

ADA Foundation

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 Cammarata, Rita, 2027, Texas*
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 Brady, Steven, 2027, director
 Frantsve-Hawley, Julie, 2026, director
 Gonzales, Theresa, 2028, director
 Graves, Dana, 2025, director
 Kamp, Michael, 2026, director
 Cohlmiia, Raymond, ADA executive director

Shapiro, Elizabeth, ADA chief of governance and strategy management and ADA Foundation Secretary
 Catral, Nicole, ADA director, Department of Corporate Social Responsibility and Philanthropy (“DCSRP”)
 Schilligo, Tracey, ADA manager, professional programs, DCSR
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Background and Strategic Forecasting Business Plan

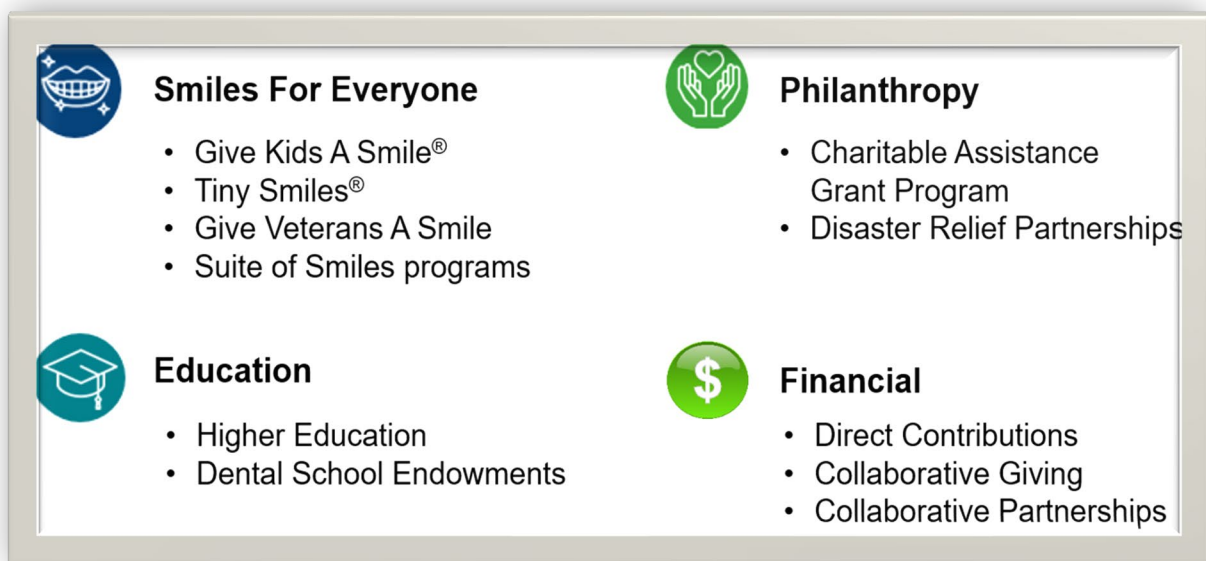
The ADA Foundation (“ADAF” or “the Foundation”) has reported to the House of Delegates (“HOD”) annually that it has been in a state of transition since June 2019, when the ADA Board of Trustees (“BOT”), representing the sole Member of the ADAF, honed the Foundation’s strategic focus to philanthropy and restructured the ADA’s scientific research activities.

The year at issue in this report—May 1, 2023 to April 30, 2024—covers the most significant growth that the Foundation has experienced since its 2019 reformulation. For comparison, in 2023, the ADAF’s Annual Report to the HOD reflected the activities overseen by a small board of four individuals—only one “outside director”—with strategic planning discussions underway. This 2024 report is submitted by a board of 10 directors whose Five-Year Strategic Forecast Business Plan, adopted in October 2023, now serves as both a roadmap and future yardstick for measuring the Foundation’s progress.

Six new outside directors were elected to the ADAF Board in June 2023. This modification to the board’s size and composition equips the Foundation with the breadth and depth of experience necessary to deliver on the ADAF’s strategic goals. Finalizing such goals was the first major project for the newly reconstituted board, which convened in Chicago for strategic planning work facilitated by the consulting firm Association Options LLC. In October, the BOT reviewed the ADAF’s proposed Five-Year Strategic Forecasting Business Plan (“Strategic Plan”) and adopted a resolution conveying its support for the plan. The ADAF Board adopted the Strategic Plan on October 11, 2023.

Below are the four focus areas identified in the Strategic Plan and corresponding initiatives.

*ADA Trustee



The Strategic Plan reflects the ADAF Board's confidence that the Foundation is uniquely situated to lead efforts nationally with respect to access-to-care programs as well as philanthropy that benefits the public while also supporting the Tripartite. In the past year, the reimagined ADAF made strides laying the groundwork for the myriad ways that these initiatives can complement and bolster the simultaneous efforts by the ADA to serve the dental profession, consistent with the ADAF's vision and mission as a public charity.

Advancing ADA Strategic Goals and Objectives: ADAF Programs, Projects, Results, and Success Measures

This section highlights the key accomplishments and outcomes of the ADAF from May 1, 2023 to April 30, 2024, except where other time frames are noted.

The ADA's activities summarized below support the Common Ground 2025 ADA Strategic Plan's goals in finance, public health, and organizational effectiveness. Such efforts over the past year have helped to lay the groundwork for the future financial sustainability of the Foundation, enabling impactful programmatic work and grant-making activities aimed at promoting public health through philanthropy. Additionally, efforts have been directed towards enhancing organizational effectiveness and alignment among ADA subsidiaries.

This report organizes the ADAF's activities into two main categories—Current ADAF Programs and New Initiatives—and includes a summary of the ADAF's finances as well as a recap of key achievements that have burnished the ADAF's reputation in the past year. After the ADAF completes its first full year under the Strategic Plan, future Annual Reports to the HOD can incorporate the structure and metrics of the Strategic Plan.

1. Current ADAF Programs

Operational highlights of ongoing programs include:

Two Endowments:

The Relief Fund (which funds the ADA Foundation Charitable Assistance Grant Program for Dentists, Spouses of Dentists, and Dependents of Dentists Under the Age of 18):

- Provided financial assistance totaling \$217,340 through 10 grants in 2023.

- ADAF Board allocated \$412,280 for relief grants in 2024.
- Samuel D. Harris Fund for Children's Dental Health ("Harris Fund"):
- ADAF Board approved \$187,709 to support Give Kids A Smile and Tiny Smiles program activities in 2023.

Two Award Programs: The Crest and Oral-B Promising Researcher Award and the Dr. David Whiston Leadership Award:

- In 2023, eligibility for both awards was expanded to include non-U.S. residents, broadening the applicant pool and the ADAF's reach.
- Two recipients were awarded the Crest and Oral-B Promising Researcher and the Dr. David Whiston Leadership Awards in the 2023 cycle, for a total of four award recipients.

2. New Initiatives

Smiles for Everyone (Suite of "Smiles" programs, including both current and new programs):

- Made significant strides to promote the importance of the age 1 dental visit to general dentists through the GKAS – Tiny Smiles program.
- Developed plans and success metrics to increase awareness of the ADAF's Suite of Smiles programs.
- Facilitated collaboration with, and provided support to, the ADA's Give Kids A Smile ("GKAS") National Advisory Committee and the Give Veterans A Smile ("GVAS") National Advisory Committee.
- Significant activities underway regarding Veteran initiatives and fundraising campaign leading up to, and during, the GVAS launch at SmileCon 2024.
- GVAS website went live May 2024.

Philanthropy:

- Expanded the Charitable Grants Committee's scope to review unsolicited grant requests, which are received from organizations that align with ADAF initiatives.
- Developed an internal emergency disaster standard operating procedure for the ADA that includes subsidiary roles, including the Foundation.

Financial:

- Established and are populating a standing Finance Committee, including a Collaborative Giving Subcommittee, to provide oversight regarding the ADAF's finances and to identify collaborative giving opportunities and other fundraising campaigns, with appointments in progress Summer 2024.
- Launched efforts to implement a Salesforce-based philanthropy solution designed to align with the ADA customer relationship management tool Fonteva, with work to be completed in the coming months.

Education:

- Established a standing Education Committee to design and implement new programmatic initiatives (e.g., identifying how the Foundation can assist with the dental faculty shortage; providing scholarships/funding to dental students/residents, including historically underrepresented students and faculty in the sciences), with appointments in progress Summer 2024.

For effective leadership oversight of the ADAF's progress in relation to the Five-Year Strategic Forecasting Business Plan, a dedicated ADAF Dashboard has been designed and launched on the Tableau platform. Comprehensive updates are provided quarterly, offering insights into the progress of Foundation key focus areas, initiatives, and financial metrics.

3. ADAF's Financials—Year Ending December 31, 2023

Total Revenues for the year were \$2.292 million, which was a \$2.285 million increase over the 2023 budget of \$7k. Driving the favorable variance in revenue was \$2.09 million in unbudgeted investment income. Contributing to the favorable revenue growth was an increase of \$45k or 28.5% in contributions and sponsorships to the *Give Kids A Smile* Program and Unrestricted Fund.

Total Expenses for the year were \$1.618 million, which was on target with the budget. Expenses for Administration were \$354k for the year and were \$139k or 28.1% lower than the budget. Most of the decrease relates to the timing of hiring additional staff and lower than anticipated legal and consulting fees. Total *Give Kids A Smile* program expenses were higher than budget by \$36k or 7.7% due to unanticipated marketing and promotion costs. Total *Relief* program expenses were \$223k or 50.1% lower than anticipated in the budget due to lower spending than anticipated on grants. Finally, total expenses for the *Colgate Fund* were \$206k or 107% higher than budget due mostly to increased consulting, outside services and laboratory supplies costs. Please note that the *Colgate Fund* is restricted to research and supports the Volpe Scholar.

The total fund balance at the end of 2023 was \$15.854 million which consisted of both funds with donor restrictions and funds without donor restrictions. The “with donor restriction funds” consisted of the two endowment funds: Relief Fund (\$7.951 million) and the Harris Fund (\$3.735 million), and the GKAS Tiny Smiles Fund (\$110k), the Whiston Leadership Fund (\$119k) and the Crest Oral-B Promising Research Award Fund (\$83k). The “without donor restriction funds” consisted of the Unrestricted Fund (\$1.818 million), the General Research and Education Fund (\$1.485 million) and the board-designated *Colgate Fund* (\$523k).

4. Bolster the ADAF's Reputation through Philanthropy and Awareness

The ADA Foundation's reputation was enhanced through numerous achievements in 2023, which include, but are not limited to:

- Nearly 4,300 dentists participated in more than 1,200 Give Kids A Smile (“GKAS”) events across the U.S. in 2023, delivering nearly \$13 million worth of charitable oral health services to 279,000 underserved children.
- The GKAS Pack and Give Back Event took place in Orlando during the ADA's 2023 SmileCon conference, providing 1,000 underserved children with backpacks filled with nutritious snacks, oral health educational materials, toothbrushes, and toothpaste.
- The third SmileDASH event, benefiting GKAS, in October 2023 encouraged SmileCon registrants to run, walk, bike, swim or do any other distance activity and log their miles. A total of 87 individuals participated, logging nearly 2,000 total miles and raising awareness about GKAS.
- As part of GKAS's collaboration with Colgate, more than 100 children received screenings and education in Orlando during SmileCon on Colgate's Bright Smiles, Bright Futures mobile dental van, which was located on the exhibit floor.
- 66% of GKAS programs taking place in 2023 expanded their events to include Tiny Smiles, which provides oral health services to children from age 0 (birth) to five.
- 53 dental professionals attended “Tiny Smiles – The Importance of the Age 1 Dental Visit,” continuing education course on October 5 at SmileCon in Orlando.
- A 15-month collaboration with the California Dental Association promoted the Treating Young Kids Everyday CE course (a \$200 value worth two CE credits) at no cost to the participant. The course is designed to increase dentists' confidence to see babies and young children and inspire a commitment to decreasing the prevalence of dental caries in children. A total of 396 professionals completed the course.
- Through a grant to the ADA's Department of Social Responsibility and Philanthropy, the ADA's International Dental Volunteer Trip Calendar was updated to include details for 180 international volunteer opportunities throughout 2023.
- An ADA Foundation awareness-building campaign was launched during SmileCon in Orlando. The below informational cards were handed out at several popcorn activation sites throughout the meeting:



ADAF's marketing efforts included collaborating with the ADA News team for coverage of newsworthy activities, including the following articles of note:

[Give Kids A Smile Kicks Off in D.C.](#)

[ADA Foundation announces two financial award opportunities](#)

[Pay it Forward During ADA Foundation's Philanthropic Events at SmileCon](#)

[ADA Foundation Give Kids A Smile Pack & Give Back Event Prompts Altruism Among SmileCon Volunteers](#)