

F.M. KIRBY FOUNDATION SOLICITATION EVALUATION FORM

DATE: August 27, 2019

REQUEST DATE: August 9, 2019

Last grant acknowledgement: Yes

Program Area: Human Services

APPLICANT:

JBWS (formerly known as Jersey Battered Women's Service)

PO Box 1437

Morristown, NJ 07962

CONTACT: Ms. Diane Williams, MSW, LCWS, President and CEO

PHONE: (973) 267-7520 x 120

PAYEE OTHER THAN ADDRESSEE: Jersey Battered Women's Service

AMOUNT REQUESTED: \$90,000 **NATURE OF REQUEST:** For general operating support

GRANT HISTORY

LAST GRANT DATE: 12/10/2018 **LAST GRANT AMOUNT:** \$85,000 **AFS DATE:** 4/13/2018

2014	\$95,000	9/15/2014	For: One-time support of the Yellow Card campaign-\$5,000
2015	\$10,000	6/30/2015	In honor of Sandra Brown Sherman
2015	\$90,000	9/14/2015	
2016	\$85,000	9/12/2016	
2017	\$85,000	9/15/2017	
2018	\$85,000	12/10/2018	

DLK COMMENTS: See financial analysis.

JFT COMMENTS: Jersey Battered Women's Service has officially changed its name to JBWS with a tagline of Safety, Support and Solutions for Abuse. The genesis of the change was "Victims are not only battered but suffer from verbal, emotional abuse and more, and men can be victims of abuse and benefit from the services of JBWS."

While service statistics decreased in 2018 (many additional stats can be found in their Annual Report), they still remain alarmingly high. There's no mention of Child & Adolescent Services, which include supportive counseling and trauma-focused cognitive behavioral therapy, in the request although the services are listed on their website (and in the Annual Report) which has been completely revamped and is significantly better than their old site.

A challenge noted in the strategic planning objectives/accomplishments is the advocacy for holding batterers accountable for their actions by admission into the ACT program, a comprehensive (court mandated), 26-week group curriculum for men and 20-week curriculum for women. "Judges are asked to wrap up cases within three months. This makes ACT directly contrary to meeting that expectation." JBWS was asked to reduce the time allotted. Their response was to present "research that supports positive outcomes if perpetrators are involved for 26 weeks, with fewer weeks resulting in little behavior change." Fewer mandates result in increased harmful behavior. JBWS and the courts are at an impasse. Also noted in the plan is an objective to admit males and LGBTQ+ into the residential program. It's a work in progress.

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I plan to visit with Diane, who I met shortly after her hiring in 2018, in the not too distant future and learn firsthand undertakings after her first year of service; I do not want to hold up this request for that meeting. I recommend the budgeted \$85K for general operating support.

SDK COMMENTS: I like the Strategic Plan pillar approach A-F. The method of looking at results and “forward” looking is a rubric worth passing along to other grantee partners as a model.

Strong Board members. This would be a good one for JFT to request JJK to join her on a site visit.

FM KIRBY FOUNDATION
Financial Statement Analysis

Grantee Name:	JBWS (Jersey Battered Women's Service)	Date:	8/19/2019
Prepared By:	DLK		
Grant Request Amt.	\$ 90,000	Type of Financial Report Submitted	Audit
Budgeted Amt.	\$ 85,000	Period Covered in Financial Report	12/31/2018
Audit Firm	Nisivoccia LLP	Date of Report Issuance	4/26/2019
Opinion	Present fairly		
Basis of Acctg.	GAAP		

Current Ratio (Liquidity Ratio/Working Capital Ratio)	7.70	Amount of Unrestricted Net Assets (Operating Reserve)	\$ 4,984,511
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Note: A current ratio measures an organization's ability to pay short-term and long-term obligations. The higher the ratio, the more capable the organization is of paying its obligations. A ratio under 1 indicates that the organization's liabilities are greater than its assets.

Allocation of Functional Expenses	12/31/2018	%	Must Read Financial Statement Notes
A. Program Service Expenses	\$ 3,630,158	78%	Ideally program expenses should be at least 70% of total budget.
B. Management and General	\$ 461,360	10%	
C. Fundraising	\$ 591,589	13%	
D. Total Expenses	\$ 4,683,107	100%	

Comments/ Notes:

Budget: The 2019 budget is projecting a \$321K operating deficit vs a \$89K surplus for 2018. Total revenue and support is budgeted for a 5% decrease (\$260K), with the decline occurring equally in contributions and government funding. The F.M. Kirby grant for 2018 accounted for 25% of JBWS's Foundation and Private Grants total. Total expenses are budgeted to increase by \$151K (3%), with personnel expenses making up most of the increase (\$145K).

Audit: There was a \$444K deficit as of December 31, 2018. All revenue streams had growth in 2018. The decline was strictly due to market valuation declines of JBWS investments (\$625K unrealized losses in 2018 vs \$315K unrealized gains in 2017). Expenses were flat to 2017. Approximately 47% of the funding for JBWS came from federal (22%), state (23%) and county (2%) funding. JBWS had a net decrease in cash and cash equivalents of \$119K.

JBWS had investments totaling \$5.3M as of December 31, 2018, of which \$4.7M were endowment-related. JBWS has a \$500K line of credit which expires October 1, 2021. There were no borrowings in 2018, nor were there any amounts outstanding as of December 31, 2018. The audit identified no deficiencies in internal control that would be considered material weaknesses. There were no instances of noncompliance or other matters that are required to be reported under Government Auditing Standards. The Center complied with the types of compliance required by each of its major federal and state programs for 2018 and qualified as a low-risk auditee. Overall, there were no red flags as a result of my review.

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DISPOSITION:

- Rejection
- Hold for review on/about:
- Approval for: **\$85,000**
- Hold for Board Review
- Insert Information:
- Other:

Initials: *rad*

Date: 8/27/19

Check #: _____

Date: _____