



SOAR

Management Consulting Group

Helping
Nonprofits
Thrive



Annual Report FY 2021

www.soarmcg.org

SOAR Mission

Helping Nonprofits Thrive

Our mission is to help nonprofits in the Greater Boston area improve their community impact by providing collaborative, results-oriented pro bono management consulting.

What we do

SOAR provides management consulting services to small and medium sized nonprofits in the Greater Boston area by engaging teams of accomplished professionals with diverse expertise.

We bring value to:

- ◆ Nonprofits who are able to address mission critical issues in a cost-effective and timely way;
- ◆ Experienced management professionals interested in using their skills to give back to their communities; and
- ◆ The philanthropic community who can refer clients to SOAR knowing SOAR can strengthen the capacity and sustainability of the organizations they fund.

A Message from our Co-Presidents on **SOAR's 15th Anniversary**

Dear Friends,

As we reflect on this past year, we feel a sense of gratitude and optimism. SOAR's consultant community adapted quickly to the pandemic and its restrictions - seamlessly transitioning our work with clients and colleagues virtually. SOAR consulting teams responded with care and creativity to the unfolding and uncertain circumstances of their nonprofit clients, recalibrating consulting engagements to meet the moment and emergent organizational needs. And we stayed connected to each other, continuing to learn and hone our skills through virtual professional development events.

Not only did we adapt, we grew. Through strategic outreach efforts and our growing reputation, SOAR consultant teams worked with 31 nonprofits, an increase over past years. We expanded our geographic reach throughout greater Boston, with projects in Cambridge, Somerville, Jamaica Plain, Boston, Framingham and Brockton among others. We recruited 15 new consultants to our volunteer ranks, transitioning the entirety of our eight-session SOAR Training in best practices to a virtual format.

In response to the racial inequities thrown into sharp relief this past year, SOAR affirmed its commitment to racial and social justice beginning with a Diversity, Equity, and Inclusion statement. SOAR formed a Racial Equity committee to spearhead learning and conversation among consultants through information sharing and professional development events. There is still much to do to fully incorporate the organizational values of diversity, equity, and inclusion in our work, but we have begun.

None of this is possible without our exceptional consultant community. Not only do SOAR consultants commit their energy and expertise to their nonprofit clients, but they keep SOAR thriving through volunteer committee work, Board service, and through their generous financial support each year.

This year we will be celebrating SOAR's 15th anniversary and our collective accomplishments over this time. As we look to the future, we feel optimistic that SOAR will continue to expand its reach and impact for our volunteer consultants and for the nonprofits with whom we work throughout greater Boston.



Lexi Turner
Lexi Turner
Co-President



Janet Wertheimer
Janet Wertheimer
Co-President

*“Not only did we adapt,
we grew.”*

SOAR Responds During the Pandemic to Serve Thirty-One Clients



Who We Are Helping

SOAR consultants have engaged with 31 clients in the Greater Boston area over the course of this fiscal year. In response to the 2020 pandemic, SOAR quickly pivoted to remote operations and communications with clients, allowing us to complete longer term projects with 13 organizations (listed below). SOAR made substantial progress with 18 other organizations, including assisting a handful of clients with shorter term challenges to help them adapt and respond to acute pandemic impacts.

CLIENT

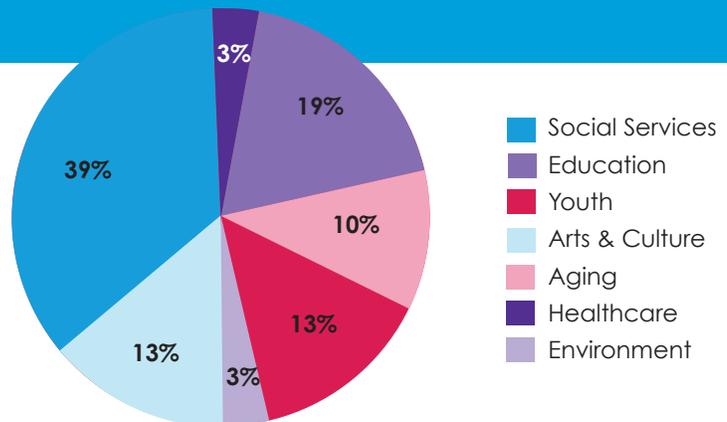
East Boston Social Center
 Elizabeth Peabody House
 Friends of Newton Cemetery
 Girls Rock Campaign Boston
 Historic Newton
 Little Brothers - Friends of the Elderly
 Margaret Fuller House
 Massachusetts Health Officers Association
 MetroWest Legal Services
 Newton at Home
 PAIR (Political Asylum/Immigration Representation) Project
 The Wily Network
 YES (Youth Enrichment Services)

LOCATION

Boston
 Somerville
 Newton
 Jamaica Plain
 Newton
 Boston
 Cambridge
 Framingham
 Framingham
 Newton
 Boston
 West Roxbury
 Boston

ENGAGEMENT

Feasibility Study
 Strategic Plan
 Strategic Plan
 Board Development
 Strategic Plan
 Strategic Plan
 Executive Coaching
 HR Policies & Procedures
 Strategic Plan
 Business Planning
 Organizational Analysis
 Expansion Plan
 Board Development



FY 2021 SOAR Engagements Across Sectors



“A Modern Nonprofit with Historical Roots”

One of the first settlement houses in Boston, the **Elizabeth Peabody House (EPH)** empowers families with the tools they need to thrive, through early childhood education, youth development, and family assistance.

Operating budget: \$1.2 M, 15 staff, 8 Board members

Impact: Provides pre-school, after school, and summer camp to 162 children from low- and middle-income families in Somerville and adjacent communities. EPH fosters a thriving multi-racial and ethnic community and is a recognized leader in social and emotional learning in greater Boston.

SOAR's impact in action:

Under the leadership of new Executive Director, Kretcha Roldan, EPH was looking to build on its core programmatic strengths and community reputation. EPH wanted to rejuvenate and grow its fundraising, and prioritize needed investments in staffing and program space (an iconic and historic building owned by EPH) to allow for expansion. EPH engaged SOAR to develop a three-year strategic plan. This was in January 2020.

In March 2020, fully immersed in stakeholder interviews and a SWOT analysis with staff and the Board, COVID struck. As a childcare provider, EPH and the families it supports were profoundly impacted. EPH and SOAR agreed to a brief hiatus in June, which allowed EPH to focus on contingency plans, check in on families, and successfully apply for PPP. During this hiatus, the SOAR team revised the strategic planning scope to focus on three mission-critical strategic priorities identified during the initial planning process. Once EPH was ready to resume in September, SOAR worked with staff leadership and the Board to develop implementation plans for these three priorities, including successfully launching a **125th anniversary celebration** and capital campaign in March 2021.

Testimonial from Kretcha Roldan, Executive Director

“On behalf of EPH board members, staff and families we want to express our deepest gratitude for your true commitment in making sure we had a road map that could direct our immediate goals for this year. We know that we have a long journey ahead of us, but we are grateful for the time and support that you offered.”

Spotlight on SOAR Consultants

“It’s great to share experiences with the SOAR community, work on a variety of projects, and also have professional development opportunities.”

The SOAR consultant team is expanding

SOAR currently has more than 75 consultants available to serve nonprofit clients. We have expertise in areas critical to the sustainability and growth of nonprofits, including Strategic, Operational, and Business planning, Finance, Marketing, and Governance. Our bench is deep and our approaches are both innovative and practical.

SOAR welcomes a new group of consultants every Spring and Fall to join our organization and participate in SOAR Training, which includes eight sessions focused on best practices for consulting to nonprofit organizations. In fiscal year 2021, 15 new consultants joined the SOAR team bringing additional expertise related to healthcare, technology, digital strategies, communications and marketing.

SOAR consultants are giving back and getting so much in return. SOAR recently concluded an organization “satisfaction” survey, which shows that consultants are both enthusiastic about their consulting assignments and excited about building new relationships within SOAR’s vibrant and inclusive community.

“I like the stimulation of engaging in interesting and challenging projects outside of the work environment and to work with interesting people to benefit worthwhile organizations”



Spotlight on **New Consultants**

SOAR consultants bring experience from successful careers in the private, nonprofit, and public sectors.



LORI BERRY

I am excited to be a SOAR consultant. I was impressed with the SOAR orientation and training and am awed by the skills and accomplishments of others in my group. I recently joined SOAR's Racial Equity Committee because so many of the non-profit agencies that are requesting our support serve communities of color.

My background is primarily in community health. I served as the CEO of the Lynn Community Health Center for 21 years. My team and I were able to add many new health and mental health services to address the specific needs of a racially diverse, low income and underserved community in collaboration with other nonprofit agencies in the community.

I have served as the VP of the Board of Health Care for All. I have also served on a number of other nonprofit boards, including the Massachusetts League of Community Health Centers, Capital Link, Neighborhood Health Plan, Community Care Cooperative, Elder Service Plan of the North Shore (Element Care). I recently joined the board of the Boston Scottish Fiddle Club.

I received my MPH at Harvard University, MSW at the University of Maryland, BA at the University of California at Berkeley, and an honorary doctorate from Salem State University.



ED CAMPBELL

I was made aware of SOAR through a former colleague, who is a SOAR consultant. The SOAR Training provided me a deeper understanding of non-profit organizational structure and challenges, along with the SOAR team-oriented approach to client engagement. Recently retired, I see SOAR as an opportunity to stay active and engaged by using my corporate business skills to assist non-profits in meeting their goals.

I have four decades of experience in the High Technology Research & Development (R&D) industry exclusively with Raytheon BBN Technologies (formerly Bolt Beranek & Newman) in Cambridge MA. My roles included Software Engineer, Program Manager, Department Manager, Program Director, Vice President, Executive Vice President/COO, and President. My management experience extends from the program level, through the full profit & loss responsibility for a 700-person organization with sales of \$200M+.

My non-profit experience has been as a 10-year member of the Board of the Greater Boston Executive Program (GBEP) at the Sloan School of Management at MIT.

I graduated from Northeastern University with a Bachelor's degree in Computer Technology. I am also a graduate of the Greater Boston Executive Program at the MIT Sloan School and have completed corporate leadership programs within GTE and Raytheon (both acquired BBN).

DIVERSITY EQUITY INCLUSION

Professional Development addresses Diversity, Equity, and Inclusion

SOAR consultants are dedicated learners who participate in a series of Professional Development workshops throughout the year to acquire new skills and share best practices. This year, topics addressed skill development in **Social Media** and **Executive Coaching**, as well as debriefs about specific project challenges, and the tools and approaches used to meet those challenges.

In addition, SOAR pledged its commitment this year to stand with others for equity and justice by denouncing racism, intolerance, and exclusion. SOAR consultants have access to a curated set of resources they can use to examine internal biases and to inform our work with clients. In addition, SOAR presented the first of future Professional Development workshops to deepen our understanding of the policies and practices that contribute to racial injustice. This year's workshop **Housing Segregation**, discussed the legacy of neighborhood segregation and the impact it continues to have on the communities we serve.



Spotlight on SOAR Contributions



Fundraising

SOAR is primarily supported through donations from our consultant community. In FY 2021, SOAR consultants once again came through with the financial support needed to ensure SOAR's continued and strengthened operations. Seventy percent of consultants made a gift this year, enabling SOAR to reach its annual financial goal.

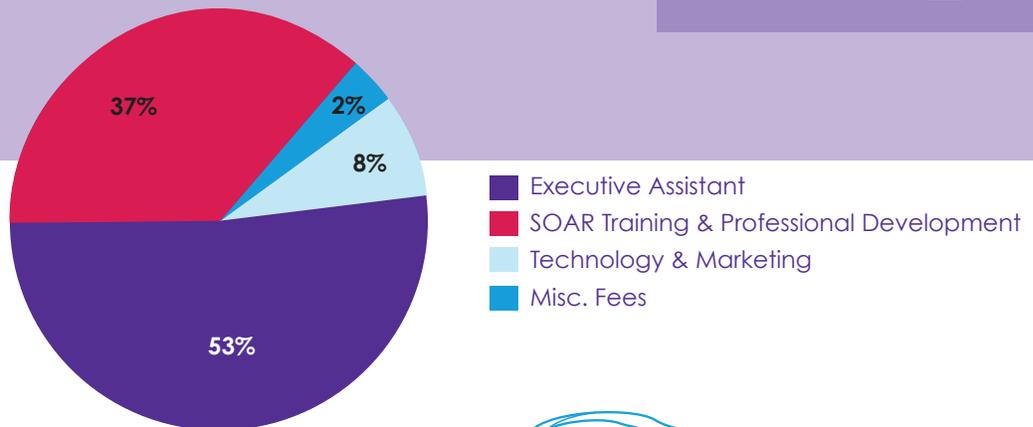
The generosity of consultants also helped us maintain a robust program to recruit and train new consultants and provide Professional Development opportunities to all consultants.

Our deepest appreciation to all of the SOAR consultants and clients who gave generously this year.

SOAR consultants have provided over \$1.5 million of consulting services to clients this past year*

* Volunteer consultant hours valued at a rate of \$175 per hour

FY 2021 SOAR Operating Expenses



SOAR's Operating Budget for FY 2021 was \$27,000.



A big THANK YOU to SOAR's dedicated Board of Directors

In addition to their strategic leadership, SOAR Board members also serve as liaisons to operating committees, and many are members of project teams providing consultations to client organizations.

Lexi Turner, Co-President

Janet Wertheimer, Co-President

Michael McConnell, Secretary

Jim Welch, Treasurer

Barbara Buchner

Don Buchholtz

Simon Dolan

Janice Fineman

Susan Glazer

Anne Meyers

Ted Tabloski