



For public health innovation

TRAILHEAD INSTITUTE'S

# Administrative Partnership Program



# About Trailhead Institute

Founded in 1993, Trailhead Institute is a nonprofit 501 (c) (3) public health institute built on the vision that everyone should have the opportunity to be healthy and live in a healthy environment. With the mission of advancing innovation and collaboration in public health, Trailhead works alongside communities, state and local public health agencies, community-based organizations, and cross-sector partners to improve health for all people living in Colorado.

Through administrative partnership, community engagement, and strategic program development, we support and lead initiatives that address fundamental health needs, advance health equity, center communities as experts and advocate for policies and funding that enable public health entities and communities across Colorado to thrive.

## MISSION

Trailhead Institute advances innovation and collaboration in public and environmental health

## VISION

Everyone has the opportunity to be healthy and live in a healthy environment

## We have three main drivers of our work:

### COLLABORATION

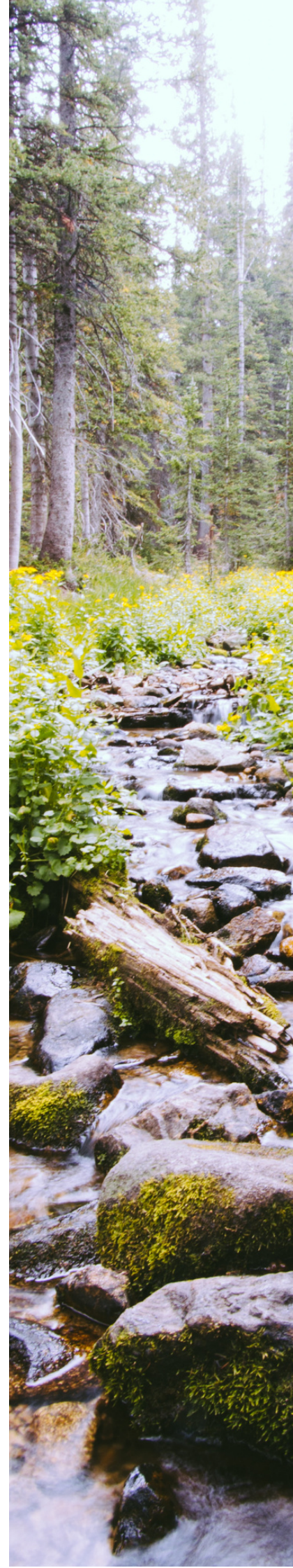
We believe that collaboration is the only way to address the public health problems we face because no one partner or industry can solve them alone.

### JUSTICE

We believe that for communities to thrive, there must be a recognition of the inequities that they face, and an awareness of our role in contributing to these systemic barriers. With this awareness, we believe that we must support the creation of equitable practices that allow communities to be at the forefront of decision-making and resource distribution.

### CAPACITY

We believe community leaders are best suited to identify and address their needs. We manage, build and grow resources needed to achieve community based goals because we believe that it is essential to offer a space for community members to address community challenges, and improve the places where they live, work and play.





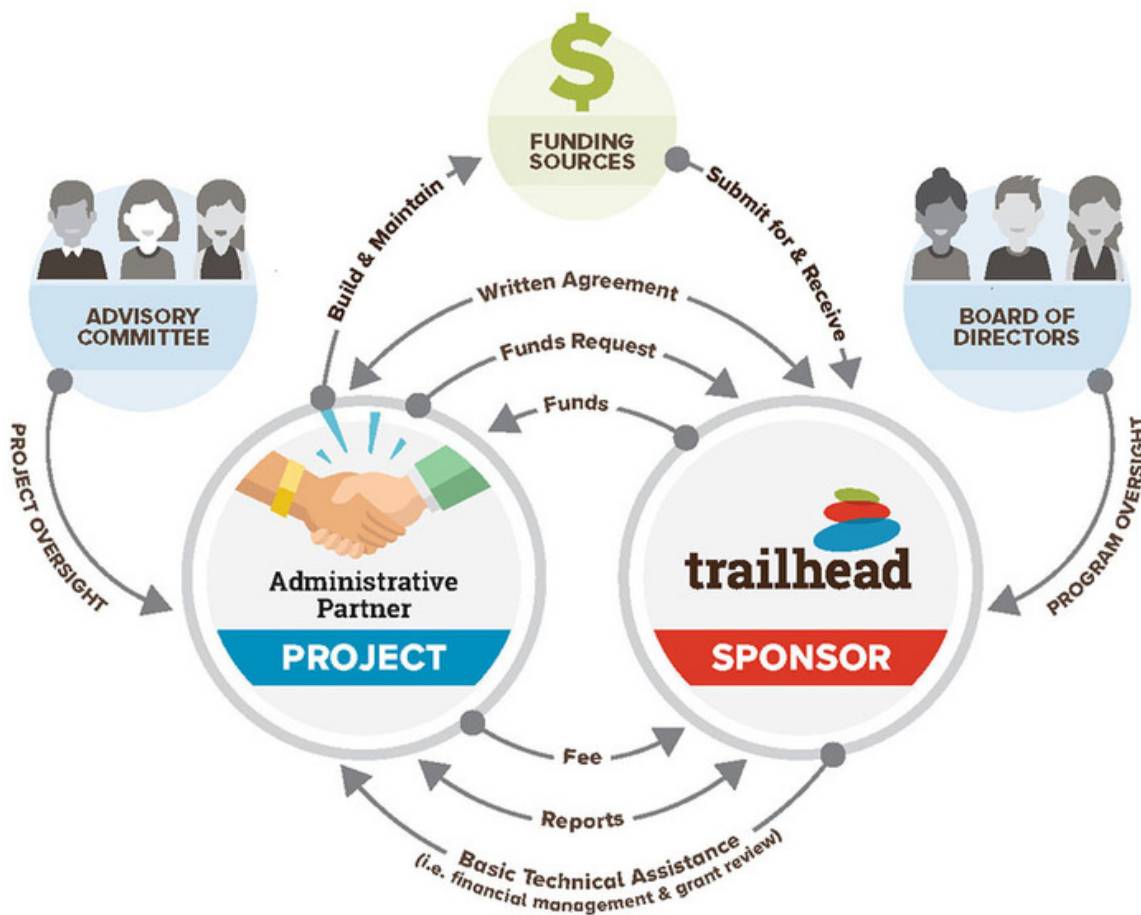
# Moving Missions Forward

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At Trailhead Institute, we serve as a flexible and strategic administrative partner for fiscal sponsorship and operations support for individuals, organizations and Collaboratives. Our approach allows partners to leverage our back office services while maintaining full control over their projects. Our Administrative Partnership Program differs from a traditional Fiscal Sponsorship Program because we work with partnerships before funding is secured to provide capacity and the expertise needed to move their mission forward. We believe that by investing time, energy and passion into partnerships from the early stages, we can help build skills to expand administrative capacity for the long term.

# Our Administrative Partnership Program's Approach to Fiscal Sponsorship

While all fiscal sponsorships allow nonprofit (501c3) entities to support non-exempt projects through financial oversight, Trailhead approaches fiscal sponsorship a bit differently from other fiscal sponsors in the field. Trailhead supports individuals, collaborations, LLCs, and new or strengthening nonprofits through nearly every model of fiscal sponsorship, utilizing our 501c3 status, and have us take on the fiscal and operational responsibilities that can often get in the way to the success of their core objectives. Our approach provides partners the ability to leverage our fiscal and operational services while maintaining full control over their work. We see our work as being a partnership rather than a transaction, which is why we call all our sponsored projects Administrative Partners. A diagram below illustrates this approach:



We advance your bottom line, so you can advance your mission.

Our approach supports both non-exempt and tax-exempt projects and organizations. You can think of our approach like the relationship between a grantor and a grantee, with wrap-around infrastructure to support your fiscal and operational needs. We “pre-approve” Administrative Partner applications for grant funding. This pre-approval process is mostly to ensure that we have the staff capacity to support the grant submission. Once the Administrative Partner is awarded funding, the funds are contributed to Trailhead. After we receive the funds, we then hold them for the Administrative Partner.

Our approach is not solely as a “pass-through” or “conduit.” Trailhead utilizes nearly all of the **core models of fiscal sponsorship** with the exception of Group Exemption. As the sponsor, Trailhead must assume “expenditure responsibility” for the Administrative Partner, and must verify any expenditure of charitable funds as compliant with charitable purposes and the wishes of the donor or funder. To cover charitable compliance, oversight, and administration costs, Trailhead assesses a 10% fee on the gross revenue that the Administrative Partner brings in during the fiscal sponsor relationship.

## How Do I Know if I Am Eligible To Be an Administrative Partner?

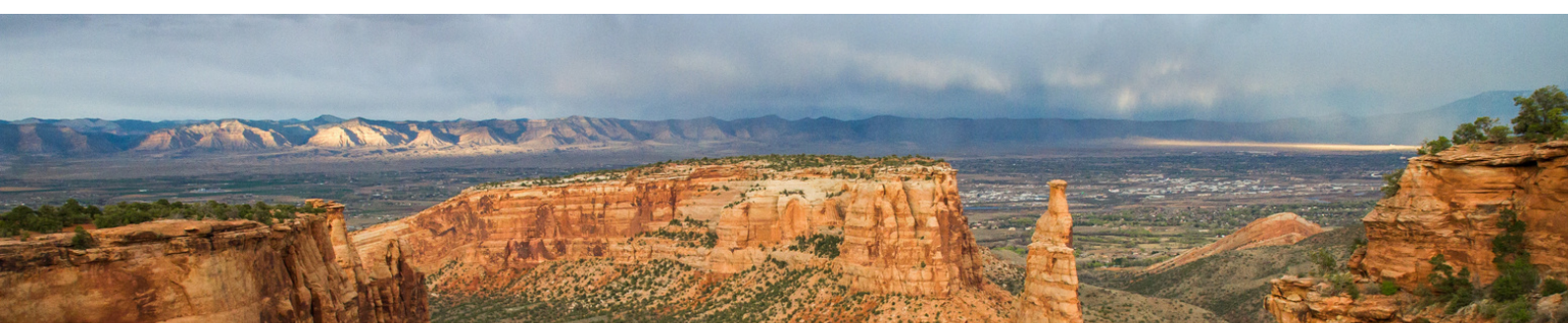
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An Administrative Partner can be a tax-exempt entity, a non-exempt entity (LLC, S-Corp, or some form of sole proprietorship) or a person (no corporate structure, unincorporated).

Administrative Partners do not need to have generated revenue prior to entering into the fiscal sponsorship relationship.

### ADMINISTRATIVE PARTNERS MUST:

- Show that they are doing work that follows the guidelines for exempt activities under section 501c3 of the Internal Revenue Code, and that they are doing work that falls within the field of public and environmental health.
- Be able to explain the basic goals of their work, how community will be engaged, how community will benefit from their work, and how their work will foster health equity, justice and collaboration.
- Align with Trailhead's strive to regenerate people and communities by actively examining and dismantling white supremacy culture and creating environments where all members are designing and evolving structures that foster equity in decision-making, power, information, and resources.



# What is the Process for Getting Started?

Each potential partner has unique needs, therefore, the timeline of our application process may vary. Generally, this is how the process works:



## 1. EXPLORE THE RELATIONSHIP

Learn more about fiscal sponsorship, Trailhead, and our Administrative Partnership Program through our website at [www.trailhead.institute](http://www.trailhead.institute). When you are ready to be considered as a new Administrative Partner, complete our [partner application](#) and a member of our APP team will reach out to schedule an Introduction Meeting. Any questions about your application will be addressed in the first Introduction Meeting with Trailhead staff.

## 2. PARTNERSHIP FIT

We do an internal review of each New Project Application and the information gathered in the Introduction Meeting. If Trailhead decides the partnership is a fit with our organizational mission and internal capacity, we will contact you and begin the next step to initiate a Fiscal Sponsorship Agreement (FSA).

## 3. KICK-OFF MEETING

Once the FSA is fully complete (when the Administrative Partner and Trailhead have both signed the document), Trailhead will have a Kick-Off Meeting to introduce you to the APP team who will be supporting you and your work.

# Naturally Evolving Partnerships: Reactivate & Graduate

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## ANNUAL REVIEW

On an annual basis, we review with each Administrative Partner their desire to continue the fiscal sponsorship relationship. At this time, we will ask for confirmation that determines whether the Administrative Partner would like to continue, pause or graduate from the partnership. In addition to this confirmation, we will work with partners to develop their annual budgets and learn about what training needs they have for the upcoming year.

## REACTIVATING INACTIVE PARTNERSHIPS


If a project is inactive for six months, someone from our APP team will reach out to the primary point of contact and if no response is received within two weeks, the project will be placed inactive. Partners who become inactive can resubmit their original partner application if the scope of their project has remained unchanged, or submit a new application reflective of their adjusted project needs, at which time Trailhead will reassess the submitted partner application. Based on our internal review and capacity we will approve or deny partner reactivation until capacity is regained on our end in order to ensure we are able to meet the needs of our existing active Administrative Partners.

## GRADUATING THE PARTNERSHIP

When you submit your New Project Application, we will ask how long you think you will need our Administrative Partnership services. When you are filling out the application you may know this information, or you might decide during the partnership that the fiscal sponsorship relationship will need to come to an end. Typically, Administrative Partners will end the relationship for the following reasons:

1. They have created a new nonprofit entity with its own exempt status under 501c3 of the Internal Revenue Code
2. The project was time-limited, one-time funding with an expected end date
3. They have decided to move on to focus on other initiatives
4. They have found a new sponsor

Whatever the reasoning, we support all Administrative Partners graduating our partnership by:

- Providing a Due Diligence Checklist to ensure the exit and transfer of assets is made consistent with its 501c3 purposes and with reasonable care consistent with the FSA. As part of this process, we must ensure that assets and funding will be transferred to an established 501c3
  - Developing and executing a Termination Agreement that is signed by Trailhead and the Administrative Partner Project Lead
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# CONNECT WITH US TO LEARN MORE

To submit a [partner application](#), or if you have further questions not answered in this document, please reach out to us at [AdminPartner@trailhead.institute](mailto:AdminPartner@trailhead.institute) or visit our website at [www.trailhead.institute/administrative-partnership](http://www.trailhead.institute/administrative-partnership)



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