



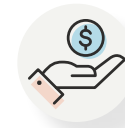
 **SOAR**<sup>365</sup>  
2023 ANNUAL REPORT

ONE **MISSION**, SHARED **VALUES**





## You can make a difference in the lives of kids and adults with disabilities



### SUPPORT

Make an impact with a donation. Your support helps to fill the gap between what it costs to provide services and the fees we receive. We are grateful for your generosity.



### VOLUNTEER

Put your passion and commitment to work! We couldn't achieve our goals without our wonderful volunteers. Sign up solo or with a group. You can join us for one day or many days to come.

# Growing Towards Our Goals

2023 was a year of growth for SOAR365, a year that helped us get a step closer to our Big Hairy Audacious Goal of serving 3,000 families by 2030. Thanks to the hard work and dedication of SOAR365 staff, donors and volunteers, we have served more people than ever in 2023—1,750. While there was no shortage of difficulties throughout the year, including continued staff shortages, we persevered and took our work to a new level.

Two areas of considerable growth within the organization—growth that will continue in 2024—are Pediatric Therapy and Supported Employment. In Pediatric Therapy, we served more children than ever before (899)! And thanks to generous philanthropic gifts from the LEGO Group and the Robins Foundation, we expect to serve close to 1,200 this year. We couldn't be prouder of being the largest provider of early intervention services in Central Virginia.

Our Supported Employment program is also growing exponentially, with a solid foundation built in 2023. Additional staffing has made it possible to serve more than 90 individuals, up from just 42 a year before. We expect to help more than 300 individuals find jobs by 2026.

As we grow and strive to serve more members of the disability community, we also continue to work toward becoming an employer of choice. Our staff are our most valuable asset, so we were thrilled to receive the Top Workplaces designation from the Richmond Times Dispatch for the second year in a row. Feedback from our staff shows that we are on the right track as we make SOAR365 an inclusive place, where people want to work.

I am thankful to donors and volunteers who continue to stand by us and make our work possible—and I look forward to another year of growth and opportunity for SOAR365.



John B. Walker  
PRESIDENT AND CEO, SOAR365



As the chair of the board, I see—up close—the impact that SOAR365 is having on the lives of children and adults with disabilities, as well as their families. They come through our doors every day and are treated with love, respect and professionalism. Thank you for all the ways you support the work of SOAR365. We couldn't do it without you!

Meg Hendrick Downs  
BOARD CHAIR



Sam provides Jack with assistance on the balance beam to improve his balance and coordination when walking.

## Specialized Support Leads to Success: Meet Jack

Jack's diagnosis is rare. So rare, that only ten cases of Warsaw Breakage Syndrome have been reported worldwide!

Luckily, Jack's SOAR365 physical therapist is pretty rare, too. **Sam Cipolla** specializes in helping medically complex kids. "Jack is actually the one who made me realize that's what I enjoyed," says Sam.

Ever since Sam's first babysitting job at age twelve, she knew she loved working with children. She also had a passion for medicine. Her physical therapy studies gave her "a really intense medical education" that she now draws on every day, helping children like Jack.

"When I first started working with him, he didn't roll over yet. So, even the tiniest little skills that he gained were huge wins," explains Sam. "At that point, he was facing open heart surgery and there were concerns about his hearing. Getting to go on that journey with his mom, Sierra, and their family was such an incredible experience."

Jack's heart surgery was a success, and he now has cochlear implants and a feeding tube as well. Sam and Jack's family are learning sign language to better communicate with him. And Jack has grown by leaps and bounds. "He started walking in June of this year and is now full on wild like a typical 2.5-year-old boy, trying to jump off the couch, scale the stairs, and climb the bookcase," says Jack's mom, Sierra.

Jack's doing so well, he will now only need to see Sam every other week. These results are amazing, but not unusual. An impressive 90% of children in our program showed significant progress within six months of beginning therapy in 2023.

Sierra is so excited but shares that both her children will miss seeing Sam more often. "She's part of the family!" says Sierra.

2023 was a record-breaking year for Pediatric Therapy!



**8,328**  
HOURS OF  
THERAPY SESSIONS



**899**  
CHILDREN &  
FAMILIES SERVED



**10**  
LOCALITIES  
IN VA

## What Is Early Intervention?

While SOAR365's pediatric therapists offer both early intervention and outpatient therapies, 90% of the children we serve are in early intervention. This program provides speech, occupational and physical therapy, and educational services to children from birth to three years old.

Our therapists come to the family, so children can practice new skills in familiar surroundings—at home, the library, the grocery store, childcare, or the playground. Studies show that children learn best with this approach. And it makes it easier for caregivers to learn, too!



## The LEGO Group Gift Impact

In November 2023, the LEGO Group announced \$1 million in grant funding to six local nonprofit organizations, including SOAR365's Pediatric Therapy program. This gift will allow us to serve 150 additional families like Jack's throughout the Richmond area. Thank you to the LEGO Group!



"At the LEGO Group, children are our role models, and we express that not only through LEGO® play, but also through our work in local communities. We are so pleased to announce our latest round of grant funding for these important local organizations that will deliver play-based programming to support kids across the greater Richmond area."

**Lizabeth Sklaroff**, SOCIAL RESPONSIBILITY DIRECTOR FOR THE LEGO GROUP



A family dedicated to SOAR365

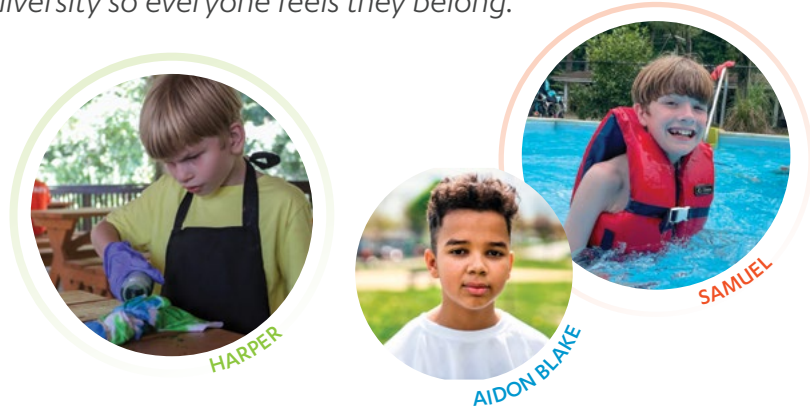
Partners **Aiyana Doswell-Coles** and **Kortney Coles** are both part of the SOAR365 family—Aiyana as a pediatric therapist and Kortney as a member of the IT team.

"For someone with a physical disability like me, the mission of SOAR365 deeply resonates with me and is giving me an opportunity to make a difference in my community," says Kortney.

"I strongly feel that everyone deserves access to the same opportunities regardless of their circumstances, and I believe that SOAR365's work really provides that for our participants," says Aiyana. "I am proud that both Kortney and I are dedicating our professional lives to this important mission."

**WE VALUE INCLUSIVITY** Promoting and valuing diversity so everyone feels they belong.

# Giving the Gift of Friendships and Fun



Samuel communicates differently. If you ask a question, he might answer by reciting memorized scenes from movies. Instead of having a conversation, he and his mom, Cynthia, take turns singing Do Re Mi.

Both Samuel and his brother, Harper, have autism. Harper doesn't communicate verbally, but he's good at making himself understood. "Harper's very loving and people are drawn to him," Cynthia explains.

Friendships form this way every day at Summer Camp. Campers with different backgrounds, disabilities and communication styles all come together to have a great time. As Beverley's son, Aidon Blake, shared, "One of my friends doesn't talk, but we still have fun!"

Aidon Blake has autism as well, with relatively low support needs. Yet in programs designed for children without disabilities, Beverley notes, "I just don't feel like he's protected. There's a difference to himself and his processing." Cynthia agrees that SOAR365 is "such a safe space" that she never worries about leaving her sons in our care.

At Summer Camp, all three boys have their favorite activities. Samuel loves horseback riding and exploring nature, Harper enjoys photography and arts and crafts, and Aidon Blake loves the water— whether swimming in the pool or paddle boating. But they also have a chance to try new things, which helps them learn and grow.

"Samuel is a little boy of habit, it stretches him," notes Cynthia. "He has grown and matured tremendously." Beverley noticed positive changes for Aidon Blake, too. "He tried new food just because other people were trying it," she says. He even won a kindness award.

Both Cynthia and Beverley agree that Summer Camp has been amazing for their children. But neither family could pay for it on their own. "I had seen SOAR365 for years, but I could never afford it," says Beverley. Cynthia notes that having children with disabilities comes with added costs, like therapy appointments and medical equipment, that are "very, very expensive." "It's a struggle," she says.

Thanks to our generous donors, like the Reinhart Foundation, all three boys were able to attend Summer Camp on financial scholarships (or "camperships"). When Beverley got the news, she was "totally floored."

"We appreciate every single person who has given any kind of money to the scholarship because it means a lot to my boys," says Cynthia. "We don't take it for granted. We treasure it."

*“The Reinhart Foundation is honored to help SOAR365 provide services that enrich the education and quality of life of its clients and their families.”*  
**Bill Reinhart, REINHART FOUNDATION**



## Sportable + Summer Evening + PARK365 = Fun!

Our friends at **Sportable** and **Beyond Boundaries** helped us host our first two Summer Series community events, with free, accessible activities.

Sportable specializes in adaptive sports, recreation, and wellness opportunities for youth and adults with disabilities or visual impairments. Everyone had a blast playing pickleball, bocce ball and basketball, and watching adaptive wheelchair demonstrations in PARK365.

Beyond Boundaries is a local non-profit specializing in guiding participants with disabilities, veterans, at risk youth, and recovery programs on outdoor adventures. With a petting zoo, rafts and fishing games, there was lots of summer fun for everyone to enjoy.

SUMMER SERIES 2023 WAS MADE POSSIBLE BY:



**PARK365 has continued to attract lots of people...and awards!** In 2023, PARK365 was voted Best Community Playground in Richmond Magazine's 2023 Best & Worst Survey. The award highlights SOAR365's commitment to inclusivity.



## Best-In-Class Administration

In 2023, SOAR365 launched a new public website with a focus on accessibility. With easy to read content and thoughtfully selected fonts, colors and images, the new website makes it possible for all users to navigate and find the information they need.

Check it out at [www.soar365.org](http://www.soar365.org).

## Case Management Ensures Quality Care: Meet Laura

When case manager Laura Yackel began chairing SOAR365's Wellness Committee, she knew just who should join—our participants! She quickly found enthusiastic recruits, like Java. Today, the committee is close to its goal of including program participants from every SOAR365 location.

Finding skill-building opportunities is one of the foundations of Laura's job, as she helps participants set and achieve their goals. Our

SOAR365 case managers are also responsible for key pieces of clinical documentation. These records help staff monitor participants' wellbeing and show how SOAR365 staff members support our participants.

"It's paramount we maintain 100% accurate and up-to-date records," Laura explains. "Throughout the day, I'm also handling lots of communications from caregivers, Community Service Boards (CSBs),

community organizations, government entities and more."

Every few months, Laura collaborates with each of her assigned participants' care team members. This way, everyone is on the same page about the participant's needs, at home and at SOAR365. Java is glad to be a part of those meetings. "I really like when my parents and Laura meet with me to talk about how things are going," she says. By working closely with our direct support professionals (DSPs), case managers can provide insights to caregivers. These might include any changes in behavior or new supports that are needed.

"Compliance and case management are so important, and we do it with love," says Laura. Case managers listen to our participants, making sure they get to do their favorite activities. For Java, that includes everything from prom to fashion shows and from exercising to bingo.

While many aspects of Laura's job are rewarding, the best part is simply being there. "I love to attend the events and celebrations so I can be with the participants, taking in all the fun with them," she says.

Java shares her wellness ideas with case manager Laura Yackel as they plan an upcoming initiative.

"Open communication is the key to case management."

LAURA YACKEL



## Supporting Employees with Disabilities on Capitol Hill and Beyond

### SOAR365 Attends SourceAmerica Grassroots Advocacy Conference

In September, SOAR365's Business Solutions team took a trip to Washington, D.C. Leroy Stanford, the supervisor at the Visitor Center of Defense Supply Center Richmond; Trent McFadden, Assistant VP of Business Solutions' AbilityOne Business Line; and Camille Jackman, Business Operations Analyst, were there to attend the SourceAmerica Grassroots Advocacy Conference.

And they weren't alone. **More than 60 people with disabilities of all ages and backgrounds came to share their stories with lawmakers on Capitol Hill.** It was an opportunity to advocate for better employment opportunities, as well as policies like Social Security Income reform.

"One of SOAR365's largest customers is the Department of Defense. We have eight contracts through the federal AbilityOne program," explains Trent. "As an AbilityOne provider, we're tapped into a nationwide network of 400 other non-profit organizations that also work toward creating meaningful employment for individuals with disabilities."

SourceAmerica helps create this network. They work as a bridge between AbilityOne and non-profit providers, such as SOAR365. SourceAmerica provided weeks of training to employees with disabilities, like Leroy, to prepare them to advocate for themselves.

"My role was saying what AbilityOne means to me," explained Leroy. "How it gives people like me with a disability an opportunity to provide for myself and take care of my family. And be more independent."

Contracts like these help Business Solutions provide steady, year-round employment with competitive pay and benefits. Even so, Trent says, "It's not just a job. It's not just a worker for us. And for them, it should be more than just a paycheck."

Our job coaches, supervisors and case managers also offer help with housing, transportation and other real-life challenges that come with having a disability.



"Everybody can't do everything, but everybody can do something. And all we want is the chance. Give us the opportunity, let us prove what we can do."

Leroy Stanford  
SUPERVISOR, ADMINISTRATIVE SERVICES

**WE VALUE PARTNERSHIP** Collaborating with families, customers, donors, volunteers and other stakeholders.

# Thank you!

Our participants' worlds are bigger thanks to our amazing community partners! Whether participants are volunteering with Meals on Wheels, cheering on the VCU Volleyball team, or starting their first job, we couldn't do it without these great organizations.

## VCU & Synergy Technical

Smiling faces. Enthusiastic cheering. And post-game hugs! Adult Day Support participants and staff had a great time watching the VCU Volleyball team play at the Siegel Center in September.



"It was especially thrilling to see the players and coaching staff interact with our participants after the game," says Vandal Truong, Director of Adult Day Support and Youth Services. That's important to VCU Volleyball Coach, Tim Doyle, too. "We want you to feel like VCU Volleyball is SOAR365's team!"

VCU Volleyball players also came to SOAR365 to play games, work on puzzles, dance, and create holiday arts and crafts with our participants.

Our partnership with VCU Athletics was spearheaded by Rohana Meade, SOAR365 Board Member and President & CEO of Synergy Technical. She wanted VCU athletes to "realize the impact they can have on somebody just by showing up."

"When we bring athletes from VCU to organizations like SOAR365, we bring joy," says Rohana.

## Meals on Wheels

Adult Day Support participants are often on the go! They enjoy trips to museums, movie theaters, restaurants and stores—learning important life skills along the way. But one of their favorite activities is volunteering.



They love to deliver meals with Feed More's Meals on Wheels program. "Our participants get a reward by not only being an active member of the community but also helping others," says Director of Adult Day Support and Youth Services, Vandal Truong.

Mary, a participant at our Saunders location, says, "They give you the biggest hug, they give you the biggest smile like you brought them a million dollars. When they see us, that's a meal they've got in their stomach tonight!"

David and Jenny, participants at Staples Mill, agree. "It feels wonderful. It feels awesome to help other people and make sure older persons get what they need," says David. "Makes you feel happy," adds Jenny.



## Call Federal Credit Union Is Our 2023 Community Partner of the Year

In 2023, Call Federal sponsored both the Ladybug Fund Winetasting & Silent Auction and Summer Series. They also organized two picnics in PARK365 for their staff and families served by Better2Gether, and even funded a billboard located off I-195 to promote community engagement.

We're so grateful for their support

“

"The strength of a community lies in its ability to uplift and empower every individual. At Call Federal Credit Union, we believe in the power of inclusivity, and our support for SOAR365 represents our unwavering commitment to unlocking the boundless potential of every individual, enabling them to transcend perceived limitations."

John West, PRESIDENT & CEO, CALL FEDERAL CREDIT UNION



## Supported Employment Is Growing!

With more than 90 participants and six employment specialists, Supported Employment had a great year in 2023. From movie theaters to grocery stores, and from bookstores to the floor of the Virginia General Assembly, our participants can be found working, training or engaging in career exploration all over town. Thank you to all of our local business partners.



# Volunteers are at the heart of our mission.

In 2023, volunteers at SOAR365 worked side-by-side with our participants, helped set up fundraising events and put their green thumb to use in beautifying PARK365.



980  
VOLUNTEERS



10,673  
COMPLETED  
HOURS



\$333,531  
DOLLAR  
EQUIVALENT



WE VALUE  
**Thalhimer, Inc.**

SOAR365 was honored to partner with Thalhimer through its Thalhimer Gives community involvement program. The Thalhimer team came out to volunteer at multiple events, and even made personal donations, along with a dollar-for-dollar company match. "Our Thalhimer team enjoyed partnering with SOAR365. From talent shows to beautification efforts to providing kits for participants, our associates exemplified our core value of transforming lives in the communities where we live, work, and play. We are proud to support SOAR365's mission; our time with them was truly inspiring," says Lee Warfield, President & CEO of Thalhimer, Inc.



WE VALUE  
**South University**

South University's Richmond Physician Assistant Program sends interns to SOAR365 to gain experience in working with individuals with disabilities. The partnership began three years ago, and this summer, 36 students from the Class of 2025 joined us at Camp Baker.

"Student participation with SOAR365, volunteering with individuals with disabilities, allows our students to better understand how to serve different patient populations as future healthcare providers," says Shannon Schellenberg, Program Director at South University.



WE VALUE  
**Josias**

Josias Collier is a sophomore studying pre-med at the University of Richmond and is a UR Bonner Scholar. He works in SOAR365's Community Engagement department, where he assists with corporate volunteer projects, administrative work and event planning. "I love to volunteer and help people in need. I also value the commitment of SOAR365's direct support professionals. The connections I have made have been genuine and eye opening!" says Josias.



Thank you to the Niamtus for their generous gift of \$50,000! Your kindness will create life-filling opportunities for people with disabilities, like Joey and Evan.

WE VALUE  
**The Steward School**

A group of kind-hearted students from The Steward School joined us over spring break. They rolled up their sleeves to stain wooden structures, clean playground equipment and landscape garden beds in PARK365, among other efforts. But it wasn't all work and no play...they also jumped in to shoot hoops with our participants!

"The Steward School greatly values our relationship with SOAR365," said Wallace Inge, history teacher and lead of the Service Learning Team. "The organization has provided opportunities of growth and care for our students of all ages through service, including making tie dye shirts with program participants, washing buses, and beautifying PARK365. The staff at SOAR365 is always well organized and prepared to maximize our efforts and create valuable learning experiences for our young students."



## Giving Back to Pay It Forward

**Dr. Joe and April Niamtu donate generously to SOAR365, where their sons received pediatric therapy**

When parents first learn their child has a disability, it can be a disorienting experience. "You don't know what to do. You're lost," says Dr. Joe Niamtu. He and his wife, April, are parents to two sons with cerebral palsy: Joey and Evan.

When Joey was about a year old, his neurologist referred the family to SOAR365 Pediatric Therapy for early intervention services. "When we found out about SOAR365, it was like being in the desert, crawling in the sand, being thirsty for days and suddenly finding an oasis," says Dr. Niamtu.

"It was a one stop shop for so many things." Joey was able to receive PT, OT and vision therapies in the comfort of his own home. And his therapists were a source of comfort for his parents as well.

"They were just remarkable," says April. "I would have never imagined Joey going to school. But it was them saying, 'Oh, definitely by the time he's two years old...' They went with me to the school and met the whole team."

"The people that they hire at SOAR365 are 100% committed," says Dr. Niamtu. "And they are there for the right reasons," adds April.

SOAR365's pediatric therapists stayed with Joey and Evan until they outgrew the services. But the Niamtus never forgot what SOAR365 meant to their family.

They have continued to support SOAR365 by making donations, raising public awareness and being involved with fundraising events, like the Ladybug Fund Winetasting & Silent Auction.

"If we could look at milestones in our life and the lives of our children, that was the first board in the bridge. We will always have an appreciation and always do some type of support," says Dr. Niamtu.

## Supporting One Another

Our Landscaping & Grounds Maintenance team serves the Defense Supply Center Richmond and Fort Gregg-Adams— and they never have a slow day. From mowing to leaf blowing, and from planting flowers to shoveling snow, the crew of 22 full-time employees is busy year-round.

Deborah Foster loves managing this team, which includes 17 employees with disabilities. “I appreciate everything our employees do, and I am so proud of how much they achieve,” says Deb.

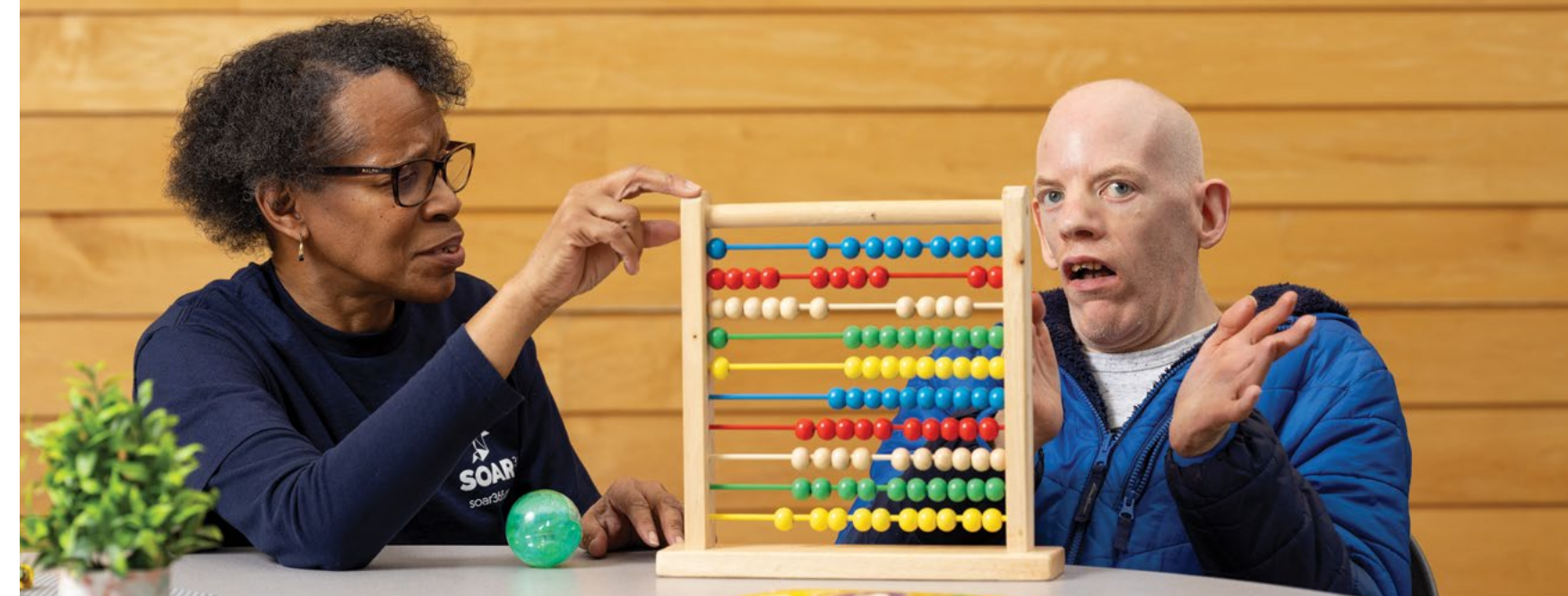
“Everyone’s needs are a little different and providing customized training is important to us.” This might mean using repetition, offering different styles of instruction, providing special equipment, or letting someone work in a slightly different way.

Sometimes, Deb calls in SOAR365’s internal job coach, who can develop a plan to address any issues. Deb also meets with employees’ family members to work together on solutions.

Deb has learned that one of the most important accommodations she can make is pairing crew members with the right leader. “Some of them need a crew leader who is strong, loud, and firm to stay focused and motivated. Others need a crew leader who is quiet, calm, and gentle so they don’t get overwhelmed or frustrated,” Deb explains. “Finding that correct balance is crucial to the success of the team.”

Deb is proud of her employees who have overcome challenges to succeed in the workplace, like Patrick. When he was first hired more than 10 years ago, he struggled, but over time, he became professional, punctual and reliable. A few years ago, Deb encouraged Patrick to step into the role of crew leader. Deb explained the role using pictures, descriptive phrases, and lots of reassurance...and he’s excelled.

“The best part is that Patrick, who has a disability, is now supervising people with disabilities,” says Deb. “We are training him to be a good coach and a good leader.”



## Adult Day Support: Familiar Faces, Brand New Skills

Diane Bledsoe has been working as a direct support professional for an incredible 40 years, and 30 of them have been spent at SOAR365. “I love working with my people,” says Diane. “There are a few of them that have been here about as long as I have.”

“All of us are getting old,” she laughs. “It’s almost like a family.”

Marsha Christian, a fellow DSP, agrees. “They rely on you as family, because a lot of them came out of institutions.”

Our DSPs work hard to meet each participant’s goals. Daily activities focus on life skills, like reading, cooking, cleaning and more. Staples Mill participants have their very own Sunshine Store. They can earn “SOAR365 bucks” to practice budgeting, saving and spending. They even have a Friendship Café where they can get a cup of coffee with a friend or practice going on a date.



Gloria first met James Patrick as a student at Maymont Elementary.

“We are here for the individuals and getting to know them,” says Gloria Womack, DSP. And Gloria has known some of our participants longer than anyone—they met her decades ago as a special education teacher at Maymont Elementary!

You can see a twinkle in her eye as she remembers: “Yes, they were little.” Some of our participants still fondly call her “Ms. Womack” from those long-ago school days.

For her, the best part of being a DSP is “seeing their growth.” And at SOAR365, they’re always treated like the adults they are today.

“I always tell my staff, these are not children. Most of them are older than we are!” says Marsha. “Just like the respect that you want, they deserve the same respect.”

And it pays off. “They’re so happy to be here,” says Diane. “Because they can feel that we care for them.”





## WE VALUE OUR DONORS

# From first steps to first jobs, you made it happen!

Your generosity and compassion made a real difference in the lives of children and adults with disabilities this year. Thank you from the bottom of our hearts. We couldn't do the work we do without you.

## 2023 Donors

### \$50,000 and above

Chesterfield County Department of Community Enhancement  
LEGO Group  
Dr. Joe and April Niamtu  
The Pauley Family Foundation  
Robins Foundation  
Synergy Technical  
United Way Greater Richmond & Petersburg

### \$10,000 to \$49,999

Anonymous (3)  
Altria  
The Animal Welfare program of the Community Foundation for a greater Richmond  
Mr. and Mrs. Michael Beall  
Chesterfield County  
City of Richmond  
CJ Fund  
Community Foundation for a greater Richmond  
Genworth  
Heartwood Wealth Advisors  
Herndon Foundation  
James M. Frye Endowment Fund II  
Jenkins Foundation  
Katherine H. Booker Trust  
Eric and Kate Margolin  
Markel Corporation  
R.E.B. Foundation  
Reinhart Foundation  
Sheltering Arms Institute

Mr. and Mrs. Wallace Stettinius  
The Wilbur Moreland Havens Charitable Foundation  
Wills Financial Group

### \$5,000 to \$9,999

Anonymous (2)  
ALDI Inc.  
Altria  
Anne and Arthur Hendrick Charitable Fund  
Buzz and Fran Brown  
Call Federal Credit Union  
CarMax Foundation  
The Estes Foundation  
Frank H. Nott Foundation Fund  
Henrico County  
Carolyn Jones  
Clinton and Katie Kelly  
Louise Tiller Memorial Fundraiser Golf Tournament  
The Nanchard Morganson Charitable Fund  
NISource Columbia Gas Charitable Foundation  
Bob and Susie Salsitz  
Target  
Michelle and Bill Thomson  
Katherine J. Timberlake  
Towne Insurance  
The Universal Leaf Foundation  
Edward Villanueva  
Anne and John Walker

### \$2,500 to \$4,999

Anonymous  
Anthem Healthkeepers Plus  
Cheryl Boltz and Elizabeth Stokes  
Marshall Butler, Jr.  
Carter & Shands, P.C.  
CIGNA  
Tom and Bonnie Cricchi  
Cullen Family Fund  
Timothy Dickson  
Dominion Energy Charitable Foundation  
Dominion Payroll

Steve and Christie Fargis  
Julee and Steve Fletcher  
GroundForce IT, Inc.  
David and Catherine Hendrick  
James River Rotary Club  
Keiter CPAs  
Mr. and Mrs. Chad A. Logan  
McGriff Insurance Services  
Susan P. McNamara  
Jeff and Lisa Penny  
Karen E. and William D. Poole  
Publix Super Markets Charities  
Jim and Vickie Quigg  
RJ Smith Companies, USA Civil  
Mr. and Mrs. William Slate  
Bob and Janet Sommerville  
St. Mary's Catholic Church  
Mr. and Mrs. Charles Story, III  
Ms. Brenda C. Street  
Thalhimer Gives  
Mark and Lisa Tripodi  
UnitedHealthcare  
The Waltie Fund

### \$1,000 to \$2,499

Anonymous (2)  
Ad Result  
Aetna  
Mark, Kimberlee and Alex Ames  
Anthem Blue Cross Blue Shield  
Anthem Life  
Atlantic Union Bank  
Betsy Haas Fund for Children  
Scott Blackwell and Jim Handly  
Mr. and Mrs. Kevin H. Brandon  
The Browell Family  
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Capital One  
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Cathedral of the Sacred Heart  
Charles M. Caravati Family Foundation  
Clay Street Builders, LLC  
Core Consulting  
Custom Kitchens, Inc.  
Christopher and Beth Daly  
Delta Dental of Virginia  
Meg and David Hendrick Downs

Fahrenheit Advisors  
Mike and Cindy Foley  
Michael and Hampton Ford  
Louanna and Allen Goolsby  
Jane Hamilton and Stephen O'Brien  
Hanbury Evans Wright Viattas + Company dba Hanbury  
Joyce Hann and Robert Hunt  
Heritage Printing Service  
Walter and Sharon Hutchinson  
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Walter and Leila Jones  
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Juno Financial Group  
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Matthew and Katie Klump  
John and Libby Lewis  
Alex and Lucille Lindamood  
Eric Livingston and Rosa-Lyn Morris  
Loyal Order of Moose Manchester Richmond Lodge 699  
Marsh & McLennan Agency LLC  
Maureen and Chuck McBride  
Diana and Jeff Miller  
MR. FIX-IT  
Wesley and Carrie Mullins  
Matt and Barbara O'Connell  
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Tricia and Brian Puryear  
Mr. and Mrs. Warren C. Redfern, Jr.  
Gus and Eileen Remppies  
Richmond Christmas Mother Fund  
Mr. and Mrs. John Romeo  
Rostro Foundation  
John and Elizabeth Schmohl  
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Janet Sheridan  
Carl and Diane Simon  
Solvaria  
Nita Starr  
Mrs. Mildred S. Stillman  
Tito's Handmade Vodka  
Trinity United Methodist Church  
TRUIST  
Kim and Larry Watson  
Williams Mullen  
Dana and John Wilson  
Glenn and Kathy Wright

### \$500 to \$999

Michelle and Adam Alford  
Ashland Christian Church  
Bank of America Matching Gifts  
Kimberly N. Bivins  
Charles and Teresa Blair  
Danielle Bonvini  
Mr. and Mrs. Joseph Bowden  
Hank and Shannon Carter  
Mr. and Mrs. R. Russell Coleman, Jr.  
Commonwealth of Virginia Campaign  
Jeff Conley  
Matthew and Dana Davis  
Dr. Nakeina E. Douglas-Glenn and Mr. Howard Glenn  
Robert Downey  
Bill and Helene Downs  
ECS Group, Inc.  
Ron and Donna Essex  
Mr. and Mrs. Bill Eutsler  
Brian and Kimberly Failon  
Leigh and Mark Gordon  
Cliffe and Elizabeth Harris  
Jesse and Sally Hawthorne  
Hedgepeth Family Fund  
The Haltom Family  
Eleanor and Chris Jones  
Christopher Lumpkin  
Jeffrey and Mary Ann Markunas  
Scott Mattison  
Mr. and Mrs. Wheat McDowell  
Sean and Syomn Miller  
Suzanne Munson  
Anne Paparella  
Jack Pasternak  
Mark Perkinson  
The Pozen Spraker Charitable Fund  
Bruce Pullen  
Kendall Rice  
Mike and Susie Stough  
James and Julie Thomas  
United Way Suncoast  
Anne F. Waring

### In Memory of

Mark Balbach  
Agnes Cain  
Dawna Denney  
Emily Claire Essex  
Steve Fetro  
Gregory Milo Gotwals  
Susan I. Greenberg  
Charlie Harris  
Dean and Ann Langer  
Robert "Bob" Lehmann  
Robert A. Levin  
James "Jay" Lumpkin  
Anna Beth Miller  
Sandy Pasternak  
Fain Peebles  
Andrew M Schwind II  
John R. Story, Jr.  
Geraldine B. Story  
Robert "Joe" Strotmeyer  
Charles Timberman

### In Honor of

Waverly Abell  
Adrian  
Ric Brown  
Stella Collins  
Tom Cricchi  
Brian Lee Crone  
Meg Downs  
Cathy Durvin  
Mike Foley  
Tom Haskins  
Melody Donovan-Hopkins  
Kim Jones  
Harriet Lumpkin  
McGriff Clients  
Sean McQueen  
Joey and Evan Niamtu  
Mary Downing Parker  
Marilyn Rice's Birthday  
RVA Rogue Runners  
Jeannette Seagraves  
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Molly Squire  
Nita Starr  
Angie Thomson  
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John Walker  
Kim Watson  
Burke Whitney  
Dana Wilson

*Every gift makes a difference. Please see a list of all donors on our website. If we made an error or omitted your name, please accept our apologies and notify us at [dana.wilson@soar365.org](mailto:dana.wilson@soar365.org) or (804) 665-1213.*

## WE VALUE FISCAL RESPONSIBILITY

**SOAR365 is financially healthy.** Since the beginning of the pandemic, we've received significant government funding, which has allowed us to continue investing in the future of our best-in-class programs and services. As a result, we are operating at a deficit while steadily working towards a full recovery from the pandemic, which is consistent with our plan.

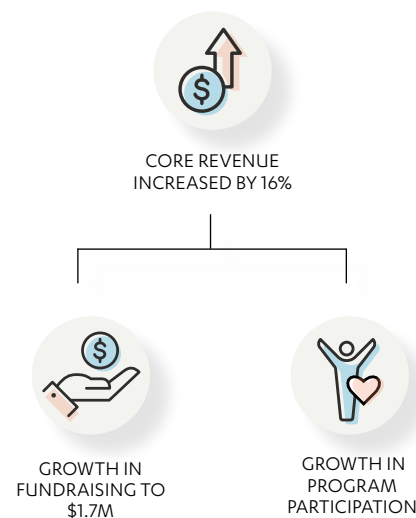
Our core revenue grew 16% in 2023. We had impressive increases in our Adult Day Support and Summer Camp programs as we added more participants. Our fundraising efforts showed major growth, too, bringing in a total of \$1.7 million.

Business Solutions' core revenue also grew, despite several challenges. During the year, we terminated a contract that was not well aligned with our mission and closed our production facility after a major client decided to take our work in-house. We made sure to support our employees with disabilities who had worked in these areas, helping them find new jobs or other services (as requested).

Last year, our operating expenses grew by 12%. As part of our commitment to being a Top Workplace, we continue to compensate our people on pace with the changing market. Healthcare benefits also increased significantly. And as we grew our

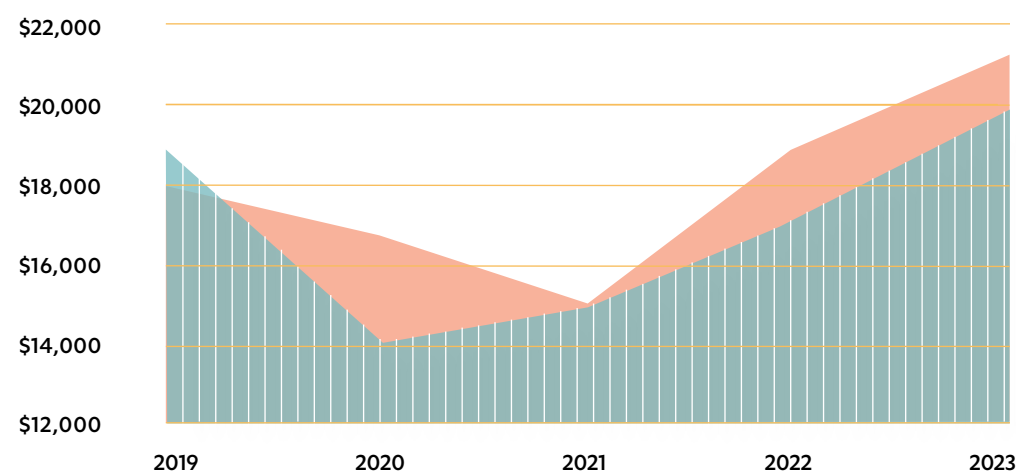
programs and took on new projects, our staff and other operating costs increased as well.

Thankfully, additional government funding of \$4 million, tied to the Employee Retention Credit program, has kept our cash and investments at a healthy level. This will enable us to continue in this environment for the foreseeable future, as we further expand our programs and services. We fully expect to be back to operating at a breakeven level before these funds are exhausted.



### 5-YEAR FINANCIAL TRENDS (\$ in thousands)

● Operating Revenue ● Expense Excluding Depreciation



### STATEMENT OF ACTIVITIES (\$ in thousands)

	2023	2022	Better / (Worse)	
			\$	%
<b>REVENUE</b>				
<b>Total Operating Revenue</b>	\$ 19,625	\$ 17,128	\$ 2,497	15%
<b>EXPENSES</b>				
Program	\$ 19,917	\$ 17,644	\$ (2,273)	-13%
Fundraising	\$ 824	\$ 772	\$ (52)	-7%
Management & General	\$ 1,541	\$ 1,453	\$ (88)	-6%
<b>Total Expenses</b>	\$ 22,282	\$ 19,869	\$ (2,413)	-12%
<b>Operating Revenue Less Expense</b>	\$ (2,657)	\$ (2,741)	\$ 84	3%
<b>CARES Act &amp; Other Relief Funding</b>	\$ 4,028	\$ -	\$ 4,028	-

### BALANCE SHEET (\$ in thousands)

	2023	2022	Increase / (Decrease)	
			\$	%
Cash & Investments—Unrestricted	\$ 5,068	\$ 3,193	\$ 1,875	59%
Cash & Investments—Restricted	\$ 422	\$ 306	\$ 116	38%
Other Current Assets	\$ 2,862	\$ 2,890	\$ (28)	-1%
Operating Lease Right-of-Use Asset	\$ 227	395	\$ (168)	-43%
Property, Plant, & Equipment, net	\$ 14,386	\$ 14,719	\$ (333)	-2%
<b>Total Assets</b>	\$ 22,965	\$ 21,503	\$ 1,462	7%
Current Liabilities	\$ 2,393	\$ 2,111	\$ 282	13%
Operating Lease Liability	\$ 235	405	\$ (170)	-42%
Long Term Debt	\$ 4,413	\$ 4,503	\$ (90)	-2%
Other Liabilities	\$ 188	\$ 119	\$ 69	58%
Net Assets	\$ 15,736	\$ 14,365	\$ 1,371	10%
<b>Total Liabilities &amp; Net Assets</b>	\$ 22,965	\$ 21,503	\$ 1,462	7%
Current Assets to Current Liabilities	3:1	3:1		
Total Assets to Total Debt	5:1	5:1		

### BOARD OF DIRECTORS

Meg Hendrick Downs | *Chair*  
 Thomas J. Cricchi | *Vice Chair*  
 Rohana Meade | *Secretary*  
 Clinton Kelly | *Immediate Past Board Chair*  
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### EXECUTIVE OFFICERS

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Julee Fletcher  
*Senior VP & CFO*

Trent McFadden  
*Assistant VP, AbilityOne Business Line*

Diana Miller  
*VP, Marketing & Communications*

Nina Moskowitz  
*Assistant VP, Compliance & Case Management*

Tricia Puryear  
*VP, Human Services*

Jim Quigg  
*VP, Business Solutions*

Bill Slate  
*VP, IT & Chief Information Officer*

Charles D. Story, III  
*VP, Human Resources & Chief Compliance Officer*

Michelle Thomson  
*VP, Community Engagement*



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- ▶ Adult Day Support
- ▶ Respite
- ▶ Summer Camp
- ▶ PARK365
- ▶ Employment Services
- ▶ Business Solutions

soar365.org



## 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

SOAR365 creates life-fulfilling opportunities for individuals with disabilities.

### Core Values

#### EXCELLENCE

Committing to continuous improvement and innovation.

#### INCLUSIVITY

Promoting and valuing diversity so everyone feels they belong.

#### INTEGRITY

Doing the right thing.

#### PARTNERSHIP

Collaborating with families, customers, donors, volunteers and other stakeholders.

#### PASSION

Giving our all to the mission.

#### RESPECT & DIGNITY

Treating others the way they want to be treated.

### BHAG

(Big Hairy Audacious Goal)

By 2030, SOAR365 will be the most respected disability services organization in Virginia, recognized for providing the highest quality services and career opportunities. As a result of our outstanding reputation, successful businesses and community support, we will double the number of individuals with disabilities we serve or employ to 3,000.