



Board Meeting January 23, 6:30 PM

Location
Sonrisas San Mateo Conference Room
430 N. El Camino Real, San Mateo

Join Zoom Meeting
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Meeting ID: 834 4561 5362

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AGENDA

- | | | |
|----|--|------|
| 1. | 6:30 CALL TO ORDER AND ROLL CALL –Board Chair Taverner | TABS |
| 2. | 6:35 MISSION MOMENT – Spandan Chakrabarti | |
| 3. | 6:40 PUBLIC COMMENTS | |
| 4. | 6:40-6:45 APPROVAL OF NOVEMBER BOARD MINUTES – Vice Chair Sánchez | A |
| 5. | 6:45-6:50 NEW BOARD MEMBER CANDIDATE – Director Hinshelwood | B |
| 6. | 6:50-7:50 STRATEGIC PLAN FY23-FY25 | |
| | A. Sonrisas Culture | |
| | a. DEIJ Business Case Development – Tanya Bluford | C |
| | B. Sustainable Growth | |
| | a. FQHC Project Update – Board Chair Taverner and Director Kneepel | |
| | C. Q2 Progress on Goals – CEO Fecher | |
| 7. | 7:50-8:00 REPORTS | D |
| | A. CEO Report – CEO Fecher | E |
| | B. CFO Report – CFO Yee | |
| | a. December 2023 Profit and Loss, Balance Sheet, Dashboards | |
| | C. Fundraising Report – Spandan Chakrabarti | F |
| | D. Outreach Report – Dr. Bonnie Jue | G |
| | E. Board Nomination Committee – Director Hinshelwood | |
| 8. | 8:00-8:05 SUGGESTED AGENDA ITEMS FOR NEXT MEETING – Board Chair Taverner | |
| 9. | ADJOURN | |





Board Meeting November 28, 6:30 PM

Location
Sonrisas San Mateo Conference Room
Zoom Teleconference

MINUTES

1. **CALL TO ORDER AND ROLL CALL** – **Vice Chair Sánchez** called the meeting to order at 6:32 pm.
 - A. **Present:** Vice Chair Henry Sánchez, Secretary Clyde Hinshelwood, Board Members: Larry Cappel, Dennis Kneoppel, Rick Navarro, Steve Stielstra
 - B. **Also Present:** CEO Tracey Fecher, CFO Vickie Yee, Strategic Project Manager Anna Mimran, DEIJ Consultant Tanya Bluford, Administrative Assistant Veronica Le
 - C. **Absent:** Chair Nigel Taverner, Sheryl Young

2. **MISSION MOMENT** – **CEO Fecher** shared about a patient that was identified at one of the school screenings in San Bruno. A family, who recently arrived from Guatemala, had their 6-year-old child screened discovering multiple cavities with an active infection. Although the parents applied for Medi-Cal, they had not heard back yet. Outreach Clinical Care Coordinator, Irma Ochoa, received another call from the child’s mom, informing Ms. Ochoa, that her daughter cried all night because of mouth pain. Ms. Ochoa, Dr. Torrey, and the Practice Manager Hiajaira Solorzano brought the case to **CEO Fecher**, asking if there was any way to treat this child who was waiting for insurance. **CEO Fecher** acknowledged their compassion, approving of moving forward in treating this child despite not having an active insurance. Dr. Torrey and Lemny Hernandez-Caceres, a Dental Assistant who is also from Guatemala, spent part of their lunch to treat this child. The team went as far as to locate a pharmacy within walking distance from a bus stop, so the mother could immediately pick up her child’s antibiotics. This is an example of the team executing Sonrisas’ mission, putting the needs of the patient before protocols.

3. **PUBLIC COMMENTS**—No public in attendance.

4. **APPROVAL OF SEPTEMBER BOARD MINUTES**
 - A. Ms. Le pointed out the vote should be approval of October Board minutes and not the September Board minutes.

***Director Rick Navarro** moved to approve the minutes of October 24th's meeting. **Vice Chair Henry Sánchez** seconded the motion and was approved by roll call. **Ayes:** Henry Sánchez, Clyde Hinshelwood, Larry Cappel, Dennis Kneoppel, Rick Navarro, Steve Stielstra.*

[Director Larissa Cutler joined the meeting at 6:46 pm.]

5. **STRATEGIC PLAN FY23-FY25**
 - A. **Strategic Plan First Quarter Update** – Introductions were made as this is the Board’s first meeting with Strategic Project Manager, Anna Mimran. Ms. Mimran gave a brief overview of the strategic plan’s first quarter results. The team leading the Strategic Plan (Focus Area Champions) met with Mission Met/Causey facilitator Eric Ryan for an overall update of the strategic plan progress. Ms. Mimran sent each Champion a survey to weigh in on the pros and cons as the Champions to note what worked well and what did not.
 - a. **Sonrisas Culture**—The goals are on track and the staff enjoy the staff-driven events such as evolving the Friendsgiving potluck into monthly potlucks.

1. Sonrisas hired Patty Leaper to provide one on one coaching to the Leadership team and group coaching sessions to all Supervisors.
 - The team have given positive feedback on Mrs. Leaper's sessions.
 2. The DEIJ Business case with Ms. Bluford is on track to engage with the Board and collaborating with the staff to build out a business plan in hopes of completing it early next year. Ideally, this business plan will be used at the next Board retreat and implemented in the next strategic plan round.
- b. **Sustainable Growth**—Significant progress was made over the first quarter in the FQHC Pathways plan. **CEO Fecher** met with various stakeholders and consultants, growing the knowledge **CEO Fecher** and the board champions have about FQHC's.
1. The goal to explore an in-office dental plan for patients without insurance is on hold. Although Ms. Solorzano identified a potential insurance provider, the Medi-Cal legislation is reportedly making changes in January to become more widely available.
 - Sonrisas is waiting to confirm the number of patients who might still need an in-office dental plan and if it is still worth enlisting a third party.
 2. The plan to update financial management processes will not begin until Quarter 3 then will begin updating the financial management tools.
 3. The team began establishing the quarterly financial review by sharing email updates with the Supervisors after monthly forecast updates. This is to give more insights to Supervisors, encouraging them to share relevant information with their team for transparency.
- c. **Patient and Community Engagement**—Several new goals were set while some of the existing goals had to be adjusted to be more efficient and focused.
1. The patient feedback survey, piloted in Half Moon Bay from July to September, was a helpful exercise as the team received positive feedback.
 - Analyzing the results was time-consuming since there were numerous open-ended questions and the platform required questions that were not necessarily helpful to Sonrisas.
 - The team is currently looking into alternative formats for conducting the surveys with the help of Mrs. LeBaron-Hsieh.
 2. **CEO Fecher** asked the Board if they know of any survey tools that could be used for this area.
 - It was mentioned that medical software pertaining to surveys can be extremely expensive.
 - **Vice Chair Sánchez** and **Director Cappel** offered to investigate software that will be beneficial to Sonrisas.
 3. Patient Demographic surveys is a new goal that was recently added since Sonrisas does not have a complete demographic of all patients. With Ms. LeBaron-Hsieh back, she will be focusing on tackling this issue with the hopes of determining the best practice of gathering demographic information.
 4. To increase the capacity of school outreach programs, Dr. Bonnie has been busy with scheduling screenings for the Spring 2024 school year.
 - Screenings for the Fall 2023 school year are completed.
 - Currently the Outreach Team is using Excel spreadsheets to gather impressive data from the programs, but it is cumbersome to manage and pull data from.
 - As the program grows, the Outreach Team needs a proper database to help manage pulling data and a bigger flow of data.
 - First Five can provide access to Persimmony so Sonrisas is trying to schedule training for early December with a small set of data to see if it will

meet the program's needs.

- **Director Hinshelwood** offered to reach out to a contact at Oracle. Ms. Mimran welcomed suggestions of any databases board members know about.

B. Sonrisas Culture

- a. **DEIJ Business Case Orientation and Overview** – Ms. Bluford gave a review of the areas of opportunities that can build a DEIJ business case for Sonrisas. Ms. Bluford believes it is important to develop a business case internally, as it is something that lives throughout the organization. If a business case is not firmly embedded within the organization, then the work is not forgotten. Diversity in the business can evolve over time and it is advisable to revisit the business case every 3-5 years to ensure it is still relevant.
 1. It was decided to postpone the feedback session regarding the articles Ms. Bluford provided for the January meeting.
 2. **Director Hinshelwood** acknowledged there may be a few areas of opportunity that are counter to Sonrisas' mission.
 - Ms. Bluford will rethink the list of opportunities after taking Sonrisas' vision and mission into consideration.
 3. A deeper dive into building a business case will be presented in the January board meeting.
 4. The team will request feedback from staff in February and share those results in March.

C. Sustainable Growth

- a. **FQHC Project Update** – **CEO Fecher** thanked **Director Kneepfel** for his help with the FQHC Pathways Project Dashboard. The dashboard will be updated every month. **CEO Fecher** opened the floor for discussion and feedback regarding the dashboard.
 1. There was a meeting with San Mateo Medical Center (SMMC) in October and it was learned that they are not interested in a subrecipient contract and only a subcontract.
 - Next steps are to work with SMMC to seek their approval to expand Sonrisas' current contract.
 - **Vice Chair Sánchez**—Is the expansion in terms of a basic expansion or a one-time expansion? How will it roll out?
 - SMMC allows Sonrisas to see adults with Medi-Cal only. Sonrisas would like to see all their patients, including children, under the contract.
 2. Currently, a conversation with Ravenswood has begun and the next steps are to attend a meeting scheduled for early December.
 3. There was an initial meeting with Samaritan House in October and followed up with research they requested.
 - There was no response at this time, possibly due to the holidays. **CEO Fecher** planned to follow up in January.
 4. **CEO Fecher** had a meeting with North East Medical Services (NEMS) back in June.
 - The per visit rate offered was too low compared to SMMC and Ravenswood.
 - A subrecipient contract could be attractive to both NEMS and Sonrisas.

6. Other Business

- A. **Professional Employment Organization (PEO) Update** – Upon the Board approval of moving to a PEO, the contract was reviewed by **Chair Taverner**, **CEO Fecher**, and Sonrisas' employment attorney. TriNet adjusted the contract based on the feedback of the employment attorney.
 1. Once the motion was approved to move forward with TriNet, the quotes for Kaiser's medical plans had expired. Once TriNet presented updated quotes, the cost had gone up 28%.
 2. TriNet rectified this increase by offering Sonrisas a one-year reduction in fees to them, which in turn **CEO Fecher** and **Chair Taverner** decided to apply that reduction towards employees' contributions.

- B. **Provider Recruiting Changes** – With the resignation of the full-time dentist in Half Moon Bay, Sonrisas will be investing in contingent recruiters to assist in searching for a replacement. The recruiters have vast knowledge in dentistry and are a great source in searching for potential candidates.
 - a. Not having an AEGD resident makes the time without a fulltime dentist in HMB easier on the team.
 - b. **CEO Fecher** thanked **Director Cappel** for coaching her on recruiting providers.

7. REPORTS

- A. **CEO Report** – **CEO Fecher** shared with the Board about the Measure K application. **CEO Fecher** will continue to update the reports in her CEO Report.
 - a. The project is to get a Dental RV to open a dental clinic on the South Coast. The clinic would have 6 provider days—3 Dentists’ and 3 Hygienists’ days.
 - b. The Dental RV clinic must be sustainable in year 4 and beyond.
- B. **CFO Report** – Similar to last month’s numbers.
- C. **Fundraising Report** – Fundraising revenue is on track.
- D. **Outreach Report** – No comments or questions.
- E. **Board Nomination Committee** – PHCD identified Dr. Paramita Roy as a potential board candidate but will not be able to meet with **CEO Fecher** and Dr. Bonnie until December 21st.

8. SUGGESTED AGENDA ITEMS FOR NEXT MEETING

- A. DEIJ Business Case with Ms. Bluford
- B. FQHC Update

- 9. **ADJOURN**—The meeting was adjourned at 8:00 pm.



DATE: January 5, 2024

TO: SDH Board of Directors

FROM: Director Clyde Hinshelwood

RE: Sonrisas Board Candidate for PHCD Seat

Director Sheryl Young, a long time Sonrisas board member that was appointed by PHCD, is retiring from the Sonrisas board as soon as her replacement is found. Sheryl has made tremendous contributions to Sonrisas as a board member, especially around strategy and non-profit trends. The Sonrisas staff and Board of Directors thank Director Young for all she has done to help Sonrisas grow and thrive since 2018.

A candidate has been identified by PHCD CEO Ana Pulido, Dr. Paramita Roy, DDS. PHCD leadership has met with Dr. Roy as have the Sonrisas CEO, Community Resources Director and Community Outreach Director. They believe Dr. Roy's experience as a practicing dentist, her work with Delta Dental and directing a Dental Hygiene program will benefit Sonrisas greatly. Dr. Roy has a strong connection to the mission and vision of the organization. Attached are her CV and letter of interest.

Dr. Roy will attend the January Sonrisas' board meeting as a guest. The PHCD board will discuss and vote on appointing Dr. Roy at their January 25th board meeting.

DR. PARAMITA ROY, DDSFoster City, CA 94404 • 201-696-7859 • proydd@gmail.com

November 1, 2023

Anna M. Pulido, MPA
CEO, Peninsula Health Care District (PHCD)
San Mateo, CA

RE: Statement of Intent, Board of Directors Position

Dear Ms. Pulido and Members of the Selection Committee:

I am writing to express my strong interest in joining the Board of Directors of the Peninsula Health Care District (PHCD). As a community organization, PHCD's distinguished dedication to providing healthcare services to underserved populations is a truly motivating mission. It is with great enthusiasm and commitment to the work of your organization that I submit my statement of intent.

Throughout my career, I have been driven by a profound sense of social responsibility and a passion for improving the lives of those who face barriers to accessing quality healthcare services. I firmly believe that oral health is an essential component of overall well-being, and I am deeply committed to advancing the cause of equitable healthcare access. Joining the board of PHCD would be an ideal opportunity for me to leverage my skills, experiences, and expertise to contribute meaningfully to this vital cause.

My professional background in private and public practice, hospital-based dentistry, academia, healthcare administration, as well as my philanthropic work has equipped me with a deep understanding of the unique challenges facing underserved populations in accessing dental and oral healthcare. I have witnessed firsthand the impact of socioeconomic disparities on oral health outcomes and the urgent need for targeted solutions. As a board member, I am eager to collaborate with the dedicated team at PHCD, as well as the community at large, to drive innovative strategies, programs, and initiatives that address these disparities.

Furthermore, my experience as a business owner, leadership, strategic mindset, and my ability to foster partnerships and collaboration will be valuable assets to the board. I am committed to assisting the organization in developing sustainable programmatic strategies, enhancing the organizations touchpoints in the community, and refining the collective mission to ensure it aligns with the evolving needs of the populations that we serve.

In addition to my professional qualifications, my personal outlook aligns closely with PHCD's core values of Stewardship, Collaboration, Inclusion, Shared Responsibility, and Transparency. I am committed to inclusivity, empathy, and the belief that everyone deserves access to the same quality of life. I am dedicated to the principles of accountability and ethical stewardship which are vital for the responsible governance of a nonprofit organization.

I am excited about the prospect of working closely with the exceptional individuals who make up the current team and contributing my skills and energy to help drive the organization's mission forward. It would be an honor to serve as a board member, working to advocate for underserved populations and to build a healthier, more equitable future for all.

In closing, I want to thank you for considering my candidacy for the Board of Directors at PHCD. I look forward to the opportunity to engage and further share how my experiences and vision can contribute to the continued success. Together, we can make a tangible difference in the lives of underserved populations through improved dental and oral healthcare access.

Sincerely,

Dr. Paramita Roy, DDS
Foster City, CA

DR. PARAMITA ROY, DDS

Foster City, CA 94404 • 201-696-7859 • proyddds@gmail.com

Oral Healthcare, Business, and Administration LeadershipServing patients through value driven personalized oral healthcare management
Dental Health / Insurance Administration / Community Service / Business Development

- Progressive leadership experience in multi-setting dental practice serving the healthcare needs of a varied socioeconomic patient population with proven high customer satisfaction scores and patient recall
- Passionate local business owner deeply committed to serving the oral healthcare needs of the local community and providing a positive employer-of-choice experience for individuals and teams
- Experienced dental insurance industry specialist leveraging standard of care knowledge to drive positive patient outcomes through complex grievance management and provider feedback
- Varied experience in hospital dentistry, academia, public health, and private practice, supporting a continuous improvement and operational excellence mindset to improve results and experiences
- Dedicated to driving healthcare equity through volunteerism, knowledge sharing, teaching, best practices, and mentorship within industry and community allyships that drive sustainable change

PROFESSIONAL EXPERIENCE**Roy Dental (Redwood City, CA), Owner & CEO**

2012 - Present

Dental practice owner with full accountability for all aspects of clinical delivery and business management.

Clinical Delivery, Patient Care, and Customer Satisfaction - establish and lead an evidence-based practice with the mission of providing high quality oral healthcare complementing the medical wellbeing of patients. Routinely consult with medical and healthcare providers to ensure end-to-end care regimen. Leverage hospital based clinical background, knowledge of disease states, general and oral health connectivity, adverse effects, and drug-drug interactions to optimize clinical delivery. Expand clinical procedures yearly through practice continuous improvement.

Office Management and Business Growth - transition practice from paper to digital to meet American Dental Association (ADA) standards while growing from 2 to 6 employees. Establish office and practice protocols (infection control, medical emergency, evacuation and disaster recovery plans, exposure protocols, etc.). Responsible for P&L decisions, including yearly insurance (re)credentialing and fee structures, investment of resources, training, and equipment. Develop preferred relationships with clinical and lab suppliers. Manage routine insurance audits with no critical observations, and all relevant business and clinical licenses (OSHA, HIPAA, CPR, Radiology, Sterilization, etc.). Establish community outreach programs (Coalition for Concerned Medical Professionals, Operation Gratitude). Member of medical office management committee deciding building improvements and fund allocation.

Employee Management and Personal Growth - increase practice skill-sets working with multiple agencies to identify and recruit talent. Establish relationships with local community colleges for internship opportunities. Conducted on-going formal employee reviews, training programs, staff meetings, and payroll. Develop self through memberships of various study clubs (SPEAR), and societies (American Dental Association, California Dental Association, American Academy of Sleep Medicine, and San Mateo Dental Society) with active participation in ongoing continuing education around evolving standard-of-care. Volunteer for various outreach programs and oral health screening camps.

Delta Dental of California (Remote), Dental Consultant

2021 - Present

Dental Appeals and Grievances Management – review and adjudicate claims appeals for both patients and providers utilizing core standard of care operations guidelines. Investigate and process medical necessity and benefit coverage, and review and assess quality of care for members. Monitor and review cases for fraud, waste, and abuse to ensure value for customers.

Business Process Improvement – utilize Six-Sigma / Lean elements to drive continuous improvement opportunities within G&A team. Develop online case tracking and data capture subsequently utilizing core datasets to cross

reference to enterprise wide dashboards (Tableau). Internal cross-function team responsible for cloud launch of enterprise system.

Employee Training Development – create collateral and develop materials for team onboarding and training, acting as single point of contact / owner for new team member and/or consultant training on process and internal systems.

Institute of Medical Education (San Jose, CA), Director - Dental Hygiene Program

2011 - 2012

Responsible for oversight of the dental hygiene program, including faculty management, curriculum development, teaching, student counseling, administration, and professional credentialing with ~\$0.5m budget. Accountable for recruitment, development, and supervision of program faculty (10+ roles). Teaching responsibility for courses (Radiology, Ethics), and on-floor clinic supervision. Primary liaison for all professional accreditation bodies (i.e. ADA). Responsible for all quality assurance oversight for diagnosis and treatment plans, patient satisfaction, and ensuring proper patient follow up.

CommWell Health (Dunn, NC), Associate Dentist

2009 - 2011

Managed all aspects of patient care and supervision to assistants, hygienists, and office staff in a fully digital, Dentrix based public health clinic (large, underserved migrant population, Medicaid, and private insurance patients). Two-to-three column patient load during clinic hours, and walk-in emergency care (25+ patients) daily. Achieved highest ratings in patient satisfaction and recall. Comfortable working in bi-lingual (Spanish) environment and translating for Indian patients (Hindi). Clinical teaching supervision to University of North Carolina dental students on rotation.

Dentonic Dental Clinic (Kolkata, India), Dentist

2001 - 2002

AMRI Apollo Hospital (Kolkata, India), Dental Surgery Staff

2000 - 2001

EDUCATION

General Practice Residency (PYG-1), Dental Ecology
University of North Carolina, Chapel Hill, NC

2008 - 2009

One-year post-graduate rotational residency program at UNC Hospital, Durham VA Hospital, and Orange County Health Department (public health).

Doctor of Dental Surgery (DDS)
New York University, College of Dentistry, New York, NY

2005 - 2008

Bachelor of Dental Surgery (BDS)
Bangalore University, VS Dental College and Hospital, Bangalore, India

1994 -1999

OTHER

California Dental License (59866)
NPI (National Provider Identification) - 1306008271
DEA - FR2873657, Current CPR Certification
Invisalign Certification, CEREC 3D, Dexis
American Dental Association
California Dental Association
San Mateo County Dental Society
American Association of Dental Consultants
Coalition of Concerned Medical Professionals California
Adjunct Associate Professor (Prior)
University of North Carolina School of Dentistry

Fluent in Dentrix & EagleSoft (Dental Office)
ADP, Intuit, Quickbooks, DemandForce, Lighthouse
Weave CRM, Indeed, Swiss Monkey
Windows, Mac, MS Office Suite, GSuite



DATE: January 5, 2024

TO: SDH Board of Directors

FROM: Tracey Fecher, CEO
Tanya Bluford

RE: DEIJ Business Case Development

Dear Board Members,

In preparation for developing Sonrisas' DEIJ business case with Tanya Bluford at the January 23rd board meeting, the following documents are attached:

- The November memo from Tanya with three articles and a video for board members to review that gives an overview of the concept of a DEI business case and how it can be used by organizations to imbed and integrate DEI work.
- Two slides that show the components of a DEIJ business case

We look forward to our session together in January!



November 21, 2023

Dear Sonrisas Dental Health Board of Directors,

In preparation for the work, we will be doing to create a clear and compelling DEI Business Case for Sonrisas I have compiled a few articles and one video for you to review prior to the January board meeting. Together these will provide a thorough overview on the concept of a “DEI Business case” and how it can be used by organizations to imbed and integrate DEI work without all business operations. Hyperlinks to the articles are included below and pdf versions of all the articles can be found in your board packet.

1. [HR University](#)
 - a. [YouTube Video](#)
2. [Forbes Inc.](#)
3. [NPR](#)
4. [SHRM](#)

In the meantime, please let me know if you have any questions and I look forward to seeing you in January.

Best,

Tanya

[HR Career Path](#)[Strategic Human Resources Management](#)[HR Compliance](#)[HR Analytics](#)[DEI](#)[Benef](#)

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What is the Business Case for Diversity?

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Need for Safe Spaces and Environments

LGBT Job Priorities

Why Inclusion and Diversity Are Important to Younger Job Seekers

The Relationship Between Inclusion and Mental Health

Inclusion and The Equality Act

Conclusion

The business case for diversity is an organizational discourse connecting a diverse workforce with organizational outcomes. For example, business leaders often make a business case for diversity, claiming that hiring more women or people of color, ethnic minorities, or sexual orientation results in better financial performance.

The business case for a diverse and inclusive workplace is clear – not only do organizations with stronger LGBTQ representation and inclusion policies attract better diverse backgrounds, but most also see significantly higher profits and better business performance. For example, a 2015 Harvard Business School alumni survey revealed that 76% of people in senior executive roles believe that “a more diverse workforce improves the organization’s financial performance.”

To learn more via video, watch below. Otherwise, skip ahead to continue reading.

What is the Purpose of a Business Case for Diversity?

Diversity in leadership is essential for equal opportunities, talent, drive, and success. In addition, women and other underrepresented groups must be given equal access to opportunities to reach

their full potential.

Diversity efforts give access to a range of talent. In addition, it helps provide insight into the needs and motivations of all of your clients rather than just a small part of them.

The purpose of diversity and belonging is to incorporate the different features that allow individuals to bring their authentic selves to work and honor their contrasts. Companies also benefit from this diversity of thought.

Looking to master diversity and inclusion? Enroll in our top-rated diversity and inclusion certification course to excel in your career:

What are Examples of Business Cases for Diversity?

The following are some examples of business cases for diversity.

Gender Business Case

Companies with more female representation in executive management have been shown to outperform companies with no women in senior roles financially.

Improved Financial Performance from Women in Leadership

- Firms with a higher share of women in senior roles have a significantly larger return on assets, even within narrowly defined industries.
- Companies with women CEOs have stronger financial performance.

- More women on corporate boards and executive teams are a form of promoting women to rise through corporate ranks.
- Companies with female senior management score higher on organizational criteria than firms with no women at the top.

Greater Capitalization of Talent

- Drawing leaders from the talent pool will give the organization more flexibility.
- Highly educated and qualified women are being underutilized.
- Women are less present in finance and STEM sector boards.
- Losing talent is expensive in both opportunity and employment costs. A rule of thumb for the cost of attrition is 150-200% of the annual package.

Enhanced leadership, Team Performance, and Motivation

- Heterogeneous teams are more creative and better at generating new ideas, but only if the organizational culture values diverse viewpoints.
- Women bring different behaviors and leadership skills to the table.
- More women in leadership opportunities highlight roles for women to succeed.
- Diversity programs have a beneficial impact on motivation, and diverse workforces accomplish more financially.
- Employee satisfaction and engagement are critical to organizational success and directly impacted by diversity. What women find unappealing about organizations is increasingly reflected in the attitudes of male employees. Employees who are not engaged with company behavior and values perform poorly.
- Greater diversity in organizations reduces staff turnover.

Corporate Governance

- Companies with women perform better in key board committee roles (such as risk and audit).
- There is a link between women on corporate boards and good governance credentials.
- Companies with at least one woman on their committees reduce their risk of bankruptcy.
- Lagging in this area exposes your organization to public relations challenges.

Economic Growth

- Unlocking the underrepresented value of the labor pool of women is useful for the economy.
- Reducing the gender gap in work spaces can increase GDP.

Corporate Social Responsibility and Culture

- More gender diversity on boards can lead to greater corporate transparency and improved ethical orientation.
- More gender diversity protects women against sexism and sexual harassment.

Racial Business Case

A [Boston Consulting Group study](#) found that companies with more diverse management teams have 19% higher revenues due to innovation. This finding is significant for tech companies, start-ups, and industries where innovation is the key to growth. Moreover, it shows that diversity is not just a metric to be strived for; it is an integral part of a successful revenue-generating business.

- Potential boost of [£24bn to the UK economy](#) annually, if employers get race equality in the workplace right.
- Organizations with [ethnically diverse](#) leadership teams outperform their peers by 33%
- Women from Pakistani and Bangladeshi backgrounds are the least likely to be employed.
- Black Americans comprise ten percent of the United States graduates, but only four percent hold executive positions.
- Hispanics and Latinos comprise eight percent of graduates versus four percent of executives, and Asian Americans, seven percent of graduates versus five percent of executives.
- In the UK, the inequality is even greater: twenty-two percent of university students identify as black and minority ethnic, yet only eight percent of UK executives are from these backgrounds.
- Black women are underrepresented in positions and face a harder path to CEO.

LGBTQ Business Case

Companies worldwide are increasingly recognizing, and committing to, LGBTI+ (lesbian, gay, bisexual, transgender, and intersex) diversity and inclusion.

- 28% of LGBTI employees did not tell anyone at work about their sexual orientation or gender identity, and 23% told only a limited number of people.
- On average, one-third (33%) of respondents had “never” been open about being LGBT at work in the past five years, and 23% had been so “rarely.”
- Having LGBT-inclusive policies is associated with reduced incidences of discrimination, and that is associated with better psychological health and higher job satisfaction among LGBTI employees.
- A supportive workplace climate, including LGBT-supportive policies, is associated with a better likelihood that LGBT employees will feel comfortable expressing their sexual orientation at work. Higher disclosure of sexual orientation is linked to better psychological health among LGBT workers.
- LGBTI employees are more satisfied with their jobs when covered by supportive policies and working in positive climates of employee resource groups.
- LGBT-supportive policies and workplace environments are associated with improved relationships among LGBTI employees, co-workers, and supervisors. In addition, LGBTI employees are more engaged in their job, are more likely to go above their job description and contribute to the workplace, and convey a greater commitment to their jobs.
- Although there are initial costs to enacting LGBT-supportive policies, such as extending health benefits to same-sex partners of LGBTI employees, costs are likely negligible. Cost savings can offset them in other areas. Healthier, more committed LGBTI employees are likely to make greater contributions to the workplace.
- Among consumers and job-seekers who value LGBT-inclusive diversity practices, businesses with LGBT-supportive policies are seen as better companies, thereby increasing their customer base and pool of prospective employees.

What are the Benefits of Business Cases for Diversity?

[Forbes](#) research conveys that decisions made and executed by diverse teams delivered 60% better results, and an inclusive environment makes better business decisions 87% of the time.

It has been well-documented that inclusive and diverse organizations are more prosperous. Whether it includes adding more women at a senior level, realizing the full potential of minority, black and ethnic workers, or being thoughtful of those with poor mental health, workplace diversity can catalyze business growth and success.

Organizations with Women Being More Profitable

We have seen little progress towards gender parity in the past five years. Moreover, the pandemic has created an additional setback, with [one in four women considering leaving work](#) compared to one in five men.

However, a lot of data shows organizations with more women in top roles are more profitable. McKinsey research shows that organizations with fewer than 20% of women at the exec level reported decline, flat or slow profitability. There is a [48% performance](#) difference between the most and least gender-diverse companies.

These compelling statistics propel organizations to look at why women are leaving or not advancing in their work lives, including looking at parental policies and flexible working to address the 17% of women who leave employment after childbirth.

Truly inclusive organizations also recognize the impact of menopause in the workplace, which affects 50% of employees.

Ethnic Diversity and Business Success

[McKinsey research](#) in 2014 and 2017 indicates a higher likelihood of outperformance differences with ethnicity rather than gender.

Black and minority ethnic people in the UK are less likely to work and progress in the workplace than white individuals. As a result, in Britain, there is a [loss of £24 billion annually](#) due to the failure to bring talented Black or minority ethnic professionals into the workforce.

It is important to consider what barriers exist in your organization, from entry to board level, preventing everyone from reaching their full potential.

People are Looking for Diverse Workplaces

In the current competitive recruitment market, companies need to work hard to attract the best candidates to their organizations. People are considering organizational culture more now, and

76% of job seekers [report that a diverse workforce](#) is a non-negotiable factor when considering job offers and companies.

Cultural inclusiveness in the workplace is mandatory. There is little point in hiring people in a culture that will not support or include them; the shift needs to come first.

Need for Safe Spaces and Environments

A culture where people feel appreciated, included, and safe will positively impact productivity. Therefore, companies must encourage employers to build safe spaces where everyone feels welcomed and bring as much of themselves to perform as they choose.

A psychologically safe environment will not only bring improved productivity and profitability but can also bring other benefits for organizations, including improved engagement, increased trust, and better teamwork.

LGBT Job Priorities

Studies have shown that the LGBTQ+ pool is well-educated, more engaged than most, and highly empathetic. In addition, clear LGBTQ+ inclusion is an increasingly powerful business differentiator for organizations. For example, more [60% of LGBTQ+ employees](#) believe being at work has improved their capacity to do business and engage with customers.

In a competitive labor market, LGBTQ+ inclusion is a talent differentiator – more than 80% of workers believe that having a supportive focus on LGBTQ+ has provided their organization with the best talent.

Companies must look at their internal and external communication platforms and determine if their organization has an authentic, supportive LGBTQ+ focus.

Why Inclusion and Diversity Are Important to Younger Job Seekers

Gen Z and Millennials' expectations of inclusion and diversity differ from those of other generations. However, these groups actively look at employers through an inclusion lens, with 83% of Gen Z candidates mentioning that a company's commitment to inclusion and diversity is important when choosing a workplace.

Additionally, these generations are said to be more engaged with an organization that fosters an inclusive work environment and has a corporate culture with a diversity plan, increasing productivity and developing loyalty and trust.

It is estimated that almost half of the working population is now made up of Millennials and Gen Z, so the business case for taking an authentic approach to inclusion is clear.

Organizations must give their workers and colleagues a voice. Companies must be able and willing to listen, adapt and flex to make their organization welcoming to all generations.

The Relationship Between Inclusion and Mental Health

When mental health comes into the picture, the business case for inclusion cannot be clearer. Work-related mental health costs the UK economy up to £45 million annually through absent days, lack of working days, high staff turnover, less retention, and lower productivity.

The impact of the COVID-19 pandemic on employees' mental health has yet to be properly figured out. Every inclusive employer needs to see accessible, inclusive mental health as essential for both business and ethical reasons. Many organizations have increased the

awareness and support around mental health during the pandemic. This focus must continue so all employees can perform at their best by being comfortable sharing how they are feeling at the moment and what is going on in their lives at present.

Inclusion and The Equality Act

Without the Equality Act, we cannot discuss the business case for diversity and inclusion.

Employers are responsible for people employed and people following their instructions regarding discrimination complaints. Over the last year or so, employment has increased for characteristics such as race, age, sexual orientation, and sex. Therefore, taking steps to prevent employees from acting unlawfully, including policies and regular inclusion and diversity training, is essential for all organizations.

Of course, alongside the legal and business case for inclusion, there is also a compelling moral case to be a fair employer. Ensuring everyone is treated fairly and equally is the right thing to do.

Conclusion

Despite a higher focus on inclusion and diversity in many organizations, women and people of color remain seriously underrepresented in many industries and most organizations' senior ranks.

Increasing the number of traditionally underrepresented people in the workforce does not automatically translate or lead to the production of business benefits. Being a just and inclusive employer is much more than collecting flattering data. It is about how you embrace diversity, bring this data to life, and use it to evolve your inclusive culture.

Josh Fechter

Josh Fechter is the founder of HR.University. He's a certified HR professional and has managed global teams across 5 different continents including their benefits and payroll. You can connect with him on [LinkedIn here](#).

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The business case for implementing DEI (diversity, equity and inclusion)

Businesses that establish diversity, equity and inclusion principles outperform their peers

April 20, 2021 by James McKim (<https://www.nhbr.com/author/jamesmckim/>).

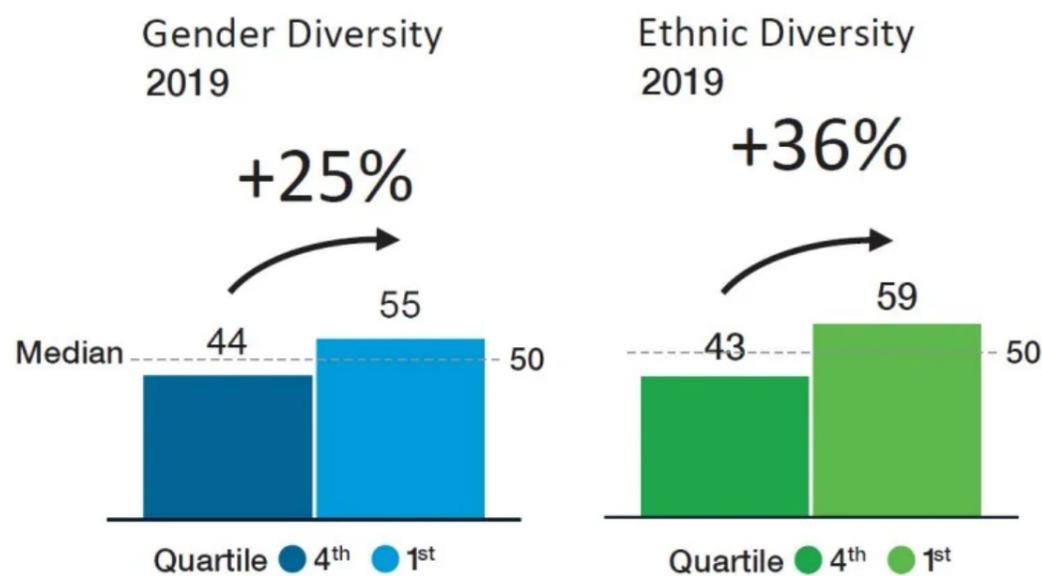
Studies show, by providing an inclusive environment for employees and managers who have diverse internal, external and organizational characteristics, companies set the stage for innovation and business growth.

Diversity — a buzzword that has taken the nation by storm. Its use and importance have been amplified by the killings of George Floyd, Ahmad Aubrey and Breonna Taylor.

Many people say that diversity is the solution to the divisiveness we have seen in our society over the last few centuries.

But is it that simple? And is there more of a reason to lean into diversity than social justice?

Studies from the Harvard Business Review, Boston Consulting Group, McKinsey and Clear Company show diversity has a strong correlation with organizational performance.



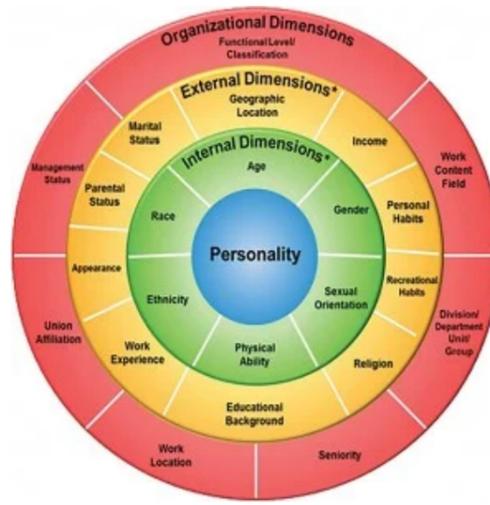
The chart above is from McKinsey's most recent report, "[Diversity Wins: How inclusion matters](https://www.mckinsey.com/featured-insights/diversity-and-inclusion/diversity-wins-how-inclusion-matters)." It shows (blue bars) that organizations with diversity of gender are 25% more likely to be more profitable than their peers. It also shows that organizations with diversity of ethnicity (green bars) are 36% more likely to be more profitable than their peers.

The World Economic Forum's report "Diversity, Equity, and Inclusion 4.0" suggests that companies with diverse employees have "up to 20% higher rate of innovation and 19% higher innovation revenues."

Think of the most innovative companies (e.g. Google and Apple). Ever wonder why they are so innovative? One reason they, themselves, point to is their diverse employee base.

Diving deeper into diversity

What does that mean for organizations here in New Hampshire? Many say that in a state that is 91.2% categorized as white, there is no diversity. Many say they have trouble hiring "diverse" people. Others think of diversity strictly in terms of gender. In my experience, those narrow definitions prevent us from realizing that diversity is broader than race or gender.



(<https://www.nhbr.com/content/uploads/2021/04/c/c/diversitywheel2.jpg>) In my experience, it is best to define “diversity” using the “Diversity Wheel” shown in the figure to the right. The wheel was originally created in 1991 by Marilyn Loden at Johns Hopkins University. It was updated in 2009 by Gardenswartz and Rowe.

The basic notion is that we all have internal, external and organizational characteristics of our personalities.

Internal characteristics are powerful/sustaining characteristics, having a lifelong impact (e.g. age, ethnicity, gender, physical abilities/qualities, race and sexual orientation/identity).

External characteristics are other important characteristics acquired later, potentially less influential, mutable differences (e.g. educational background, income, marital status, work experience, military experience, religion and geographic location).

Organizational characteristics are social interaction characteristics (e.g. function in an organization such as sales or R&D, seniority in the organization, level of contribution such as individual contributor or manager).

Diversity is more than just race or gender. It includes belief systems and ways of thinking or interacting with the world.

Driving results

But diversity of people in an organization alone is not sufficient to achieve the results described by the research. Inclusion must also be part of the equation — inclusion with the goal of making people feel like they are valued and belong is what drives those results.

A good way to think about inclusion is that it is “active, intentional and ongoing engagement with diversity in ways that increase awareness, content knowledge, cognitive sophistication and empathic understanding of the complex ways individuals interact within systems and institutions. (It is) the act of creating involvement, environments and empowerment in which any individual or group can be and feel welcomed, respected, supported and valued to fully participate.”*

This begs the question, how do we include people so they feel welcomed, respected, supported and valued — in other words, like they belong?

Many people feel that including and treating people equally is what makes them feel as if they belong. Yet, equality is also insufficient to produce belonging and superior organizational performance.

Treating people equally does not take into consideration the different needs, capabilities and circumstances of individuals.

Have you ever been given the same sized chair in your office as everyone else yet you are smaller (or larger) than most? Was not the chair uncomfortable, leading you to spend time addressing that discomfort that could, otherwise, be spent on your work?

Treating people equitably accounts for those differences and provides people with what they need. Treating people equitably is what makes people feel as if they are valued and belong. Treating people equitably helps them perform at their best.

Bringing these three concepts (diversity, equity and inclusion — DEI) together, organizations that equitably include diverse people are those that outperform their peers.

Your next steps toward DEI

We have established that diversity is more than just race or gender. We have established that organizations that equitably include diverse employees outperform those that do not. With New Hampshire demographics the way they are, how can you gain the advantages of DEI?

We know that benefiting from DEI is a long journey. Different organizations are at different points along the journey. Some have a DEI committee and a DEI plan already in progress. They are making their way through the challenges faced by any organization, trying to change the way an entire organization operates. Others are just starting and don’t know where to begin.

First, realize that DEI is all about people. I suggest you think of DEI as an organizational approach or set of principles rather than a goal or objective. DEI should be in the DNA of your organization – in everything your employees do. How do you do this? Make it part of your organization’s culture. Establish DEI principles that align with your organizational values.

Second, think of DEI as a change management effort. We humans are resistant to change. We tend to change only when we are truly motivated to do so. Everyone's motivations are different. Identify and empower a person in your organization to be the change agent authorized to drive the change. This person will need to identify what motivates the people in your organization and help identify ways to make change happen.

Third, follow my 5 Magic Guideposts to DEI. (Note: Any change or project management professional will recognize these "phases," but it is their application to the topic of DEI that makes the difference.)

1. set the tone. Provide foundational DEI education. Establish definitions of words such as "diversity," "equity" and "inclusion."

Answer questions such as "What percentage of our employee base is <insert characteristic from Diversity Wheel>?" "Do employees feel like they 'belong' in the organization?" "How many discrimination lawsuits have we had?" "Are we not reaching part of our TAM (Total Addressable Market) because we don't understand them?"

Identify challenges in your organization around race and set the stage for addressing race as a priority for your organization, such as establishing board and management-level commitment.

2. identify areas. Identify the areas in the organization where discrimination is occurring or where there is lack of innovation or belonging due to exclusion of diverse people based on the questions identified in the first step.
3. assess gaps. Assess the gaps in employee understanding of how to live by DEI principles at multiple levels: informal (off-task office interaction) and formal (policy/process/procedure).
4. establish goals. Define goals for living by DEI principles that support organizational goals. Create an action plan (including funding) to close that gap.
5. implement change. Implement the action plan. Monitor and control the effort. Track and report on progress regularly. Make adjustments to the action plan as needed to reset the tone for further success, even returning back to the beginning of the cycle. Always look for continuous improvement.

The journey ahead

Organizations across New Hampshire are working toward diversity, equity and inclusion. You don't have to create tools and techniques from scratch or go it alone. But do expect to have many difficult conversations about race, gender, age, religion, ways of thinking, how the organization is structured and how the organization is run (to name a few).

While some conversations may not be pleasant, they will lead to employees bringing their authentic selves to work.

As Debe Henley wrote in a recent Forbes article "[How To Be Your Authentic Self At Work \(And Why It Matters\)](http://How%20To%20Be%20Your%20Authentic%20Self%20At%20Work%20(And%20Why%20It%20Matters))," bringing our authentic selves to work is critical to achieving best personal performance, which leads to best organizational performance.

Just think, you will be killing four birds with one stone: bringing about social justice; following the precept of corporate responsibility; making New Hampshire a more welcoming place for people to work and live; and achieving the best performance your organization can muster.

*Accreditation Review Commission on Education for the Physician Assistant Standards 5th edition



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The Business Case For Diversity, Equity And Inclusion



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Diversity, equity and inclusion have become critical components of business success. While these concepts are often viewed through the lens of social justice and morality, there is also a compelling business case for promoting diversity and creating a culture of inclusion in the workplace. From attracting top talent to fostering a

more collaborative and creative workplace, the benefits of DEI are clear.

BETA

Below, [Forbes Business Development Council](#) members share the reasons why diversity, equity and inclusion are essential to business development success and how promoting diversity can lead to a more innovative and productive workforce, help companies better understand and serve diverse customer bases and improve overall business performance.

1. To Build Stronger Teams

As a sales and marketing leader, I believe that diversity, equity and inclusion are integral components of a successful business development strategy. Embracing and valuing differences helps us build stronger teams, foster innovation and better serve our customers and communities. - [Kuldeep Bhatnagar, Fusion Business Solutions Pvt. Ltd.](#)

2. To Foster Collaboration

By prioritizing diversity, equity and inclusion (DEI), organizations can create an atmosphere that is open to multiple perspectives and fosters collaboration, problem solving and innovation. Embracing DEI also builds trust and a sense of belonging among employees and customers, which is essential to creating a positive work environment and can lead to increased engagement, loyalty and profitability. - [Jeffrey Alpaugh, Marsh McLennan](#)

3. To Leverage The Best Talents

Instead of "checking the box" by appointing a figurehead of a new DEI division, true diversity means you are leveraging the best talents across age, ethnicity, race, culture, sexual orientation—and moreover—everyone's life experiences, unique expertise and fresh

perspectives. Equity brings everyone to a level playing field. Inclusion says you belong. Success comes naturally when this happens. - [Claudia Lin 林詠涵, HUB International](#)

[Forbes Business Development Council](#) is an invitation-only community for sales and biz dev executives. *Do I qualify?*

4. To Ensure The Production Of New Ideas

Businesses that fail to prioritize diversity, equity and inclusion are shooting themselves in the foot. When approached and implemented properly, diversity can be the lifeblood of an organization, ensuring there are always new ideas and perspectives to explore. The best way to achieve that diversity in thought is to first prioritize having equitable and inclusive structures in place. - [Dave Merkel, Expel](#)

5. To Create A Welcoming Environment

A focus on diversity, equity and inclusion serves the dual goals of creating a welcoming environment for all and increasing the likelihood of commercial success. Companies with diverse workforces typically outperform their peers, as they are better able to understand the needs of a broader customer landscape and can therefore develop offerings with more widespread appeal. - [Darby Green, Reorg](#)

6. To Make Employees Feel Valued

Diversity enhances problem-solving due to a broader range of perspectives. Equity builds confidence that growth opportunities are possible for everyone. Inclusion improves psychological safety

and employees feel more valued. These are a few of the numerous DEI benefits that empower business development teams to increase collaboration, engagement and productivity. - [Matthew Rolnick, Yaymaker](#)

7. To Perform Well And Achieve Success

Time and time again, data shows that diverse teams perform better than non-diverse teams. When every member of your revenue-generating team can bring their whole self to work and contribute to a culture of belonging, their performance is going to benefit and lead to success. As managers and leaders, it's our responsibility to prioritize DEI and set the tone for the entire team. - [Hayden Stafford, Seismic](#)

8. To Increase Retention

A focus on DEI makes business sense in today's diverse and interconnected world. Evidence from reputable sources and studies supports the notion that DEI is key to business development success, as it contributes to innovation, talent acquisition, retention, access to diverse markets, reputation and brand image, employee engagement and performance and mitigation of legal and reputational risks. - [Quyên Pham, Swoon](#)

9. To Make Critical Decisions

The best business execution is only possible with ideas, thoughts and execution strategies from varied sources and minds. Critical business decisions are best made by including thought processes from opined and debated and considering all vantage points. This is only possible with the inclusion of diverse talents, ensuring equitable representation of thoughts from all multiple facets of teams. - [Bharath Yadla, Workato](#)

10. To Increase Business Development

Diversity, equity and inclusion significantly affect the team's performance level in the area of business development. The better a team works together and holistically considers how multiple perspectives would translate to better decisions, will result in better business outcomes. - [Gabriel Tan, GUAVA Amenities](#)

11. To Build Trust Among Employees

Organizations should look for every opportunity, both internally and externally, to reaffirm the values underlying DEI commitments, how these map back to business goals and how the tactics being used will actually drive change. Ultimately, this builds trust between leadership and employees, and, when treated as a long-term, sustainable initiative, facilitates better work for the organization. - [Javier Molina, Starburst](#)

12. To Avoid Stymied Progress

To only have a singular or even a dominant perspective of any kind—whether race, gender, creed or otherwise, means that your business outlook is missing an essential aspect. When you multiply that aspect across all the areas of your company operation—including business development success—the missing aspect creates an unacceptable chasm of knowledge and understanding which limits productivity and progress. - [Peter Schravemade, REACH ASEA](#)

13. To Engage With Customers

Diversity provides the opportunity to make better decisions through a broader and more varied knowledge base. It affords the chance to engage with customers and consumers in a way that is more representative of their needs and wants. And it allows for

differences in values and beliefs that can lead to greater creativity and ideation. - [Michael Smith, Sonendo](#)

BETA

14. To Enhance Productivity

I have learned through experience that prioritizing DEI is key to achieving success. A diverse team brings new and innovative ideas while creating equal opportunities for growth and fostering inclusivity leading to a more engaged and productive workforce.

DEI is now an essential component of any B2B strategy, as customers and clients expect businesses to prioritize social responsibility. - [Oscar Chavez, Growthly Group](#)

15. To Attract Top Talent

Prioritizing diversity, equity and inclusion allows you to formulate a team and working environment that embraces varied skill sets and backgrounds. You want to create an environment that attracts the most talented people, and this starts with making your employees feel like they are welcomed, valued, engaged and recognized based on their talents and what they bring to the organization. - [Jim](#)

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Senior-level sales & biz dev executives from [Forbes Business Development Council](#) share firsthand insights.

How to Make a Business Case for DEI&B at your Company

By SHRM Staff (/Author/12) On January 5, 2023 0 Comments (/Blog/How-To-Make-A-Business-Case-For-Deib-At-Your-Company#Comments)



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Workplace culture continues to come under scrutiny in today's constantly changing and highly competitive market. One in four U.S. workers say workplace inclusivity needs improvement. Candidates have higher expectations for employers' ability to cultivate an inclusive workplace culture and foster a diverse workforce.

In response, diversity, equity, inclusion, and belonging (DEI&B) initiatives are becoming a priority for more workplaces. And while the responsibility to drive these efforts tends to fall on HR, they can no longer be viewed as solely HR initiatives, but rather, as organization-wide business imperatives.

While HR may be in the driver's seat of developing DEI&B strategies, company leadership has a responsibility to help advance these policies in their organizations. They must lead by example to influence change from the top-down and encourage employees to carry the values of DEI&B across the entire organization. And although many executives recognize the importance of DEI&B in the workplace, they often lack a commitment to those efforts. Leadership buy-in and engagement require HR practitioners to make a compelling case and demonstrate how DEI&B can support overall business goals.

[Learn more about the SHRM Inclusive Workplace Specialty Credential \(https://youtu.be/tTmN-HTIXrM\)](https://youtu.be/tTmN-HTIXrM)

The Role of Leadership in Driving DEI&B

Prioritizing DEI&B is an all-hands-on-deck effort and company executives should be leading by example. Two-thirds of North American organizational leaders surveyed by Harvard Business Review Analytic Services and SHRM (<https://shrm.org/hr-today/trends-and-forecasting/research-and-surveys/Documents/DEI%20Metrics%20Full%20Report.pdf>) say that DEI&B is a high strategic priority for their organization. Half of the respondents who view their organization as "not very successful" at DEI&B say a lack of leadership commitment hinders those efforts, whereas 77% of respondents from organizations with successful initiatives report that their executives demonstrate visible support for improving DEI&B.

Despite the clear need for leadership involvement, there is some uncertainty about who is responsible for implementation. According to a study by Chief Executive Group and SHRM (https://strategicchro360.com/wp-content/uploads/2022/02/CHRO-Board-Partnership.pdf?utm_source=SHRM+CHRO+Whitepaper+CHROSite+Downloads&utm_medium=SHRM+CHRO+Whitepaper+CHROSite+Downloads&utm_campaign=SHRM+CHRO+Whitepaper+CHROSite+Downloads)

of HR practitioners hold themselves responsible for implementing DEI&B while only 62% say the CEO is responsible. By contrast, 69% of board directors hold HR functions accountable while 82% view the CEO as responsible.

Whether this disparity is due to a lack of understanding about the connection between diversity and profitability, or discrepancies around responsibilities to implement DEI&B initiatives, executives are aware of their influence on workplace culture and morale. In fact, 97% (<https://www.shrm.org/resourcesandtools/hr-topics/people-managers/pages/managers-and-empathy.aspx>) of CEOs agree that their actions directly impact workplace culture.

Workplace culture is created through a shared set of values. When leadership and high-visibility employees collectively demonstrate a commitment to those values, it sets the tone for everyone else.

The Case for DEI&B with Leadership

We know we need to get leadership on board with DEI&B, but making the case can be a challenge. To succeed, HR practitioners must tell a strong, data-backed story and deliver a plan of action with clear measurable goals.

When building a case, HR practitioners should consider three key steps:

- 1) Take a data-driven approach

- Integrate data about your company's performance and draw a connection to any deficiencies or past progress in DEI&B.

2) Set measurable and timely goals

- Based on existing company performance, identify key areas and opportunities for improvement that could be positively impacted by DEI&B.
- Create a launch timeline and note important milestones that will keep the business accountable and ensure an efficient roll-out.
- Set relevant KPIs that can be achieved through your proposed DEI&B strategy. These will allow you and the leadership team to easily track progress as the strategy is deployed.

3) Spotlight success stories

- Share how companies who have implemented successful DEI&B initiatives have seen improvements across their business.
- Highlight cases of peers and competitors with successful DEI&B programs that showcase metrics around improved financial performance, new investments, customer growth, and recruitment and retention.
- Build out the case with reputable third-party research that illustrates how DEI&B supports business growth. For example, recent research (<https://www.mckinsey.com/featured-insights/diversity-and-inclusion/diversity-wins-how-inclusion-matters>) shows that companies with successful DEI&B initiatives outperform their competitors financially. Specifically, companies in the top quartile for workforce diversity have a 36% greater chance of outperforming those in the fourth quartile in profitability.

Creating Lasting, Positive Change in your Workforce

Making a business case for DEI&B is hard, but with the right steps you can make a convincing case to get the ball rolling. Use data to demonstrate DEI&B's business impact and share an actionable strategy with measurable goals to get leadership on board.

Beyond building a business case, continuing education and training can be vital tools for enabling HR practitioners to foster positive transformation. SHRM's educational program (<https://shrm.co/as5b31>) and Inclusive Workplace Culture Specialty Credential (<https://store.shrm.org/SHRMInclusive-Workplace-Culture-Specialty-Credential>) equips practitioners with the necessary tools and insights to drive DEI&B strategies within their organizations. The program teaches practitioners skills like inclusive recruitment, hiring, and onboarding practices.

There's a lot of work to be done, but you're not in this alone. Learn more about the invaluable skills you can develop as an HR practitioner with SHRM's educational program and Inclusive Workplace Culture Specialty Credential. (<https://store.shrm.org/SHRMInclusive-Workplace-Culture-Specialty-Credential>)

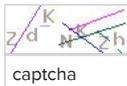
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SUBMIT

JEDI Business Case Opportunities

Reduce Expenses

Increase Income

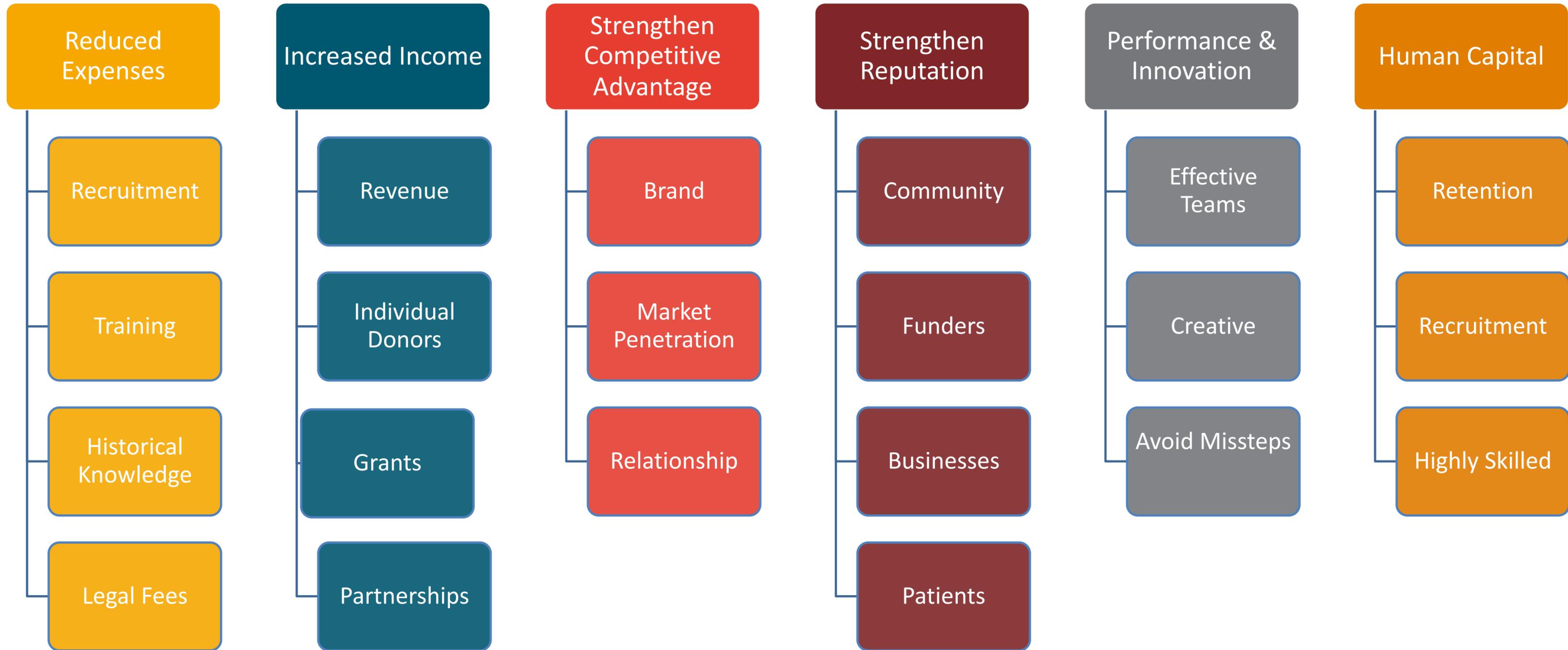
Strengthen Competitive
Advantage

Strengthen Reputation

Strengthen
Performance/Innovation

Human Capital

JEDI Business Case - Opportunities







DATE: January 5, 2024

TO: SDH Board of Directors

FROM: Tracey Fecher, CEO

RE: CEO Report

1. Clinic Operations:

- Clinic visits were under budget by (293) visits and ahead of forecast by 18 visits. Visits remain off budget number due to being understaffed by 1 FTE dentist in HMB and .6 FTE hygienist between both clinics.

December

	Budget	Forecast	Actual	Actual vs. Budget	% of Actual Visits	% of Budgeted Visits
Comm/PPO	316	232	253	(63)	25%	24%
Private Pay	32	19	28	(4)	3%	2%
Medi-Cal Dental	704	548	536	(168)	52%	54%
Affordable Plan	44	42	28	(16)	3%	3%
Farmworker	29	18	25	(4)	2%	2%
FQHC	189	143	151	(38)	15%	14%
Access to Care Subtotal	966	751	740	(226)	72%	73%
Total Visits	1,314	1,003	1,021	(293)		

- There has been a change to Public Dental Insurance in San Mateo County. Patients who receive their primary care at Kaiser will no longer have their dental care administered and funded by Health Plan of San Mateo. Their dental care will be funded through Medi-Cal Dental fee-for-service. The difference between HPSM and Medi-Cal Dental is an average of 20% less funding per visit. A survey of the San Mateo clinic patient's primary care provider was completed in October and 19% of the patients had Kaiser. This will affect the bottom line of the patient revenue in Public Dental Insurance. Also, the patients moving from HPSM will have less coverage with Medi-Cal Dental, for example they were receiving two cleanings a year and now will receive one. The team will track how the changes affect clinic operations and revenue.

2. HR and Staffing:

- In January, the first payroll with TriNet will take place on 1/12/24. The team is implementing a new workflow for payroll as well as preparing for Time and Attendance

to move to TriNet on 1/21/24. In the interim, timecards are being manually entered into the payroll system. After payroll and time and attendance are implemented, the team will begin to work on moving the onboarding process, expense reporting and applicant tracking to TriNet. The team is already seeing the advantages of the integrated Human Resources Information System with employee changes moving seamlessly between payroll, benefits, and the 401K.

3. Recruiting:
 - Recruiting for 1 FTE dentist for HMB, .6 FTE hygienist, 1 FTE dental assistant and 1 FTE Care Coordinator continues.
4. Medi-Cal Eligibility: Beginning January 1, 2024, Medi-Cal changed eligibility such that adults age 26-49 can enroll in Medi-Cal, regardless of their legal status. Pat Curran, CEO of HPSM, shared that HPSM has enrolled 14,000+ adults in January. Giving those 14,000+ Medi-Cal Dental benefit. These additional members will only exacerbate the existing significant lack of access to a dental home for adults with Medi-Cal in San Mateo County.
5. Financial Update: On January 5th, Sonrisas' current cash position was \$1,920,500.





DATE: January 11th, 2024

TO: SDH Board of Directors

FROM: Vickie Yee, CFO
Tina Wang, Senior Accountant

RE: **December Unaudited Financials and YTD Performance to Budget**

December PERFORMANCE:

- A. **Revenue:** Net Patient Revenue was **\$234,387** - \$52K below the budget.
- Total visits were 1,021 - 293 visits below the budget.
 - Total gross revenue was \$442,007– \$126K below the budget.
 - Total uncompensated care deduction was **(\$207,620)** – 47% of gross revenue.
- B. **Expenses:** **\$493,827** – \$38K better than the budget.
- Direct Expenses - \$40k better than budget, mainly from savings in personnel costs. During the holidays, a few staff took unpaid leave.
 - Indirect Expenses -\$2.3K below the budget.
- C. **Donations/Grants & Other Income: \$266,526**
- \$11,260 was received for donations through the year-end campaign.
 - \$128,903 released from restricted grants, including a \$12,488 First 5 grant for FY24 Q1 and a \$26,000 grant released for outreach activities.
 - \$118,668 in PHCD grant.
 - \$7,695 interest income & capital gain

NET INCOME- \$7,086 -\$41K positive variance to budget



YTD PERFORMANCE:

- Performance continues to be favorable to budget primarily due to the following:
 - While visits are under budget by 13.6%, total direct care expenses are under budget by 12.9%.
 - Fundraising efforts remain strong with a net positive budget variance after fundraising expenses of \$91K.
- Staffing continues to be challenging, resulting in 1,108 fewer visits than budget. However, all available appointments are mostly filled except for a few no-shows.
- Building maintenance expenses will increase due to the installation of key card access entry at the Half Moon Bay Clinic, and consultant expenses will be higher due to implementing TriNet PEO HR services.
- The current City National Bank balance is \$1,013,020 (our initial investment was \$1M) and an unrealized gain of \$10,264.

YTD PERFORMANCE TO BUDGET: YTD net income is **\$274k** better than the budget. The estimated Cash-flow is \$273K, better than the budget. PHCD grant to date is \$512K.

	YTD Actual	YTD Budget	Performance
<i>Visits</i>	<i>7037</i>	<i>8145</i>	<i>(1108)</i>
Gross Patient Revenue	\$3,155,612	\$3,531,707	(11%)
Uncompensated Care (Deductions)	(\$1,562,907)	(\$1,751,109)	11%
Grants/Donations/Other Income	\$1,388,014	\$1,249,504	10%
Direct Cost	(\$1,884,305)	(\$2,163,857)	13%
Indirect Cost	(\$1,058,530)	(\$1,102,195)	4%
Net Income	\$37,884	\$(235,950)	116%
<i>Non-cash items adj.</i>			
Depreciation	\$148,375	\$153,436	3%
Capital Expenditure	\$64,767	\$69,012	(6%)
Estimated Cash Flow	\$121,492	(\$151,526)	175%

Sonrisas Dental Health
Revenues and Expenditures - Budget vs Actual
As of December 31, 2023

As of Date:

Location:

Restriction:

	Month Ending 12/31/2023			Year To Date 12/31/2023		
	Actual	2023 2024 BUDGET	Budget Diff	Actual	2023 2024 BUDGET	Budget Diff
Revenue and Expenditures						
Net Program Income						
Patient Revenue						
Patient Services						
Commercial Insurance	13,456.00	17,972.74	(4,516.74)	84,385.00	113,472.37	(29,087.37)
PPO	68,520.26	101,421.50	(32,901.24)	480,597.59	634,506.61	(153,909.02)
Private Pay	13,804.00	9,399.12	4,404.88	57,357.00	59,126.75	(1,769.75)
Public Dental Insurance	247,724.00	323,471.19	(75,747.19)	1,754,167.30	2,003,238.45	(249,071.15)
Tobacco Tax	5,670.70	0.00	5,670.70	128,516.75	0.00	128,516.75
Affordable Scale	12,086.00	18,592.51	(6,506.51)	113,262.00	112,300.40	961.60
Farmworker	11,107.00	12,916.42	(1,809.42)	79,703.00	82,185.68	(2,482.68)
FQHC	69,639.00	84,320.12	(14,681.12)	456,161.00	526,877.11	(70,716.11)
Gross Patient Revenue	442,006.96	568,093.60	(126,086.64)	3,154,149.64	3,531,707.37	(377,557.73)
Uncompensated Care						
Prior Period Adjustment	(1,451.76)	(1,000.00)	(451.76)	9,206.84	(6,000.00)	15,206.84
Uncompensated Care - Commercial Insurance	(2,370.50)	(3,048.96)	678.46	(14,397.63)	(19,003.23)	4,605.60
Uncompensated Care - PPO	(25,155.80)	(41,747.71)	16,591.91	(188,140.35)	(261,119.17)	72,978.82
Uncompensated Care - Public Dental Insurance	(144,074.00)	(199,930.37)	55,856.37	(1,142,208.60)	(1,238,190.56)	95,981.96
Uncompensated Care - Affordable Scale	(5,301.00)	(7,895.49)	2,594.49	(48,876.75)	(47,668.44)	(1,208.31)
Uncompensated Care - Farmworker	(2,307.00)	(2,072.61)	(234.39)	(5,727.00)	(13,187.78)	7,460.78
Uncompensated Care - FQHC	(22,135.00)	(24,125.27)	1,990.27	(150,521.80)	(153,940.00)	3,418.20
Fee Adjustments	(4,824.65)	(2,000.00)	(2,824.65)	(22,241.28)	(12,000.00)	(10,241.28)
Total Uncompensated Care	(207,619.71)	(281,820.41)	74,200.70	(1,562,906.57)	(1,751,109.18)	188,202.61
Other Program Revenue						
Other Program Revenue	0.00	0.00	0.00	1,462.00	0.00	1,462.00
Total Other Program Revenue	0.00	0.00	0.00	1,462.00	0.00	1,462.00
Net Patient Revenue	234,387.25	286,273.19	(51,885.94)	1,592,705.07	1,780,598.19	(187,893.12)
Total Expenses						
Direct Expenses						
Direct Personnel Expense						
Direct Program Salaries	243,337.58	264,708.23	21,370.65	1,419,239.26	1,588,249.38	169,010.12
Payroll Taxes	13,832.93	20,250.18	6,417.25	95,559.92	121,501.08	25,941.16
Unemployment Taxes	132.88	2,179.68	2,046.80	2,190.48	13,078.08	10,887.60
Benefits	1,175.32	8,400.11	7,224.79	41,947.49	50,400.66	8,453.17
401k Match	3,951.82	6,617.70	2,665.88	27,569.62	39,706.20	12,136.58
Worker's Comp	879.61	1,852.95	973.34	7,841.88	11,117.70	3,275.82
Continuing Education	465.00	150.00	(315.00)	2,839.93	900.00	(1,939.93)
License and Registration	1,058.24	1,000.00	(58.24)	8,586.44	6,000.00	(2,586.44)
Outreach Extra Help	0.00	1,111.00	1,111.00	0.00	3,333.00	3,333.00
Total Direct Personnel Expense	264,833.38	306,269.85	41,436.47	1,605,775.02	1,834,286.10	228,511.08
Clinic Expenses						
Sterilization Services	841.43	841.46	0.03	5,103.58	5,048.76	(54.82)
Shredding	78.00	98.00	20.00	487.00	588.00	101.00
Dental Specialist-Claims Processing	4,366.45	5,078.46	712.01	26,908.37	31,572.61	4,664.24
Dental Supplies	27,954.88	24,076.62	(3,878.26)	137,893.71	148,280.43	10,386.72
Small Dental Equipment	667.12	400.00	(267.12)	3,706.34	2,900.00	(806.34)
Dental Equipment Repair	2,090.04	3,218.00	1,127.96	10,555.96	19,308.00	8,752.04
Lab Fees	12,706.31	12,827.48	121.17	62,471.76	78,603.29	16,131.53
Uniforms	0.00	0.00	0.00	924.17	200.00	(724.17)
PPE& Covid Related	5,900.36	6,971.38	1,071.02	30,478.72	43,069.94	12,591.22
Total Clinic Expenses	54,604.59	53,511.40	(1,093.19)	278,529.61	329,571.03	51,041.42
Total Direct Expenses	319,437.97	359,781.25	40,343.28	1,884,304.63	2,163,857.13	279,552.50
Indirect Expenses						
Indirect Personnel Expenses						
Salaries/Wages	74,244.31	77,703.14	3,458.83	442,233.66	476,218.84	33,985.18
Payroll Taxes	4,703.57	5,659.92	956.35	32,297.46	34,724.52	2,427.06
Unemployment Taxes	0.00	677.25	677.25	117.90	4,163.50	4,045.60
Benefits	947.88	1,659.31	711.43	5,638.70	10,171.86	4,533.16
401k Match	732.92	2,331.09	1,598.17	6,031.80	14,286.54	8,254.74
Worker's Comp	865.56	543.91	(321.65)	4,736.96	3,333.46	(1,403.50)
Total Indirect Personnel Expenses	81,494.24	88,574.62	7,080.38	491,056.48	542,898.72	51,842.24
Facility Expenses						
Building Maintenance	4,259.49	1,830.00	(2,429.49)	14,433.42	10,980.00	(3,453.42)
Janitorial Service	2,678.00	2,668.50	(9.50)	16,148.00	15,950.00	(198.00)
Rent	3,484.00	3,484.00	0.00	20,904.00	20,904.00	0.00
Phone/Internet	1,909.94	1,820.25	(89.69)	9,648.77	10,921.50	1,272.73

Utilities	3,940.04	4,000.00	59.96	24,812.78	24,000.00	(812.78)
Total Facility Expenses	16,271.47	13,802.75	(2,468.72)	85,946.97	82,755.50	(3,191.47)
Office Expenses						
Claims Processing	518.24	470.00	(48.24)	3,574.29	2,820.00	(754.29)
Patient Notification	798.00	800.00	2.00	4,788.00	4,800.00	12.00
Office Supplies	1,711.52	2,494.85	783.33	12,040.32	12,137.10	96.78
Postage and Shipping	604.35	384.00	(220.35)	2,073.48	2,304.00	230.52
Printing Costs	0.00	0.00	0.00	0.00	750.00	750.00
Property Taxes	0.00	0.00	0.00	65.58	250.00	184.42
Employee Goodwill	6,137.20	1,403.00	(4,734.20)	9,703.17	8,263.00	(1,440.17)
Recruitment Expense	600.00	181.00	(419.00)	4,151.35	1,086.00	(3,065.35)
Total Office Expenses	10,369.31	5,732.85	(4,636.46)	36,396.19	32,410.10	(3,986.09)
Insurance						
Insurance - Malpractice	909.00	780.00	(129.00)	4,934.00	4,680.00	(254.00)
Insurance - Liability & Property	551.00	552.00	1.00	3,306.00	3,312.00	6.00
Insurance - Directors & Officer Liability	804.00	804.00	0.00	4,824.00	4,824.00	0.00
Total Insurance	2,264.00	2,136.00	(128.00)	13,064.00	12,816.00	(248.00)
Fundraising Department						
Fundraising Expenses	2,555.95	935.00	(1,620.95)	51,267.78	35,524.00	(15,743.78)
Fundraising Consulting	3,260.00	2,367.00	(893.00)	55,080.00	45,052.00	(10,028.00)
Total Fundraising Department	5,815.95	3,302.00	(2,513.95)	106,347.78	80,576.00	(25,771.78)
Professional fee						
Consultant - General	7,500.00	500.00	(7,000.00)	12,400.00	7,000.00	(5,400.00)
Consultant - HR Professionals	2,600.00	2,600.00	0.00	16,200.00	15,600.00	(600.00)
Consultant-Project Manager	2,800.00	6,000.00	3,200.00	27,100.00	36,000.00	8,900.00
Consultant-Outreach System	0.00	1,250.00	1,250.00	0.00	7,500.00	7,500.00
Consultant-FQHC	0.00	3,500.00	3,500.00	16,200.00	18,000.00	1,800.00
Consultant - Legal	1,463.00	0.00	(1,463.00)	2,239.00	0.00	(2,239.00)
Consultant - Leadership Coaching	4,020.83	3,277.77	(743.06)	15,062.49	12,833.31	(2,229.18)
Total Professional fee	18,383.83	17,127.77	(1,256.06)	89,201.49	96,933.31	7,731.82
General						
Depreciation Expense	24,980.08	25,572.67	592.59	148,374.92	153,436.02	5,061.10
Marketing Expense	2,350.00	1,608.00	(742.00)	11,473.02	10,783.00	(690.02)
Meeting & Travel Expenses	563.02	4,165.00	3,601.98	2,753.58	5,590.00	2,836.42
Fees and Interest	1,580.67	2,000.00	419.33	11,385.98	12,000.00	614.02
Outreach Supplies	1,550.84	0.00	(1,550.84)	9,218.49	12,737.00	3,518.51
Training & Membership	320.00	0.00	(320.00)	695.00	0.00	(695.00)
Board Expense	285.04	875.00	589.96	480.37	5,250.00	4,769.63
Total General	31,629.65	34,220.67	2,591.02	184,381.36	199,796.02	15,414.66
Computer expense						
Computer Support	7,207.27	6,446.66	(760.61)	37,402.03	35,479.98	(1,922.05)
Software Support	953.00	706.00	(247.00)	14,734.04	18,529.00	3,794.96
Total Computer expense	8,160.27	7,152.66	(1,007.61)	52,136.07	54,008.98	1,872.91
Total Indirect Expenses	174,388.72	172,049.32	(2,339.40)	1,058,530.34	1,102,194.63	43,664.29
Total Total Expenses	493,826.69	531,830.57	38,003.88	2,942,834.97	3,266,051.76	323,216.79
Total Net Program Income	(259,439.44)	(245,557.38)	(13,882.06)	(1,350,129.90)	(1,485,453.57)	135,323.67
Grants and Other Income						
Grants and Donations						
Fundraiser	0.00	0.00	0.00	163,844.63	130,000.00	33,844.63
Donations	11,259.69	20,000.00	(8,740.31)	32,407.05	35,000.00	(2,592.95)
Grants	128,902.59	116,667.00	12,235.59	649,192.49	674,998.00	(25,805.51)
PHCD Grants	118,668.00	66,667.00	52,001.00	511,800.00	400,002.00	111,798.00
Total Grants and Donations	258,830.28	203,334.00	55,496.28	1,357,244.17	1,240,000.00	117,244.17
Other Income						
Interest Income-Heritage	218.35	42.00	176.35	1,204.11	252.00	952.11
Other Income	0.00	0.00	0.00	32.27	0.00	32.27
Unrealized gain(loss)-CityNational	6,480.72	0.00	6,480.72	17,198.15	0.00	17,198.15
Investment Income	996.27	1,542.00	(545.73)	12,292.86	9,252.00	3,040.86
Interest Income	0.00	0.00	0.00	42.47	0.00	42.47
Total Other Income	7,695.34	1,584.00	6,111.34	30,769.86	9,504.00	21,265.86
Total Grants and Other Income	266,525.62	204,918.00	61,607.62	1,388,014.03	1,249,504.00	138,510.03
Net income	7,086.18	(40,639.38)	47,725.56	37,884.13	(235,949.57)	273,833.70

Sonrisas Dental Health**Balance Sheet**

As of Date:

12/31/2023

Location:

Sonrisas Dental Health

Year To Date

12/31/2023

Current Year Balance**Assets**

Current Assets

Cash and Cash Equivalents

11218 - Heritage -Operating 839,708.79

11600 - Petty Cash 198.84

Total Cash and Cash Equivalents 839,907.63

Accounts Receivable, Net

Accounts Receivable

12100 - Accounts Receivable 238,308.96

12210 - Accounts Receivable - Grants 433,195.46

12218 - Contra Acct - Allowance for Bad Debt (21,248.65)

12220 - Accounts Receivable - Other Agencies 124,655.28

Total Accounts Receivable 774,911.05

Total Accounts Receivable, Net 774,911.05

Other Current Assets 15,041.00

Total Current Assets 1,629,859.68

Long-term Assets

Property & Equipment

17300 - Improvements 1,202,486.39

17400 - Equipment 1,541,214.61

17500 - Furniture/Fixtures 134,795.71

17999 - Accum Depreciation (2,057,313.97)

Total Property & Equipment 821,182.74

Other Long-term Assets 16,297.00

Total Long-term Assets 837,479.74

Investments

Long Term Investments

11410 - Investment Acct. - Merrill Lynch 10,793.17

11412 - Investment Acct. - City National 1,013,090.74

11415 - Unrealized Gain(loss) on Investment 10,264.43

Total Long Term Investments 1,034,148.34

Total Investments 1,034,148.34

Total Assets**3,501,487.76****Liabilities and Net Assets**

Liabilities

Short-term Liabilities

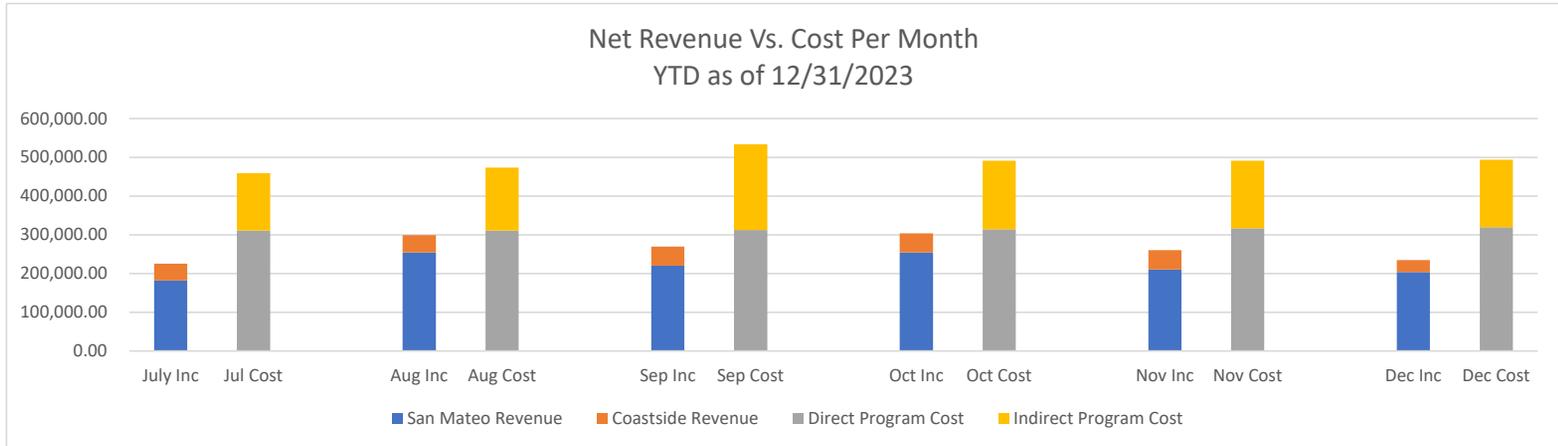
Accounts Payable

21110 - Accounts Payable 98,465.36

23100 - Patient Prepayments	18,763.62
23200 - Patient Refunds Payable	4,979.80
Total Accounts Payable	122,208.78
Accrued Liabilities	
22210 - Accrued Payroll	79,710.68
22220 - Accrued PTO	83,587.86
22255 - Accrued 401k Match Fund	1,157.74
22260 - Accrued HSA Fund Payable	5,845.57
Total Accrued Liabilities	170,301.85
Withholding Tax Payable	
22230 - Accrued Payroll Taxes	10,572.18
Total Withholding Tax Payable	10,572.18
Total Short-term Liabilities	303,082.81
Long Term Liabilities	
Other Long-term Liabilities	4,361.93
Total Long Term Liabilities	4,361.93
Total Liabilities	307,444.74
Net Assets	3,194,043.02
Total Liabilities and Net Assets	3,501,487.76

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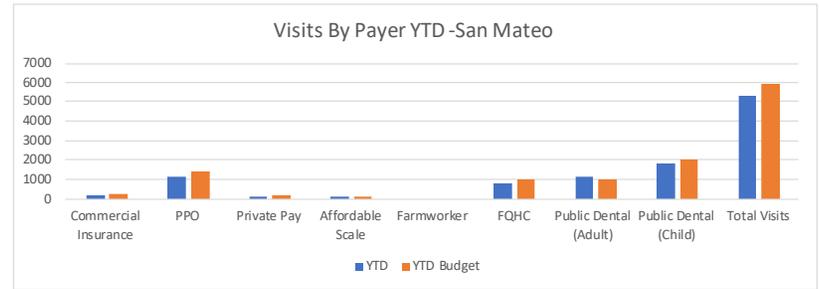
Sonrisas Dental Health Operations									
	Jul 23	Aug 23	Sept 23	Oct 23	Nov 23	Dec 23	Total	Budget	B(W)
San Mateo Revenue	181,811	254,513	220,223	254,699	210,340	203,601	1,325,186	1,345,244	(20,058)
Coastside Revenue	43,960	44,659	49,383	48,986	49,743	30,786	267,518	435,355	(167,837)
Total Net Revenue	225,771	299,172	269,606	303,685	260,083	234,387	1,592,703	1,780,598	(187,895)
Direct Program Cost	310,925	310,629	312,436	314,267	316,608	319,438	1,884,303	2,163,857	279,554
Indirect Program Cost	147,846	162,745	221,513	177,180	174,859	174,389	1,058,531	1,102,195	43,664
Total Cost	458,771	473,374	533,949	491,447	491,467	493,827	2,942,834	3,266,052	323,218
TOTAL	(233,000)	(174,202)	(264,343)	(187,761)	(231,385)	(259,440)	(1,350,131)	(1,485,454)	135,323
Dividend/Other Income	4,578	4,520	1,535	4,196	8,245	7,695	30,770	9,504	21,266
Donations Received	128,140	136,132	191,729	131,776	117,505	140,162	845,444	839,998	5,446
Grant from PHCD	66,666	80,667	112,467	66,666	66,666	118,669	511,801	400,002	111,799
OTHER INCOME	199,384	221,318	305,731	202,638	192,416	266,527	1,388,014	1,249,504	138,510
NET INCOME	(33,616)	47,116	41,388	14,877	(38,968)	7,086	37,883	(235,950)	273,833



	22-Jul	30-Aug	30-Sep	31-Oct	30-Nov	31-Dec	Total	Budget	Variance
San Mateo Visits	872	989	871	948	777	819	5,276	5949	(673)
Half Moon Bay Visits	231	299	334	347	348	202	1,761	2196	(435)
Total Visits	1103	1288	1205	1295	1125	1021	7,037	8145	(1108)

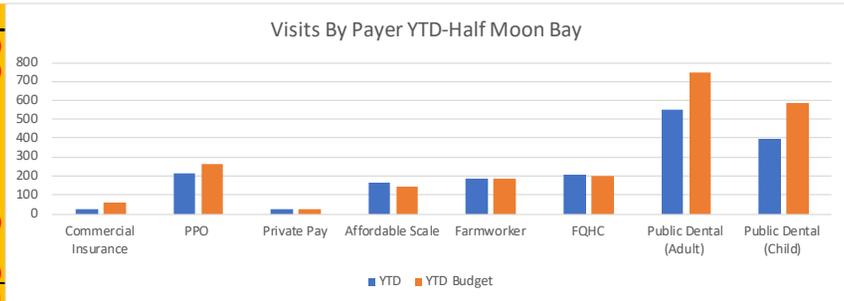
Dec-23

	31-Dec Budget	Variance	YTD	YTD Budget	Variance	
Commercial Insurance	29	39	(10)	163	246	(83)
PPO	192	222	(30)	1161	1411	(250)
Private Pay	23	29	(6)	133	184	(51)
Affordable Scale	16	19	(3)	103	122	(19)
Farmworker			0			0
FQHC	128	154	(26)	777	981	(204)
Public Dental Insurance(Adult)	176	154	22	1113	981	132
Public Dental Insurance (Child)	255	318	(63)	1826	2024	(198)
Total Visits	819	935	(116)	5276	5949	(673)



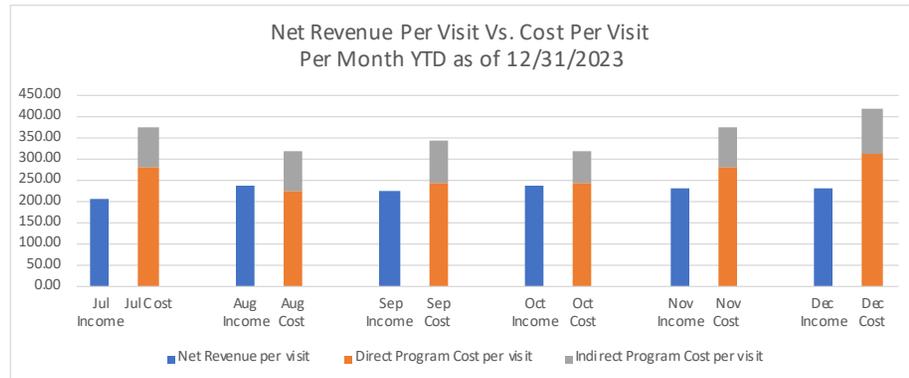
Visits by Payer -Half Moon Bay

	31-Dec Budget	Variance	YTD	YTD Budget	Variance	
Commercial Insurance	3	11	(8)	26	61	(35)
PPO	29	45	(16)	211	261	(50)
Private Pay	5	4	1	26	21	5
Affordable Scale	12	25	(13)	164	141	23
Farmworker	25	29	(4)	186	184	2
FQHC	23	35	(12)	207	201	6
Public Dental Insurance (Adult)	45	128	(83)	549	743	(194)
Public Dental Insurance (Child)	60	102	(42)	392	584	(192)
Total	202	379	(177)	1761	2196	(435)



Avg. Income (Loss) per Visit				
	YTD	Budget YTD*	FY23	
Net Revenue per Visit	\$ 226.33	\$ 218.61	\$204.01	
Direct Cost per Visit	\$ (261.46)	\$ (265.67)	(\$234.27)	
Indirect Cost per Visit*	\$ (92.28)	\$ (86.37)	(\$79.46)	
Net Income per Visit	\$ (127.40)	\$ (133.43)	(\$109.72)	

* Indirect cost excludes costs in outreach program and fundraising department



Sonrisas Dental Health Operations Dec 23 VS. Dec 23			
	Dec-23	Dec-24	Variance B(W)
Visits	1021	1029	(8)
San Mateo Revenue	203,601	176,515	27,086
Coastside Revenue	30,786	47,872	(17,086)
Total Net Revenue	234,387	224,387	10,000
*Direct Program Cost	319,438	274,632	(44,806)
*Indirect Program Cost	174,389	157,076	(17,313)
Total Cost	493,827	431,708	(62,119)
TOTAL	(259,440)	(207,321)	(52,119)
Dividend/Other Income	7,695	1,221	6,474
Donations Received	140,162	96,420	43,742
Grant from PHCD	118,669	75,000	43,669
Grants and Donations	266,527	172,641	93,885
NET INCOME	7,086	(34,680)	41,766





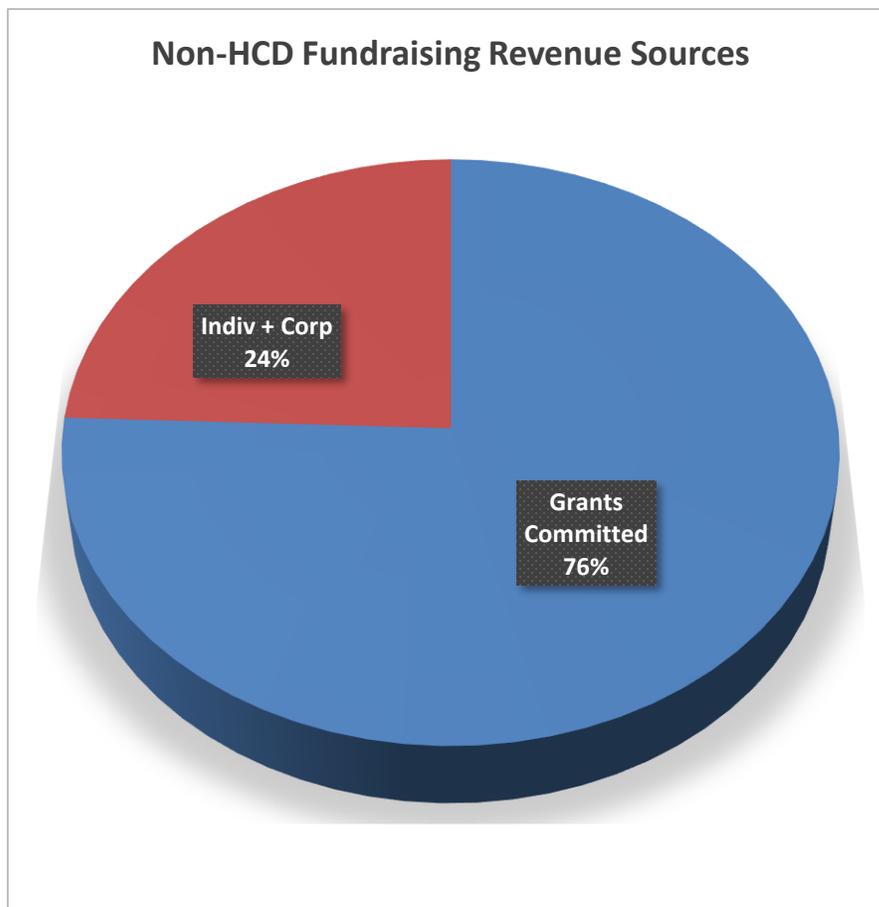
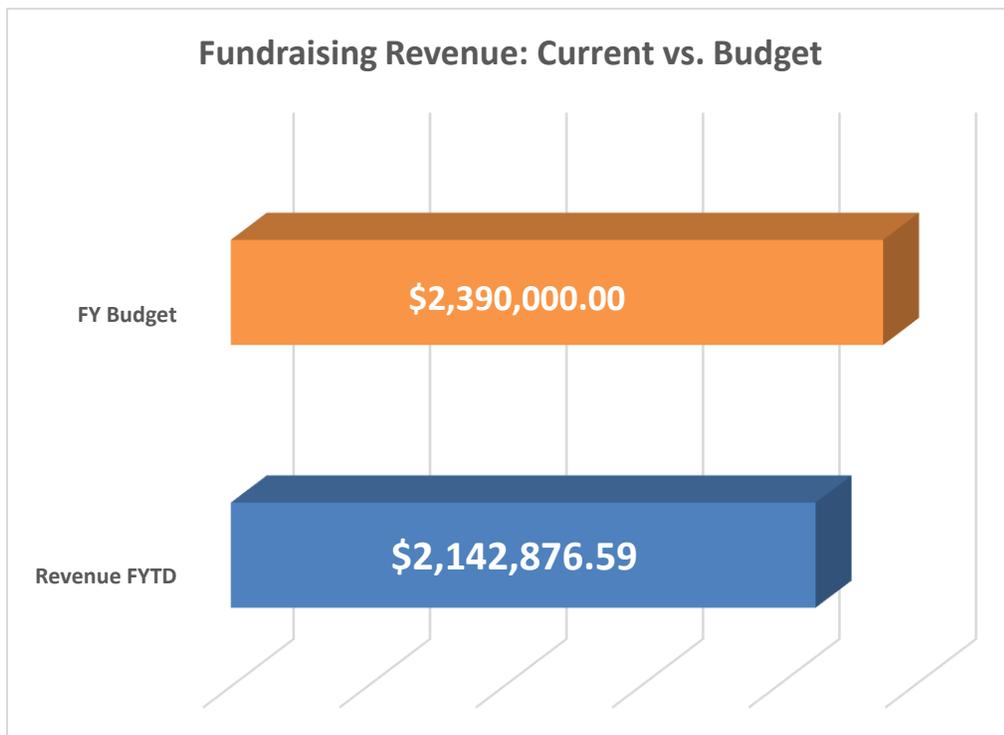
DATE: January 15, 2023
TO: SDH Board of Directors
FROM: Spandan Chakrabarti, Community Resources Director
RE: **Development Update**

General Fundraising Update: As of the submission of this report, Sonrisas has accounted for 90% of total budgeted fundraising revenue of the 2024 Fiscal Year. These figures include the FY24 commitments from both the Peninsula and the Sequoia Health Care Districts. Revenue from non-healthcare district sources has reached 75% of its annual target. Revenue from individual and corporate donations, at the close of December, was at 64% of budget for the full fiscal year.

To date this fiscal year, Sonrisas' fundraising operations have secured over \$2.1 million, with more than \$570,000 in grant revenue not connected to healthcare districts and nearly \$185,000 in individual and corporate donations. This leaves \$105,000 in individual and corporate contributions to be raised in the latter half of this fiscal year, nearly identically matching the \$110,000 raised over the same period in FY23. Over the past month, Sonrisas Development staff has implemented a correction on the over-counting of pledged contributions, resulting in adjustments to the individual-and-corporate contributions figure.

Upcoming and Ongoing Philanthropic Initiatives: In the final half of FY24, Sonrisas is focused on the following fundraising initiatives:

- **Coastside Gives:** This annual community fundraising initiative, sponsored by the Mavericks Community Foundation, is a community giving day for nonprofits serving coastal communities in San Mateo County. Opportunity to give opens on April 1 and the final day ("giving day") of the campaign is May 2.
- **Cooking for a Cause 2024:** The 10th anniversary of this iconic event is now scheduled for September 21, 2024 at Domenico Winery in San Carlos, CA. Sonrisas Development staff, and along with the Development Committee, is focusing on a strategy to grow sponsorship revenue, individual ticket sales, and auction revenue to give this event, popular with our donors, a revenue boost.
- **Major Donor Listening session:** In late February, Sonrisas will host a Major Donor Listening session in Half Moon Bay. By listening to individuals philanthropically committed to Sonrisas, we expect to gain insights to improve and grow our individual donor operations.







DATE: January 15, 2024
TO: SDH Board of Directors
FROM: Bonnie Jue, DDS
RE: **Community Engagement Director Report – January 2024**

2023 was a ground-breaking year for Sonrisas Dental Health’s (SDH) Community Outreach Programs, and 2024 is already shaping up to be just as impactful!

Last semester (September-December), SDH provided free dental screenings to 1,587 children – well on our way to reaching our goal of 3,000 screenings by the end of the school year.

In addition to the dental screenings for children and older adults, SDH has also been providing in-service training presentations and participating in health/resource fairs across the county, as we’re noticing more organizations hosting in-person community events again since the pandemic started.

And as the scope of SDH’s Community Outreach Program services has expanded, so has our Outreach team. SDH’s two new interns have officially started their fellowship program at Sonrisas this month and Irma Ochoa, who has proven to be an outstanding Community Care Coordinator over the years has been promoted to the role of Community Outreach Programs Manager. In addition to the essential care coordination duties that she continues to provide, Irma will now also direct screening events and help manage Community Program operations, allowing for the expansion of SDH’s collaborations with community partners and donors, thereby increasing Sonrisas’ visibility and depth and breadth of service to the community.

Here is a list of SDH community events that are scheduled in the next few weeks – any one is welcome to visit and witness Sonrisas Dental Health in action out in our community!

January 18th (Thurs) – South San Francisco Preschool and Kindergarten Readiness Fair (resource fair – SSF)

January 19th (Fri) – Allen Elementary (screenings – San Bruno)

January 23rd (Tues) – Pescadero Elementary (screenings – Pescadero)

January 26th (Fri) – Millbrae Senior Showcase (resource fair and screenings – Millbrae Recreation Center)

January 30th (Tues) – Little House-PVI (screenings – Menlo Park)

February 2nd (Fri) – Lomita Park Elementary (screenings – San Bruno/Millbrae)

February 6th (Tues) – Location pending (screening – San Mateo Foster City School District)

February 9th (Fri) – Farallone View Elementary (screenings – Montara)

Hatch and El Granada school screenings scheduled in March 2024

