [X] OCCUR						DAMAGE TO RENTED PREMISES (Ea occurrence)	$ 1,000,000
							MED EXP (Any one person)	$ 10,000
							PERSONAL & ADV INJURY	$ 1,000,000
	GEN'L AGGREGATE LIMIT APPLIES PER:						GENERAL AGGREGATE	$ 2,000,000
	POLICY [ ] PRO-JECT [X] LOC						PRODUCTS - COMP/OP AGG	$ Included
	OTHER:							$
A	AUTOMOBILE LIABILITY			(25)7354-66-34	10/1/2025	10/1/2026	COMBINED SINGLE LIMIT (Ea accident)	$ 1,000,000
	ANY AUTO						BODILY INJURY (Per person)	$
	OWNED AUTOS ONLY / SCHEDULED AUTOS						BODILY INJURY (Per accident)	$
	X HIRED AUTOS ONLY / X NON-OWNED AUTOS ONLY						PROPERTY DAMAGE (Per accident)	$
								$
A	X UMBRELLA LIAB / X OCCUR			79861066	10/1/2025	10/1/2026	EACH OCCURRENCE	$ 10,000,000
	EXCESS LIAB / CLAIMS-MADE						AGGREGATE	$ 10,000,000
	DED X RETENTION $ 0							$
D	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY			71733182	10/1/2025	10/1/2026	X PER STATUTE / OTH-ER	
	ANYPROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? Y/N [N] (Mandatory in NH)	N / A					E.L. EACH ACCIDENT	$ 1,000,000
	If yes, describe under DESCRIPTION OF OPERATIONS below						E.L. DISEASE - EA EMPLOYEE	$ 1,000,000
							E.L. DISEASE - POLICY LIMIT	$ 1,000,000
B	Professional Liability			D96621772	10/1/2025	10/1/2026	Aggregate	5,000,000
B	Cyber Liability			D96621772	10/1/2025	10/1/2026	Aggregate	5,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)
State of New Hampshire, Department of Health and Human Services are included as an Additional Insureds with respect to general liability if required by written contract and subject to terms, conditions, and exclusions of the policy.

CERTIFICATE HOLDER

State of New Hampshire
Department of Health and Human Services
129 Pleasant Street
Concord NH 03301-3857

CANCELLATION

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

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NONPROFIT COVER SHEET

A. Entity Name: JSI Research & Training Institute, Inc.

B. Entity's Contact Information:

For Records Requests (e.g., resumes of key personnel; audited financial statements):

Name / Phone / Email: Cara Griffith / (603) 573-3300 / cara.griffith@jsi.org

C. List Board of Directors and Affiliations

Name (Identify any additional role(s) in Parentheses) E.g., John Doe (President)	Affiliations
Dr. Sandro Galea (Board Chair)	Dean, Washington University School of Public Health
Alina Rocha Menocal	Principal Research Fellow, Politics and Governance – ODI Global
Hafiz Adamjee	Retired, former executive at Novartis
Kulleni Gebreyes	Principal at Deloitte
Lia Tadesse Gebremedhin	Executive Director, Harvard Ministerial Leadership Program
Mike Useem	William and Jacalyn Egan Professor of Management Wharton School at University of Pennsylvania
Dr. Muka Chikuba-McLeod (President/CEO)	JSI Research & Training Institute, Inc.
Dr. Nneka Mobisson	Co-founder and CEO of mymdoc and Faculty Advisor at IHI
Topsy Kola-Oyeneyin	Managing Partner, Augmentum Advisory

D. List Key Personnel (Resumes must be available upon request to the person(s) listed in section B or may be attached):

Name	Role	Annual Salary	Amount Paid From This Contract
Katie Robert	Director	$162,463	$55,283
Cara Griffith	Project Coordinator	$76,260	$23,197
Katelyn Flaherty-Dore	Training Lead	$137,488	$43,770
Emma Gier	Peer Learning Lead/Technical Advisor	$94,462	$30,827
Yvonne Hamby	Quality Improvement Lead	$168,881	$42,687
Rachel Daube	Analyst	$76,686	$19,412
Tanisha Luthria	Project Associate	$66,977	$33,773
Faith Bouchard	Designer	$87,319	$6,731

DISCLOSURE OF LEGAL ACTIVITIES INVOLVING THE STATE OF NEW HAMPSHIRE OR ANOTHER GOVERNMENT ENTITY

E. Check one of the following:

[X] The entity is **not currently or has not been** party to any legal proceeding involving the State of New Hampshire (or any agency or subdivision thereof) or any other state/federal government entity before any adjudicative body in any jurisdiction **OR**

[ ] The entity is or has been party to one or more legal proceedings as set forth above. Identify the jurisdiction, court or other adjudicative body, case number, and briefly describe the nature of the proceeding (Attached extra sheet if necessary).

_____

_____

_____

CHARITABLE TRUSTS UNIT COMPLIANCE CERTIFICATION

F. Check one of the following:

[X] is registered and in good standing with the New Hampshire Department of Justice Charitable Trusts Unit (** see note below) **or** has submitted a complete application for registration to the Charitable Trusts Unit and is awaiting a registration determination **OR**

[ ] is not required to register with the Charitable Trusts Unit because it is neither tax-exempt under section 501(c)(3) of the Internal Revenue Code nor engages in charitable solicitations in the State of New Hampshire **OR**

[ ] is exempt from registration with the Charitable Trusts Unit because it is a federal or state government, agency, or subdivision or is a religious organization, an integrated auxiliary of a religious organization, or is a convention or association of churches.

** Note: Attached screen shot from the DOJ Registered Charities List found at:

https://mm.nh.gov/files/uploads/doj/remote-docs/registered-charities.pdf

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Registered Charities List-no PDF1 199 / 419 90%

Registered Charities List
G = Good Standing; X = Not in Good Standing; S = Suspended

Reg. No.	Charity Name	Address	City	State	Zip	Status	Report Due
19808	Joseph F. Healey Memorial	3 Howard Road	East Hampstead	NH	03826	G	11/15/2026
35264	Joseph L Robinson FBO Molly CRUT	R11-537-07-02 1 Financial Plaza	Providence	RI	02903	G	5/15/2026
4711	Joseph L Robinson Unitrusts	PO Box 653067Dallas, TX 75265-3067	Dallas	TX	75265-3067	G	5/15/2026
31002	Joseph Sell Into the Light Foundation	1179 Suncook Valley Highway	Epsom	NH	03234	X	11/15/2020
3792	Josephine V Gilioli Trust	100 William Loeb Drive #3	Manchester	NH	03109	G	8/15/2025
12636	Joseph's Storehouse	PO Box 707	Barrington	NH	03825	G	5/15/2026
17439	Josh Russell Ski Race Scholarship Fund	331 Maple Street	Contoocook	NH	03229	X	5/15/2023
35162	Joshua Druke Foundation (The)	PO Box 1014	Walpole	NH	03608	G	5/15/2026
18216	Joshua Fund	PO Box 3468	McLean	VA	22103-3468	G	8/15/2026
5111	Josiah Bartlett Center for Public Policy	PO Box 897	Concord	NH	03302-0897	G	5/15/2026
17493	Josiah Venture, NFP	PO Box 4317	Wheaton	IL	60189-4317	G	5/15/2026
12083	Joslin Diabetes Center	One Joslin Place	Boston	MA	02215-5306	G	8/15/2025
34726	Journalism Development Network, Inc.	7 Saint Paul St Ste 820Baltimore, MD 21202	Baltimore	MD	21202	X	5/15/2025
34930	Journalism Funding Partners	1731 Howe Ave, #242Sacramento, CA 95825	Sacramento	CA	95825	G	5/15/2026
30171	Journey For Good Foundation, Inc.	6905 Rockledge Drive	Bethesda	MD	20817	G	5/15/2026
31360	Journey Gives, Inc.	PO Box 69	Lyme	NH	03768	X	5/15/2021
19461	Journey Home, Inc.	PO Box 1561	North Hampton	NH	03862	X	5/15/2025
32841	Journey Song	57 South Street	Portsmouth	NH	03801	G	5/15/2026
35642	Journey Through Hallowed Ground Partnership	PO Box 1384	Leesburg	VA	20177	G	2/15/2026
10934	Journeyman Basketball	PO Box 1016	Exeter	NH	03833	X	5/15/2025
12497	Journeys in Education, Inc	26 Main Street	Peterborough	NH	03458	G	5/15/2026
4288	Journeys, A Center for Pastoral Psychotherapy and Spiritual Growth	PO Box 684	Durham	NH	03824	X	5/15/2023
31323	Jovenes, Inc.	1208 Pleasant Avenue	Los Angeles	CA	90033	X	2/15/2020
13139	Joy in Childhood Foundation, Inc.	120 S Central AvenueClayton, MO 63105	Clayton	MO	63105	G	5/15/2026
13547	Joy Ranch, Inc.	PO Box 727	Hillsville	VA	24381	G	5/15/2026
19879	Joy to the World Foundation	PO Box 12129	Denver	CO	80212	X	11/15/2023
18443	Joy's Network	463 Washington Street	Keene	NH	03431	X	5/15/2025
34878	JPMA Cares, Inc.	1120 Route 73, Suite 200	Mount Laurel	NJ	08054	G	11/15/2025
31861	Jr. Miss Seabrook	49 Railroad Avenue	Seabrook	NH	03874	G	1/15/2026
35191	JScreen.org, Inc.	6 Woodrow Road	Hanover	New Ha	03755	G	5/15/2026
16479	JSI Research & Training Institute, Inc.	44 Farnsworth StreetBoston, MA 02210	Boston	MA	02210	G	2/15/2026
13777	JT Fortin Foundation for Autism	4 Alder Street	Windham	NH	03087	G	11/15/2025
31095	JTStrong Memorial Fund, Inc.	255 Mill Road	Hampton	NH	03842	G	11/15/2026

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FINANCIAL DISCLOSURES

G. Check one the following:

[X] The organization hired an outside firm to audit its financial statements or to prepare GAAP-compliant financial statements for its most recently completed fiscal year. If so, please ensure that the financial statements and audit results are available to be requested from the contact listed on Page 1 (audited financials may be attached) **OR**

[ ] The above does not apply, but the organization filed an IRS Form 990 or Form 990-EZ for its most recently completed fiscal year. Please attach that IRS Form 990 or Form 990-EZ to the submission. (Form 990 Schedule B is not required) **OR**

[ ] ***If neither of the above apply***, complete the Income Statement and Balance Sheet below with the following basic financial information from the organization's most recently completed fiscal year:

1. INCOME STATEMENT

Revenue	
Grants	$
Donations	$
Program Services Revenue	$
Interest & Dividends	$
All other Revenue	$
Total Revenue	$

Expenses	
Compensation of officers, directors, and key personnel	$
Other salaries & wages	$
Payroll taxes & employee benefits	$
Occupancy, rent, utilities, and insurance	$
Printing, publications, postage, office supplies, and IT	$
All other expenses	$
Total Expenses	$

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2. BALANCE SHEET

Assets	
Cash & Equivalents	$
Investments	$
Real Estate (less any depreciation)	$
Other Property & Equipment (less any depreciation)	$
Pledges, grants, accounts receivable	$
All other assets	$
Total Assets	$

Liabilities	
Accounts Payable	$
Loans Payable	$
All other liabilities	$
Total Liabilities	$

JSI

Better Health & Education Outcomes. For All.

At JSI, we believe that all people should have what they need to live their healthiest lives and reach their full potential. We are dedicated to improving lives through better health and education outcomes for individuals and communities and to providing an environment where people of passion can pursue this cause.

Our Approach

JSI works hand-in-hand with government agencies, community organizations, and the private sector to design pragmatic strategies for complex problems. We drive measurable impact in public health, health care, and education to enhance the well-being of people in the United States and around the world. Clients and funders rely on JSI for exceptional partnership, technical insight, context alignment, and adaptive thinking.

Our Reach

As a global organization, JSI has designed, delivered, and scaled programs in more than 50 countries worldwide. In the U.S., JSI has worked in evaluation, training and technical assistance, policy, and strategy in all 50 states.

Our Services

- Program Design and Implementation
- Applied Research and Evaluation
- Training and Technical Assistance
- Strategic Planning
- Policy Development and Implementation

Our Expertise and Results

With the support of private, government, and philanthropic funders, JSI has built a reputation of excellence. Here are a few examples of the world-class results we have delivered:

We expand access to lifesaving medicines and health products at scale.

Supported Tanzania's electronic logistics management system to achieve 99.9% uptime, increasing national health supply chain visibility

99.9%

We use digital transformation to improve patient outcomes and systems efficiency.

Trained 1,000+ U.S. health centers in optimizing digital systems and AI tools to improve patient outcomes

We increase access to immunizations for individuals and communities.

Reached over 2.8 million infants annually across 7 countries with life-saving vaccinations

We support community health workers in the United States.

Evaluated programming with 3,600+ community health workers serving 20 million Americans and identified emergency preparedness best practices

We prevent, detect, and treat infectious diseases globally.

Increased treatment success rates for multidrug-resistant TB from 55% to 75% in the Kyrgyz Republic

75%

We advance policy and practice change in primary care and behavioral health.

Supported primary care and behavioral health associations in 20 U.S. states to improve access to integrated care provided by organizations serving 40+ million people nationally

40+ million

We scale data and digital solutions to improve efficiency.

Equipped 5,500 health providers with digital tools to serve 16 million clients in Ethiopia

We support the future of the American workforce.

Supported adult educators to integrate digital skills and resilience resources used in over 800 programs reaching 50,000+ learners

Learn more at JSI.org

JSI

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Consolidated Financial Statements and Report of Independent Certified Public Accountants and Reports in Compliance with Uniform Guidance

JSI Research and Training Institute, Inc.

September 30, 2024 and 2023

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Grant Thornton

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REPORT OF INDEPENDENT CERTIFIED PUBLIC ACCOUNTANTS

Board of Directors
JSI Research and Training Institute, Inc.

Opinion

We have audited the consolidated financial statements of JSI Research and Training Institute, Inc. and affiliates (the "Organization"), which comprise the consolidated statements of financial position as of September 30, 2024 and 2023, and the related consolidated statements of activities, functional expenses, and cash flows for the years then ended, and the related notes to the financial statements.

In our opinion, the accompanying consolidated financial statements present fairly, in all material respects, the financial position of the Organization as of September 30, 2024 and 2023, and the results of its operations and its cash flows for the years then ended in accordance with accounting principles generally accepted in the United States of America.

Basis for opinion

We conducted our audit of the consolidated financial statements in accordance with auditing standards generally accepted in the United States of America (US GAAS) and the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States (*Government Auditing Standards*). Our responsibilities under those standards are further described in the Auditor's Responsibilities for the Audit of the Financial Statements section of our report. We are required to be independent of the Organization and to meet our other ethical responsibilities in accordance with the relevant ethical requirements relating to our audit. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

Responsibilities of management for the financial statements

Management is responsible for the preparation and fair presentation of the consolidated financial statements in accordance with accounting principles generally accepted in the United States of America, and for the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of consolidated financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the consolidated financial statements, management is required to evaluate whether there are conditions or events, considered in the aggregate, that raise substantial doubt about the Organization's ability to continue as a going concern for one year after the date the financial statements are available to be issued.

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Auditor's responsibilities for the audit of the financial statements
Our objectives are to obtain reasonable assurance about whether the consolidated financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with US GAAS and *Government Auditing Standards* will always detect a material misstatement when it exists. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Misstatements are considered material if there is a substantial likelihood that, individually or in the aggregate, they would influence the judgment made by a reasonable user based on the consolidated financial statements.

In performing an audit in accordance with US GAAS and *Government Auditing Standards*, we:

- Exercise professional judgment and maintain professional skepticism throughout the audit.
- Identify and assess the risks of material misstatement of the consolidated financial statements, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining, on a test basis, evidence regarding the amounts and disclosures in the financial statements.
- Obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the Organization's internal control. Accordingly, no such opinion is expressed.
- Evaluate the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluate the overall presentation of the consolidated financial statements.
- Conclude whether, in our judgment, there are conditions or events, considered in the aggregate, that raise substantial doubt about the Organization's ability to continue as a going concern for a reasonable period of time.

We are required to communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit, significant audit findings, and certain internal control-related matters that we identified during the audit.

Supplementary information
Our audit was conducted for the purpose of forming an opinion on the consolidated financial statements as a whole. The schedule of expenditures of federal awards, as required by Title 2 U.S. *Code of Federal Regulations* Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards*, is presented for purposes of additional analysis and is not a required part of the consolidated financial statements. Such supplementary information is the responsibility of management and was derived from and relates directly to the underlying accounting and other records used to prepare the consolidated financial statements. The information has been subjected to the auditing procedures applied in the audit of the consolidated financial statements and certain additional procedures. These additional procedures included comparing and reconciling such information

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Grant Thornton

directly to the underlying accounting and other records used to prepare the consolidated financial statements or to the consolidated financial statements themselves, and other additional procedures in accordance with US GAAS. In our opinion, the accompanying supplementary information is fairly stated, in all material respects, in relation to the consolidated financial statements as a whole.

Other reporting required by *Government Auditing Standards*

In accordance with *Government Auditing Standards*, we have also issued our report dated June 10, 2025 on our consideration of the Organization's internal control over financial reporting and on our tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements and other matters. The purpose of that report is solely to describe the scope of our testing of internal control over financial reporting and compliance and the results of that testing, and not to provide ah opinion on the effectiveness of the Organization's internal control over financial reporting or on compliance. That report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the Organization's internal control over financial reporting and compliance.

Grant Thornton LLP

Boston, Massachusetts
June 10, 2025

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JSI Research and Training Institute, Inc. and Affiliates

CONSOLIDATED STATEMENTS OF FINANCIAL POSITION

September 30, 2024 and 2023

ASSETS	**2024**	**2023**
Current assets		
Cash and cash equivalents	$ 175,627,874	$ 198,258,786
Receivables for program work	64,413,792	79,831,673
Field advances - program	414,536	540,895
Employee advances	110,988	176,555
Inventory	58,157,411	51,056,340
Prepaid expenses and other current assets	15,310,164	18,430,741
Total current assets	314,034,765	348,294,990
Property and equipment, net	5,334,028	6,567,204
Goodwill, net	581,900	727,375
Right-of-use assets	35,959,137	41,961,185
Other assets	1,653,288	3,041,817
Total assets	$ 357,563,118	$ 400,592,571
LIABILITIES AND NET ASSETS		
Current liabilities		
Accounts payable and accrued expenses	$ 60,080,426	$ 59,658,105
Accrued vacation	4,787,668	4,651,012
Lease liabilities	5,652,473	7,444,243
Advances for program work	133,604,024	176,180,268
Total current liabilities	204,124,591	247,933,628
Long-term lease liabilities	30,652,647	34,822,121
Total liabilities	234,777,238	282,755,749
Net assets		
Without donor restrictions	122,120,139	117,036,234
With donor restrictions	665,741	800,588
Total net assets	122,785,880	117,836,822
Total liabilities and net assets	$ 357,563,118	$ 400,592,571

The accompanying notes are an integral part of these consolidated financial statements.

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JSI Research and Training Institute, Inc. and Affiliates

CONSOLIDATED STATEMENTS OF ACTIVITIES

Years ended September 30, 2024 and 2023

	2024	2023
Net assets without donor restrictions		
Support and revenue		
Public support		
Global Fund	$ 400,393,311	$ 415,379,336
Government grants and contracts		
U.S. Government	268,428,164	354,586,872
Commonwealth of Massachusetts	18,803,065	20,585,288
Other grants and contracts	99,280,182	105,338,023
Contributed net assets (see Note 3)	-	291,248
Program income	303,336	166,488
Contributions	50,422	181,469
Net assets released from restriction	184,802	24,497
In-kind project contributions	5,207,551	862,161
Other income	629,526	140,980
Interest income	2,815,917	1,776,163
Total support and revenue	796,096,276	899,332,525
Expenses		
Program services		
International programs	658,852,169	760,016,335
Domestic programs	62,138,674	74,001,338
Total program services	720,990,843	834,017,673
Supporting services		
Management and general	68,598,569	52,945,220
Fundraising	-	21,731
Total supporting services	68,598,569	52,966,951
Other expenses		
Income taxes	442,400	4,422,777
Unallowable costs	980,559	1,219,515
Total expenses	791,012,371	892,626,916
Change in net assets without donor restrictions	5,083,905	6,705,609
Net assets with donor restrictions		
Contributions, net of net asset releases of $184,802 and 24,497, respectively	(134,847)	49,921
CHANGES IN NET ASSETS	4,949,058	6,755,530
Net assets at beginning of year	117,836,822	111,081,292
Net assets at end of year	$ 122,785,880	$ 117,836,822

The accompanying notes are an integral part of these consolidated financial statements.

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JSI Research and Training Institute, Inc. and Affiliates

CONSOLIDATED STATEMENT OF FUNCTIONAL EXPENSES

Year ended September 30, 2024

	Program Services			Supporting Services		
	International Programs	Domestic Programs	Total	Management and General	Fundraising	Total
Commodities	$ 357,046,741	$ -	$ 357,046,741	$ -	$ -	$ 357,046,741
Freight costs	37,610,562	-	37,610,562	-	-	37,610,562
Salaries	58,450,932	35,858,516	94,309,448	44,302,937	-	138,612,385
Consultants	8,640,591	1,614,791	10,255,382	2,453,195	-	12,708,577
Cooperating national salaries	53,059,098	-	53,059,098	1,128,469	-	54,187,567
Travel	19,979,182	1,276,149	21,255,331	1,744,553	-	22,999,884
Allowance and training	4,204,768	14,816	4,219,584	44,374	-	4,263,958
Subgrants	59,993,259	1,699,437	61,692,696	40,213	-	61,732,909
Subcontracts	12,798,630	17,426,987	30,225,617	156,140	-	30,381,757
Equipment, material and supplies	11,572,456	84,192	11,656,648	1,052,130	-	12,708,778
Other costs	27,904,504	4,142,326	32,046,830	15,377,595	-	47,424,425
Information technology	78,019	-	78,019	891,452	-	969,471
Quality assurance	66,607	-	66,607	-	-	66,607
Equipment over $5,000	1,921,698	21,053	1,942,751	-	-	1,942,751
VAT	317,571	407	317,978	-	-	317,978
In-kind project expenses	5,207,551	-	5,207,551	-	-	5,207,551
Depreciation and amortization	-	-	-	1,407,511	-	1,407,511
Total expense	$ 658,852,169	$ 62,138,674	$ 720,990,843	$ 68,598,569	$ -	$ 789,589,412

The accompanying notes are an integral part of this consolidated financial statement.

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JSI Research and Training Institute, Inc. and Affiliates

CONSOLIDATED STATEMENT OF FUNCTIONAL EXPENSES

Year ended September 30, 2023

	Program Services			Supporting Services		
	International Programs	Domestic Programs	Total	Management and General	Fundraising	Total
Commodities	$ 376,216,569	$ -	$ 376,216,569	$ -	$ -	$ 376,216,569
Freight costs	41,410,482	-	41,410,482	-	-	41,410,482
Salaries	53,235,995	39,228,072	92,464,067	34,488,777	2,509	126,955,353
Consultants	21,890,660	8,678,182	30,568,842	4,125,306	-	34,694,148
Cooperating national salaries	65,219,485	1,581,774	66,801,259	875,014	-	67,676,273
Travel	28,174,875	2,037,035	30,211,910	1,576,128	-	31,788,038
Allowance and training	12,953,687	324,885	13,278,572	568,850	-	13,847,422
Subgrants	46,756,192	583,286	47,339,478	158,030	-	47,497,508
Subcontracts	59,210,032	10,157,643	69,367,675	75,150	-	69,442,825
Equipment, material and supplies	12,714,542	716,540	13,431,082	1,356,069	-	14,787,151
Other costs	33,972,645	10,595,081	44,567,726	7,427,317	19,222	52,014,265
Information technology	161,498	-	161,498	873,822	-	1,035,320
Non-commodity	308,387	-	308,387	-	-	308,387
Quality assurance	38,931	-	38,931	-	-	38,931
Equipment over $5,000	5,730,415	35,838	5,766,253	-	-	5,766,253
VAT	593,976	63,002	656,978	-	-	656,978
In-kind project expenses	1,427,964	-	1,427,964	-	-	1,427,964
Depreciation	-	-	-	1,420,757	-	1,420,757
Total expense	$ 760,016,335	$ 74,001,338	$ 834,017,673	$ 52,945,220	$ 21,731	$ 886,984,624

The accompanying notes are an integral part of this consolidated financial statement.

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JSI Research and Training Institute, Inc. and Affiliates

CONSOLIDATED STATEMENT OF CASH FLOWS

Years ended September 30, 2024 and 2023

Cash flows from operating activities:		
Change in net assets	$ 4,949,058	$ 6,755,530
Adjustments to reconcile change in net assets to net cash provided by operating activities:		
Depreciation and amortization	1,407,511	1,420,757
(Increase) decrease in operating assets:		
Receivables for program work	15,417,881	(16,248,188)
Field advances - program	126,359	(171,747)
Employee advances	65,567	54,735
Inventory	(7,101,071)	43,038,776
Prepaid expenses and other current assets	3,120,577	(10,049,422)
Right-of-use assets	6,002,048	4,326,258
Other assets	1,388,529	(1,892,358)
Increase (decrease) in operating liabilities:		
Accounts payable and accrued expenses	422,321	(17,336,680)
Accrued vacation	136,656	1,883,560
Advances for program work	(42,576,244)	55,147,460
Lease liabilities	(5,961,244)	(4,103,657)
Net cash provided by operating activities	(22,602,052)	62,825,024
Cash flows from investing activities:		
Acquisition of The Manoff Group, net of cash acquired	-	(403,359)
Contributed net assets, net of cash received	-	2,039,409
Acquisition of property and equipment	(28,860)	(1,846,608)
Net cash used in operating activities	(28,860)	(210,558)
NET (DECREASE) INCREASE IN CASH AND CASH EQUIVALENTS	(22,630,912)	62,614,466
Cash and cash equivalents at beginning of year	198,258,786	135,644,320
Cash and cash equivalents at end of year	$ 175,627,874	$ 198,258,786
Supplemental cash flow information:		
Cash paid during the year for income taxes	$ -	$ 936,475

The accompanying notes are an integral part of these consolidated financial statements.

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NOTE 1 - ORGANIZATION AND NATURE OF ACTIVITIES

JSI Research and Training Institute, Inc. ("R&T") was incorporated in the Commonwealth of Massachusetts on April 11, 1979. R&T is a global nonprofit dedicated to improving lives around the world through greater health, education, and socio-economic equity for individuals and communities. As of September 30, 2024, funding is principally from the United States Agency for International Development ("USAID") and the United States Department of Health and Human Services ("DHHS").

R&T is the sole member of The Partnership for Supply Chain Management, Inc. ("PFSCM"), InSupply Health Limited ("InSupply"), and the sole shareholder of Community Economics Corporation ("CEC") and John Snow India Private Limited ("JSIPL"). R&T is accorded with such powers as are typical for a sole member including the power of appointment and removal of the affiliates' board of trustees, the right to approve amendments to the bylaws and certificate of incorporation, and the right to approve any merger, consolidation, dissolution or transfer of substantial assets of affiliates.

The Partnership for Supply Chain Management ("PFSCM") was incorporated on February 14, 2005 under the laws of Massachusetts. PFSCM began operations on October 1, 2005. PFSCM's project teams collaborate with institutions that are among the most trusted names in international public health and development, each offering unique capabilities that ensure that high-quality ARV drugs, HIV tests, and other supplies for treating HIV/AIDS are available to the people, patients, clinicians, laboratory technicians, and others who need them. PFSCM supply chain projects and initiatives strengthen, develop, and manage secure, reliable and cost-effective provision of health products to low- and middle-income countries. PFSCM delivers to 90+ countries globally via a supply chain that is transparent, accountable, and tailored to specific country needs.

InSupply Health Limited ("InSupply") is domiciled in Kenya where it is incorporated under the Kenyan Companies Act, 2015 as a non-profit organization limited by guarantee. The principal activity is providing supply chain advisory with customized guidance on supply chain management and design.

Community Economics Corporation (CEC) is controlled by R&T and during fiscal year 2024 was engaged in providing information, consulting, and problem-solving services, advice and management. All of CEC's revenue is received from related parties. As of September 30, 2024, CEC ceased operations and entered dormant status.

John Snow India Private Limited (JSIPL) is controlled by R&T and is engaged in implementing public health programs at scale to support India's efforts to improve maternal, newborn and child health and nutrition, strengthen immunization systems, reduce the spread of communicable diseases, and build capacity for managing complex supply chains.

R&T and its affiliates, excluding CEC and JSIPL, are tax exempt organizations under 501(c)(3) of the Internal Revenue Code ("IRC"), while InSupply is subject to Kenyan income tax based on the Kenyan Income Tax Act.

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As of the end of fiscal year 2023, in addition to being the sole member of The Partnership for Supply Chain Management, Inc. ("PFSCM"), InSupply Health Limited ("InSupply"), and the sole shareholder of Community Economics Corporation ("CEC") and John Snow India Private Limited ("JSIPL"), R&T was also the sole shareholder of John Snow, Inc. ("JSI") and the sole member of World Education, Inc. ("WEI") through June 30, 2023, at which time WEI was merged into R&T and no longer exists as a separate legal entity. In addition, through September 30, 2022, JSI was a 40% shareholder of The Manoff Group, Inc. ("TMG") which was reflected on the financials utilizing the equity method of accounting for investments. Effective October 1, 2022, JSI purchased the remaining shares of TMG's stock. As a result, TMG's fiscal year 2023 activity is included in the fiscal year 2023 consolidated financials. Effective October 1, 2023, TMG was merged into R&T and no longer exists as a separate legal entity.

John Snow, Inc. ("JSI") was an international management-consulting firm organized on May 29, 1975, in the Commonwealth of Massachusetts. JSI provided research and consulting services to public health programs, health care and service sectors. Its mission was to work with clients to improve the quality of their operations. Funding was principally with the United States Agency for International Development. Effective October 1, 2023, JSI was merged into R&T and no longer exists as a separate legal entity.

WEI was founded in 1951 and incorporated in the state of New Jersey. Working in partnership with community, national, and international agencies in Asia, Africa, and the United States, it provided professional assistance in the design and implementation of non-formal adult education programs. These programs integrated functional education with relevant problem-solving aspects of individual growth and national development such as health, nutrition, family planning, childcare, refugee education, agricultural practices, literacy, and income generation. WEI's financial data is consolidated utilizing its fiscal year-end financial statements, as of and for the year ended June 30, 2023. As noted above, WEI was merged into R&T on June 30, 2023 and no longer exists as a separate legal entity.

The Manoff Group, Inc. ("TMG") was incorporated December 1, 1988 in the Commonwealth of Massachusetts. TMG provided social and behavior change, strategic program assistance and social marketing services that include: in depth consumer research to better understand and be responsive to client needs; effective and creative social and behavior strategies and communication plans to promote new products, better health and nutrition practices, and increased utilization of program services; skills development training in social marketing; and assistance to strengthen linkage between the government and private sector firms working in social and behavior change programming, marketing and communication.

In fiscal year 2023, R&T and its affiliates, excluding JSI, CEC, JSIPL, and TMG, were tax exempt organizations under 501(c)(3) of the Internal Revenue Code ("IRC"), while InSupply is subject to Kenyan income tax based on the Kenyan Income Tax Act.

NOTE 2 - SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES

Principles of Consolidation

In fiscal year 2024, the consolidated financial statements include the accounts of R&T, InSupply, CEC, JSIPL, and PFSCM, (collectively referred to as the "Organization"). All intercompany balances and transactions have been eliminated in consolidation.

In fiscal year 2023, the consolidated financial statements include the accounts of R&T, WEI, JSI, InSupply, CEC, TMG, JSIPL, and PFSCM, (collectively referred to as the "Organization"). All intercompany balances and transactions have been eliminated in consolidation.

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Basis of Accounting

The consolidated financial statements of the Organization have been prepared utilizing the accrual basis of accounting in conformity with accounting principles generally accepted in the United States of America ("U.S. GAAP"). Net assets, revenues, and expenses are classified based on the existence or absence of donor-imposed restrictions. Accordingly, the net assets of the Organization and the changes thereof are classified and reported as follows:

Net Assets Without Donor Restrictions - Net assets that are not subject to donor-imposed restrictions.

Net Assets With Donor Restrictions - Contributions, grants, and income whose use by the Organization has been limited by donors or grantors to a specific time period or purpose.

Use of Estimates

The preparation of consolidated financial statements in conformity with U.S. GAAP requires management to make estimates and assumptions that affect certain reported amounts and disclosures. Accordingly, actual results may differ from those estimates.

Cash and Cash Equivalents

The Organization considers all monies in banks and highly liquid investments with maturity dates of three months or less to be cash equivalents. The carrying value of cash and cash equivalents approximates fair value because of the short maturities of those financial instruments. Total cash held in foreign accounts was $14,486,457 and $17,294,403 at September 30, 2024 and 2023, respectively.

Inventory

Inventory consists of in-transit commodities purchased for use in program services. Inventory is valued at the lower of cost or net realizable value.

Property and Equipment

Property and equipment owned by the organization are reported on the basis of cost less accumulated depreciation. Acquisitions of property and equipment in excess of $5,000 are capitalized. Depreciation is computed using the straight-line method calculated to extinguish the book value of the respective assets over their estimated useful lives (5 - 27.5 years) of the related assets. Property and equipment purchased with grant funds where ownership rests with the donor is expensed at the time of purchase and is returned to the donor or disposed of in accordance with the terms of the grant and/or donor permissions at the conclusion of the grant period.

Revenue Recognition

Grants and Contacts

The majority of the Organization's revenues are derived from contracts, cooperative agreements, and grants with The Global Fund to Fight AIDS Tuberculosis and Malaria (the Global Fund), and U.S. government agencies, primarily United States Agency for International Development and the United States Department of Health and Human Services.

The Organization recognizes revenue from external organizations for services provided under exchange and non-exchange grants and contracts. Unconditional grants, contracts, and contributions are recognized as revenue in the period received in the appropriate net asset category, based on the existence or absence of donor-imposed restrictions. If donor-imposed restrictions are present, the associated revenue is reported

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as an increase in net assets with donor restrictions and are reclassified to net assets without donor restrictions when the restrictions are met. Grants and contracts revenues whose restrictions are met in the same reporting period are reported as net assets without donor restriction.

Revenues from non-exchange transactions may be subject to conditions in the form of both a barrier to entitlement and a refund of amounts paid (and a release from obligation to make future payments). The Organization recognizes revenue earned from conditional non-exchange grants and contracts as these conditions are satisfied. At September 30, 2024 and 2023, the Organization had $352,769,212 and $397,101,328, respectively, of conditional grants and contracts not recognized as revenue in the statement of activities.

Revenues from exchange transactions are recognized as the Organization satisfies performance obligations, which in some cases, mirrors the timing of when related costs are incurred. In the case of the procurement and delivery of commodities revenues are recognized upon receipt by the customer. As of September 30, 2024 and 2023, included in advances for program work is $77,977,551 and $99,852,811, respectively, of deferred revenue related to exchange transactions, which will be recognized as revenue upon completion of delivery of commodities and receipt by the customer. Also included in the advances for program work as of September 30, 2024 and 2023, is $55,626,473 and $76,327,458, respectively, of non-exchange grant funding received in advance of revenue being earned.

Donated Materials and Services

Donated materials and services are recorded as in-kind project contributions at their estimated fair market value as of the date of receipt and as an expense in the accompanying consolidated statement of activities. Donated services are recognized if the services received create or enhance non-financial assets or require specialized skills that are provided by individuals possessing those skills and would typically need to be purchased if not provided by donation.

Income Taxes

R&T and PFSCM are exempt from income taxes under Section 501(c)(3) of the IRC (as was WEI) and are not private foundations as described in Section 509. InSupply is an international non-profit, non-governmental organization based in Kenya which is subject to Kenyan income tax based on the Kenyan Income Tax Act but is not subject to US taxation.

JSI, CEC, and TMG were corporations that were subject to Federal, state, and other jurisdiction income taxes. JSIPL is an organization based in India, and therefore, subject to taxation as set by the Indian Revenue Authority.

Accordingly, deferred tax assets and liabilities are recognized for the future tax consequences attributable to differences between the financial statement carrying amounts of existing assets and liabilities and their respective tax bases. These assets and liabilities are measured using rates expected to be in effect when these timing differences reverse. Valuation allowances are provided to the extent that tax assets are not likely to be recovered.

Deferred tax is recognized on temporary differences between the carrying amounts of assets and liabilities in the consolidated financial statements and the corresponding tax base used in the computation of taxable profit. Deferred tax liabilities are generally recognized for all taxable temporary differences. Deferred tax assets are recognized for all taxable temporary differences to the extent that it is probable that taxable profits will be available against which those deductible temporary differences can be utilized. A valuation allowance is established against a deferred tax asset when it is more likely than not that the asset or any portion thereof will not be realized.

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JSI has evaluated its tax positions and believes that there would be no material changes to the results of its operations or financial position as a result of an audit by the applicable taxing authorities, federal or state. JSI has filed all of its known and required returns in a timely manner including, as permitted, allowed extensions. Following administrative practice of the taxing authorities, the tax years 2018 through 2024 remain open years subject to possible examination and review.

Functional Allocation of Expenses

The costs of providing the various programs and other activities have been summarized on a functional basis in the consolidated statements of activities. Accordingly, certain costs have been allocated among the programs and supporting services benefited. Each functional classification includes all expenses related to the underlying operations by natural classification. Natural expenses attributable to more than one functional expense category are allocated using a variety of cost allocation techniques.

Foreign Currency Transactions

Expenses of international operations are measured generally using local currency. Expenses are translated to USD using the first in, first out method of exchange based on the bank rate assigned at transfer. As a result, foreign currency transaction gains and losses are negligible and are included as direct program expenses.

Receivables for Program Work

Receivables for program work are reported at their face amounts less an allowance for credit losses. The Organization evaluates its accounts receivable and establishes the allowance for credit losses based on a combination of specific funder circumstances and credit conditions and based on a history of write-offs and collections. Balances that are still outstanding after management has used reasonable collection efforts are written off through a charge to the allowance for credit losses. The allowance for credit losses at September 30, 2024 and 2023 was $0 and $0, respectively. Included in receivables for program work is $56,059,350 and $71,073,501 of amounts billed and $8,354,442 and $8,758,172 of amounts unbilled at September 30, 2024 and 2023, respectively.

Goodwill

Goodwill is the amount by which the cost of acquired net assets in a business combination exceeds the fair value of the identifiable net assets on the date of purchase or valuation.

The Organization has adopted Accounting Standards Update ("ASU") 2014-02, *Intangibles - Goodwill and Other*, to account for goodwill. ASU 2014-02 provides private companies alternative accounting for amortizing goodwill on a straight-line basis over a 10-year useful life, replacing the previous method of subsequent measurement, which required a testing of goodwill for impairment at least annually. Under the new guidance, impairment testing is performed upon the occurrence of a triggering event indicating that the fair value of the entity (or operating units) might be less than its carrying amount and there is no annual goodwill impairment test. When a triggering event occurs, an entity has the option to perform a qualitative assessment to determine whether a quantitative test is needed.

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If that assessment demonstrates that it is not more likely than not that an impairment exists, no further testing is required. On the other hand, if impairment of goodwill is more likely than not, a quantitative test is required that compares the fair value of the entity (or reporting unit) with its carrying value. The amount by which the carrying amount exceeds fair value represents the impairment loss to be recognized, up to the carrying amount of goodwill. Additionally, a company elects to amortize goodwill on a straight-line basis over either 10 years or less than 10 years if a shorter useful life is more appropriate. Further, a company that elects the alternative must also elect whether to test goodwill for impairment at the entity level or the reporting unit level. The Organization has elected to amortize goodwill on a straight-line basis over 10 years and to test goodwill for impairment, when necessary, at the entity level.

No triggering events were identified during fiscal 2024 and 2023.

Leases

Operating lease right-of-use assets ("ROU") and lease liabilities are recognized at the lease commencement date based on the present value of the lease payments using the implicit rate when readily determinable. If the lease does not provide an implicit rate, the Organization uses the risk-free discount rate over the lease term. ROU assets also include adjustments related to lease payments made and lease incentives received at or before the commencement date. The ROU assets are included in other assets, net of accumulated amortization and lease incentives and the related ROU liabilities are included in ROU liabilities in the consolidated statement of financial position. Operating lease expense is recognized on a straight-line basis over the lease term within the appropriate functional category in the statement of activities. Lease terms may include options to extend or terminate the lease when it is reasonably certain the Organization will exercise the option.

Finance lease ROU assets (if any) are included in property, plant, and equipment, net of accumulated amortization and lease incentives, and the related ROU liabilities are included in ROU liabilities, in the consolidated statement of financial position.

The Organization has elected to account for lease and non-lease components as a single component. In addition, the Organization has elected to establish a short-term lease exception policy, permitting the Organization to not apply the recognition requirements to short-term leases (i.e., lease with terms of twelve months or less).

NOTE 3 - ACQUISITION OF TMG

Prior to October 1, 2022, JSI was a 40% shareholder of TMG. Accordingly, JSI's investment in TMG was reflected in the financials utilizing the equity method of accounting. Effective October 1, 2022, JSI purchased the remaining outstanding shares for $1,700,000 and became the sole shareholder of TMG.

As of the date of acquisition the estimated fair value of the assets and liabilities assumed, net of the existing equity investment was as follows:

Cash and cash equivalents	$ 1,296,641
Accounts receivable	658,003
Prepaid and other current assets	67,785
Goodwill	727,375
Accounts payable and accrued expenses	(263,901)
Existing equity investment in TMG	(785,903)
	$ 1,700,000

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The Organization recorded goodwill of $727,375 as a result of this acquisition.

Amortization expense on goodwill was $145,475 during fiscal year 2024.

NOTE 4 - INSUPPLY

InSupply is a non-profit organization under the Kenyan Companies Act, 2015. Effective October 1, 2022, R&T is the sole member and guarantor of InSupply. As of October 1, 2022, the estimated fair value of the assets and liabilities of InSupply were as follows:

Cash and cash equivalents	$ 2,330,780
Accounts receivable	33,315
Prepaid and other current assets	74
Accounts payable and accrued expenses	(2,072,798)
Total net assets	$ 291,371

As there was no consideration related to this transaction the $291,371 is reflected in the 2023 consolidated statement of activities as contributed net assets.

NOTE 5 - CONCENTRATION OF CREDIT RISK - CASH

The Organization maintains demand deposits and money market funds at financial institutions. At times, certain balances held in these accounts may not be fully guaranteed by the United States government. The uninsured portions of cash and money market accounts are backed solely by the assets of the financial institution. Therefore, the failure of a financial institution could result in a financial loss to the Organization. However, the Organization has not experienced losses on these accounts in the past and management believes the risk of loss, if any, to be minimal.

NOTE 6 - PROPERTY AND EQUIPMENT AND ACCUMULATED DEPRECIATION

Property and equipment and accumulated depreciation account balances as of September 30:

	2024	2023
Furniture and equipment	$ 4,321,686	$ 4,427,328
Leasehold improvements	13,504,917	13,504,917
Gross property and equipment	17,826,603	17,932,245
Less: accumulated depreciation	(12,492,575)	(11,365,041)
Property and equipment, net	$ 5,334,028	$ 6,567,204

Depreciation expense was $1,262,036 and $1,420,757 for the year ended September 30, 2024 and 2023, respectively.

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NOTE 7 - ADVANCES FOR PROGRAM WORK

Advances for program work consist of the following at September 30:

	2024	2023
Bill and Melinda Gates Foundation	$ 25,578,360	$ 32,455,067
Various donors	51,304,227	63,557,232
Global Fund	56,721,437	79,602,223
Doris Duke Charitable Foundation	-	565,746
	$ 133,604,024	$ 176,180,268

Advances for program work represent refundable advances of cash related from non-governmental organizations. They are reported as advances because there is typically a barrier placed by the granting organization, as well as a right of return if the funds are not used in accordance with the terms of the arrangement with the funding organization. Once the barriers are overcome and there is no longer a right of return, revenue is recognized.

NOTE 8 - DEBT

WEI had a revolving line of credit with a bank with a borrowing limit of up to $500,000. The loan was payable on demand. Interest was charged by utilizing a fluctuating rate based on the LIBOR (Advantage) rate plus 2.50%. The line is collateralized by a first priority interest in all the assets of WEI. The line of credit remained in effect until May 31, 2023, with no outstanding balance at the time, and was not renewed thereafter.

R&T (JSI prior to October 1, 2023) has a revolving demand loan with a bank. The loan allows for borrowings up to $6,500,000. Interest is charged by utilizing a fluctuating rate based on a per annum rate equal to 2.00% above the one-month BSBY, payable monthly in arrears, which at September 30, 2024 and 2023 was 7.25% and 7.39%, respectively. The loan is collateralized by a security agreement with a first lien on all business assets of JSI and R&T, including assignment of promissory notes and security documents between the two companies. The bank's agreement to advance funds is subject to an annual review in April. As of September 30, 2024 and 2023, there were no outstanding borrowings under this agreement.

NOTE 9 - CONTINGENCIES

In accordance with the terms of its federal and state grants and contracts, the records of the Organization are subject to audit. The Organization is, therefore, contingently liable for any disallowed costs. Management believes that any adjustment, which might result from such an audit, would be immaterial to the consolidated financial statements.

Provisional indirect cost rates are negotiated with the USAID on an annual basis. As of September 30, 2024 and 2023, actual indirect cost rates have been approved by USAID for JSI Research and Training Institute, Inc. and JSI through December 31, 2021 and WEI through June 30, 2022. Based on favorable past experience, management believes the effects of changes to the overhead rates, if any, would not be material to the consolidated financial statements.

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NOTE 10 - NET ASSETS

Donor restricted net assets as of September 30, 2024 and 2023 are restricted for use in specificprograms and/or projects that are specified by the donor.

Included in net assets without donor restrictions as of September 30, 2024 and 2023, is common stock of CEC totaling $2,050 and $2,050, respectively.

Included in net asset without donor restrictions as of September 30, 2024 and 2023 is common stock of TMG totaling $0 and $43,875, respectively.

As of September 30, 2023, JSI had 875 shares of $1 par value common stock authorized, issued and outstanding.

As of September 30, 2024 and 2023, JSIPL has 1,000 and 1,000 shares, respectively, of no-par value common stock authorized, and 100 shares issued and outstanding.

NOTE 11 - RETIREMENT PLANS

R&T has a defined contribution profit sharing/401(k) plan covering substantially all of its employees. R&T contributes an amount equal to 7% of the employee's monthly earnings, funded with each month's payroll, to the plan. In addition, employees receive a 100% match on the first 2% of employee contributions made to the plan. Employees are automatically enrolled at 2% either at the time of hire, or annually in July, but may elect to opt out of contributing to the plan. Pension expense was $7,054,218 and $4,948,085 for the year ended September 30, 2024 and 2023, respectively.

WEI had a defined contribution tax sheltered annuity plan covering substantially all of its employees. WEI contributed an amount equal to 7% of the employee's monthly earnings, funded with each month's payroll. Additional voluntary contributions may be made by the employees. Participants of the plan are fully and immediately vested when contributions are made. Pension expense was $415,714 for the year ended June 30, 2023.

JSI had a defined contribution profit sharing/401(k) plan covering substantially all its employees. Employee contributions were voluntary. As of July 1, 2018, JSI contributed an amount equal to 7% of the employee's monthly earnings, funded with each month's payroll. In addition, employees received a 100% match on the first 2% of contributions made to their retirement account. Employees were automatically enrolled at 2% either at the time of hire, or annually in July, but may elect to opt out of contributing to the plan. Pension expense was $1,029,425 for the year ended September 30, 2023.

PFSCM has a defined contribution profit sharing/401(k) plan covering substantially all of its employees. PFSCM contributes an amount equal to 7% of the employee's monthly earnings, funded with each month's payroll. In addition, employees receive a 100% match on the first 2% of contributions made to the plan. Employees are automatically enrolled at 2% either at the time of hire, or annually in July, but may elect to opt out of contributing to the plan. Pension expense was $634,091 and $236,643 for the year ended September 30, 2024 and 2023, respectively.

TMG had a 401(k) Retirement Plan for its employees who met required eligibility requirements. The Plan allowed participants to make a pre-tax contribution as well as a TMG matching percentage up to 4% of the participant's compensation. The Plan also provided for discretionary 401(k) employer profit sharing contributions. For the period January 1, 2023 through September 30, 2023, 401(k) contributions totaled $191,384.

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NOTE 12 - COMMITMENTS

Operating Leases

R&T leases space for general offices under operating leases expiring from 2024 through 2030. The leases contain renewal options for periods of up to five years.

PFSCM entered into an operating lease agreement for its field office in Woerden, Netherlands that commenced on February 1, 2023. The lease term expires on February 1, 2030. Under the lease agreement, PFSCM has a four-year renewal option through February 1, 2034. The annual base rent under the lease is approximately $210,800.

Prior to the merger, JSI leased space for general offices under operating leases expiring at various dates through 2030. The leases contain renewal options for five to ten-year periods. These leases were novated to R&T.

WEI, prior to its merger into R&T, leased space for general offices on a year-to-year basis.

During the year ended September 30, 2024, operating lease costs and lease costs under short-term leases were $7,530,925 and $0, respectively. During the year ended September 30, 2023, operating lease costs and lease costs under short-term leases were $6,768,178 and $1,072,723, respectively.

Future obligations under operating leases as of September 30, 2024 are:

2025	$ 6,076,762
2026	5,686,104
2027	6,856,692
2028	6,937,426
2029	7,091,003
Thereafter	4,649,965
	$ 37,297,952

Supplemental information related to operating leases as of September 30, 2024 and 2023, consists of the following:

	2024	2023
ROU assets	$ 41,961,185	$ 49,468,669
Accumulated amortization	(6,002,048)	(7,507,484)
ROU assets, net	$ 35,959,137	$ 41,961,185
ROU liabilities, current	$ 5,652,473	$ 7,444,243
ROU liabilities, non-current	30,652,647	34,822,121
ROU liabilities	$ 36,305,120	$ 42,266,364

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The following summarizes cash flow and supplemental noncash information related to the Organization's leases for the year ended September 30, 2024 and 2023:

	2024	2023
Cash paid for amounts included in the measurement of lease liabilities:		
Operating cash flows from operating leases	$ 7,695,649	$ 8,542,737
ROU assets obtained in exchange for new lease liabilities	954,169	1,141,435

Supplemental information related to leases as of September 30, 2024 and 2023, consist of the following:

	2024	2023
Weighted-average remaining lease term (in months)	65	77
Weighted-average discount rate	1.82%	1.78%

NOTE 13 - CONCENTRATION OF FUNDING

The Organization received 10% or more of its revenues and support from the following sources for the year ended September 30, 2024 and 2023:

	2024		2023	
	Revenue	% of Total Income	Revenue	% of Total Income
The Global Fund (PfSCM)	$ 400,393,311	51%	$ 415,379,336	45%
U.S. Agency for International Development (R&T for FY24; R&T, JSI and WEI for FY23)	$ 230,953,857	29%	$ 320,332,065	34%

The end date of the current Global Fund contract is December 31, 2024; based on procurement functions that will extend beyond this date, revenues are estimated to remain the same through fiscal year 2025. PFSCM has submitted a proposal for the Global Fund's consideration to either extend the current contract or issue a new contract. Management anticipates contract continuation at similar terms if PFSCM is the successful bidder.

NOTE 14 - LIQUIDITY AND AVAILABILITY OF RESOURCES

The Organization maintains a policy of structuring its financial assets to be available as its general expenditures, liabilities and other obligations come due. Given the project-based nature of the Organization's work, the annual budget is structured to break even and ensure that there are sufficient inflows to cover budgeted outflows each year. Any use of the Organization's reserve, which is minimal, is subject to management's review and approval.

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The following reflects the Organization's financial assets as of September 30 reduced by amounts not available for general use within one-year due donor-imposed restrictions:

	2024	2023
Cash and cash equivalents	$ 175,627,874	$ 198,258,786
Receivables for program work	64,413,792	79,831,673
Total financial assets available within one year	240,041,666	278,090,459
Less: donor restricted assets	(665,741)	(800,588)
Total financial assets available to management for general expenditures within one year	$ 239,375,925	$ 277,289,871

The organization also has one committed line of credit with availability of $6.5 million, which it could draw upon in the event of an unanticipated liquidity need (see Note 8).

NOTE 15 - SUBSEQUENT EVENTS

The Organization has evaluated subsequent events through June 10, 2025, the date on which the consolidated financial statements were available to be issued.

During the year ended September 30, 2024, the Organization received approximately 34% of its funding from various U.S. government agencies, including USAID which represented 29% of total revenues for this period. In January 2025, the U.S. government paused almost all foreign aid programs and initiated a 90-day review period to assess alignment of programs with current administration policy. Upon completion of this review the vast majority of USAID contracts were cancelled. Given these circumstances, in February 2025 management implemented cost reduction measures including a substantial reduction in force. Given these measures and the Organization's available cash and cash equivalents, management believes that the Organization has sufficient liquidity to meet its liabilities for at least one year from the date of the issuance of these financial statements.

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SUPPLEMENTARY INFORMATION

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JSI Research and Training Institute, Inc.

SCHEDULE OF EXPENDITURES OF FEDERAL AWARDS

Year ended September 30, 2024

Federal Grantor/Program Title/Pass-Through Grantor/Program		Pass-Through or Direct	Pass-Through Number	Federal Assistance Listing #	Federal Expenditures	Total Subcontract Expenses
U.S. Department of Agriculture						
Gus Schumacher Nutrition Incentive Program						
Springfield Community	SCG Health Script	Pass-through grant	agreement @ 1.26.2023	10.331	$ 5,943	$ -
WIC Special Supplemental Nutrition Program For Women, Infants, and Children						
The Opportunity Alliance	TOC WIC	Pass-through grant	TOA103124	10.557	36,116	-
SNAP Cluster						
NY Dept of Health	NYDOH NYS PANCE	Pass-through grant	DOH01-C36068GG-3450000	10.561	380,874	136,973
Food for Education						
World Food Program	WFP/USDA/NEPAL/FFE3 62479	Pass-through grant	Not available	10.608	386,034	172,876
World Food Program	WFP/USDA/Nepal/FFE-4	Pass-through grant	Not available	10.608	42,341	13,660
	Subtotal AL#10.608				428,375	186,536
USDA						
World Food Program	WFP/USDA/CAM/MGD FFE	Pass-through grant	Not available	10.U57	480,519	-
	Subtotal U.S. Department of Agriculture				**1,331,827**	**323,509**
U.S. Department of Justice						
Treatment Court Discretionary Grant Program						
NH Department of Justice	NH DOJ DCATT 2.0	Pass-through grant	15PBJA-21-GG-04133-DGCT	16.585	63,691	
NH Department of Justice	NH DOJ DCATT 2.0	Pass-through grant	15PBJA-21-GG-04133-DGCT	16.585	70,980	
	Subtotal AL#16.585				134,671	-
Comprehensive Opioid, Stimulant, and other Substances Use Program						
County of Cumberland	Pathways for ME	Pass-through grant	15PBJA-23-GG-02392-COAP	16.585	22,033	-
NH Department of Justice	NH DOJ COSSAP	Pass-through grant	2024COSSAP10	16.585	6,149	-
	Subtotal AL#16.585				28,182	-
	Subtotal U.S. Department of Justice				**162,853**	-
U.S. Department of Labor						
U.S. Department of Labor	international Labor Programs	Direct grant	N/A - Direct grant	17.401	296,775	40,976
	Subtotal U.S. Department of Labor				**296,775**	**40,976**
U.S. Department of State						
Weapons Removal and Abatement						
U.S. DEPARTMENT OF STATE	DOS/LAOS/WVMF 62459	Direct grant	N/A - Direct grant	19.800	53,098	-
U.S. DEPARTMENT OF STATE	DOS/LAOS/LAWANG EOR 62473	Direct grant	N/A - Direct grant	19.800	450,036	
U.S. DEPARTMENT OF STATE	DOS/LAOS/US MED FUND UXO	Direct grant	N/A - Direct grant	19.800	9,459	-
	Subtotal United States Department of State				**512,593**	-
U.S. Department of transportation						
Highway Safety Cluster						
RI Department of Labor	National Priority Safety Programs	Direct grant	N/A - Direct grant	20.616	10,997	-
	Subtotal U.S. Department of transportation				**10,997**	-
U.S. Department of the Treasury						
COVID-19 - CORONAVIRUS STATE AND LOCAL FISCAL RECOVERY FUNDS						
ECONOMIC DEV & INDUS CORP	BOSTON OWD PHASE III	Pass-through grant	Not available	21.027	1,860	-
City of Denver	CODENVER AIAN Healing COV	Pass-through grant	HRCRS-202366493-00	21.027	8,933	-
ECONOMIC DEV & INDUS CORP	EDIC / OWD PHASE II 61305	Pass-through grant	0504500601	21.027	49,289	6,098
	Subtotal U.S. Department of the Treasury				**60,082**	**6,098**
State and Tribal Indoor Radon Grants						
NH DHHS	NH DHHS PHPS FY24	Pass-through grant	agreement @ 12.6.2021	66.032	56,580	-
					56,580	-
Performance Partnership Grants						
NH DHHS	NH DHHS PHPS FY24	Pass-through grant	agreement @ 12.6.2021	66.605	10,261	-
NH DHHS	NH DHHS PHPS FY25	Pass-through grant	agreement @ 12.6.2021	66.605	2,957	-
					13,218	-
Environmental Justice Thriving Communities Grantmaking Program (EJ TCGM)						
US EPA	EPA MAP EJ Grants	Direct grant	N/A - direct grant	66.615	578,516	-
	Subtotal Environmental Protection Agency				**648,314**	-
U.S. Department of Education						
Adult Education - Basic Grants to States						
DPTMNTS OF EDU-NEW ENGLND	NELRC CT FY25	Pass-through grant	Not available	84.002A	3,630	-
DPTMNTS OF EDU-NEW ENGLND	NELRC-CT	Pass-through grant	Not available	84.002A	8,663	-
	Subtotal AL#84.002A				**12,293**	-
Education Research, Development and Dissemination						
AMER INST FOR RESEARCH	AIR/IES/NETWRK LEAD 61276	Pass-through grant	5240400002	84.305N	70,447	-
AMER INST FOR RESEARCH	AIR/IES/TSTM 61280	Pass-through grant	5205000001	84.305N	269,263	131,250
WESTED	WESTED/DOE/IES/NRCY 61278	Pass-through grant	S-00018580	84.305N	3,938	-
	Subtotal AL#84.305				343,648	131,250
COVID-19 - Education Stabilization Fund						
Hampton University	HMPTN UNIV - VA Workforce	Pass-through grant	Not available	84.425	93,179	-
					93,179	-
AMER INST FOR RESEARCH	AIR-IET/OCTAE/NCTN 61296	Pass-through grant	GS00F347CA/BPS#91990020a0014	84.U03	250,753	-
JOBS FOR THE FUTURE, INC.	JFF/OCTAE/DIGTL LIT 61273	Pass-through grant	Not available	84.U11	332,603	-
MATHEMATICA INC.	MATHEMATICA/NCTN 61282	Pass-through grant	Not available	84.U14	6,776	-
RTI International	RTI/OCTAE-EARN/NCTN 61272	Pass-through grant	Not available	84.U19	93,728	-
RTI International	RTI/DOE/IET/NCTN 61297	Pass-through grant	888-17-20-06	84.U20	36,556	-
RTI International	EARN-2_RTI-IET-DOE OCTAE	Pass-through grant	16-312-0217730-67940L	84.U36	14,117	-
JOBS FOR THE FUTURE, INC.	DRAW2_JFF-OCTAE_FY25-27	Pass-through grant	21-237	84.U37	12,780	-
	Subtotal US Department of Education				**1,196,433**	**131,250**
U.S. Department of Health and Human Services						
Public Health Emergency Preparedness						
Cambridge Health Alliance	CHA BP5 REG 4AB	Pass-through grant	agreement @ 1.25.2024	93.069	106,102	-
NH DHHS	NH DHHS PHPS FY24	Pass-through grant	agreement @ 12.6.2021	93.069	70,800	-
NH DHHS	NH DHHS PHPS FY25	Pass-through grant	agreement @ 12.6.2021	93.069	31,010	-
					207,912	-
Environmental Public Health and Emergency Response						
MA Dept. of Public Health	MDPH Asthma	Pass-through grant	RFR 500224	93.070	15,237	-
NH DHHS	NH DHHS PHPS FY24	Pass-through grant	agreement @ 12.6.2021	93.070	4,121	-
NH DHHS	NH DHHS PHPS FY25	Pass-through grant	agreement @ 12.6.2021	93.070	843	-
					20,201	-

The accompanying notes are an integral part of this schedule.

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JSI Research and Training Institute, Inc.

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Birth Defects and Developmental Disabilities - Prevention and Surveillance						
FASD United Inc	FASDUNITED CDC Evaluation	Pass-through grant	agreement @ 12/6/22	93.073	$ 45,150	$ -
Advancing System Improvements for Key Issues in Women's Health						
DHHS	Women's Health-NTC	Direct grant	N/A - Direct grant	93.088	2,563,400	680,830
Maternal and Child Health Federal Consolidated Programs						
Maine Medical Association	MMA Postpartum 2024	Pass-through grant	agreement @ 6.25.24	93.110	37,114	20,000
Wyoming Depart of Health	Wyoming PMHCA Program	Pass-through grant	235066	93.110	146,657	-
					183,771	20,000
Technical and Non-Financial Assistance to Health Centers						
HRSA	HITEQ	Direct grant	N/A - Direct grant	93.129	627,208	179,595
Association of Clinicians	ACU 2024	Pass-through grant	U30CS26934	93.129	18,995	-
Comm Hlth Ctr CT	CHCACT UDS 2023	Pass-through grant	6 U58CS06842	93.129	2,415	-
National A of Comm Health	NACHC 2024 Needs Assmt 2	Pass-through grant	331-03-399-19	93.129	21,747	-
National A of Comm Health	NACHC 2024 Needs Assmt	Pass-through grant	agreement @ 5.1.24	93.129	22,615	-
					692,980	179,595
Cooperative Agreements to States/Territories for the Coordination and Development of Primary Care Offices						
NH DHHS	NH PCO FY23-FY24	Pass-through grant	RFA-2022-DPHS-11-HEALT	93.130	18,798	-
RI Dept. of Health	RI EPI FY21-26	Pass-through grant	7607811	93.130	47,496	-
State of Delaware	DE MCTA Analysis Phase II	Pass-through grant	#25-101	93.130	12,508	-
State of Delaware	DE MCTA Analysis Phase I	Pass-through grant	24-322	93.130	33,029	-
State of Maine	ME DHHS HPSA 24-26	Pass-through grant	Not available	93.130	43,643	-
Wyoming Depart of Health	WY PCO 2024-2029	Pass-through grant	239090	93.130	23,307	-
Wyoming Depart of Health	WY PCO FY 20	Pass-through grant	ORH-0212-D	93.130	44,769	-
					223,550	-
Injury Prevention and Control Research and State and Community Based Programs						
RI Dept. of Health	RI EPI FY21-26	Pass-through grant	7607811	93.136	99,844	-
HIV-Related Training and Technical Assistance						
HRSA HIV/AIDS BUREAU	HRSA Status Neutral ETAP	Direct grant	N/A - Direct grant	93.145	176,393	25,000
HRSA HIV/AIDS BUREAU	HRSA Status Neutral ETAP	Direct grant	N/A - Direct grant	93.145	1,948,892	418,589
HRSA HIV/AIDS BUREAU	HIV Integrated Plng	Direct grant	N/A - Direct grant	93.145	80	-
HRSA HIV/AIDS BUREAU	HIV Integrated Plng	Direct grant	N/A - Direct grant	93.145	477,735	604
HRSA HIV/AIDS BUREAU	HIV Integrated Plng	Direct grant	N/A - Direct grant	93.145	135,278	-
HRSA HIV/AIDS BUREAU	RWHAP ACE TA Center	Direct grant	N/A - Direct grant	93.145	367,154	30,000
National Alliance of Stat	NASTAD EHE SCP Sub	Pass-through grant	2020-CO-326401-657	93.145	328	-
National Minority AIDS Co	ELEVATE	Pass-through grant	U69HA39335	93.145	24,147	-
					3,130,007	474,193
Undergraduate Scholarship Program for Individuals from Disadvantaged Backgrounds						
University of MA	BPHC Gaston COMM	Direct grant	N/A - Direct grant	93.187	23,647	-
Childhood Lead Poisoning Prevention Projects, State and Local Childhood Lead Poisoning Prevention and Surveillance of Blood Lead Levels in Children						
NH DHHS	NH DHHS PHPS FY24	Pass-through grant	agreement @ 12.6.2021	93.197	11,654	-
NH DHHS	NH DHHS PHPS FY25	Pass-through grant	agreement @ 12.6.2021	93.197	3,604	-
					15,258	-
Telehealth Programs						
HRSA	TARA	Direct grant	N/A - Direct grant	93.211	478,253	10,000
Family Planning Services						
NY Dept of Health	NYS Telehealth TTA	Pass-through grant	C37768GG	93.217	73,272	-
NY Dept of Health	NYS FP Training 2022-2027	Pass-through grant	C37872GG	93.217	9	-
NY Dept of Health	NYS FP Training 2022-2027	Pass-through grant	C37872GG	93.217	642,558	46,038
					715,839	46,038
Substance Abuse and Mental Health Services Projects of Regional and National Significance						
Blackstone Valley Prevent.	RI Host R2 Year 3	Pass-through grant	agreement @ 10.11.2022	93.243	3,966	-
East Bay Regional	Karyn Madore Consulting	Pass-through grant	Not available	93.243	6,512	-
Kent County Prevention	Karyn Madore Consulting	Pass-through grant	agreement @ 11.1.2022	93.243	1,790	-
Newport County Prevention	Karyn Madore Consulting	Pass-through grant	agreement @ 11.1.2022	93.243	2,902	-
RI Dept of Bev Hlthcr Dev	PFS FY20	Pass-through grant	3629405	93.243	(454)	-
RICARES	RICARES RCSP Evaluation	Pass-through grant	Agreement@3.4.21	93.243	2,968	-
South County Prevention	Karyn Madore Consulting	Pass-through grant	agreement @ 11.1.2022	93.243	2,704	-
The Opportunity Alliance	Partnership for Success	Pass-through grant	agreement @ 1.25.2023	93.243	14,938	-
The Opportunity Alliance	TOA PTY 2024	Pass-through grant	agreement @ 3.29.2024	93.243	23,800	-
Tri-County Community	Karyn Madore Consulting	Pass-through grant	agreement @ 10/11/2022	93.243	3,906	-
Whittier Street Health Ctr	Whittier HIV PNP	Pass-through grant	Agreement@11.4.21	93.243	8,124	-
					71,156	-
Family Planning Personnel Training						
DHHS	Title X-NTC	Direct grant	N/A - direct grant	93.260	4,560,223	130,000
Immunization Cooperative Agreements						
NH DHHS	NH DHHS PHPS FY24	Pass-through grant	agreement @ 12.6.2021	93.268	94,720	20,907
NH DHHS	NH DHHS PHPS FY25	Pass-through grant	agreement @ 12.6.2021	93.268	13,810	10,885
					108,530	31,792
Viral Hepatitis Prevention and Control						
NH DHHS	NH DHHS PHPS FY24	Pass-through grant	agreement @ 12.6.2021	93.270	96,447	-
NH DHHS	NH DHHS PHPS SFY23	Pass-through grant	agreement @ 12.6.2021	93.270	40,530	-
					136,977	-
Teenage Pregnancy Prevention Program						
DHHS	TPP-NTC	Direct grant	N/A - Direct grant	93.297	1,557,116	107,000
Protecting and Improving Health Globally: Building and Strengthening Public Health Impact, Systems, Capacity and Security						
Center for Disease	CDC DIS Training	Direct grant	N/A - Direct grant	93.318	922,036	-
Epidemiology and Laboratory Capacity for Infectious Diseases (ELC)						
NH DHHS	NH DHHS PHPS FY24	Pass-through grant	agreement @ 12.6.2021	93.323	10,708	-
Public Health Emergency Response: Cooperative Agreement for Emergency Response: Public Health Crisis Response						
NH DHHS	Oral Health Promo	Pass-through grant	05-95-90-902010-45270000	93.354	22,442	13,872
NH DHHS	NH DHHS PHPS SFY22	Pass-through grant	agreement @ 12.6.2021	93.354	126,347	-
NH DHHS	NH DHHS PHPS SFY23	Pass-through grant	agreement @ 12.6.2021	93.354	1,157	-
					149,946	13,872
State Actions to Improve Oral Health Outcomes and Partner Actions to Improve Oral Health Outcomes						
NH DHHS	Oral Health Promo	Pass-through grant	05-95-90-902010-45270000	93.366	241,969	127,476
NH DHHS	SORH Chronic Conditions	Pass-through grant	Agreement@4.5.21	93.366	72,073	51,244
					314,042	178,720
National and State Tobacco Control Program						
NH DHHS	SORH - Comm. Based Tobacco Prevention	Pass-through grant	Agreement@11.5.20	93.387	548,461	79,650
NH Dept of Health	Mass Media Vape Prevention	Pass-through grant	RFP-2022DPHS-13-MASSM-01	93.387	183,565	22,000
					732,026	101,650
Activities to Support State, Tribal, Local and Territorial (STLT) Health Department Response to Public Health or Healthcare Crises						
Health Research Inc	HRI NYS Racial Equity WG	Pass-through grant	7725-01	93.391	34,792	10,500
NH DHHS	NH ECCS	Pass-through grant	90577170	93.391	235,336	86,867
NH DHHS	NH DHHS PHPS FY24	Pass-through grant	agreement @ 12.6.2021	93.391	158,428	20,000
					428,556	117,367

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Year ended September 30, 2024

Federal Grantor/Program Title/Pass-Through Grantor/Program		Pass-Through or Direct	Pass-Through Number	Federal Assistance Listing #	Federal Expenditures	Total Subcontract Expenses
The National Cardiovascular Health Program						
MA Dept. of Public Health	MDPH Chronic Disease Coor	Pass-through grant	SPR61	93.426	$ 83	$ -
NH DHHS	SORH Chronic Conditions	Pass-through grant	Agreement@4.5.21	93.426	340,145	-
					340,228	-
Well-integrated Screening and Evaluation for Women Across the Nation (Wisewoman)						
NH DHHS	SORH Chronic Conditions	Pass-through grant	Agreement@4.5.21	93.436	29,927	-
Congressional Directives						
Santa Clara County	SCC API CHW Evaluation	Pass-through grant	4400008718	93.493	99,343	-
Community Health Workers for Public Health Response and Resilient						
State of Washington Dept	SWDH CHW for COVID-19 Eval	Pass-through grant	PRV26723	93.495	4,727	-
State of Washington Dept	SWDH CHW for COVID-19 Eval	Pass-through grant	PRV28357-0	93.495	2,229,452	353,987
University of MA	UMB Gaston	Pass-through grant	010176-00001	93.495	123,795	-
					2,357,974	353,987
Mental and Behavioral Health Education and Training Grants						
University of NH	UNH BFT Year 4	Pass-through grant	T26HP39462	93.732	27,339	-
Medicaid Cluster/Medical Assistance Program						
Colorado HCPF	CO DHCPF ARPA	Pass-through grant	20-140823OL4	93.778	571,723	343,361
Opioid STR						
MA Dept. of Public Health	MA BSAS OTP TTA	Pass-through grant	INTF2331M78235228002	93.788	351,872	-
Capacity Building Assistance (CBA) for High-Impact HIV Prevention						
CICATELLI ASSOCIATES, INC	CDC HIP Training	Pass-through grant	Not available	93.834	14,281	-
National Bioterrorism Hospital Preparedness Program						
NH DHHS	NH DHHS PHPS FY24	Pass-through grant	161611-B0001	93.889	73,906	-
NH DHHS	NH DHHS PHPS FY25	Pass-through grant	161611-B0001	93.889	12,841	-
					86,747	-
Cancer Prevention and Control Programs for State, Territorial and Tribal Organizations						
NH DHHS	SORH Chronic Conditions	Pass-through grant	Agreement@4.5.21	93.898	41,221	-
Rural Health Care Services Outreach, Rural Health Network Development and Small Health Care Provider Quality Improvement						
Maine Primary Care Assoc	MEPCA WIN	Pass-through grant	agreement @ 2.2.2024	93.912	17,221	-
Rural Health Redesign Center	RHRC ME HEAL	Pass-through grant	agreement @ 7.13.2023	93.912	20,175	-
					37,396	-
HIV Emergency Relief Project Grants						
Boston Public Hlth Com.	BPHC RWHAP Site Visits	Pass-through grant	Agreement@4.5.21	93.914	137,522	-
HIV Care Formula Grants						
MA Dept. of Public Health	Policy Dev Eval QI	Pass-through grant	CAPACITYBLD500824M04	93.917	1,395,897	92,893
MA Dept. of Public Health	MDPH HIV EHR Review	Pass-through grant	INTF5280H23PRF760004	93.917	226,010	-
MA Dept. of Public Health	FY 17 HIV QA	Pass-through grant	PRF61	93.917	181	-
RI Exec Office of Health	RI-HIV TTA Consult 14069	Pass-through grant	3763333	93.917	149,954	-
					1,772,042	92,893
Special Projects of National Significance						
Boston University	BU SURE Housing EP	Pass-through grant	U90HA45813-01_KC 3409	93.928	381,028	-
HRSA HIV/AIDS BUREAU	Linking Eligibility RWHAP	Direct grant	N/A - Direct grant	93.928	53,366	-
HRSA HIV/AIDS BUREAU	HRSATelehealthHIV	Direct grant	N/A - Direct grant	93.928	218	-
HRSA HIV/AIDS BUREAU	HRSATelehealthHIV	Direct grant	N/A - Direct grant	93.928	1,733,040	918,548
HRSA HIV/AIDS BUREAU	HRSATelehealthHIV	Direct grant	N/A - Direct grant	93.928	164,296	-
HRSA HIV/AIDS BUREAU	HRSA Status Neutral ETAP	Direct grant	N/A - Direct grant	93.928	343,922	-
					2,675,870	918,548
HIV Prevention Activities_Health Department Based						
NH DHHS	NH DHHS PHPS FY24	Pass-through grant	agreement @ 12.6.2021	93.940	125,520	-
NH DHHS	NH DHHS PHPS FY25	Pass-through grant	agreement @ 12.6.2021	93.940	16,968	-
					142,488	-
Assistance Programs for Chronic Disease Prevention and Control						
NH DHHS	Oral Health Promo	Pass-through grant	05-95-90-902010-45270000	93.945	135,023	110,000
NH DHHS	SORH Chronic Conditions	Pass-through grant	Agreement@4.5.21	93.945	191,353	132,000
					326,376	242,000
Block Grants for Prevention and Treatment of Substance Abuse						
Colorado DPH	CODPH SBIRT-SBHC QI	Pass-through grant	2023*0793	93.959	(6,414)	-
County of Cumberland	Cumberland MIHYS Data	Pass-through grant	agreement @ 5/21/24	93.959	15,328	-
MA Dept. of Public Health	BSAS Consumer Feedback	Pass-through grant	INTF2400H78241733578	93.959	28,584	-
MA Dept. of Public Health	MDPH BSAS Strategic FY22	Pass-through grant	PRF61	93.959	15,654	-
MA Dept. of Public Health	MDPH BSAS Grants Mngment	Pass-through grant	SPRF61	93.959	557	-
NH DHHS	NH SAP Network	Pass-through grant	05959292051033820000	93.959	2,413,105	1,859,551
RI Dept of Bev Hlthcr Dev	RIPRC	Pass-through grant	3534294	93.959	45,986	-
RI Dept of Bev Hlthcr Dev	RIPRC	Pass-through grant	3534294	93.959	198,768	-
					2,711,568	1,859,551
Centers For Disease Control and Prevention Collaboration with Academia to Strengthen Public Health						
NH DHHS	NH DHHS PHPS FY24	Pass-through grant	agreement @ 12.6.2021	93.967	9,210	-
NH DHHS	NH DHHS PHPS FY25	Pass-through grant	agreement @ 12.6.2021	93.967	77,844	-
					87,054	-
Sexually Transmitted Diseases (STD) Prevention and Control Grants						
MA Dept. of Public Health	MDPH Ratelle	Pass-through grant	PRF61	93.977	113	-
Santa Clara County	SCC GTZ Stigma Research	Pass-through grant	4400008656	93.977	62,493	-
CDC	CDC STOP STDS	Direct grant	N/A - Direct grant	93.977	200,479	-
					263,085	-
Cooperative Agreements for Diabetes Control Programs						
NH DHHS	SORH Chronic Conditions	Pass-through grant	Agreement@4.5.21	93.988	16,687	-
State of Maine	ME Rethink Diabetes Y4	Pass-through grant	CD0-24-4544	93.988	7,026	-
					23,713	-
Maternal and Child Health Services Block Grant to the States						
RI Dept. of Health	RI EPI FY21-26	Pass-through grant	7607811	93.994	160,695	-
University of NH	SHApl	Pass-through grant	Subaward L0032	93.994	23,794	-
					184,489	-
HRSA BPHC	Uniform Data System (UDS) Training and Technical Assistance	Pass-through grant	47QRAA23D0087	93.U01	2,505,617	799,918
HRSA BPHC	BPHC3 C 3125 Health Center Workforce Survey Evaluation and Technical Assistance	Pass-through grant	75R60219D00012 / 75R60221F34003	93.U02	757,392	90,247
HRSA BPHC	Technical Assistance and Training of Uniform Data Systems for Health Centers (UDS)	Pass-through grant	GS-00F-005AA/HHSH250201800032G	93.U03	1,772	
HRSA HIV/AIDS BUREAU	AIDS Education Training Centers (AETC) Evaluation Implementation Contract.	Pass-through grant	75R60219D00012 / 75R60220F34002	93.U04	526,303	
HRSA HIV/AIDS BUREAU	HRSA RWHAP Best Practices Compilation of Innovative Intervention Strategies	Pass-through grant	75R60219D00036 / 75R602223F34001	93.U05	550,080	78,652
HRSA BPHC	Workforce Well-being Initiative	Pass-through grant	75R60219D00036 / 75R602223F34002	93.U06	1,525,544	947,227
	Subtotal Department of Health and Human Services				**38,542,094**	**7,817,441**
Department of Homeland Security						
Boating Safety Financial Assistance						
U.S. Coast Guard	UCG Life Jacket Study	Direct grant	N/A - Direct grant	97.012	**254,366**	-

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USAID Foreign Assistance for Programs Overseas						
USAID/Uganda	UGANDA RHITES Lango 13759	Direct grant	N/A - Direct grant	98.001	$ 538	$ -
USAID/Uganda	Uganda USAID/PUMRA 14070	Direct grant	N/A - Direct grant	98.001	8,800,854	2,142,209
USAID/Zambia	Zambia SAFE 13690	Direct grant	N/A - Direct grant	98.001	1,064,862	-
USAID	USAID Asia Resilient Cit	Direct grant	N/A - Direct grant	98.001	3,360,479	1,064,705
USAID	USAID Ethiopia	Direct grant	N/A - Direct grant	98.001	9,987,963	1,978,278
USAID	USAID Adv Nutrition Hondu	Direct grant	N/A - Direct grant	98.001	1,506,454	-
USAID	USAID/LAOS/OKARD 62427	Direct grant	N/A - Direct grant	98.001	3,782,174	1,481,876
USAID	USAID/SAINT LUCIA 63173	Direct grant	N/A - Direct grant	98.001	2,715	-
USAID	USAID/MALI/BAANI 63177	Direct grant	N/A - Direct grant	98.001	32,780	(632)
USAID	USAID /MOZ/SABER 63181	Direct grant	N/A - Direct grant	98.001	15,976,597	3,087,744
USAID	USAID/MALAWI/ APA 64119	Direct grant	N/A - Direct grant	98.001	6,627,376	2,523,652
USAID	BHA Capacity Bldng 24-26	Direct grant	N/A - Direct grant	98.001	72,807	-
USAID	USAID Kyrgyz Cure TB2 Act	Direct grant	N/A - Direct grant	98.001	35,540	-
USAID	USAID/UGANDA/TLC	Direct grant	N/A - Direct grant	98.001	12,744	-
USAID	EGYPT SEFPP 13747	Direct grant	N/A - Direct grant	98.001	6,739,759	248,406
USAID	Yemen SHARP 13910	Direct grant	N/A - Direct grant	98.001	5,909	-
USAID	Digital Hlth Actvy 13914	Direct grant	N/A - Direct grant	98.001	9,296,549	789,004
USAID	USAID Yemen SHA 14639	Direct grant	N/A - Direct grant	98.001	7,537,379	1,769,395
USAID	UGANDA STAR-EC	Direct grant	N/A - Direct grant	98.001	(23,780)	-
USAID	MOZAMBIQUE M-SIP	Direct grant	N/A - Direct grant	98.001	(4,747)	-
USAID	ZambiaUSAIDDiscoverHealth	Direct grant	N/A - Direct grant	98.001	14,350,765	54,971
USAID	Ghana HIV/AIDS	Direct grant	N/A - Direct grant	98.001	4,739,324	1,063,530
USAID	Pakistan IHSS-SD	Direct grant	N/A - Direct grant	98.001	9,544,729	1,580,914
USAID	USAID Adv. Nutrition	Direct grant	N/A - Direct grant	98.001	7,943,502	3,027,201
USAID	Partnerships Plus	Direct grant	N/A - Direct grant	98.001	8,227,880	8,172,199
USAID	Kyrgyz Cure Tuberculosis	Direct grant	N/A - Direct grant	98.001	3,709,708	1,379,374
USAID	TIFA TB	Direct grant	N/A - Direct grant	98.001	13,549,014	9,403,964
USAID	MRITE	Direct grant	N/A - Direct grant	98.001	28,867,219	8,872,173
USAID	CHISU	Direct grant	N/A - Direct grant	98.001	33,333,175	7,469,809
USAID	USAID/Laos MCH-N Activity	Direct grant	N/A - Direct grant	98.001	7,336,605	369,588
USAID	USAID BHA Capacity Bldng	Direct grant	N/A - Direct grant	98.001	473,692	29,248
John Snow Health Zambia	USAID Zambia CHEKUP II	Pass-through grant	72061122FA0001	98.001	310,232	-
PATH	PATH Ghana Interoperabity	Pass-through grant	Not available	98.001	14,908	-
COMUSANAS	COMUSANAS TA/USAID/MOZ	Pass-through grant	72065620CA00006	98.001	277,600	-
Chemonics International	USAID Malawi OpenLMIS	Pass-through grant	Not available	98.001	61,608	8,002
Project Hope	Empowering Communities	Pass-through grant	04134	98.001	266,758	65,526
EngenderHealth	Lowlands Health Activity	Pass-through grant	SAET011	98.001	327,448	-
PATH	PATH DS Traceability 2024	Pass-through grant	AID.2134-01729729-SUB	98.001	41,847	-
OCSIDA-MAPUTO	AID/MOZ BTW/FILOVC-OCSIDA	Pass-through grant	Not available	98.001	7,879	-
UNC	DIAH 13834	Pass-through grant	AID-OAA-L-14-00004	98.001	5,195,986	134,052
UNC	D4I 13837	Pass-through grant	AID-OAA-L-14-00004	98.001	254,499	71,157
Cooperative Housing Found	CHFGC Enhancing WASH	Pass-through grant	EWASH-SA-22-07	98.001	465,332	-
PFSCM	PFSCM Clients	Pass-through grant	Not available	98.001	92,733	-
Pathfinder International	Ethiopia TRANSFORM	Pass-through grant	AID663A1700002	98.001	(2,718)	-
Palladium International	Data FI	Pass-through grant	7200AA19CA00004	98.001	319,620	-
PRB	USAID PRB Momentum 2C	Pass-through grant	7200AA20CA00003	98.001	1,568,131	-
IMA World Health	MOMENTUM IHR	Pass-through grant	7200AA20CA00005	98.001	9,432,134	610,898
The Trustees of TUFTS Col	STOP Spillover	Pass-through grant	7200AA20CA00032	98.001	642,249	-
Heartland Alliance Int'l	HAI Nigeria TMA 2020/2021	Pass-through grant	72062020CA00001	98.001	1,303	-
John Snow Health Zambia	ZAM-Health Activity	Pass-through grant	720611121CA00001	98.001	713,837	-
John Snow India Private	SAMVEG-India	Pass-through grant	IPE ¿ DOM (2006)- JSI	98.001	34,697	-
Heartland Alliance Int'l.	HAI TMA Nigeria	Pass-through grant	72062022CA00001	98.001	338,711	-
					227,255,457	57,397,243
Food for Peace Development Assistance Program						
CNFA	CNFA Amalima LOKO Zim	Pass-through grant	72DFFP20CA00008	98.007	302,997	-
RTI International	RTI/USAID/CAM/IPEA 62478	Pass-through grant	Not available	98.U27	668,428	-
John Snow Health Zambia	Zambia eSCMIS 13933	Pass-through grant	72061120C00003	98.U05	613,710	-
PRICEWATERHOUSE	GHSC-TA-TZ 13628	Pass-through grant	AID-OAA-I-15-00032	98.U09	1,150,734	33,814
UNC	Malaria SM&E 13883	Pass-through grant	AID-OOA-L-14-00004	98.U12	171,218	-
Chemonics International	USAIDGHSC-PSM-GTO4 14129	Pass-through grant	AID-OAA-I-15-0004	98.U17	69,310	-
Tetra Tech ARD	TTA Clean Cities Blue Ocn	Pass-through grant	N/A	98.U38	327,837	-
Land O'Lakes Venture 37	LOV Orora Wihaze - Rwanda	Pass-through grant	19-ROW-C-C-1160	98.U41	74,099	-
DAI Global, LLC	Strengthening Livelihoods	Pass-through grant	1004415-S21-35472-00	98.U42	176,964	-
Heartland Alliance Int'l.	HAI Nigeria ACE	Pass-through grant	72062022CA00002	98.U99	143,103	-
	Subtotal Agency for International Development				**230,953,857**	**57,431,057**
Total Expenditures of Federal Awards					**$ 270,970,191**	**$ 65,750,331**

The accompanying notes are an integral part of this schedule.

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JSI Research and Training Institute, Inc.

NOTES TO SCHEDULE OF EXPENDITURES OF FEDERAL AWARDS

September 30, 2024

NOTE 1 - BASIS OF PRESENTATION

The accompanying schedule of expenditures of federal awards (the Schedule) includes the federal grant activity of JSI Research and Training Institute, Inc. under programs of the federal government for the year ended September 30, 2024. The information in this Schedule is presented in accordance with the requirements of Title 2 U.S. *Code of Federal Regulations* Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements. Federal Awards* (Uniform Guidance). Because the Schedule presents only a selected portion of the operations of JSI Research and Training Institute, Inc., it is not intended to and does not present the financial position, changes in net assets, or cash flows of JSI Research and Training Institute, Inc.

NOTE 2 - SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES

(1) Expenditures reported on the Schedule are reported on the accrual basis of accounting. Such expenditures are recognized following the cost principles contained in the Uniform Guidance, wherein certain types of expenditures are not allowable or are limited as to reimbursement.

(2) Negative amounts shown on the Schedule represent adjustments or credits, which management has determined are not material to the Schedule nor the program to which they relate, made in the normal course of business to amounts reported as expenditures in prior years. Accordingly, such adjustments are presented on a current basis.

(3) Federal Assistance Listing numbers and pass-through entity identifying numbers are presented when available.

NOTE 3 - INDIRECT COST RATE

JSI Research and Training Institute, Inc. has elected not to use the 10% de minimis indirect cost rate allowed under the Uniform Guidance.

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REPORT OF INDEPENDENT CERTIFIED PUBLIC ACCOUNTANTS ON INTERNAL CONTROL OVER FINANCIAL REPORTING AND ON COMPLIANCE AND OTHER MATTERS REQUIRED BY *GOVERNMENT AUDITING STANDARDS*

Board of Directors
JSI Research and Training Institute, Inc.

We have audited, in accordance with auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards* issued by the Comptroller General of the United States (*Government Auditing Standards*), the consolidated financial statements of JSI Research and Training Institute, Inc. and affiliates (the "Organization"), which comprise the consolidated statement of financial position as of September 30, 2024, and the related consolidated statements of activities and cash flows for the year then ended, and the related notes to the financial statements, and have issued our report thereon dated June 10, 2025.

Report on internal control over financial reporting
In planning and performing our audit of the consolidated financial statements, we considered the Organization's internal control over financial reporting ("internal control") as a basis for designing audit procedures that are appropriate in the circumstances for the purpose of expressing our opinion on the financial statements, but not for the purpose of expressing an opinion on the effectiveness of the Organization's internal control. Accordingly, we do not express an opinion on the effectiveness of the Organization's internal control.

A deficiency in internal control exists when the design or operation of a control does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, misstatements on a timely basis. A material weakness is a deficiency, or a combination of deficiencies, in internal control, such that there is a reasonable possibility that a material misstatement of the Organization's financial statements will not be prevented, or detected and corrected, on a timely basis. A significant deficiency is a deficiency, or a combination of deficiencies, in internal control that is less severe than a material weakness, yet important enough to merit attention by those charged with governance.

Our consideration of internal control was for the limited purpose described in the first paragraph of this section and was not designed to identify all deficiencies in internal control that might be material weaknesses or significant deficiencies. Given these limitations, during our audit we did not identify any deficiencies in internal control that we consider to be material weaknesses. However, material weaknesses or significant deficiencies may exist that were not identified.

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Report on compliance and other matters
As part of obtaining reasonable assurance about whether the Organization's consolidated financial statements are free from material misstatement, we performed tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements, noncompliance with which could have a direct and material effect on the financial statements. However, providing an opinion on compliance with those provisions was not an objective of our audit, and accordingly, we do not express such an opinion. The results of our tests disclosed no instances of noncompliance or other matters that are required to be reported under *Government Auditing Standards*.

Purpose of this report
The purpose of this report is solely to describe the scope of our testing of internal control and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the Organization's internal control or on compliance. This report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the Organization's internal control and compliance. Accordingly, this report is not suitable for any other purpose.

Grant Thornton LLP

Boston, Massachusetts
June 10, 2025

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INDEPENDENT AUDITOR'S REPORT ON COMPLIANCE FOR EACH MAJOR PROGRAM AND ON INTERNAL CONTROL OVER COMPLIANCE REQUIRED BY THE UNIFORM GUIDANCE

Board of Directors
JSI Research and Training Institute, Inc.

Report on compliance for each major federal program

Opinion on each major federal program

We have audited the compliance of JSI Research and Training Institute, Inc. and affiliates (the "Organization") with the types of compliance requirements identified as subject to audit in the U.S. Office of Management and Budget's OMB Compliance Supplement that could have a direct and material effect on each of the Organization's major federal programs for the year ended September 30, 2024. The Organization's major federal programs are identified in the summary of auditor's results section of the accompanying schedule of findings and questioned costs.

In our opinion, the Organization complied, in all material respects, with the types of compliance requirements referred to above that could have a direct and material effect on each of its major federal programs for the year ended September 30, 2024.

Basis for opinion on each major federal program

We conducted our audit of compliance in accordance with auditing standards generally accepted in the United States of America (US GAAS); the standards applicable to financial audits contained in *Government Auditing Standards* issued by the Comptroller General of the United States (*Government Auditing Standards*); and the audit requirements of Title 2 U.S. *Code of Federal Regulations* Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards* (Uniform Guidance). Our responsibilities under those standards and the Uniform Guidance are further described in the Auditor's Responsibilities for the Audit of Compliance section of our report.

We are required to be independent of the Organization and to meet our other ethical responsibilities in accordance with the relevant ethical requirements relating to our audit. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion on compliance for each major federal program. Our audit does not provide a legal determination of the Organization's compliance with the compliance requirements referred to above.

Responsibilities of management for compliance

Management is responsible for compliance with the requirements referred to above and for the design, implementation, and maintenance of effective internal control over compliance with the requirements of laws, statutes, regulations, rules and provisions of contracts or grant agreements applicable to the Organization's federal programs.

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Auditor's responsibilities for the audit of compliance
Our objectives are to obtain reasonable assurance about whether material noncompliance with the compliance requirements referred to above occurred, whether due to fraud or error, and express an opinion on the Organization's compliance based on our audit. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with US GAAS, *Government Auditing Standards*, and the Uniform Guidance will always detect material noncompliance when it exists. The risk of not detecting material noncompliance resulting from fraud is higher than for that resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Noncompliance with the compliance requirements referred to above is considered material if there is a substantial likelihood that, individually or in the aggregate, it would influence the judgment made by a reasonable user of the report on compliance about the Organization's compliance with the requirements of each major federal program as a whole.

In performing an audit in accordance with US GAAS, *Government Auditing Standards*, and the Uniform Guidance, we:

- Exercise professional judgment and maintain professional skepticism throughout the audit.
- Identify and assess the risks of material noncompliance, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining, on a test basis, evidence regarding the Organization's compliance with the compliance requirements referred to above and performing such other procedures as we considered necessary in the circumstances.
- Obtain an understanding of internal control over compliance relevant to the audit in order to design audit procedures that are appropriate in the circumstances and to test and report on internal control over compliance in accordance with the Uniform Guidance, but not for the purpose of expressing an opinion on the effectiveness of the Organization's internal control over compliance. Accordingly, no such opinion is expressed.

We are required to communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit, and any significant deficiencies and material weaknesses in internal control over compliance that we identified during the audit.

Report on internal control over compliance

A deficiency in internal control over compliance exists when the design or operation of a control over compliance does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, noncompliance with a type of compliance requirement of a federal program on a timely basis. A material weakness in internal control over compliance is a deficiency, or a combination of deficiencies, in internal control over compliance, such that there is a reasonable possibility that material noncompliance with a type of compliance requirement of a federal program will not be prevented, or detected and corrected, on a timely basis. A significant deficiency in internal control over compliance is a

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deficiency, or a combination of deficiencies, in internal control over compliance with a type of compliance requirement of a federal program that is less severe than a material weakness in internal control over compliance, yet important enough to merit attention by those charged with governance.

Our consideration of internal control over compliance was for the limited purpose described in the Auditor's Responsibilities for the Audit of Compliance section above and was not designed to identify all deficiencies in internal control over compliance that might be material weaknesses or significant deficiencies. Given these limitations, during our audit we did not identify any deficiencies in the Organization's internal control over compliance that we consider to be material weaknesses or significant deficiencies. However, material weaknesses or significant deficiencies in internal control over compliance may exist that have not been identified.

Our audit was not designed for the purpose of expressing an opinion on the effectiveness of internal control over compliance. Accordingly, no such opinion is expressed.

The purpose of this Report on Internal Control Over Compliance is solely to describe the scope of our testing of internal control over compliance and the results of that testing based on the requirements of the Uniform Guidance. Accordingly, this report is not suitable for any other purpose.

Grant Thornton LLP

Boston, Massachusetts
June 10, 2025

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JSI Research and Training Institute, Inc.

SCHEDULE OF FINDINGS AND QUESTIONED COSTS

September 30, 2024

SECTION I - SUMMARY OF AUDITORS' RESULTS:

Financial Statements

The type of report issued on whether the financial statements audited were prepared in accordance with U.S. GAAP	Unmodified
Internal control over financial reporting:	
• Material weaknesses identified?	No
• Significant deficiency(ies) identified?	None reported
• Noncompliance material to the financial statements noted?	No

Federal Awards

Internal control over major programs:	
• Material weaknesses identified?	No
• Significant deficiency(ies) identified?	None reported
Type of auditors' report issued on compliance for major programs	Unmodified
Any audit findings which are required to be reported under 2 CFR section 200.51(a):	No
Identification of major programs:	

Federal Assistance Listing Number	Name of Federal Program
98.001	Foreign Assistance for Programs Overseas
93.145	HIV-Related Training and Technical Assistance

Dollar threshold used to distinguish between Type A and Type B programs:	$3,000,000
Auditee qualified as low risk auditee?	Yes

SECTION II - FINANCIAL STATEMENT FINDINGS

None noted.

SECTION III - FINDINGS AND QUESTIONED COSTS FOR FEDERAL AWARDS

None noted.

KATHERINE ROBERT

JSI, 501 South Street 2nd floor, Bow, New Hampshire 03304 | (603) 573-3331 | katie_robert@jsi.com

EDUCATION

UNIVERSITY OF NEW HAMPSHIRE, DURHAM, NEW HAMPSHIRE
Master of Public Administration, 2009
Bachelor of Arts in Political Science, 2006

EXPERIENCE AND CERTIFICATIONS

JSI, Bow, New Hampshire

Regional Director, August 2019 to present
Responsible for overall functionality and performance of JSI Northern New England team and office operations; ensures alignment of JSI NNE activities with the JSI Health Services Division priorities and vision; provides supervision and support to staff in order to promote morale and work quality.

Consultant, December 2007 to present
Provide technical assistance, training and evaluation to health and human service organizations to support the development of effective public health and health care systems.

CITI Program Human Research Subject Certificate

HIGHLIGHTS OF RELEVANT PROJECTS

NH Home Visiting Learning Hub *July 2015 to September 2021, April 2024 to present* Serves as Project Director of the NH Home Visiting Learning Hub supporting Healthy Families America, Comprehensive Family Support Services, and Newborn Navigation home visiting agencies contracted by NH DHHS' Early Childhood, Family, and Community Health Section. Conduct an annual training needs assessment, identify subject-matter expert trainers, and engage in continuous dialogue with agencies to most effectively provide training and technical assistance resources. Support implementation of continuous quality improvement plans for local implementing agencies, and promotional materials to promote utility of family support programs. Previously, completed a statewide needs assessment, and provided consultation to the NH Home Visiting Task Force.

NH Early Childhood Comprehensive Systems (ECCS), *July 2022 to May 2024* Served as co-Director with NH Family Voices. Project activities have included a storytelling project, various efforts to provide CQI support to health care providers, the development of webinars focused on improving care coordination practices in various settings, and the implementation of a rapid micro-grant program.

Public Health Professional Support Services *July 2013 to December 2024* Provide fiscal and administrative coordination to the contract task leads. Serve as the primary point of contact for DHHS contracts and finance groups, and liaise with the JSI accounting department.

State Health Assessment and Improvement Plan *August 2019 to June 2024* Partner with the University of New Hampshire to facilitate and support the State Health Assessment and Improvement Plan Advisory Council and community engagement subcommittee. Create logo and graphic materials, lead the plan's vision development, and serve as primary lead for community engagement through quantitative and qualitative data collection methods. Designed www.NHLivesWell.org.

Lower Grafton County Council for Young Families, United Way of the Greater Seacoast, and SAU21 Preschool Development Grant Needs Assessment Projects (three separate projects) *September 2020 to December 2021* In all three regions, implement a multi-modal needs assessment to inform each respective early childhood coalition's regional Preschool Development Grant work. Needs assessment activities for each project included a review of secondary data for towns and cities in the UWGS footprint to support improved service delivery for families with young children. Leveraged work by groups conducting parallel needs assessments to collect primary data from families, conduct key informant interviews with local agency leaders, and conduct focus groups with families. Project deliverables include

community profiles, an inventory of local programs and supports, and high-level recommendations for where partners may focus coordination and planning.

Lakes Region Community Health Needs Assessment *September 2020 to January 2021* Complete a Community Health Needs Assessment on behalf of the LRGHealthcare. Central NH VNA & Hospice, HealthFirst Family Care Center, and the Partnership for Public Health. Assessment activities include the development, administration and analysis of a community leader survey and a general community resident survey; preparation of a discussion guide for community discussion groups, orientation of discussion facilitators and synthesis of discussion notes; the collection of population health statistics from secondary data sources; and the completion of a final needs assessment report with a presentation of key findings to project partners.

Watch Me Grow Steering Committee Strategic Facilitation *May 2020 to June 2021* Provide strategic facilitation support to the Watch Me Grow Steering Committee. Identify technical assistance needs, and coordinate with partners in order to support the Committee in furthering its goals and objectives around increasing early identification of developmental screening and improving access to supportive care and services. Support development of centralized access point pilot project to support a more integrated statewide system for developmental screening.

NH Maternal, Infant, and Early Childhood Home Visiting Needs Assessment *July 2017 to October 2018* Provide project direction and oversight to a statewide needs assessment required by HRSA's Maternal and Child Health Bureau to identify communities with concentrated risk, assess the quality and capacity of existing home visiting offerings, and to understand the state's capacity for providing substance use disorder treatment and counseling services to families in need. The multi-modal needs assessment utilized a systematic data review, community survey, focus groups, a PhotoVoice project, and the oversight of the NH Home Visiting Task Force to develop its findings and recommendations.

Healthy Start EPIC Center *December 2014 to May 2019* Provide technical assistance and training to Healthy Start grantees to ensure program effectiveness in achieving the goals to reduce infant mortality and health disparities, and improve perinatal health outcomes. This project focused on providing comprehensive and innovative capacity building assistance to community-based grantees, measuring project success by the degree to which grantees achieve core competencies essential for effective implementation of the Healthy Start model and institutionalize a culture of QI and evaluation based on a foundation of documented program effectiveness. Primary responsibilities include coordination of technical assistance.

OTHER PROFESSIONAL EXPERIENCE AND CERTIFICATIONS

Leadership Greater Concord *Class of 2024* Participated in a monthly leadership development program aimed at strengthening connections across sectors for the betterment of Concord and its surrounding towns, and to increase civic engagement.

NH Health & Equity Partnership *Diversity and Cultural Competence trainer, April 2018 – present* Participated in a train the trainer session to qualify in offering diversity and cultural competence trainings for a wide range of organizations.

Rivier University *Adjunct Faculty, September 2016-January 2018*
Developed the curriculum for and instructed the online capstone for the undergraduate Public Health program.

PROFESSIONAL ASSOCIATIONS AND VOLUNTEER ENGAGEMENTS

- Special Olympics of NH, Concord Golden Eagles *Local Program Volunteer, 2025 - Present*
- CATCH Neighborhood Housing *Board of Directors, 2024 - Present*
- American Public Health Association *Member, 2013 – Present*
- YWCA New Hampshire *Board of Directors, 2020 - 2021*
- NH Home Visiting Task Force *Member, 2015 – 2019*
- NH Public Health Services Improvement Council *Member, 2016-2019*
- NH Public Health Association, *Past President, 2012-2018*

CARA GRIFFITH

JSI Research & Training Institute, Inc., d.b.a. Community Health Institute *Cara_Griffith@jsi.com*
501 South St, Bow, NH 03304 (603) 573-3300

EDUCATION

UNIVERSITY OF NEW HAMPSHIRE INSTITUTE ON DISABILITY
Building Futures Together Certificate, 2022

ST. LAWRENCE UNIVERSITY
B.A. Sociology, 2019, Public Health and Arabic Studies Minors

EXPERIENCE

JSI, Bow, New Hampshire, *Project Associate, February 2023-Present*

Current projects:

NH Department of Health and Human Services, NH Home Visiting Learning Hub
(April 2024-Present)
Serves as Project Coordinator of the NH Home Visiting Learning Hub supporting Healthy Families America, Comprehensive Family Support Services,Kinship Navigation, and Newborn Navigation home visiting agencies contracted by NH DHHS' Early Childhood, Family, and Community Health Section. Conduct an annual training needs assessment, identify subject-matter expert trainers, and engage in continuous dialogue with agencies to most effectively provide training and technical assistance resources. Support implementation of continuous quality improvement plans for local implementing agencies, and promotional materials to promote utility of family support programs.

NH Department of Health and Human Services, Public Health Emergency Preparedness (PHEP)
(February 2023-Present)
Serves as an Analyst and Project Manager in providing technical assistance and support to the 13 Regional Public Health Networks in NH around public health emergency preparedness, planning, and response. Assists in meeting and training logistics, training development, and conducting and analyzing results from the statewide jurisdictional risk assessment. Assist in After Action Report development for the NH Mpox response. Supports the planning and logistics for the NH Emergency Volunteer Conference.

Health Resources & Services Administration HRSA HIV/AIDS Bureau, Syndemic ETAP
(July 2024-Present)
Serve as an Analyst on the EvaluationTeam and two system coaching teams to provide technical assistance to five health systems to design, implement and participate in the evaluation of a syndemic approach to link and retain people with HIV in comprehensive and integrated care.

Previous projects:

NH Department of Health and Human Services, NH Early Childhood Comprehensive Systems (ECCS)
(October 2023-Present)
Serves as a Project Associate responsible for providing support and technical assistance through CQI, coordinating virtual learning opportunities for providers, and establishing and providing contract management to a micro-grant with a focus on improving the experience of families receiving care or resource coordination support.

Wyoming Department of Health, Public Health Division, Office of Rural Health (ORH), Workforce Provider Capacity
(February 2023-Present)
Provides project support for the Health Professional Shortage Area (HPSA) Analysis and Designation project for the state of Wyoming. Served as a Project Associate and Survey Coordinator responsible for assisting in identifying areas meeting the federal criteria for health professional shortage area (HPSA) and medically underserved area/population (MUA/P) in the state of Wyoming. Conducts collection and analysis of statewide primary care, mental health, and dental health survey data and completes data updates in the BHW Shortage Designation Management System (SDMS). Works with providers and members of the local service area to obtain and validate information for designations.

NH Department of Health and Human Services, NH Student Assistance Network
(February 2023-October 2023)
Served as a Project Associate to provide support in planning, logistics, and coordination of Community of Practices, Regional Peer Collaboratives, and assisted in evaluation, contract management, and subcontracting process for over 30 Student Assistant Network programs across NH. The NH Student Assistance Network develops and promotes Student Assistance Programs and provides group and individual technical assistance, a Community of Practice learning collaborative, and support with evaluation and sustainability planning.

NH Department of Health and Human Services, NH Governor's Commission on Alcohol and other Drugs (*February 2023-October 2023)*
Served as a Project Associate responsible for providing technical assistance and support to the Coordination and Cooperation Task Force of the NH Governor's Commission on Alcohol and Other Drugs through the Center for Excellence on Addiction. This support included providing meeting preparation and support through note taking, creation of agendas, finalizing official meeting summaries

and minutes for online publication, as well as coordinating internal meeting logistics and budget tracking.

Prior Experience

The Upper Room, a Family Resource Center Derry, NH
(Program Coordinator, 2020-2023)
Managed Teen Information for Parenting Success and Kinship Navigation programs, to promote self-sufficiency and increase outcomes for over 50 families using a trauma informed approach. Developed and facilitated a calendar of workshops, while building strong partnerships with community organizations. Assisted in data collection, report writing, and case management as well as provide oversight to staff and volunteers.

Presentations

Panelist, International Summit on Female Concussion and TBI at Georgetown University, 2016.
Speaker, TEDx Amoskeag Millyard at Southern New Hampshire University, 2015.

Trainings

HSEEP Certified (December, 2023), IS-100, IS-120, IS-700, IS-800

KATELYN FLAHERTY DORÉ

JSI, 44 Farnsworth Street, Boston, MA 02210 (617) 482-9485 *katelyn.dore@jsi.org*

EDUCATION

BOSTON UNIVERSITY, BOSTON, MASSACHUSETTS
MPH, Maternal and Child Health, 2012

UNIVERSITY OF WISCONSIN, MILWAUKEE, WISCONSIN
BS, Major in Biology, 2004

CERTIFICATES

ASSOCIATION FOR TALENT DEVELOPMENT (ATD) CERTIFICATION INSTITUTE
E-Learning Instructional Design Certificate, 2023

ACADEMY OF LACTATION POLICY AND PRACTICE, MASSACHUSETTS
Certified Lactation Counselor, 2018 (renewed in 2021 and 2024)

EXPERIENCE

JSI, Boston, Massachusetts
Senior Associate II, May 2024–Present; Senior Consultant, June 2020–May 2024
Selected projects:

Alliance for Innovation on Maternal Health (AIM) Technical Assistance (TA) Center | Health Resources and Services Administration (HRSA) Maternal and Child Health Bureau (MCHB)
Resource Manager. Provide strategic direction to refine the project website (saferbirth.org)—a comprehensive, web-based resource that allows birthing facilities to easily search for resources to support the implementation of AIM patient safety bundles and best practices. Coordinate with TA Specialists and other team members to develop training and TA resources that are responsive to the needs of AIM states nationwide. Provide instructional design services for all phases of resource development as needed.

New Hampshire (NH) Home Visiting Learning Hub | NH Department of Health and Human Services (NH DHHS)
Training Advisor. Work as part of a team to assess the training needs of Healthy Families America-New Hampshire and Comprehensive Family Support home visiting program staff. Led the development of annual training needs assessments and training plans. Provide content, subject matter expertise, and editorial review of the monthly eNewsletter. Update the *Trauma-Informed & Healing-Centered Family Support Services* eLearning developed previously (see below).

Reproductive Health National Training Center | U.S. Department of Health and Human Services (HHS) Office of Population Affairs (OPA).
Grantee Liaison / Training and Technical Assistance Provider (T&TA). Serve as direct point of contact for a group of Teen Pregnancy Prevention (TPP) Program grantees to facilitate access to T&TA resources. Design T&TA opportunities, including the on-demand *Trauma-Informed Approach in Adolescent Health: Team Meeting Series, Introduction to Fidelity eLearning course, Introduction to Adaptations eLearning course,* and *Introduction to Sexual and Reproductive Anatomy and Physiology for TPP Project Staff eLearning course.* These on-demand learning opportunities are inclusive of multiple learning modalities such as text, graphics, audio, video, interactive and scenario-based activities, and case studies. Led the development of three video series: *Ask Me Anything, Bringing Content to Life: Techniques for Effective Group Facilitation*, and *Caring for Yourself and Your Participants: Techniques for Effective Group Facilitation.* Created the *Effective Facilitation & Youth Engagement: A Toolkit for Working with Youth* and following group TA activities.

Recipient Compilation of Best Practice Strategies and Interventions | HRSA HIV/AIDS Bureau
Knowledge Management & Communications Lead. Provided strategic direction to develop and refine the Ryan White HIV/AIDS Program (RWHAP) Best Practices Compilation—a comprehensive, web-based resource that allows people to easily search, share, and nominate emerging and established approaches shown to improve HIV care and services. Coordinated across JSI and subcontractor team to design and write profiles and curate resources, develop fact sheets and postcards, and design presentations. Collaborated with the University of California, San Francisco (UCSF) to design, develop content for, maintain, and refine the Compilation (targethiv.org/bestpractices). Develop dissemination plan and coordinate with HRSA and UCSF to promote the Compilation.

Family Planning National Training Center | HHS Office of Population Affairs
eLearning Specialist. Designed on-demand learning opportunities including the *Providing Quality Family Planning Services: Recommendations of CDC and the U.S. Office of Population Affairs* (QFP) *eLearning series* and *Identifying and Responding to Human Trafficking in Title X Settings eLearning Course.*

NH Maternal, Infant, & Early Childhood Home Visiting (MIECVH) Program T&TA | NH DHHS
Training Advisor and eLearning Lead. Worked as part of a team to assess MIECHV local implementing agency staff T&TA needs and design responsive yearly training plans. Planned, designed, and implemented a variety of opportunities including in-person meetings, webinars, eNewsletters, blended learning, eLearning, and microsite. Assessed participant satisfaction with T&TA opportunities and identifies opportunities for improvement.

Project Manager, March 2012–June 2020; Intern, Nov 2011– March 2012
Selected projects:

Supporting Healthy Start Performance Project | HRSA MCHB
Online Technologies Lead & Capacity Building Assistance Provider. Provided T&TA services to Healthy Start grantees across the U.S. Managed online technologies (healthystartepic.org website, Twitter, and YouTube). Co-led the development of an 11-module online Community Health Worker course and companion guide for supervisors. Including formative research to inform course content development, programming content into web-based platform, conducting user testing to refine course experience, and leading the development of communications materials to increase awareness of and uptake of the course. Led the development of a Peer Learning Group and associated resources for Healthy Start Certified Lactation Counselors (CLCs).

What Works in Youth HIV | HHS Office of Adolescent Health
Content Development Specialist. Worked with a team to research and develop content for the What Works in Youth HIV website and TA to re-launch the Adolescent HIV/AIDS Prevention National Resource Center. Areas of focus included building the capacity of youth-serving providers to: 1) find prevention strategies, interventions, or social media/marketing strategies to meet the needs of youth, 2) use positive youth development principles, and 3) create engaging programs and inclusive supportive environments for the youth they serve.

Healthy Futures TPP Evaluation | HHS Office of Adolescent Health.
Project Manager. Provided evaluation project management on a TPP grant from OAH. Used a randomized controlled trial design to evaluate the impact of Healthy Futures on youth knowledge, perceptions, and behaviors in three Massachusetts communities.

Boston University School of Public Health, Boston, Massachusetts
Research Fellow, Oct 2010 to Oct 2011 | Administrative Assistant/Coordinator, January 2010 to November 2011

Boston Public Health Commission, Boston, Massachusetts
Intern, June 2011 to August 2011

Meriter Hospital, Madison, Wisconsin
Scheduling Coordinator, August 2007 to July 2009

St. Francis Pediatrics, Milwaukee, Wisconsin
Medical Office Manager, July 2004 to August 2007

PUBLICATIONS

Selected publications:

Quimby K, Spitzer N, **Doré KF**, Kawatu J. An eLearning series for staff working in Title X-funded settings: An effort to disseminate national family planning recommendations. Contraception. 2023 Apr;120:109903. doi: 10.1016/j.contraception.2022.10.005. Epub 2022 Oct 15. PMID: 36257373.

DeAngelis KR, **Doré KF**, Dean D, Osterman P. Strengthening the Healthy Start Workforce: A Mixed-Methods Study to Understand the Roles of Community Health Workers in Healthy Start and Inform the Development of a Standardized Training Program. *Maternal and Child Health Journal.* 2017; 21 (Suppl 1): S65–S74

EMMA GIER

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EDUCATION

DEPAUL UNIVERSITY, CHICAGO, ILLINOIS
Master of Public Health, Community Health, 2020

DEPAUL UNIVERSITY, CHICAGO, ILLINOIS
Bachelor of Arts, Anthropology, 2017

EXPERIENCE

JSI, Berkeley, California
Consultant, September 2022-present

New Hampshire Home Visiting Learning Hub | New Hampshire Department of Health and Human Services

Delaware Maternity Care Target Area (MCTA) Landscape Analysis | Delaware Division of Public Health
Serves as Qualitative Research Lead. Project team will conduct landscape analysis to identify leading factors that contribute to maternal health and maternity care access, and to better understand disparities within each MCTA. Responsible for developing qualitative protocol detailing study design, sampling and recruitment methods, data collection methods, analysis plan, and data collection tools.

Population Health Management Initiative (PHMI) | Kaiser Permanente

California Home Visiting Program Planning | City of Berkeley Department of Health, Housing and Community Services
Served as Program Manager. Oversaw and conducted mapping and analysis of current California Home Visiting Program (CHVP) programs in similar Local Health Jurisdictions (LHJ), current Berkeley Public Health Division (BPH) services for families and children, and the size, scope and demographics of eligible CHVP population in Berkeley to identify a) gaps in programming and services, b) staffing requirements to implement and sustain CHVP, and c) anticipated challenges in program implementation and sustainability. Findings informed final report detailing recommended selection of HV model.

City of Berkeley CHA/CHIP | City of Berkeley Department of Health, Housing and Community Services
Serves as Program Manager. Project team will conduct a Health Assessment and develop a Health Improvement Plan for the City of Berkeley. Throughout this project, the team will: integrate qualitative and quantitative research methods to gain a clearer picture of context and opportunities to improve the wellbeing of residents, engage a Steering Committee of community leaders with organizational standing and lived experience to ensure genuine community engagement and power-sharing, and center health equity and a root-cause analysis so that solutions acknowledge history and focus on high-impact structural and systems changes.

Delaware PRAMS Non-Response Study | Delaware Division of Public Health, Delaware Health and Social Services
Led qualitative data collection and analysis to learn about parental experience with being contacted for the (Pregnancy Risk Assessment and Monitoring System) PRAMS survey and the factors that influenced their decision to respond or not.The purpose of this study was to explore and identify factors related to response and non-response to the Delaware PRAMS survey, and inform strategies and actions of the Delaware Division of Public Health to promote response to the PRAMS survey.

Santa Clara County Childhood Immunization Campaign | County of Santa Clara Public Health Department
Responsible for formative research processes including but not limited to: literature review, environmental scan, planning and facilitation of stakeholder convening and listening sessions; key informant interviews; and execution of message testing workshops. This project aimed to design and implement an immunization campaign to increase vaccination rates among children in the south Bay Area. The campaign focused on COVID-19 vaccines as a part of routine vaccinations for children,

aiming to reach parents and caregivers. Led development and provision of trainings for community partners on addressing vaccine hesitancy and patient advocacy.

Delta Center California | California Health Care Foundation
Collaboratively crafted, wrote, and designed Learning Lab team final products including project spotlights, podcasts, and briefs. Supported convening preparation and execution, project management, and Learning Lab team coaching. Delta Center California was a 2.5-year initiative supported by the California Health Care Foundation and the Robert Wood Johnson Foundation that brought together behavioral health and primary care leaders to accelerate care improvement and integration through policy and practice change. The project aimed to foster collaboration and collective action between primary care and behavioral health at the state and county level in California; to build knowledge and ability of state associations to ensure that changes in incentives and care systems meet the goals and needs of individuals and families; and to accelerate payment and care integration through on-the-ground projects in selected sites across California. Ultimately, Delta Center California aimed to advance health policy solutions and create a care system that better meets the goals and needs of individuals and families, and addresses racial and economic disparities.

Northwestern University, Program in Public Health, Chicago, IL
Teaching Assistant / Co-Instructor, 2021-2022
Facilitated case based foundational public health courses; sourced current reading materials in alignment with CEPH MPH competencies; graded student work, and engaged with students to support them in becoming public health professionals

Northwestern University, Center for Community Health, Chicago, IL
Mothers and Babies Evaluation and Implementation Coordinator, 2020-2022
Oversaw program evaluation efforts to understand implementation and client-level impact as MB is implemented in real world settings; facilitated trainings and provided tailored technical assistance for all implementation sites; developed implementation resources and strategies to support service providers as they implement MB; conducted readiness conversations to assess organizational structure, and barriers and facilitators to implementation; created adaptations and innovations of intervention materials to meet needs of diverse parent populations, increase reach and promote equity; provided supervision and mentorship to staff and interns

Mothers and Babies Program Intern, 2019-2020
Evaluated and assessed feasibility and scalability of pilot Fathers and Babies program

RefugeeOne, Chicago, IL
Resettlement Case Coordinator, 2018-2020
Oversaw department to ensure productivity, efficiency and quality assurance; completed regular file checks in preparation for contract compliance monitoring and evaluation; conducted intake interviews with all new clients and referred to appropriate departments; created client-focused strengths-based self-sufficiency plans for all new arrivals; evaluated cultural orientation curriculum and revamped to better meet needs of clients

Publications/Presentations

Ward, E. A., Iron Cloud-Two Dogs, E., **Gier, E. E.**, Littlefield, L., & Tandon, S. D. (2022). Cultural Adaptation of the Mothers and Babies Intervention for Use in Tribal Communities. *Frontiers in psychiatry*, 13, 807432. https://doi.org/10.3389/fpsyt.2022.807432

Hamil, J., **Gier, E.,** Garfield, C. F., & Tandon, D. (2021). The Development and Pilot of a Technology-Based Intervention in the United States for Father's Mental Health in the Perinatal Period. *American journal of men's health*, 15(5), 15579883211044306. https://doi.org/10.1177/15579883211044306

Tandon, S. D., Hamil, J., **Gier, E. E.**, & Garfield, C. F. (2021). Examining the Effectiveness of the Fathers and Babies Intervention: A Pilot Study. *Frontiers in psychology*, 12, 668284. https://doi.org/10.3389/fpsyg.2021.668284

Innovative Methodologies for Adapting an Evidence-Based Perinatal Depression Preventive Intervention to Advance Equitable Dissemination and Implementation. 2022, Presentation – Society for Prevention Research 30th Annual Meeting.

Cultural Adaptation of an Evidence Based Postpartum Depression Intervention: Mothers and Babies for Tribal Communities. 2021, Presentation – Ann & Robert Lurie Children's Hospital Scholarly Projects – Monthly Series.

Computer Skills

Microsoft Office, Google Suite, ATLAS.ti, NVivo, Creative Cloud, Canva, WordPress

YVONNE HAMBY, M.P.H.

JSI, 1733 17th Street, Suite 300, Denver, Colorado 80202 (303) 262-4304 *yhamby@jsi.com*

EDUCATION

UNIVERSITY OF SOUTH FLORIDA, TAMPA, FLORIDA
MPH, MATERNAL AND CHILD HEALTH, 1996
Recipient of the Centers of Excellence in MCH Education, Science and Practice (formerly the National MCH Traineeship)

GEORGIA STATE UNIVERSITY, ATLANTA, GEORGIA
BA, Sociology, 1989
Sociology Honors Award

EXPERIENCE

JSI, Denver, Colorado
Project Director, 1999 to present
Quality-oriented professional with 22+ years of experience and a proven knowledge of research methodology, wellness programs, and public health administration. Areas of expertise are program evaluation, research, and quality improvement of health services delivery for under-served populations. Skilled in quantitative and qualitative research and evaluation design, analysis, and implementation. I have served on a variety of projects where I have provided oversight to all project related activities. I designed the research protocols, as well as oversaw the primary and secondary data collection methods and analysis. The research activities have included quantitative data collection across varied public datasets and qualitative data collection among a diverse group of stakeholders. Below are a sample of key evaluation/quality improvement projects I have led:

New Hampshire Maternal, Infant, and Early Childhood Home Visiting Home Program. Responsible for the development and implementation of a continuous quality improvement (QI) plans for three local agencies implementing the Healthy Families America model, funded by the federal Maternal, Infant, and Early Childhood Home Visiting Program (MIECHV). Providing QI coaching and training to three QI teams.

Supporting Healthy Start Performance Project-Team Lead Healthy Start Collaborative Improvement and Innovative Network. Provided logistical and facilitation and supported to the HS CoIIN as well as leadership development. The HS CoIIN functioned as an expert panel to the Division of Healthy Start and Perinatal Services (DHSPS) and the HS EPIC Center, the training and technical assistance provider for the program. Through a structured process, the HS CoIIN sought to identify and promote implementation of standardized evidence-based and field-tested approaches to essential HS components such as perinatal risk assessment, care coordination and case management, and participant engagement.

Department of Health and Human Services, Office of Population Affairs, National Reproductive Health Training Center. Served as Grantee Liaison for cohort of 20 teen pregnancy prevention (TPP) grantees. Manage special projects to build capacity of TPP grantees. Special project topics include: developing systems change toolkit and sustainability job aids.

Feasibility Study-Early Childhood Mental Health Consultant Hub. Conducted a feasibility study that captured the demand, operational and technical characteristics of an accelerator model of a hub for early childhood mental health consultants. The findings were summarized into a Lean canvas format and strategic recommendations were provided to the stakeholder committee and funders.

Department of Health and Human Services, Administration for Children Youth and Families, Family and Youth Services Bureau – Teen Pregnancy Prevention Training, Technical Assistance. Subcontractor through RTI International to provide training and technical assistance to support Personal Responsibility Education Program (PREP) grantees with implementation of evidence-based teen pregnancy prevention programming. Collaborated with a team of five agencies to support FYSB. Served as the JSI lead in overseeing eleven tasks including: provision of training webinars, planning regional in-person trainings and Annual Grantee Conference, management of a consultant roster, drafting e-Updates, and conducting one-on-one technical assistance with Tribal PREP grantees. Developed a Communities of Practice website to serve as an online discussion board and resource sharing tool for grantees.

Boulder Speak Now! Campaign Evaluation-Project Director. Served as Project Director to provide oversight to all project related activities. Designed the evaluation protocols, as well as oversee the secondary data collection methods and analysis. As a part of the project, a statewide social marketing campaign is being implemented to target parents and caregivers focusing on providing evidence-based information and resources to create awareness about and interest in talking with their children about the risks of alcohol and other drugs among Boulder's youth.

Komen African-American Health Equity Initiative –Community Collaboration for Collective Impact Landscape Analysis. Contracted by Susan G. Komen to conduct a landscape analysis to form the basis for interventions designed to reduce breast cancer inequities across twelve metropolitan areas with the highest breast cancer disparities. Served as the quantitative data lead, manage the collection, analysis and presentation of population health data including but not limited to breast cancer statistics, demographic data and other public health surveillance and social determinants data.

Pueblo City-County Teen Pregnancy Research Project and Boulder County Unintended Pregnancy Research Project-Project Director. Served as Project Director to provide oversight to all project related activities. Designed the research protocols, as well as oversaw the secondary data collection methods and analysis. Pueblo City-County Public Health Department partnered with JSI to research the local issues and factors associated with unintended pregnancy in Pueblo County. The research activities included quantitative and qualitative data collection among a diverse group of young men and women, as well as their immediate social network, health care and social service providers, and key stakeholders.

Published Abstracts | Presentations

- Co-Author, **Hamby, Y.**, Smith, G., Barron, C., Teig, E. *The Future of the Infertility Prevention Project (IPP): Partnership Opportunities and Recommendations in Light of Passage of the Patient Protection and Affordable Care Act.* The National STD Conference, 2012. Presented as an oral presentation.
- Co-Author, **Hamby, Y.**, Smith, G., Barron, C., Teig, E *The Future of the Infertility Prevention Project (IPP): Using the Impact Assessment Methodology to Understand Change on a Local Level.* The National STD Conference, 2012. Presented as a poster presentation.
- Co-Author, **Hamby, Y**. and McCrimmon, M. *Sexual and Reproductive Health Quality Improvement System (SRQIS).* The National STD Conference, 2012. Presented as a showcase poster presentation.
- Co-Author, **Hamby, Y.**, *Client-Centered Quality: Clients' Perspectives to Receiving Care*. 2010 National Family Planning Clinical Conference. Presented as a poster presentation.
- Author, **Hamby, Y.**, *Region VIII RQIP Overview*. 2010 OPA National Regional Training Centers Meeting. Presented as an oral presentation.
- Author, **Hamby, Y**., *Racial/Ethnic Differences in Service Utilization Patterns and Mobility of Female Clients in the Region VIII*

Selected Consultations

- Participant for CDC, STD Prevention Program Funding Announcement Consultation
- Participant for Title X Guidelines Review Technical Panel for Family Planning Service Provision: Innovative Practice – Quality Improvement/Assurance
- Participant for the CDC Consultation to Identify, Characterize, and Assess the Barriers to Adoption and Implementation of Laws and Policies that Authorize the Practice of EPT

Computer Skills

Qualitative Research Methods, Atlas.ti
SPSS 15.0, quantitative statistical analysis package
Web Ex and Zoom (virtual meeting software)
G-suite Google applications
Microsoft suite (Word, Excel, Publisher, PowerPoint)

Certificates | AWARDS | HONORS

Social Marketing and Qualitative Research Summer Institute
Colorado Medical Institution Review Board, Expedited Review
CITI Program Human Research Group and Social & Behavioral Research
Technology of Participation Strategic Planning, Institute of Cultural Affairs

RACHEL DAUBE

JSI Research & Training Institute, Inc., d.b.a. Community Health Institute
rachel.daube@jsi.org | 501 South Street, 2nd Floor, Bow, New Hampshire 03304

EDUCATION

KEENE STATE COLLEGE
Bachelor of Science, Political Science, 2017

SOUTHERN NEW HAMPSHIRE UNIVERSITY
Masters of Science, Data Analytics, 2024-present

CURRENT PROJECT EXPERIENCE

JSI Research & Training Institute, Inc. d/b/a **Community Health Institute**, Bow, New Hampshire
Analyst, November 2021 to present

HRSA Bureau of Primary Health Care Uniform Data System, *January 2026 to present*
Serves as an Analyst supporting quality control analysis and review of roughly 1,600 qualified health centers' serving vulnerable populations nationwide. Health center data is submitted to the Uniform Data System (UDS) each year; the Analyst role contributes to various reporting requirements and analysis/GIS requests and provides oversight to the UDS Technical Advisory Board.

Pathways for Maine, *January 2025 to present*
Serves as a Data Analyst for the Pathways for Maine reentry program, collecting reentry, overdose, diagnosis, and infraction data monthly from program partners to determine if jail-based and community-based resources are effective at reducing recidivism and overdose events/deaths.

Episcopal Health Foundation's CPA Evaluation, *January 2025 to present*
Serves as an Analyst and Evaluator, deploying and analyzing surveys to partner health sites, conducting in-person site visits to interview leadership teams for a qualitative analysis, and supporting data needs for the site visit reports.

NH Juvenile Court Diversion Network, *January 2025 to present*
Serves as an Analyst and Evaluator to support all data collection, cleaning, and analysis to evaluate program reach, efficacy, and fidelity to the model. Works within RedCAP to identify participant profiles and analyze survey data to assess program satisfaction and feedback.

Open Sky NH, *June 2024 to present*
Serves as an Analyst and Evaluator for the prison-based humanities program and Promising Practice, working directly with program staff and incarcerated participants to evaluate prosocial outcomes through qualitative data collection and analysis, design and implementation of a mindfulness questionnaire, and direct observation.

NH Home Visiting, *June 2024 to present*
Serves as an Analyst working with the NH Maternal, Infant, and Early Childhood Home Visiting program and the Comprehensive Family Support Services program to identify and support training needs, conduct various gap- and meta-analyses to identify service gaps or strengths, and respond to ad hoc analysis requests.

NH Adult Drug Court, *January 2023 to present*
Serves as an Analyst; provides support to elevate the use of evidence-based practices and principles; build capacity in risk and needs assessment; evaluate program fidelity to the national model; conduct an ORAS validation study; and has completed a recidivism study calculating 1- and 3- year recidivism rates as well as provided study presentation materials and coaching for statewide conferences.

Select Completed Project Experience

NH Community-Based Partnership for Comprehensive Tobacco Control, *Nov 2021 to Oct 2025*
Serves as an Analyst; responsible for analysis, reporting, and marketing tasks supporting the implementation and maintenance of a statewide multi-media marketing strategy for mass-reach communication interventions of a comprehensive tobacco prevention and cessation.

NH Tobacco Prevention and Cessation Program, *Nov 021 to Oct 2025*
Serves as an Analyst; responsible for analysis, reporting, and marketing tasks including developing and implementing a campaign for Tobacco Cessation eLearning Modules for QuitWorks-NH; participates in formative research and focus groups to reduce health disparities of those living with a mental health condition or illness who use tobacco; completes monthly reporting and campaign analysis.

Dartmouth Hitchcock Community Health Needs Assessment, *Aug 2023 to Dec 2025*
Serves as an Analyst; collects and compiles state health and population data, identifies resource gaps and systems strengths and weaknesses, analyzes and reports findings, and facilitates community-based focus groups and engagement sessions.

Manchester Health Department Community Health Needs Assessment, *January to September 2025*
Following the work completed in 2024 for the Health Department's Implementation Plan, serves as an Analyst responsible for needs assessment survey development, deployment, and analysis for Manchester residents and community leaders. Lead evaluator and writer for the final CHNA.

Maine CDC's Rethink Diabetes Campaign, *November 2021 to June 2025*
Serves as an Analyst and digital marketing specialist; responsible for marketing tasks including development and implementation of paid and organic marketing and communications plan; fulfilling reporting requirements, monthly budget reconciliation, campaign analysis and reporting.

NH Lives Well State Health Improvement Plan, *January 2024 to June 2024*
Serves as an Analyst; responsible for creating implementation plans and materials for community partners to elevate the identified priorities and strategies of the State Health Improvement Plan.

Santa Clara County Public Health Department Childhood Immunization, *January 2023 to July 2023*
Served as Digital Marketing Specialist; responsible for all aspects of developing, implementing, maintaining, and analyzing a paid digital media campaign for Santa Clara County, CA's "Another Part of Growing Up" vaccine campaign.

Concord Hospital Community Needs Assessment/Implementation Plan, *August 2022 to June 2023*
Serves as an Analyst; collects and compiles state health and population data, identifies resource gaps and systems strengths and weaknesses, analyzes and reports findings, and facilitates community-based focus groups and engagement sessions.

Skills

Google applications (Docs, Sheets, Forms); Microsoft Office Suite; Advanced Analytical Tools and Software (SPSS, R); Survey and analysis platforms (Alchemer, Qualtrics, SurveyMonkey); Social media management and advertising platforms (Meta, LinkedIn, YouTube, Canva, Yoast SEO, Hootsuite); Web content management systems (Wordpress, Weebly); Email management software (Hubspot, Constant Contact, Salesforce, MailChimp, SendInBlue); Search advertising platforms (Google Ads, Microsoft Ads [Bing]); Adobe Creative Suite (Premiere Pro, Photoshop).

Certifications

Hubspot CMS for Developers Certification
The Institute of Cultural Affairs, Technology of Participation Facilitation Methods

TANISHA LUTHRIA

JSI, 44 Farnsworth Street Boston, Massachusetts 02210 (617) 482-9485 *tanisha_luthria@jsi.com*

EDUCATION

JOHNS HOPKINS UNIVERSITY
Bachelor of Arts, Public Health Studies (Hons) & Biology (Double Major), 2024

EXPERIENCE

JSI Research & Training Institute Inc, Boston, Massachusetts
Program Coordinator, Nov 2024- present

NH Home Visiting Learning Hub, Nov 2024 to present
Serves as the Project Coordinator for the NH Home Visiting Learning Hub supporting Healthy Families America, Comprehensive Family Support Services, and Newborn Navigation home visiting agencies contracted by NH DHHS' Early Childhood, Family, and Community Health Section. Coordinate internal and external meetings, monthly newsletter, and assist with the development and implementation of trainings and technical assistance resources.

NH Student Assistance Network, Nov 2024 to present
The New Hampshire Student Assistance Network (The Network) develops, aligns, and promotes Student Assistance Programs (SAP) based on the nationally recognized, evidence-based Project SUCCESS. Serve as the Project Coordinator, managing internal and external meetings as well as website management.

MA Department of Public Health, Primary Care Office (PCO), Workforce/Provider Capacity, Nov 2024 to present
Serves as the Project Coordinator for the HPSA designation process for the state of Massachusetts. Coordinate client meetings, conduct feasibility assessments for new dental, mental health, and primary care HPSA and MUA/P designations.

PAST EXPERIENCE

Council on Foreign Relations, Washington DC
Global Health Intern, Feb 2024 - May 2024
Conducted literature reviews, background research and synthesized information in written summaries for policy-oriented projects on access and production of anti-obesity drugs in LMICs, life expectancy, AI and healthcare.

PATH, Washington, DC
Communications Intern, Programs & Innovation (P&I) [now Global Health Programs] Aug 2023 - Dec 2023
Conceptualized and designed the executive communication strategy focused on Social Media - LinkedIn & Threads
Developed communication materials and briefs for campaigns and global events, including UNGA78 & COP28
Managed the LinkedIn profile of the Chief of P&I, highlighting projects & disseminating research findings

Johns Hopkins University Bloomberg School of Public Health, Baltimore, MD
Research Assistant, Nov 2022 – Aug 2024
Qualitative researcher on a study analyzing social norms surrounding access to and use of Gender Resource Centers in rural India. Developed questionnaires for focus group discussions, analyzed transcripts after coding on Dedoose, authored manuscripts.

Center for Communication and Change – India, Remote (New Delhi, India)
Technical Support Consultant Intern, Apr 2023 - Sep 2023
Synthesized briefs on need, status and focus of projects which were used to facilitate discussion with government officials and implementing partners in 10 Indian cities to create public spaces that are infant-toddler-caregiver friendly. Conducted a literature review to analyze feasibility, developed prototypes of a digital intervention for health workers

PUBLICATIONS/PRESENTATIONS

Development and Implementation of a Flexible Yoga Therapy Protocol in the Group Acupuncture Therapy and Modified Yoga

(GAPYOGA) Pilot Study. Moonaz, S., **Luthria, T.**, Whitehead, A. M., Mah, D., & Teets, R. (2023).
International journal of yoga therapy, 33(2023), Article 13.
Maryland University of Integrative Health Research Symposium, Provost Award (2023)

Uncovering the role of social norms, the diffusion and adoption of Gender Resource Centers in India: a research protocol.
Tharmarajah, S., Ganjoo, R., Lapinski, M. K., Kuch, L., **Luthria, T.**, Bhaktaram, A., ... Rimal, R. (2024, February 8).
Open Science Framework, 2024

Exploration of gender norms in villages in Madhya Pradesh, India in the context of Gender Resource Centers
Johns Hopkins University Public Health Student Forum Research Symposium, 2024

Impact and Innovation: 2023 Year in Photos, Dec 2023
PATH Year End Article

COMPUTER SKILLS

Microsoft Office, Google Suite, Canva, Alchemer, Mailchimp, Survey Monkey, Wordpress, Dedoose.

FAITH BOUCHARD

JSI Research & Training Institute, Inc. *faith.bouchard@jsi.org*
501 South Street, 2nd Floor, Bow, NH 03304

EDUCATION

COLBY-SAWYER COLLEGE
Bachelor of Fine Arts in Graphic Design, Minor in Psychology, 2015 – Magna Cum Laude

EXPERIENCE

JSI Research & Training Institute, Inc., Bow, New Hampshire
Senior Graphic Designer 2015 to present

Population Health Management Initiative, *Graphic Designer*
The Population Health Management Initiative (PHMI) is a 3-year project with participation from 32 community health centers (CHCs) across eight counties in California, which collectively serve over one million patients. PHMI focuses on advancing CHC population health management capabilities to achieve improved population outcomes.

NH Department of Health and Human Services, NH Home Visiting Learning Hub, *Graphic Designer*
Serves as Graphic Designer of the NH Home Visiting Learning Hub supporting Healthy Families America, Comprehensive Family Support Services, Kinship Navigation, and Newborn Navigation home visiting agencies contracted by NH DHHS' Early Childhood, Family, and Community Health Section. Support implementation of continuous quality improvement plans for local implementing agencies, and promotional materials to promote utility of family support programs.

Medicaid to Schools Resource Center - New Hampshire, *Graphic Designer*
Supporting schools to receive reimbursement for medically necessary services provided in the school setting per Medicaid and Education regulations.

Denver Indian Health and Family Services (DIHFS), *Graphic Designer*
JSI conducted a clinic efficiency study of DIHFS, an Urban Indian Health Program. As part of the study, JSI trained DIHFS staff to observe clinic operations to build the program's capacity to conduct efficiency studies to improve the clinic's services. JSI developed training materials and tools, supported the observation data analysis and contributed to clinic recommendations.

EPA Region 8 Thriving Communities, *Graphic Designer*
The Environmental Protection Agency (EPA), the Mountain and Plains Environmental Justice (MAP EJ) Grants Hub aims to support thriving communities in 28 federally recognized Tribes, and Colorado, Montana, North Dakota, South Dakota, Wyoming, and Utah.

New Hampshire Immunization Program, *Graphic Designer*
Supported the development of a health marketing campaign that identified priority audiences, best-practice outreach strategies, and effective educational outreach materials to advance the understanding of the health benefits of vaccines and immunizations and increase NH immunization rates. Designed marketing material and event collateral for NH's yearly Immunization Conference.

New Hampshire Healthy Homes and Lead Poisoning Prevention Program, *Project Manager and Graphic Designer*
JSI supported efforts to reduce childhood lead poisoning throughout the State of New Hampshire and in New England by producing diverse educational materials, providing social media marketing and outreach, and logistical support for training and conferences geared toward health providers, parents, lead professionals, and contractors.

Massachusetts Sexual and Reproductive Health Program, *Graphic Designer*
The MA SRH program's mission is to support health promotion, risk reduction, disease prevention efforts, improve sexual health and well-being for all, not only to prevent negative health outcomes, but also to promote positive, healthy relationships and sexuality. Designed a new logo for the MA SRH Training Center and supported the JSI web development team in creating a website and resources for the MA Sexual and Reproductive Health Program.

New Hampshire Home Visiting Program Supports and Services, *Graphic Designer*
The NH Home Visiting Program and its sub-recipient agencies implemented the Healthy Families America model, funded by

the federal Maternal, Infant, and Early Childhood Home Visiting Program (MIECHV). Provided support for the facilitation of statewide training events for the HFA home visitors and assisted with the development of a statewide needs assessment.

New Hampshire Maternal and Child Health – Healthy Families America Marketing Campaign, *Graphic Designer*
A statewide recruitment campaign focused on low-income and at-risk women of childbearing age who were currently pregnant or may become pregnant. The research utilized online survey software to determine knowledge, attitudes, and beliefs around the visiting nurse program, Healthy Families America, to increase participation in the program through social media engagement, as well as in-depth Key Informant Interviews with providers.

New Hampshire Center for Excellence Addressing Alcohol and Other Drugs, *Graphic Designer*
The NH Center for Excellence Addressing Alcohol and Other Drugs is a statewide technical assistance and resource center for the implementation of evidence-based interventions in substance abuse services. JSI provides technical assistance in the selection and implementation of evidence-based practices in the prevention of, treatment of, and recovery from alcohol and other drug disorders.

Chronic Disease Conditions, *Graphic Designer*
The Chronic Disease Condition Program had an overarching goal of improving access to and participation in American Diabetes Association/American Association of Diabetes Educators accredited Diabetes Self-Management Education and Support programs in underserved areas.

New Hampshire Young Adult Binge Drinking Prevention Messaging Campaign, *Graphic Designer*
The Binge-Free 603 campaign increased awareness among the young adult population (ages 18–25 years) of the risks of underage, high-risk alcohol use (i.e., binge drinking) and reduced the misuse of prescription drugs such as illicit opioids. The campaigns involved the theories of social marketing and behavior change, social media, traditional media, and youth leadership, peer group or peer network identification and validation in NH, and video production.

Fenway Health, *Graphic Designer*
The Fenway Health Toolkit project developed 11 toolkits for the Evidence-Informed Interventions Coordinating Center for Technical Assistance (E2i CCTA) through its funding from the Health Resources and Services Administration.

Technical Skills

Adobe Creative Suite (Adobe InDesign, Illustrator, Photoshop, Premiere Pro)
Vyond Animated Videos
Canva
Constant Contact
Microsoft Office Suite
Google Suite
AirTable
Asana

Communication & Project Management Skills

Identity & Branding Design
Logo Development
Typography
Publication Design
Advertisement Design
Packaging Design
Creative Development
Mood Boards
Visual Data Representation
Infographics
Team Management
Budget Management
Critical Thinking
Meeting Facilitation
Product Management