



SOAR

Management Consulting Group

Helping Non-profits THRIVE

Annual Report
FY 2023

www.soarmcg.org

The background of the slide features a repeating pattern of stylized sailboats in a light purple color. The sailboats are composed of simple geometric shapes like triangles and lines, creating a modern, abstract look. They are scattered across the entire page, with some appearing larger and more prominent than others.

SOAR'S mission

Helping Non-profits Thrive

Our mission is to help non-profits 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 non-profits in the Greater Boston area by engaging teams of accomplished professionals with diverse expertise.

We bring value to:

- ◆ Non-profits 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.

Promoting Equity To Strengthen Our Communities

SOAR Management Consulting Group takes pride in our commitment to racial and social justice and the core values of diversity, equity, and inclusion. We believe that embracing these organizational values is a way to intentionally create a stronger consultant community and improve our impact with the non-profits with whom we work.

A Message from the SOAR

President

dear
friends



Karen Leibold
President

I am happy to share with you that SOAR continues to thrive and to make a difference in the communities we serve. This year SOAR consultants were engaged with approximately 30 non-profits in the Greater Boston area. This includes long term projects, as well as our expanded service to assist clients with an immediate need on a short-term basis. Consultants with specific subject matter expertise have guided clients, in one or two meetings, to address specific short-term issues such as a recruitment process for Board members or outlining a Development strategy.

SOAR continues to attract highly skilled professionals. During this fiscal year, we trained two new consultant classes on SOAR best practices to help them leverage their expertise in areas such as higher education, healthcare, marketing and technology. Our new consultants are already making a difference – engaged on project teams as well as internal SOAR Committees.

During the past year, SOAR has expanded our focus on diversity, equity and inclusion. In addition to increasing our efforts in the recruitment of a more diverse community of consultants, we continue to offer professional development events focused on DEI topics such as the geographic roots of poverty and inequity in Greater Boston and systemic racism. We believe that by deepening our understanding of these issues and by continuing to create a broader consultant community, we will enhance our relationship with and impact on the clients we serve.

This year we've undertaken Strategic Planning to help SOAR better serve non-profit clients who want to strengthen their community impact. We've received input from clients, consultants, and a network of other non-profit organizations to ensure that SOAR's new initiatives will address the needs of all stakeholders.

"I'm very excited about the commitment of SOAR's board of directors to use the strategic planning process to explore and implement new ways of serving our non-profit clients, and continuing to provide a rewarding and enriching experience for our consultants."

—Ed Hudson
SOAR Vice President
Chair, Strategic Planning Committee

Lastly, we have embarked on a new strategic planning process to help SOAR identify and prioritize initiatives to help our clients thrive. This is a very exciting time for us and we look forward to continuing to serve non-profits in the Greater Boston area. We are so proud of our past accomplishments, and look forward to new opportunities.

Sincerely yours,

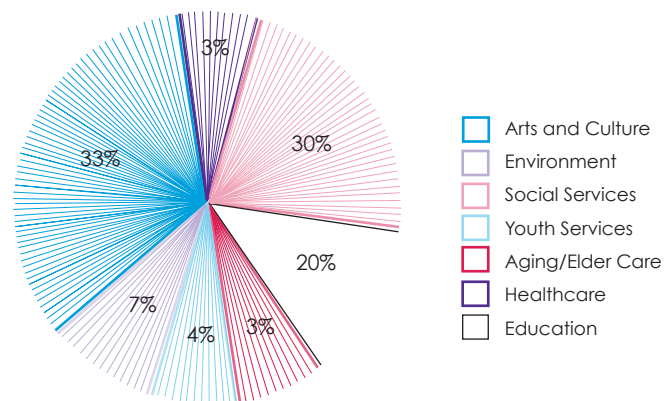
Karen Leibold

COMMUNITY

SOAR Responds to 28 Non-Profits Facing Ongoing Economic and Operational Challenges

SOAR consultants have engaged with 28 clients in the Greater Boston area over the course of this fiscal year. SOAR consultations continue to help organizations address their toughest challenges, some related to human resource planning, staffing shortages, Board development, and funding needs.

SOAR has completed projects with 16 organizations (listed below) and has assisted a handful of clients with shorter term issues to help them adapt and respond to environmental and economic impacts.



FY 2023 SOAR Engagements Across Sectors

who we help

CLIENT (completed projects)

LOCATION

ENGAGEMENT

African Bridge Network	Newton	Strategic Plan and Board Development
ātac: downtown arts + music (Amazing Things Arts Center)	Framingham	Strategic Plan
Boston Raising Powerful Musicians	Jamaica Plain	Human Resources
Boston Singers' Resource	Boston	Needs Assessment
Cambridge Women's Center	Cambridge	Strategic Plan
Jean Appolon Expressions	Cambridge	Strategic Plan
Library Land Project	Medway	Feasibility Study
Lynn Family and Children's Services	Lynn	Strategic Plan
Margaret Fuller Neighborhood House	Somerville	Human Resources
MetroWest Legal Services	Framingham	Needs Assessment
Natick Community Organic Farm	Natick	Strategic Plan
Newton Food Pantry	Newton	Strategic Plan
Northeast Energy Efficiency Partnerships	Lexington	Strategic Plan
Programs for People	Framingham	Business Plan
Sharon Cooperative School, Inc	Sharon	Strategic Plan
ThinkGive	Concord	Strategic Plan and Board Development

Client

Jean Appolon Expressions



SOAR's Client Becomes an Anchor in the Revitalized Nubian Square Arts Community



In 2013, Haitian Choreographer Jean Appolon took the first step to fulfilling his life-long dream when he founded **Jean Appolon Expressions (JAE)**, a contemporary dance company deeply rooted in Haitian-folkloric culture. For the past decade, he has had a growing impact on the arts scene in Boston – home to one of the largest populations of Haitian immigrants in the country. JAE's mission is to celebrate, nurture, and empower a global community through professional dance performances, community classes, and educational workshops. It aims to foster healing and the joy of movement among people of all ages, abilities, and backgrounds. In addition to performing and teaching in the Boston metropolitan area, each year JAE holds a free summer dance institute in Haiti and the Dominican Republic for young aspiring dancers. In the ten years since Appolon founded JAE, the non-profit has grown to serve more than 3,500 community members.

SOAR Impact: SOAR became engaged with JAE in the Spring of 2021 during a period of new opportunity, as the dance company was about to receive a major grant from the Barr Foundation. This was an opportune time to take a fresh look at JAE's mission, strategic

direction, and organizational structure. Also, during this period Haiti suffered numerous tragic events, including the assassination of its President, a devastating earthquake, international kidnappings, a rise in gang violence, and escalating political unrest. These events – and Haiti's long history of oppression and trauma -- directly affected the JAE community and influenced our conversations.

During a multi-phase engagement spanning over two years, SOAR facilitated the development of a short-term "roadmap" which helped to guide the organization through this period of growth. When an opportunity for permanent space in Nubian Square presented itself, JAE asked SOAR for help in making this a reality. SOAR worked with JAE to pursue new funding sources, identify project management support, expand the Board, and identify specific needs for new staff. As a result, JAE has secured over \$1 million in multi-year funding in support of this move. On September 1, 2023, JAE signed a long-term lease for its first ever permanent "home." Ready and committed to move into Nubian Square in the Fall of 2024, JAE is well-positioned to expand its staffing and program offerings even further to meet the growing demand from BIPOC communities for arts programs which promote health and healing.

"SOAR has been instrumental in helping JAE move to the next level of maturity as an organization. The SOAR team, with each member bringing complementary skills to the project, helped us to navigate a path leading to new opportunities and greater impact. I'm proud to say that we are ready for this next chapter and incredibly grateful to SOAR for helping us get here."

—Meghan McGrath, JAE Executive Director



our Spotlight

Consultants

“ātac worked with a SOAR team to help us define our mission and values. The SOAR team helped us navigate tough questions and conversations, creating the space required to find consensus and clarity amongst our board and staff. This process helped us better understand our growth and goals for our organization and community. The result was a clarified mission and an expanded purpose that has catalyzed our opportunities, partnerships, and direction.”

—Jannelle Codianni, Executive Director, ātac

Over 80 SOAR consultants bring diverse experience. About half have had long careers in the non-profit or public sectors and half have deep experience in the private sector.



Joseph Frolkis

Having spent my entire career in the non-profit world of healthcare, I saw SOAR as a way to give back to other non-profit organizations and the often-vulnerable populations that they serve. I was also attracted by the opportunity to make new connections with like-minded volunteers at SOAR, and I have been consistently impressed by both the skills and the collegiality of my fellow consultants who bring talent, perspective, AND humility to our project (not a frequent combination in academic medicine!) In addition to direct consultation with non-profits, I serve on the SOAR Strategic Planning Committee and am optimistic about its future evolution.

In 2021, I retired as President and CEO of the New England Quality Care Alliance (NEQCA), the network of 1800 physicians affiliated with Tufts Medical Center. I received a Ph.D in Clinical Psychology from Boston University, and an M.D. from Case Western Reserve University. Past leadership positions include: Chief of Primary Care, Chief of General Medicine and Geriatrics, and President and CEO at medical centers in Cleveland, Connecticut and Boston. I have helped design and implement programs in Leadership Development at both Brigham and Women's and NEQCA.



Jennifer Moran

I am an attorney with a specialized focus in corporate law and financial services. I worked at Fidelity Investments for 27 years in various roles including risk management, legal and business management. I enjoy leading teams, providing advice and getting things done! I ran various strategic initiatives for the company bringing together my risk, legal and business background. Most importantly I enjoyed building relationships and helping the business succeed. I graduated from Providence College and Suffolk Law School.

Since joining SOAR in 2021, I have worked on three consulting engagements in which I was able to employ my skills in Strategic Planning, Board Development, and conducting online surveys and focus groups to inform a Needs Assessment. In addition, I recently joined the SOAR Board of Directors, and chair the Operational Excellence Committee, which guides SOAR to continuously improve by adopting best practices and assessing the quality and impact of its consultations with non-profits. I am currently a member of SOAR's Strategic Planning Committee.

**SOAR welcomed
14 new consultants
to it's team this
past year!**

DEI

PROFESSIONAL DEVELOPMENT

SOAR Consultants Continue to Learn About and Advance Racial Equity

Thanks to a \$5,000 grant from [The Sudbury Foundation](#), SOAR engaged the [Racial Equity Institute \(REI\)](#) to provide a 3-hour training for all SOAR Board members and consultants. REI uses a Groundwater metaphor and data visualization to help practitioners see the present-day impact of racial inequity across systems - child welfare, education, health, and employment - and understand that these inequities persist even when controlling for socio-economic differences. The power of the presentation is in the data that helps participants move beyond the idea of individual prejudice and bias, revealing the systemic nature of persistent racial inequities.

SOAR uses this metaphor and data in its training for new consultants every Fall and Spring, and was thrilled to bring a more intensive training to all SOAR consultants this year. This type of training is vital to SOAR's ongoing efforts to promote learning and dialogue on issues of racial equity, diversity and inclusion, integral to our consulting work with non-profits.



“If socio-economic difference explained the racial inequity, controlling for socio-economic status would eliminate it; it does not. Scholars and practitioners have demonstrated this over and over across multiple systems.”

FUNDRAISING

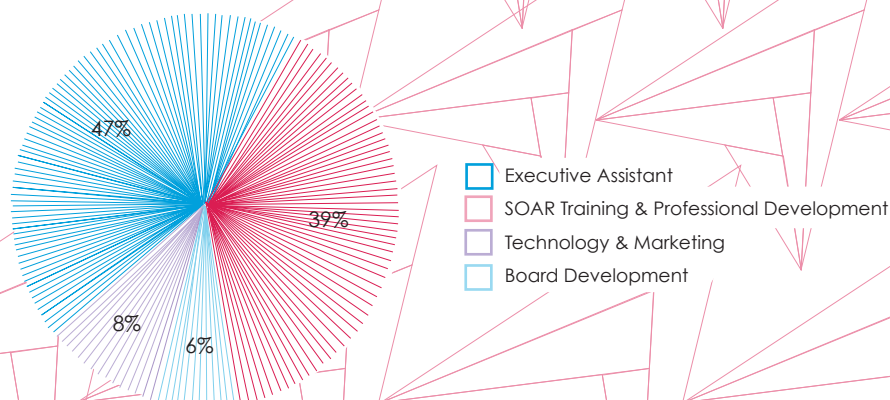
SOAR Broadens its Funding Sources, while Delivering over \$2 Million in Pro Bono Services to its Clients!*

SOAR's Development Committee is extremely proud to have raised over \$32,000 this fiscal year!

Since its inception, SOAR has relied on the generosity of its consultants to cover the costs of operations. Fiscal year 2023 expanded our reach, with clients participating in SOAR's fundraising to a greater level and with an exciting grant from The Sudbury Foundation. The Sudbury Foundation's \$5,000 grant allowed SOAR to provide additional training to consultants from the Racial Equity Institute, broadening consultants' base of knowledge of some of the many issues of racial inequity. We look forward to working on additional grants to further consultants' professional development! Two grants from grateful clients (\$5,000 from the League School of Greater Boston and \$300 from the Sharon Preschool Cooperative) added \$5,300 to our coffers. Our consultants, in addition to the pro bono services that they provide to clients, are still the main source of funding for SOAR. We cannot thank them enough for their time, skills and generosity, which are critical to SOAR growing as a vibrant organization servicing the vulnerable populations in the Greater Boston area.

In the new fiscal year, we will once again look to our consultants for support. And, we will be exploring new ways to raise funds for SOAR as we begin to execute our new strategic plan! Stay tuned ...

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



FY 2023 SOAR Operating Expenses



THANK YOU

SOAR Board of Directors

SOAR Board members serve as liaisons to other operating committees, and many are members of project teams providing consultations to client organizations.

SOAR Board of Directors FY 2024

Board Officers

Karen Leibold, President
Ed Hudson, Vice President
Barbara Buchner, Secretary
Joan Shea, Treasurer

Members

Don Buchholtz
Michael McConnell
Anne Meyers
Kathy Millstein

Jen Moran
Megan Secatore
Janet Wertheimer