Case Study
of Dental Aid and
Social Venture Partners Boulder County
INVESTEE PROFILE

MISSION Dental Aid’s mission is to improve the quality of life of children and adults struggling to afford health care by providing compassionate, affordable, high quality dental care and education, while advocating to ensure access to care.

VISION Dental Aid’s vision is a community where all individuals and families have access to dental care.

HISTORY Dental Aid was the first non-profit, comprehensive dental clinic in the United States. It was founded in Boulder County in 1974 as a referral organization, and opened its first full-service clinic in 1980. Dental Aid has three clinics, located in Boulder, Longmont and Louisville. Dental Aid charges for its services, making it a fee-for-service based social enterprise. However, the maximum charge for any procedure is 50% of the “usual, customary and reasonable” (UCR) fee that a regular dentist might charge. The UCR rate is what an insurance company or the government will pay if one has dental insurance or if one is covered by a government program. Dental Aid’s patients are low income, lack insurance and are challenged to pay the UCR rate. If the patient qualifies for one of the major programs listed below he or she will pay less than 50% value. Finally, based upon a patient’s ability to pay, Dental Aid will lower the fee or work out a long-term payment plan to make these critical services available to the underserved in Boulder County.

MAJOR PROGRAMS Dental Aid provides comprehensive and restorative oral health care for adults and children in Boulder County, subsidizing the care of any low-income or uninsured residents who seek oral health care services. Programs include:

- Bright Smiles for Bright Futures: Subsidizes oral health care for more than 400 pregnant women annually. Women enrolled in Bright Smiles are provided with free emergency dental care, preventive dental care (cleanings, x-rays and education), and necessary periodontal care to reduce or eliminate infection in the gum tissue, as well as case management and education to create sustained change. The program was highlighted as a national best practice by the National Network for Oral Health Access.

- Adult Assured Access: Offers uninsured and at-risk adult Front Range residents comprehensive oral health care in a welcoming and culturally sensitive environment.

- Marcie’s Fund: Provides comprehensive oral health care for uninsured low-income children who might otherwise go without.

- Schools: Provides outreach oral health screenings and education to low-income children at Head Start Centers, preschools, elementary schools and secondary schools.

SVP INVESTMENT SUMMARY

Investee Name: Dental Aid
Contact Info: www.dentalaid.org; 303.665.8228
Years of Investment: 2010 to 2013
Focus Area: Health care
Cash Grants: $50,000
Consulting Hours: More than 2,100, at a value of over $210,000
• Children’s Hospital: Provides restorative care under general anesthesia for children with extensive oral health care requirements in partnership with Children’s Hospital of Colorado (CHC).

• Advocacy: Conducts advocacy efforts at local, state and national levels in order to provide more community education about oral health, and to educate policy makers at all levels about the need for increased access to oral health care.

• Research: In addition to evaluating the efficacy of its own programs, Dental Aid is conducting a three-year research study to determine the effectiveness of using Xylitol (a sweetener shown to kill cavity-causing bacteria) to decrease the transmission of cavity-causing bacteria from mother to child.

RATIONALE FOR SVP INVESTMENT  Dental Aid is a longtime Boulder County non-profit assisting thousands of underserved patients annually. SVP selected Dental Aid because it is a substantial non-profit in Boulder County—large and complex enough that SVP felt it could really make an impact. As essentially the only major safety-net dental service provider in the area, Dental Aid serves thousands of individuals and fulfills a critical niche. SVP was interested in supporting a dental organization as it learned more about the relationship between dental health and general health—especially in children. SVP also saw a chance to make a significant impact on Dental Aid’s future direction with the organization’s impending leadership transition and its need to move from a growth stage to a mature organization.

KEY SVP IMPACT TO DATE:

• Helped new CEO, who had no prior managerial experience, become a thriving leader

• Aided organization in overcoming vast financial woes that could have dramatically decreased Dental Aid’s ability to serve its constituencies, if left unaddressed

• Helped organization shift to new, more sustainable business model with improved communications organization-wide

• Helped the Board of Directors become a “true” governing body, growing from four members to nine and taking an active leadership role in the organization

SVP PARTNERS AND VOLUNTEERS INVOLVED:

<table>
<thead>
<tr>
<th>Name</th>
<th>Role</th>
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<tbody>
<tr>
<td>Brian Hawkins</td>
<td>co-Lead Partner</td>
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<tr>
<td>Walt Pounds</td>
<td>co-Lead Partner</td>
</tr>
<tr>
<td>Mary Cobb</td>
<td>Executive coaching; community outreach</td>
</tr>
<tr>
<td>Caryn Cappriciosso</td>
<td>Board development</td>
</tr>
<tr>
<td>Randi Grassgreen</td>
<td>Board development</td>
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<tr>
<td>Amy Maranowicz</td>
<td>Staff development</td>
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<tr>
<td>Cindy O’Keefe</td>
<td>Executive coaching</td>
</tr>
<tr>
<td>Mike Durall</td>
<td>Fundraising</td>
</tr>
<tr>
<td>Bruce Borowsky &amp; People Productions</td>
<td>Marketing</td>
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INTRODUCTION
Social Venture Partners (SVP) Boulder County brought local non-profit Dental Aid into its investee pool in 2010, graduating the organization in 2013. The arrangement evolved into one of the more complex and time-consuming (in sheer hours) of all SVP partnerships.

For Dental Aid, the timing of the partnership could not have been more critical—the organization underwent a meaningful leadership change and faced unknown and unprecedented financial hardships during its time as an investee. For SVP, the relationship started slowly but built into one of the most fulfilling partnerships to-date. As Lead Partner Brian Hawkins recalls, neither he nor co-Lead Partner Walt Pounds were overly passionate about the arrangement initially: "We agreed we would do it at least for a year. It turned out to be one of the most rewarding things I certainly have ever done."

BACKGROUND
Dental Aid was the first non-profit, comprehensive dental clinic in the United States. It was founded in Boulder County in 1974 as a referral organization, and opened its first full-service clinic in 1980. At the time of initial partnership, Dental Aid seemed to be a solid, mid-level organization with a long track record and significant impact—treating more than 7,000 underserved people in Boulder County each year. In 2010, Dental Aid provided the market equivalent of $6.3 million in services. SVP had also become more aware of the relationship between oral health and overall health and wanted to support an organization that worked to help in this underserved area.

Dental Aid charges for its services, making it a fee-for-service based social enterprise. However, the maximum charge for any procedure is 50% of the “usual, customary and reasonable” (UCR) fee that a regular dentist might charge. The UCR rate is what an insurance company or the government will pay if one has dental insurance or if he or she is covered by a government program. Dental Aid’s patients are low income, lack insurance and are challenged to pay the UCR rate. Based upon a patient’s ability to pay, Dental Aid will lower the fee and/or work out a long-term payment plan to make these critical services available to the underserved in Boulder County.

SUMMARY OF SVP INVESTMENTS

<table>
<thead>
<tr>
<th></th>
<th>Total</th>
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<tr>
<td>Grants Awarded</td>
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<td>Consulting Hours</td>
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<td>Consulting Value</td>
<td>$213,100*</td>
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<td>Number of Projects</td>
<td>40+</td>
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<tr>
<td>Number of Partner Volunteers</td>
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*Rate = conservatively valued at $100/hour
SUMMARY OF INVESTEES GROWTH

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<tr>
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<th>2010</th>
<th>2011</th>
<th>2012</th>
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<td>Current Liabilities</td>
<td>$370,212</td>
<td>$329,212</td>
<td>$215,958</td>
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<td>Net Patient Revenue</td>
<td>$2,396,126</td>
<td>$2,451,594</td>
<td>$2,554,366</td>
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<td>Public Support</td>
<td>$938,777</td>
<td>$723,904</td>
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<tr>
<td>Average Monthly Clinical Revenue</td>
<td>$199,677</td>
<td>$204,299</td>
<td>$212,864</td>
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<td>Draws on Line of Credit</td>
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<td>9</td>
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<tr>
<td>Line Credit Balance</td>
<td>$76,939</td>
<td>$80,397</td>
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<tr>
<td>Adult Treatment Plan Completion</td>
<td>33%</td>
<td>37%</td>
<td>55%</td>
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<tr>
<td>Total Patients</td>
<td>7,260</td>
<td>7,722</td>
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<td>Total Patient Visits</td>
<td>19,110</td>
<td>20,283</td>
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<tr>
<td>Average visits per patient</td>
<td>2.4</td>
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EXPLORATION OF IMPACT

While SVP and Dental Aid accomplished many typical capacity building tasks together, the partnership also met some unanticipated challenges. In addition to the predicted duties of helping transition the new CEO and developing the Board, SVP and Dental Aid also tackled an inordinate financial crisis very early on in the partnership that almost fractured the sustainability of the organization.

From the perspective of Dental Aid, if the partnership had not occurred, the current President & CEO and Board Chair quite candidly suggest the organization might be shuttered, or at the very least, would be operating with at a reduced level with eliminated services or locations. From the perspective of SVP’s dual mission, SVP partners were able to contribute meaningful time and expertise to an organization that needed it (and needed it more than anyone knew from the outset) and have the satisfaction that their particular expertise made a difference in the availability of safety-net health services in the community. At the same time, SVP Partners learned a great deal from Dental Aid about the role dental health plays in overall health, educational attainment, work productivity and more.

SUMMARY OF CAPACITY BUILDING ACHIEVEMENTS

IMPACT HIGHLIGHTS

Executive Capability
- Held weekly consulting sessions with the President & CEO on management, financial and strategy issues, providing coaching and mentoring for two-and-a-half years
- Provided HR training for the entire leadership team of Dental Aid
- Provided executive coaching for the Chief Development Officer

Financial Stability
- Helped orchestrate a major
ELEMENTS THAT CONTRIBUTED TO THE SUCCESS:

- The leadership transition timing was an ideal opportunity for SVP to have influence
- The new President & CEO was willing to take advice, to learn, to grow and to ask for help
- The serendipity that the eventual needs of the organization and the skills of the Lead Partners matched perfectly
- The size and complexity of Dental Aid allowed for SVP’s assistance to be significant

Financial Stability
Dental Aid underwent a very unpredicted and unprecedented financial crisis during its time as an SVP investee. None of these issues were known at the outset of the relationship or during the selection process of the grantees. Just months into the SVP relationship—and just days into his tenure as President & CEO in the fall of 2010—Dennis Lewis found a package of unpaid bills totaling more than $300,000 that the organization had no ability to pay. As he started to piece together the financial puzzle that led to the unpaid bills, he realized that Dental Aid was in a serious financial mess:

“I inherited probably about six months of accounts payable that had not been paid, and I inherited an accountant that really was probably a wonderful accountant but not capable of doing non-profit accounting. I was two weeks into the job when I basically had to [make a change with] my CFO.”  

Dental Aid went through several bookkeepers in a relatively short time period, partially leading to the financial crisis. After several unsuccessful bookkeepers at a critical juncture when the finances were already off-track, Dental Aid was in quite a predicament. Recalls Walt Pounds:

“It was a little bit of a perfect storm there, and those things can be very devastating if not managed well. When you start to have financial problems and you don’t have the depth in financial management to deal with them, that can put the organization at great risk. I think our involvement at that juncture really helped Dental Aid manage through and mitigate that risk.”

It was fortunate, as referenced, that the Lead Partners’ reorganization and downsizing effort, with the reduction of seven positions, saving $25,000 per month

- Helped to develop a new business model for Dental Aid
- Assisted in developing a data-driven budget
- Assisted in the development of timely, regular and more informative financial statements for the CEO and Board
- Developed a cash flow model for Dental Aid, which has very uneven cash flow from philanthropy
- Helped to develop a policy on financial reserves, and saw it implemented

Board Development
- Helped to slowly, and without turmoil, transition away from an extremely mechanistic form of policy governance to an approach which appropriately defines the Board role, and provides Board members systematic information through which they can appropriately govern and assume their role
- Assisted in the formulation of more than a dozen Board policies for the organization
- Helped to develop a Board Orientation Manual and a systematic Board Orientation process
- Conducted interviews and led
particular career experiences played well into this scenario. Both Hawkins and Pounds had many years of experience in dealing with financial reports, developing financial plans, and leading complex organizations, and were the ideal match to help Dental Aid sort through the fiscal mistakes that led to that 2010 shortfall. SVP helped support Dental Aid through the necessary transitions of bookkeepers, and eventual search and hiring process for a Chief Financial Officer (CFO)—a person with an MBA and a CPA, rather than a bookkeeper—who has now solidly served in that position for more than a year.

Before Dental Aid hired a capable CFO, SVP met with Dental Aid multiple times a week, for several hours at a time, doing in-depth analysis of Dental Aid’s financials to pinpoint how the organization could get back in the black. Recalls Hawkins:

“The analyses showed what we had to do to make this place work and so we came up with a plan, but with the caveat that the organization needed to make cuts deep enough so you never have to do this again. So we cut out $25,000 a month in expenses. An organization keeps their money in people, and so that meant staffing needed to be reduced.”

In the middle of 2011, per SVP’s analyses, Dental Aid had to choose the hard road out and lay off seven people and eight positions to get revenue and expenses more aligned. Losing 18% of his staff in one day was a huge undertaking for Lewis—one with which he had no prior experience. He was very overwhelmed initially: “I would never have had the methodologies or the self-confidence [to handle all of that] without SVP,” says Lewis.

With SVP’s assistance, Dental Aid:
- Went from no accounting in 2010 to cash-based accounting in 2011
- Began a process of timely, consistent and accurate financial reporting to the Board
- Laid off 18% of staff to reduce expenses
- Defined a new and sustainable business model leading to positive cash balances and the development of a reserve account
- Hired a capable CFO to lead and cleared up concerns of the 2010 audit by 2012

from previous page

several Board Development and Board Orientation sessions

- Helped to expand the Board from four to nine members

Mission, Vision, Strategy & Planning
- Led an effort to define a methodology for clarifying and identifying key business processes
- Helped to facilitate a strategic planning process with the Dental Aid leadership team
- Assisted in the development of an environmental scan which looked at future scenarios for health care and competition with Dental Aid
- Helped explore affiliations and/or MOUs with health providers
- Coordinated a workshop on internal communication leading to a systematic evaluation of communication, a new newsletter, and an electronic opportunity to ask any question

Staff Development/Human Resources
- Assisted in the reorganization and staffing plan for Dental Aid
- Developed a new compensation system for dentists allowing all to have a realistic chance at getting a bonus and inducing higher organizational productivity
- Assisted in the development of a new job description and the hiring of a new CFO

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• Began accurate accrual accounting and regular reporting in 2012

**Executive Capability**

When Lewis took over as Dental Aid President & CEO in fall 2010, he had no prior executive leadership experience. While he had previously worked at Dental Aid for several years as Chief of General Dentistry, he had little proficiency on how to be a head boss. “I was a dentist, and I am a dentist,” recalls Lewis. “So actually managing an organization of this size, I didn’t have any experience doing that.”

Once again, the partners’ unique skills came into play in a timely manner. Not only did Lewis lack experience managing, he inherited an organization that had huge financial decisions to be made, huge staffing decisions to be made, and a longstanding culture of communication void from its leadership. Lewis has said candidly that he would not have been able to execute the layoffs of 2011 had it not been for the coaching, mentoring and role playing sessions with SVP partners:

“SVP was really the only safe haven I had to even talk through that issue. They say it’s lonely at the top, and that’s probably true, but Brian and Walt made it tolerable and manageable. I don’t know that I could have done it without them. They were always very willing to share their experience and knowledge easily and openly and without coming across as being demeaning.”

SVP partners and current Board Chair Stuart Feinglas give Lewis credit that he was able to accept and absorb the advice. Says Feinglas: “I have huge respect for Dennis being able to take that in and use it and not just see them as outsiders.”

With the help of SVP, Dental Aid’s new President & CEO:

• Increased management skills

• Improved internal communication mechanisms and external communication about the organization

• Stabilized, improved and developed internal business processes

**Board Development**

While Dental Aid had a Board of Directors prior to the SVP partnership, it was not functioning at the level desired for the size and scope of the organization. Some members were “there in name only,”
suggests Hawkins. Both SVP and Dental Aid leadership felt that the Board should have been much more attuned to what was going on in the organization—particularly the financials. If, in fact, the Board had been functioning as it should have, some financial red flags could have been detected far before the crisis mode of fall 2010.

Lewis recalls the prior Board as being run in an unusually strict “policy governance” model based on the teachings of John Carver. Most major decisions happened behind closed doors. Board members were not previously very involved in the decision-making processes over the direction of the organization. Feinglas, current Board Chair and Board member since 2008, recalls this distinctly:

“Prior to SVP coming in I think the Board was challenged in some ways. I don’t think we had as good a flow of communications, or as good a sense of what we needed to know. I think it was run a little more top-down than it is now. And by the time we found out about the issues, the damage was done.”

Feinglas is the longest tenured Board member and chose to stay with the organization during the financial crisis. He says that when the financial issues came to light, several members left the Board immediately—shrinking it down to only four people at one point. “When the issues happened, certainly I could have left, but what we saw was an opportunity—that things didn’t have to be the way they were,” he says. “I have to give SVP a lot of credit. They helped us understand where we could be as a Board. They really helped us see what we needed to do.”

Through a structured process and training, two other SVP partners, Caryn Capriccioso and Randi Grassgreen, led an intervention to help the Board understand their role and execute their responsibilities

With the help of SVP, Dental Aid:

- Increased the size of the Board from four to nine current members, as well as added to the professional strength
- Developed and refined the way the Board should operate, helping the Board understand what information it needs
- Developed a Board Orientation program
- Developed a current Board manual
- Created a new atmosphere of open and transparent Board meetings

While there is still much more education to be done, and much planning to do in the coming years, the Board is now a useful and positive force within Dental Aid. “The Board is more open, more honest, much more transparent and therefore so much more helpful in terms of a Board actually determining the values and vision of the organization,” says Lewis.

Improving Business Practices/Systems Change

Dental Aid also underwent some significant systems and business practice changes while an SVP investee:

- Shifting to a Dentist-run System: As a longtime staff member, Lewis was in a unique position to see the organization through the eyes of the staff. Dental Aid was previously
run through an office management system and Lewis observed that it wasn’t the most efficient process. “Dentists weren’t hiring their assistants, they weren’t evaluating performances, they had very little ability to influence scheduling and influence productivity,” he recalls. Through conversations with SVP, Lewis refined a long-term systems change idea that dentists needed to have more control. As Dental Aid President & CEO, he subsequently implemented a system that put the administrative authority and critical decision-making processes into the hands of the dentists—not office management staff.

**Decreasing No-show Rates:** At the start of the SVP partnership, Dental Aid had a no-show rate of more than 20% of its patients on any given day. While that rate is not highly unusual for a safety-net clinic, it was losing the organization money and creating a negative atmosphere of dentists and hygienists who were at work with nothing to do. The number of people served and the number of visits increased by 19% from 2011 to 2012 basically due to the decrease in patient no-shows. “It wasn’t like we booked any more patients in a day,” says Lewis. “We just became much more consistent in making sure the patients booked actually came,” mainly through improved and consistent communications. Dental Aid also implemented a no-show policy that bars the patient from coming back for a year if they no-show two consecutive appointments. SVP estimated that decreasing the no-show rate by just half a percent saved $30,000 annually.

**Pay-for-Performance Compensation System:** Dental Aid underwent extraordinary financial hardships and had to make tough choices to lay off positions. At the same time, some of the dentists were still receiving huge bonuses that essentially did not fit anymore in the organization’s new financial landscape. With the help of SVP, Dental Aid was able to come up with new pay-for-performance compensation models that are motivational, but fair in the land of safety-net dentistry. While SVP helped advise on this, the Lead Partners insist that Lewis is really the one who deserves credit: “Because of the nature of the layoffs and changing the fundamental compensation structure of the dentists, only another dentist could pull that off,” recalls Hawkins. This new direction of developing a pay-for-performance system was facilitated by SVP partner Amy Maranowicz, who worked with Lewis and his leadership team in developing job descriptions, evaluation methods and a performance appraisal system for all job families within Dental Aid.

**Different Approach to Philanthropy:** In the past, whenever Dental Aid had gotten into a cash crunch, the organization would look to write a grant or have a fundraiser to make ends meet. The focus was never on running a more efficient business as a means to generate revenue. After partnering with SVP, Dental Aid became more aware of how it could save money through the business side of things. Explains Lewis:

“The reality of the situation is we employ 45 people, and of those people, only three or four are doing accounting, fundraising, grant management or grantwriting. The other 41 people are doing dentistry. To always be looking at the two people doing grantwriting for more money and not looking at the 40 people doing dentistry as their job as the source of revenue, that is what we changed.”

**Branding/Strategic Direction**

As a longtime organization, Dental Aid was in a bit of a plateau phase in terms of planning. SVP helped Dental Aid look toward the future and explore how changes in the safety-net dental landscape might help or hinder Dental Aid in the future. “What we tried to do is say, what difference does ‘Obamacare’ make? What is going to happen with new competitors? What is going to change in the business environment of dentistry?” says Hawkins.
SVP helped Dental Aid:

- Conduct detailed environmental scans of competitor businesses including the impact of relatively newer low-cost dental businesses such as Comfort Dental

- Explore regulatory and business changes including federal changes mandated through “Obamacare,” potential Colorado state laws that are in the works, as well as potential Medicaid reimbursement changes

- Consider potential future partnerships with health agencies

- Start an ongoing process of anticipating future positioning of Dental Aid in a more proactive manner
ANALYSIS & REFLECTIONS

The SVP-Dental Aid partnership was one of the more complex so far in SVP’s recent history. The sheer number of hours the Lead Partners spent working with the organization nearly doubled that of comparable Partner projects at the same time. This complex intervention encountered inevitable interpersonal challenges, but resulted in dramatic organizational and cultural changes within Dental Aid.

CHALLENGES/LESSONS LEARNED

CEO Transition
A minor challenge faced early on in the partnership was the CEO search. When SVP brought Dental Aid on as an investee, it was aware of an impending leadership change and assumed SVP would be helping to craft the CEO search process. That ended up not being the case as Dental Aid created and executed the process without much involvement from SVP. Lewis did not have the managerial experience that Dental Aid had said it wanted in its new President & CEO. As Hawkins explains, though, the decision quickly morphed into one that worked out for everyone involved; the skills Lewis lacked were returned in spades through his passion and dedication to safety-net dentistry, the population Dental Aid serves, and the loyalty and respect of his staff:

“They said they wanted someone with executive leadership experience. Dennis had none. But he had all the passion in the world about this subject. As it turns out, I don’t think anybody else could have done it as well.”

As noted previously, the specific experience that Lewis lacked was precisely what the Lead Partners could provide, rather serendipitously, as this was not planned or known from the outset. The Lead Partners’ management lessons made up for Lewis’s deficit in leadership skills at a critical time, recalls Hawkins, and yet if Lewis “hadn’t had the relationships with the dentists and a knowledge of safety net dentistry, and the national reputation that he had, I don’t think they could have succeeded.”

Adds Pounds:

“Purely from a timing perspective, our involvement at the time that Dennis steps into the job with a significant set of problems was fortunate in that we could help him with those issues. We were well prepared and had experience dealing with those issues in different situations. So I think the timing came together well.”

Financial Issues
The financial issues, of course, also had the potential to become very problematic for SVP and Dental Aid. SVP was giving Dental Aid money—essentially investing in the organization. Dental Aid and SVP had to make some big decisions in the time period following these financial discoveries and the road to enlightenment was not always smooth. There were missteps and bad hires and huge layoff decisions to be made and implemented. “They had to change or there would be no way that they could survive,” says Hawkins.

On top of all that, the 2010 audit was not completed until November 2011, so new models had to be developed, and short-term strategies and methods of monitoring the financial status of Dental Aid had to be established.
Interpersonal Challenges
While it’s often true that “all is well that ends well,” the level of commitment and intensity of the partnership was not without a few interpersonal trials at various junctures. The Lead Partners’ level of involvement led to conflicted feelings over “ownership” of the organization and the new President & CEO felt a little overwhelmed at times by the SVP’s immersion into the organization. Recalls Lewis:

“Both Brian and Walt got to know Dental Aid very well. There weren’t things I kept from them or hid from them. The potential when someone is that involved is to take ownership, to feel like they work there. At some point, it became a little difficult for people to think that the things I was saying were truly coming from Dennis and not a paraphrase from Walt and Brian.”

Lewis concedes that the high level of involvement described might have been necessary in 2011 but he didn’t think they did a very good job of transitioning that back in 2012. He also wondered if having the two Lead Partners, while it was very beneficial and possibly necessary in this relationship, was a factor. “There were two of them and one of me and at times it felt like I couldn’t or I didn’t effectively express a dissenting opinion,” recalls Lewis.

Still, these challenges—while significant at the time—ended up being just bumps in the road of an otherwise very successful relationship, particularly given the circumstances. Through this partnership, SVP learned, once again, that an important success element is the chemistry between the CEO and Lead Partners. By all accounts, the SVP-Dental Aid matchup worked out well. Explains Pounds:

“The critical factor in a successful engagement for SVP is the relationship between the Partners and the CEO/leadership team of an investee organization. Just because you have the skills and knowledge in a particular area and are ready to help, doesn’t mean somebody wants your help. It’s critical that the recipient really wants the help you’re willing to provide. And that doesn’t always exist.”

MOVING FORWARD
As the Dental Aid-SVP partnership winds to a close, both organizations have a lot to be both fulfilled by and excited for moving forward. SVP Partners were essentially able to come in and do exactly what SVP hopes to do—take the Partners’ past experience and put it to good use in helping grow and strengthen a valuable (but struggling) non-profit organization. Says Pounds:

“This is my bias, but Dental Aid is a pretty significant business. It employs around 45 people and its budget is about $3.5 million dollars. It is substantial enough with an earned-income model that the business experience we brought to bear was meaningful. We accomplished what we set out to do, which was to really help Dental Aid succeed. So we feel good about that.”

The Partners also gained professional and personal development in learning a bit about safety-net dentistry. For example, through work with the Bright Smiles for Bright Futures program, which provides oral health care to more than 400 pregnant women annually, Hawkins learned that women who underwent prenatal dental care were eight times less likely to have a baby that needs serious neonatal care, based on research conducted at Dental Aid.
“It was a revelation. One of the things we asked for ‘payment,’ was that Dennis had to tell us a story every week of how they changed a life or something of that nature. It never ceased to amaze me, the impact that dental health has on the social and physical health of an individual.”

Lewis says very succinctly that without SVP’s help, Dental Aid may have had to close. And if it had remained open, it would have been much smaller—likely shuttering its Longmont branch and selling off assets. Instead, it did neither and is thriving and growing and in the black again with growth in revenue, reduction in liabilities and positive cash flow in 2012. With a now-confident President & CEO, better financials, new business and communications systems, and a bolstered Board, the organization is able to finally look toward the future instead of “put out fires.” Says Feinglas:

“I think Dental Aid is more dynamic now. It can make decisions on its future now, which I don’t think, at least for a couple years, we could do when we were totally in response mode. So now that the organization is stronger, there is great potential to look at which direction we want to go. SVP was critical to this process.”

With its business practices cleaned up, Dental Aid can now better present itself as a major player and thought leader on safety-net dentistry in the local, state and national community. Lewis is currently working on several studies and evaluations of Dental Aid research (including Bright Smiles for Bright Futures, which has already documented numerous positive outcomes, and a study on the effects of the artificial sweetener Xylitol). He has also been involved at the state level with potential dental legislation, including advocating for dental services as a benefit for pregnant women under Colorado’s Medicaid program.

Without having to worry about very basic internal issues like making payroll on a weekly basis, Lewis is able to spend more time and energy on advocacy and research to further the field and improve dental policies in Colorado and nationally. Lewis currently represents oral health on the Caring for Colorado Board of Directors and on the State Medical Assistance and Services Advisory Council. He also chairs the Evidence Based Dentistry Committee for the National Network for Oral Health Access. “He is already a huge voice in the community about safety-net dentistry,” says Hawkins.

Nine SVP partners worked on more than 40 projects across all facets of Dental Aid in the last three years. This combined effort helped to significantly increase the sustainability of an organization that is so critical to the health care of Boulder County. Despite a few growing pains that came as part of a very stressful process, Lewis says he looks back at the experience very gratefully. He has nothing but praise for SVP and for the Lead Partners, with whom he worked most closely at Dental Aid:

“These guys are really brilliant and successful in their own right. Being willing to share that much of their time when neither really had to… It’s something I will probably never be able to thank them for.”
Sources Cited

1 Phone interview with Brian Hawkins, February 19, 2013.
2 Phone interview with Walt Pounds, February 19, 2013.
3 Phone interview with Dennis Lewis, February 15, 2013.
4 Phone interview with Stuart Feinglas, February 20, 2013.