



2019 ANNUAL REPORT



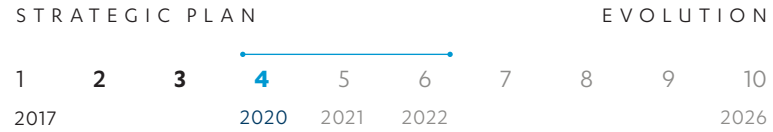
BRINGING OUR

P L A N

TO LIFE



It all starts with a **PLAN**



Any organization with the lofty ambitions of SOAR365 needs more than a big heart, big ideas and big dreams. (Although we have those qualities in abundance.) It also needs a big plan. A big Strategic Plan, to be exact. And that plan is driven by our vision—which is made up of our mission, our core values and, while we’re thinking big, our Big Hairy Audacious Goal. For short we call it our BHAG.

By 2025, SOAR365 will be the most respected human services agency in Virginia, recognized for providing the highest-quality services for individuals with disabilities, regardless of their ability to pay.



As a result, we will have grown to serve over 3,000 individuals with disabilities.

The road map to meet our BHAG is a three-year Strategic Plan we initially developed in 2016. This bold, detailed and uncompromising plan looked at every aspect of the organization, from our programming and staffing levels to our compliance department and IT services, with Best-in-Class as our constant measure. Every year we review our progress, then we update the plan for the next three years.

This annual report is our way of showing you just how powerful our Strategic Plan is and, more importantly, how strongly positioned we are for the future.

“SOAR365’s Strategic Plan is a well-thought-out and, just as importantly, a realistic document. They’ve come to grips with exactly what they’ve got to do to get to exactly where they want to be. Because of their commitment to the plan, SOAR365 is being transformed.”

—Wally Stettinius \ Former chair & CEO of Cadmus Communications, visiting lecturer at UVA’s Darden School of Business and faculty member at VCU’s School of Business.

Our biggest, hairiest accomplishments. So far.

- 2016:** Renamed and rebranded the organization
- 2016:** Transformed the culture to reflect our mission, core values and our BHAG, with Best-in-Class as our constant measure
- 2016:** Made, in total, almost \$2.3 million in strategic investments while maintaining a very stable and secure financial position
- 2017:** Opened the Staples Mills site, an unplanned initiative that was achieved in record time
- 2017:** Increased revenues in our profitable Facilities Management Services by 50% or \$3 million in new revenues (that means more money for our Human Services programs)
- 2017:** Brought our IT department and cloud-based technologies up to date
- 2017:** Made huge progress to pay people fairly, because Best-in-Class employees deserve fair compensation
- 2018:** Created a robust compliance function to meet stringent regulatory standards
- 2018:** Created vigorous Volunteer Engagement and Major Gifts programs
- 2019:** Significantly strengthened our Human Services programs by adding depth to management and creating 15 new supervisory positions

Real growth starts with a solid foundation. So we dug deep to strengthen SOAR365 from the bottom up, preparing every level of the organization to be stronger, faster and more primed for the big, bold—and highly visible—changes in our Strategic Plan.

Why being Best-in-Class matters

147,823

Number of people who have a disability in Central Virginia. This is 12% of the entire population

2,513

Number of people on the waiting list in Central Virginia for critical Medicaid Waiver funding for services like Day Support and Respite

87%

Percentage of US families who have a problem finding needed respite services

The heart—and resources—to take on the toughest challenge of all: Respite

There's a simple reason SOAR365's Strategic Plan is so focused on growing revenues, increasing volunteers and encouraging more donations: You can show more compassion when you have more resources. For the evidence you need, look no further than SOAR365 Respite.

SOAR365 is the only organization in Central Virginia that offers out-of-home, overnight respite care for families of individuals with disabilities, perhaps because we're the only organization that can afford to do it.

The rates paid for services like the 46 weekends of Respite and 10 weeks of Summer Camp at SOAR365 @ Camp Baker—plus emergency Respite—covers only 60% of the costs. That's a cost

“At first, Respite was valuable because Matthew was among his peers and he didn't feel so different. Now he's among his friends.”

—Melissa Hill with her son Matthew Patterson



to SOAR365 of more than \$566,000 annually, an amount other organizations can't—or won't—bear. But the rewards, for individuals and their families, make it worth the cost to us.

Bill McDonough, whose daughter Sade recently started coming to weekend Respite (after attending Summer Camp since 2015) shares: “A lot of our decisions are based on how Sade will react. So her weekend away means we can relax, or do things we couldn't be doing. It also gives us a chance to expose our other daughters to worldly things we couldn't otherwise.”

Melissa Hill, whose son Matthew has been coming to Respite at Camp Baker for 30 years, offers another perspective on the value of Respite: “What Matthew is getting—and what I'm learning—are things we take home with us. So the impact is so much more than the two days he's here every month.”

“For the clients, Respite is like a home away from home. And it gives their loved ones a break,” says Latasha Otey, a SOAR365 Respite supervisor. “It's respite for the caregiver. And a retreat for the individual.” A retreat where they can go bowling, attend a movie or museum, dance, shop, go to cookouts, swim, play basketball and other sports, and just hang with friends.

Melissa speaks for many parents and caretakers when she says: “Thanks to Respite, Matthew now sees himself as an individual... who's part of a community. As long as there's Respite at Camp Baker, he'll be coming. He loves everybody here.”

The truth is, our compassion motivates us to find a way to get the required resources. But if we're true to our Strategic Plan, we can continue to fill the gap through other resources.

The newly constructed all-weather M.H. 'Bud' Reinhart Center opened in fall 2019 for more year-round recreation and expanded program space at SOAR365's Camp Baker facility.

46
Weekends of
Respite

10
Weeks of
Summer Camp

52
Days of Emergency
Respite provided for
individuals in 2019



Meredith Clark, case manager (left), and Sabrina Bolling, direct support professional (above), provide safe and fun activities for Matthew, Danyell, Richard and over 100 individuals who attend Weekend Respite at our Camp Baker facility.

How Best-in-Class looks on the faces of our clients

SOAR365's Strategic Plan is informed by more than our mission, BHAG and core values. It's the result of our immersion into what Best-in-Class looks like at similar programs around the country—then using those examples as a starting point for our excellence. We hope these photos give you a glimpse of how well we're doing.

The joy we provide our clients and the support we provide their families are the true measure of what we do. And they're the single biggest reason we adhere to our Strategic Plan every day at every level of our organization.

Too many individuals with disabilities aren't getting the services they need. And too many families are overwhelmed by their responsibilities. That's why we're working so hard to grow revenue through Business Solutions, engage more volunteers and encourage donations.

In the end, the best part of being Best-in-Class is being our best for more people year after year.

Part of being Best-in-Class is being the Only-in-Class, like our woodworking program, shown here. Our wide range of programs also includes art therapy through Art on Wheels, Healing Sounds music therapy, cooking and horseback riding.



We increased the total number of individuals we serve in 2019 to 1,442 (up from 1,337). This is an increase of almost 8% and we expect similar continued growth in the years to come.



Thanks to increased staffing and more volunteers, our Human Services programs continue to grow and improve. Funding from our donors and earnings from contracts with our Business Solutions partners make these Best-in-Class activities possible.



Meet **Amara Nwangwa** (pronounced Wangu), SOAR365 Volunteer of the Year. Amara spends 40 hours a month working in Adult Day Support at our Saunders Avenue location. She coordinates activities, does research and works “on the floor.” She’s currently a University of Richmond student with plans of going to medical school. “I like building relationships with people, regardless of their ability,” she says. “It’s rewarding to come in and know you’re needed.”



Our **PLAN** for **CONTINUOUS IMPROVEMENT**

Our plan to stick to our Plan

Every day, in ways big and small, our Strategic Plan defines what we do and how we do it. We step back once a year and take an unflinching look at what we’ve accomplished (and what we haven’t), then decide where best to focus our efforts over the next three years. For 2020, we’ve identified 10 Key Strategic Initiatives. All 10 are included here, but we’re taking a slightly deeper dive on three of them.

STRATEGIC INITIATIVE

Our volunteers are the best. And getting better.

In 2019, for the first time in our history, donations to SOAR365 exceeded \$1 million. Thank you.

But as we move toward being Best-in-Class in all we do, it’s important to remember there’s another way to give that’s just as powerful: **Volunteering.**

Why? Because volunteers make our staff much more effective. Volunteers are adored by our clients and staff (and our volunteers adore them right back.) And volunteers make SOAR365 a stronger more vibrant, and more successful organization.

We’re currently in the process of becoming a *Service Enterprise*, a demanding certification awarded by Points of Light that recognizes Best-in-Class volunteer engagement practices—a distinction only 11% of not-for-profits have achieved.

Volunteers like Amara (pictured left) are already a vital part of the everyday operation of SOAR365, though not everyone can see it. In a few short years, the impact of volunteers will be impossible to ignore. And they’ll be a major reason our services, our results, our growth and our financial health will be Best-in-Class.

707

Number of volunteers who supported programs, events, facility beautification and special projects that required technical expertise in 2019

8,779

Hours contributed by volunteers in 2019

\$225k

Financial impact of our volunteers in 2019

STRATEGIC INITIATIVE

Assessing our Respite program

We are reevaluating Respite to make it stronger and more effective in meeting families’ needs in a safe, caring and fun environment.

STRATEGIC INITIATIVE

Workforce Development

We want to give employees with disabilities every possible chance to succeed. That means we need to make sure they learn the hard and soft skills that employers are looking for. Then, we need to support them even after they are working.

STRATEGIC INITIATIVE

Assembly & Logistics

Our Production Facility has been in operation for a long time. We need to re-assess whether this business model is still viable and what potential alternatives might better serve our clients.

STRATEGIC INITIATIVE

Growing Business Solutions creates more human solutions

SOAR365 does something most other not-for-profits don't: **Our Business Solutions division generates income we use to fund our Human Services programs.** And since reimbursements for our Human Services programs cover only 71% of our costs—and are NOT growing—we've made growing our margin-producing businesses, especially Landscaping & Grounds Maintenance and Janitorial & Custodial Services, an essential part of our Strategic Plan.

"You can help us grow our businesses by talking about our expertise to anyone and everyone in the commercial world," says SOAR365 president & CEO John Walker. And thanks to a 15-year relationship with the Defense Supply Center Richmond, providing both Landscaping & Grounds Maintenance and Janitorial & Custodial Services, we have plenty of expertise to sell.

We already have the coveted Cleaning Industry Management Standard (CIMS) Green Building Designation with Honors, given to fewer than 25% of custodial companies. And we're confident of receiving Certification for Landscaping and Grounds Maintenance from the National Association of Landscaping Professionals, a process that is currently underway.

We've been growing rapidly and now have added two new clients in 2020: Laurel Lakes Community and Chesterfield Schools. But we're eager for more work. In fact, we've been preparing for it since 2005!

STRATEGIC INITIATIVE

Best-in-Class starts with the best possible staff

"You can only be Best-in-Class if you have the best staff. The people who work here make everything happen." Those are the words of Charles Story, VP of human resources at SOAR365. But they could be the words of any manager of any department in the organization.

Just as growth in income is essential to achieving our goals, making SOAR365 an *Employer of Choice* is one of our top priorities in Year 4 of our Strategic Plan.

Being an *Employer of Choice* leads to higher standards of professionalism, better continuity of care, higher-quality care, a shorter recruitment period, lower turnover, reduced costs and the ability to fill vacancies from within.

Obviously, compensation plays a part in making SOAR365 a more attractive destination. "Compensation doesn't make you an *Employer of Choice*. But it can get in the way of achieving it," Story says. So, in addition to paying competitive wages, the organization is focused on literally every phase of employment, from recruitment and onboarding to professional development and benefits. It's an intense process, but without a focus on the quality and satisfaction of the staff, all the other goals in the Strategic Plan will fall short.



2019 Best-in-Class Employee Recognition Award Finalists

These awards recognize SOAR365 employees who consistently exemplify the core values of SOAR365 and have distinguished themselves as outstanding employees who work tirelessly to support our mission.

STRATEGIC INITIATIVE

Marketing & Communications

Because sharing our mission contributes to achieving it, we'll be growing our Communications staff, starting with our first ever VP/Marketing. We'll also continue to promote our new name and brand.

STRATEGIC INITIATIVE

Electronic Record-Keeping

Electronic record-keeping is more secure and efficient in today's world. We're moving to an electronic medical record-keeping system for Pediatric Therapy and then for other programs. We're also preparing to automate employee self-service and benefits enrollment.

STRATEGIC INITIATIVE

Business Continuity

We'll be developing a comprehensive Business Continuity Plan that allows us to keep running in times of disaster.

STRATEGIC INITIATIVE

HIPAA

We'll be conducting a systematic study to ensure that our HIPAA compliance is Best-in-Class.

Florence Smith

Business Solutions Team
Member of the Year

Scanning technician, Business Solutions Digital Imaging @ Westwood

Marsha Christian

SOAR365
Employee of the Year

Supervisor, Adult Day Support @ Staples Mill

Michelle Martinson

Administration Staff
Member of the Year

Case Manager, Adult Day Support @ Saunders

Tanya Streater

Direct Service Professional of the Year

Direct Support Professional, Adult Day Support @ Camp Baker

Carlyle Dabney

Business Solutions Management & Support Staff Member of the Year

Crew Leader, Landscaping and Grounds Maintenance, Defense Supply Center Richmond

To do everything we want, we have to grow everything we do

This Annual Report should make one thing clear: Every single one of our goals is woven into every single other one of our other goals.

To grow the number of people we serve, we need to grow our revenue, which means we have to grow our biggest source of revenue—Business Solutions. To manage all this growth, we need to attract the best employees and the most enthusiastic and well-trained volunteers—both of which are driven by SOAR365 becoming

an *Employer of Choice* and a *Service Enterprise*, a highly sought-after designation recognizing the most well-run volunteer programs.

And, finally, we need the infrastructure in place to support the growth we’re planning for in every phase of our operation. As we hope you can see, since creating our Strategic Plan in 2016, we’ve grown in significant ways across the board, positioning ourselves for even more growth in the years ahead.

REVENUE TREND \ BUSINESS SOLUTIONS

\$ in thousands



The growth of Business Solutions is essential to the overall growth of SOAR365. As the chart here shows, we’ve done a good job of growing on our own, but if you know a business that might benefit from our hard work, efficiency and loyalty, please give us a referral.

“If we can’t grow our margin producing businesses, we might as well forget about achieving our Strategic Plan.”

John Walker \ President & CEO, SOAR365



605

Number of individuals served in Pediatric Therapy in 2019

1,000

Number of children we plan to serve in 2022

Mark and his mother, Yadira, in session with speech therapist Todd D'Ambrosio

We want to tell a 1,000 stories like this one

When Mark came to SOAR365 in June 2018 he didn’t speak or respond, he couldn’t identify himself or his mother, Yadira, he had little (if any) attention span and he couldn’t communicate what he wanted.

Today, he’s a totally different little boy.

“He knows his name, he knows my name, he can tell you his address and phone number. He can say his prayers,” says Yadira, proudly adding that he can even talk on the cell phone with relatives in Mexico. Beyond his newly acquired communication skills, Mark now cleans up after himself, turns lights on and off and has taken to dressing himself (without Pampers!). And perhaps most encouraging of all, he’s now a happy kindergarten student.

Individuals like Mark are the very reason SOAR365 is so committed to our Strategic Plan. We want to tell thousands of stories like this one—stories of accomplishment, stories of hope, stories of liberation and joy.

Annually, we serve over 600 children in Pediatric Therapy. Our goal is to serve 1,000 children by 2022. It’s a bold goal, but with children like Mark as a beacon, it’s one of the most important goals we could possibly have. And considering that the number of infants and toddlers in Central Virginia who receive early intervention services is expected to increase from 19,000 in 2017 to nearly 25,000 in 2020, our growth is desperately needed.

Our Strategic Plan is designed to create one thing: Opportunity

It's right there in our mission statement: "create life-fulfilling opportunities for people with disabilities." That also means creating opportunity is at the heart of our Strategic Plan.

For some, opportunity means working for one of our Business Solutions divisions, earning a paycheck and benefits—and bringing home a sense of independence and accomplishment. For others, it's being hired by a local employer with the help of Workforce Development. And for many, opportunity comes through growing and learning in specialized pediatric sessions or working on life, social and behavior skills when they are engaged in arts and music classes, volunteering or simply enjoying recreation and cultural events.

And all the while, our programs are giving family members the opportunity to be in the workforce, spend more time with other family members or simply get a break from the routine of caring for a loved one with a disability.

She had the tools. All she needed was the chance.

If you want to know what SOAR365's Plan for Opportunity looks like, look no further than **Brittany Cope**. And her family. Before Brittany began working at the Defense Supply Center Richmond (DSCR) as part of Business Solutions' Landscaping and Grounds Maintenance staff in 2013, she worked at a McDonald's and lived in a modest one-bedroom apartment with her family.

Not long after being hired by Business Solutions, she helped her parents buy a house. In 2016, she met her future husband, Steven (who also worked at DSCR at the time), started a family and bought a home of her own.

She also advanced from being a seasonal employee to a full-time crew chief. "Working here has opened my eyes to a lot of different people and helped me appreciate life more," Brittany says. "These jobs give people with disabilities lots of opportunities."

Brittany especially appreciates that Business Solutions works so hard to find the job that fits each person best. Her *get-'er-done* attitude made her perfect for the rigors of maintaining the 600 acres at DSCR, where they mow 175 acres a week, complete trash, snow and leaf removal, and trim the trees.

As SOAR365 looks to expand our Grounds Maintenance and Custodial division, we'll also expand opportunities for people like Brittany, giving them the chance to feel the joys of accomplishment, leadership, respect and satisfaction.

"I like to get the job done and do it right. And I teach my team to do the same."

—Brittany Cope \ CREW CHIEF

47
Number of men and women with disabilities employed through Business Solutions in 2019



CREW MEMBER
Jacob

CREW MEMBER
Patrick

CREW MEMBER
Jonah

CREW MEMBER
Jake

The future looks amazing from here...

If you think we've been ambitious in the last few years, wait until you see our long-term goals.

Guided by our Strategic Plan, SOAR365 is working every day toward what we call our *Envisioned Future*, where we provide a lifetime of Best-in-Class services to individuals with disabilities and their families. A future where our highly qualified and passionate staff is available to every individual who needs services, regardless of his or her ability to pay. And where each client's care will be more personalized than it ever has been.

People will seek to use our services, professionals will want to work with us and students will want to train with us.

In our *Envisioned Future*, everyone in Central Virginia will know about SOAR365 and direct people to us because we deliver the highest-quality services available. People will speak knowledgeably about and support our organization because of our well-known and highly respected reputation.

We're on our way—but, for us, our benchmark of success is a continuous, incremental process in line with *never being satisfied with the status quo*. With your continued financial support, volunteer efforts and business referrals, we can continue our march toward even our loftiest ambitions.



and **you** can make it better

SOAR365's ambitions are driven by more than our compassion. They're also driven by the realities of the world we live in. Reimbursement rates have been flat (or worse) for years. At the same time, the need for our services has never been more intense. Nearly 1 in 8 people in Virginia have a disability, and too many of those individuals are NOT getting the care they—and their families—need.

Our clients find valuable and reliable employment, which gives them a feeling of independence and self-worth.



The good news is that SOAR365's unique business model—centered around Business Solutions—creates a win / win / win scenario for SOAR365, Central Virginia businesses and our clients.

The companies that employ us receive first-rate services while making a difference in the lives of so many.

The profits from Business Solutions go a long way toward funding Human Services programs at SOAR365.



We also have generous supporters like you who have proven that three words—**Support, Volunteer, Refer**—are essential to our success and continued growth.

To you we say, **THANK YOU!**
Because of you, individuals with disabilities—and their families—can dream bigger than they ever have.

Nearly 1 in 8 people in Virginia have a disability.

FILLING THE GAP

71% of our costs for Human Services programs are covered by the fees for service we receive from government agencies. We need to fund the other 29%, what we call The Gap.



The Gap is funded by our generous donors and by revenues earned by Business Solutions.

Volunteer \ Ambassador

Gordon Russell's

introduction to working with individuals with disabilities began when he was in his 20s and was asked to teach an 18-year-old to swim. After trying what he thought was every possible learning technique, he had a break-through. "The only thing I didn't try was love," he says. "It was there all along." Soon enough, the young man was floating and kicking.

That experience stuck with Gordon, and years later when he was looking for a volunteer opportunity, he found SOAR365. It was the perfect fit.

"If I could put a value on the satisfaction, warmth, love, accomplishment and excitement I have experienced by volunteering at SOAR365, it would fill the largest bank vault in the world!" he says.



"Our goal is for our volunteering efforts to be two, three, four times bigger than they are now."

—John Walker \ President & CEO, SOAR365

Our **PLANS** for **COMMUNITY SUPPORT**

Together, we set fundraising records in 2019

Last year, for the first time in our 65-year history, we exceeded **\$1 million in donor contributions to support our annual operations. Thank you!** And to make the achievement even more impressive, donors also contributed another \$651,000 for the M. H. 'Bud' Reinhart Center at SOAR365's Camp Baker.

Overall, our donors helped us fill the ever-widening gap between what it costs to provide our programs and the fees we receive for those services—71% covered vs. 29% left to pay in 2019. They know, as we do, that achieving Best-in-Class results demands generosity that matches our desire for excellence.

While we're grateful for Medicaid funding, moving forward we expect these reimbursement rates to remain stagnant (or go down). Which means our families simply can't continue to benefit from our programs without your contributions. So, again, our deepest gratitude for all you do to make our ambitious goals and plans come true.

Three Ways to Help Us Be Best-in-Class

① **SUPPORT**

Please continue to donate, increasing your donation if possible. With your help, we can meet our goal of raising another \$1 million in 2020.

② **VOLUNTEER**

Our volunteers are nothing less than essential to our growth and excellence. You win, our clients win, the organization wins. We can't achieve our bold goals without having great volunteers in every part of our organization.

③ **REFER**

Our Janitorial & Custodial Services and Landscaping & Grounds Maintenance teams are eager to follow up on referrals from our supporters. A referral to Business Solutions can be as powerful as a donation.

2019 Donors

\$50,000 and above

- Anonymous
- Judith Haskell Brewer Fund of the Community Foundation for a greater Richmond
- Chesterfield County
- Foundation for Children with Intellectual & Developmental Disabilities
- Henrico County
- HRH Charitable Fund of the Community Foundation for a greater Richmond
- Moses D. Nunnally Charitable Lead Trust
- Mr. Myron H. Reinhart
- The Reinhart Foundation
- City of Richmond
- The William H., John G., & Emma Scott Foundation
- United Way of Greater Richmond & Petersburg

511
Donors

\$1.043m
Annual Fund Donations

\$651k
Additional Gifts for the M. H. 'Bud' Reinhart Center

2019 Donors

Every gift is important to us. Because of space limitations, we are able to list only gifts of \$500 or more in our Annual Report. Please see a list of all donations and all tribute gift donors on our website. If we made an error or omitted your name, please accept our apologies and notify us at info@soar365.org or (804) 212-1444.

\$10,000 to \$49,999

Altria Companies Employee Community Fund
Mr. & Mrs. Michael Beall
Community Foundation for a greater Richmond
James M. Frye II Endowment Fund
Genworth Foundation
KOVAR
Eric & Kate Margolin
City of Petersburg
R.E.B. Foundation
Mr. & Mrs. H. Spencer Seagraves
Seventh Street Christian Church
Mr. & Mrs. Wallace Stettinius
Synergy Technical
TowneBank Richmond Foundation
West Charitable Trust
Estate of Leonia S. Wood

\$5,000 to \$9,999

Anonymous
The CarMax Foundation
Mr. Rob Chesson
DAYCON
Dominion Energy Charitable Foundation
C. Forbes, Inc.
Hartcorn Studios
Rick Hendrick Chevrolet Buick GMC
Mr. & Mrs. Mark Kirkpatrick
Piedmont Pediatrics
Mr. James Ukrop
The Universal Leaf Foundation
The Waltie Fund

\$2,500 to \$4,999

Anonymous
Mr. & Mrs. Michael Atkins, Sr.
Burgess Inspections, Inc.
Mr. Marshall Butler, Jr.
Commonwealth of Virginia Campaign
Mr. & Mrs. Stephen Fargis
Steve & Julee Fletcher
Mr. & Mrs. Lawrence Gibson
Mr. & Mrs. J. Clinton Kelly
Mr. & Mrs. Wheat McDowell
Loyal Order of Moose Manchester Richmond Lodge 699
Mr. & Mrs. Christopher Mumford
Frank H. Nott Foundation Fund of the Community Foundation for a greater Richmond
Mr. & Mrs. Randall Park
Mr. & Mrs. Jeff Penny
Karen E. & William D. Poole
Publix Super Market Charities
Mr. & Mrs. Robert Sommerville
St. Mary Catholic Church
Mr. & Mrs. Andrew Stefanovich
George C. Stuckey Fund of the Community Foundation for a greater Richmond
SunTrust, now Truist
Target
Mr. & Mrs. Bill Tatu
Towne Insurance
United HealthCare
John & Anne Walker

\$1,000 to \$2,499

Anonymous
BB&T, now Truist
BDO
Ric & Lynda Brown
Mr. Christopher Caesar
Mr. & Mrs. David Campbell
James & Lynne Carney
Charles M. Caravati Family Foundation
Hank & Shannon Carter
Carter & Shands, P.C.
Cathedral of the Sacred Heart
Civitan Club of Chester
Columbia Gas of Virginia
Mr. & Mrs. Thomas Cricchi
Custom Kitchens, Inc.
Christopher & Elizabeth Daly
Davenport & Company, LLC—Walter & Dyke Jones
Dominion Payroll
Dominion Youth Services
David & Meg Hendrick Downs
Susan Eutsler
Mrs. Marguerite Foley
Mike & Cindy Foley
Mr. Michael Ford
Mr. & Mrs. John Golden
Mr. & Mrs. Allen Goolsby
Mr. & Mrs. Jay Haas
Joyce Hann & Robert Hunt
Mr. & Mrs. Jesse Hawthorne
HBA Architecture Interior Design, Inc.
Mr. & Mrs. Thom Horsey
Mr. Timothy Hubert
James River High School
James River Lions Club
Ms. Carolyn Jones
Mr. & Mrs. Michael Joshua

Ms. Magdalena Karol
Mr. & Mrs. Bruce Kay
Kjellstrom + Lee, Inc.
Brad & Emily Lehmann
Mr. & Mrs. Chad Logan
McGriff Insurance Services
Mosaic Catering & Events
Nanchard Morganson Charitable Fund of the Community Foundation for a greater Richmond
Mr. & Mrs. Tony Naumann
Matt & Barbara O'Connell
OneDigital
Mr. N. Douglas Payne, Jr.
Mr. & Mrs. James Peters
Mr. Bill Reinhart
Republic National Distributing Company
Mr. & Mrs. John Romeo
Mr. & Mrs. Robert Salsitz
Mr. & Mrs. Cullen Seltzer
Mr. & Mrs. Dan Sharon
Mr. & Mrs. Bill Slate
R J Smith Companies
Ms. Laura Snyder
Dr. Terry & Mr. Max Solano
Mr. Aaron Steelman and Ms. Tracy Robinson
Mrs. Mildred Stillman
Mr. & Mrs. Charles Story, III
SyCom Technologies
TowneBank
Virginia Family Dentistry
Virginia Oral & Facial Surgery
Larry & Kim Watson
The Wilton Companies

\$500 to \$999

Mark, Kimberlee & Alex Ames
Mr. & Mrs. William Amiss
Mr. & Mrs. Steve Anderson
Anonymous
Mr. Mark Baisch
Ms. Becky Bareford
Mr. & Mrs. Alvin Brandon
Dr. Patricia & Mr. James Dewey Brown
Eda H. Cabaniss Charitable Lead Unitrust
Mr. & Mrs. Paul Calamita
Andrew Carney Photography
Chamberlayne Heights United Methodist Church
Mr. Russell Coleman
Mr. & Mrs. Harvey Crone
Ruby Earley
Mr. & Mrs. Suter Easley
Mr. Leigh Gordon
Great Wolf Lodge
Ms. Renee Haltom
Ms. Nancy Harmon
Ms. Kimberly Jones
Mr. & Mrs. Walter Jones, IV
Ms. Nancy Kay
Mr. & Mrs. Jeffrey Markunas
Ms. Christina Mizelle
Mosquito Hunters
New Life Solutions, LLC
David & Valerie Pace
Peters Law Firm
PGA Tour Charities, Inc.
Priority Elevator

Mr. & Mrs. Warren Redfern, Jr.
Rostro Foundation
Rotary Club of South Richmond
Ms. Janet Sheridan
Smile Fixer RVA
Dr. & Mrs. Hall Squire
Ms. Jen Strife
Mr. & Mrs. Christopher Szymonik
Mr. Joseph Thomas
Valerie Fleming Tillies and Seneca
Trinity United Methodist Church
Tuckahoe Sports
Ms. Anne Frost Waring
Mr. & Mrs. John Wyatt, IV
Mr. & Mrs. Zach Yates

In Memory of

Mark John Balbach
Vic Cricchi
Christopher B. Daly
Sallie Dance
Maddie Desmond
Corey Face
Edward T. Foley
John Foley
Gregory Milo Gottwald
Betsy Hass
Elizabeth "Betty" Hayes
Liddy Horsey
Robert A. Levin
James "Jay" Lumpkin
The Rich & Weigl Families
Suzanne Schlegel
John R. Story, Jr. & Geraldine B. Story

In Honor of

Jamie, Stacy & Lilah Allen
Owen Bunby
Burgess Inspections, Inc. Honorees
Maurice Carter
Marsha Christian
Cara Coffman
Tom Cricchi
Mr. & Mrs. Harvey Crone
Mike Duncan
Cathy Durvin
Thomas Haskins & Family
Susan & Dennis Krause
Robert Longest
Lila Mumford
Joey & Evan Niamtu
Jonah Nixon
Richard A. Pedersen
Justin Poythress
Rodney K. Randolph
Marilyn Rice
Elaine Rizzuto
Owen & Ann Seagraves
Sarah Seltzer
Rosemary & Cullen Seltzer
Ann & Rebecca Sharp
Nita Starr
Seneca Tillies
John Walker

Following our plan has kept SOAR365 financially healthy, while allowing us to make significant investments

We are a large and very financially stable organization. In 2019, we had significant growth throughout our Human Services and Business Solutions programs. Operating revenue of \$18.7 million was 15% above the prior record achieved in 2018, and we

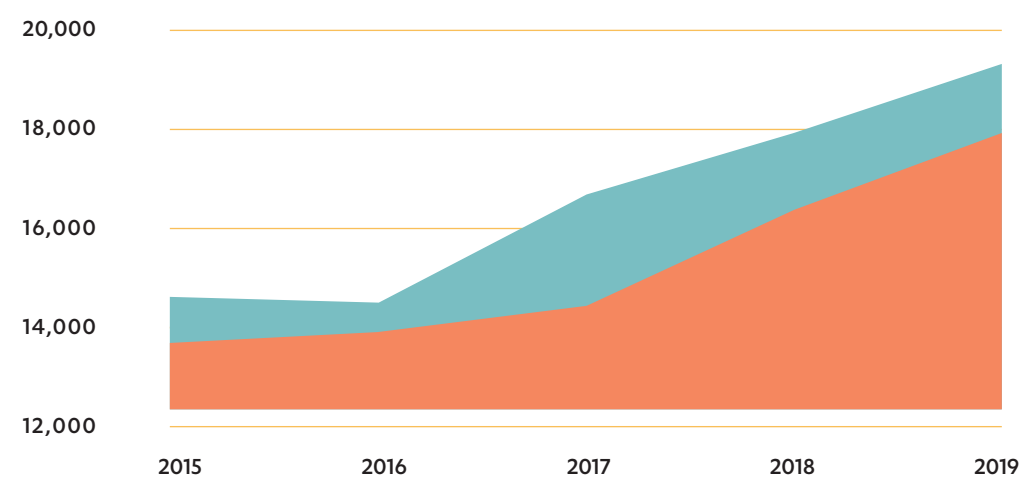
continued to invest in both our programs and our margin-producing businesses. We also completed construction of the M. H. 'Bud' Reinhart Center, which helps us improve the quality of our programming and increases our year-round client capacity at our Camp Baker location.

The strong revenue growth was achieved as a result of careful planning and strategic investments. Based upon our Strategic Plan, we've made significant investments. In the past three years, we have invested \$2.4 million in incremental annual operating spend and \$0.3 million in capital investments. In the next three years, our plan has us investing an additional \$1.4 million in annual operating spend and \$0.2 million in capital investments.

Our past investments have allowed us to grow our margin-generating businesses and also strengthen our risk management, technology and program infrastructure. Investments over the next three years will help us continue with our revenue growth, further advance our risk management and technology posture and move ever closer toward our goal of becoming Best-in-Class in all of our programs and support areas.

5-YEAR FINANCIAL TRENDS (\$ in thousands)

● Revenue ● Expense excluding depreciation



STATEMENT OF ACTIVITIES (\$ in thousands)

	2019	2018	Better / (Worse)	
			\$	%
REVENUE				
Operating Revenue	\$ 18,705	\$ 16,264	\$ 2,441	15%
Camp Baker Capital Campaign	\$ 651	\$ 756	\$ (105)	-14%
Staples Mill Campaign	\$ —	\$ 959	\$ (959)	-100%
Total Revenue	\$ 19,356	\$ 17,980	\$ 1,376	8%
EXPENSES				
Program	\$ 17,056	\$ 15,676	\$ (1,380)	-9%
Fundraising	\$ 536	\$ 453	\$ (83)	-18%
Management & General	\$ 1,293	\$ 1,147	\$ (146)	-13%
Total Expenses	\$ 18,885	\$ 17,276	\$ (1,609)	-9%
Change in Net Assets	\$ 471	\$ 704	\$ (233)	-33%

BALANCE SHEET (\$ in thousands)

	2019	2018	Increase / (Decrease)	
			\$	%
Cash & Investments—Unrestricted	\$ 2,475	\$ 1,713	\$ 762	44%
Cash & Investments—Restricted	\$ 526	\$ 2,453	\$ (1,927)	-79%
Other Current Assets	\$ 2,200	\$ 2,903	\$ (703)	-24%
Property, Plant & Equipment, net	\$ 16,535	\$ 12,851	\$ 3,684	29%
Other Assets Property	\$ —	\$ 151	\$ (151)	-100%
Total Assets	\$ 21,736	\$ 20,071	\$ 1,665	8%
Current Liabilities	\$ 1,523	\$ 1,492	\$ 31	2%
Total Debt	\$ 5,128	\$ 4,123	\$ 1,005	24%
Other Liabilities	\$ 343	\$ 185	\$ 158	85%
Net Assets	\$ 14,742	\$ 14,271	\$ 471	3%
Total Liabilities & Net Assets	\$ 21,736	\$ 20,071	\$ 1,665	8%
Current Assets to Current Liabilities	3:1	4:1		
Total Assets to Total Debt	4:1	5:1		

BOARD OF DIRECTORS

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Vice Chair

Eleanor S. Jones
Secretary

Warren C. Redfern Jr.
Immediate Past Board Chair

Meg Hendrick Downs
Executive Committee

Ric D. Brown
Executive Committee

Henry Stokes Carter, Esq.

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Harvey Crone

Thomas Horsey

Eric Margolin

Chris Mumford

Jeff Penny

William Poole

Valerie Fleming Tillies

Anne Waring

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President & CEO

Julee Fletcher
Senior Vice President & CFO

Jim Quigg
Vice President, Business Solutions

Charles D. Story III
Vice President, Human Resources & Chief Compliance Officer

Kimberly Watson
Vice President, Community Engagement

This is our Vision

Mission + Core Values → BHAG

Our Strategic Plan is how we make our Vision come true. This Annual Report shows you how we're succeeding.

Mission

In partnership with families, SOAR365 creates life-fulfilling opportunities for individuals with disabilities.

Core Values

INTEGRITY
Doing the right thing, even when no one is looking.

RESPECT and DIGNITY
Treating others the way we want to be treated.

PASSION
Dedicating ourselves to our mission and always giving our all.

STRIVING for EXCELLENCE through CONTINUED IMPROVEMENT
Never being satisfied with the status quo, because we can always do better.

CAREGIVER and PERSON PERSPECTIVE
Seeking to understand and meet the needs and wants of our families.

BHAG (Big Hairy Audacious Goal)

By 2025, SOAR365 will be the most respected human services agency in Virginia, recognized for providing the highest-quality services for individuals with disabilities, regardless of their ability to pay.



Respite staff (left to right) Jerri Vincent, Latasha Otey, Meredith Clark, Sabrina Bolling and Nick DeRatto chat with Noah as Danyell and Richard join the conversation.



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(804) 353-0163 FAX

soar365.org

Every age. Every individual.
Every solution possible.

- ▶ Pediatric Therapy
- ▶ Children & Youth Program
- ▶ Adult Programs
- ▶ Respite
- ▶ Summer Camp
- ▶ PARK365
- ▶ Workforce Development
- ▶ Business Solutions



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