

# TRAILHEAD INSTITUTE STRATEGIC PLAN 2025-2030



**trailhead**  
**INSTITUTE**

For public health innovation

# INTRODUCTION

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**Background and Opportunity:** As a public health institute, Trailhead's role is to champion initiatives that protect and improve the health of all people in our communities. In 2023, Trailhead revised its Theory of Change to sharpen the focus of its strategic planning. This updated strategic plan defines Trailhead's strengths as a public health partner and outlines the operational capacity needed to achieve our mission. A clear implementation plan and accountability framework will help align efforts, prioritize what matters most, and drive lasting impact. The plan spans five years, with a detailed implementation roadmap for the first three years to be refreshed for the final two.

**Methodology:** From January to June 2025, Trailhead engaged in a six-month planning process, guided by a consultant and in collaboration with Trailhead staff. The process centered on leveraging internal expertise and aligning with the organization's Theory of Change. To develop a comprehensive plan, six teams were established to focus on key areas:

- 1.Coordinating Team: members of Trailhead staff and board, responsible for synthesizing information from all other teams.
- 2.Internal Exploration Team: focused on Trailhead's internal culture and employee engagement.
- 3.External Exploration Team: focused on external partner feedback.
- 4.Administrative Systems Workgroup
- 5.Public Health Relationships Workgroup
- 6.Strengthen Public Health Systems Workgroup

Over the course of the planning period, these groups developed survey tools, gathered input, and created draft work plans. On May 15, 2025, Trailhead held a full-day retreat to assess the integration, prioritization, and impact of the proposed work.



# INTRODUCTION

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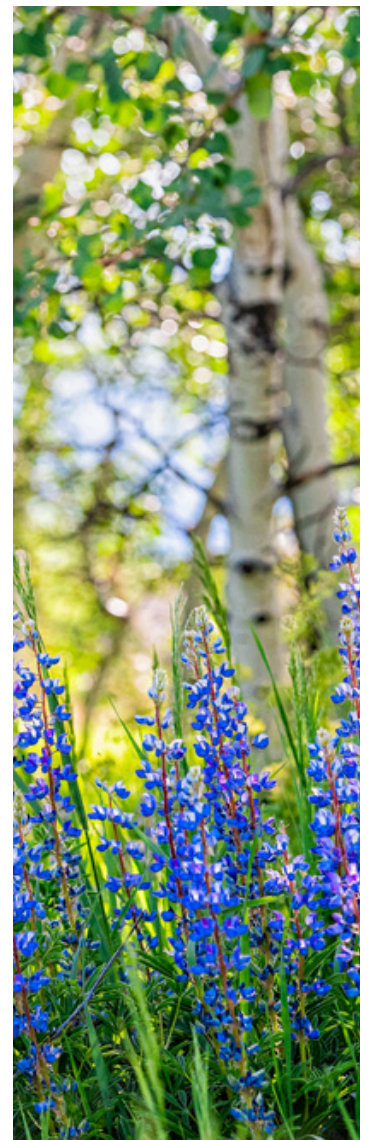
## **Methodology (Cont):**

The retreat outputs, combined with additional refinements from Trailhead Leadership and the Coordinating Team, resulted in the five strategic goals and corresponding activities outlined on the following pages.

## **Resources Included in this Document:**

- Strategic Plan Overview
- High-Level Roadmap
- Detailed plans by goal
  - Goal 1: Clearly define, articulate, and evaluate Trailhead’s distinct role and value within Colorado’s public health ecosystem and to its partners
  - Goal 2: Establish and sustain learning systems within Trailhead and with partners to advance equity, collaboration, and consistent practices
  - Goal 3: Strengthen and protect the public health system by building advocacy, policy, and lobbying capacity
  - Goal 4: Develop and implement a clear decision-making framework rooted in the Theory of Change that guides Trailhead’s engagement in public health initiatives and partnerships
  - Goal 5: Ensure supports for a rooted, strong, and stable organization
- Team member lists
- Implementation Planning Considerations

These detailed plans by goal area identify the activities within each goal. It is at the activity level that we will convene leaders and advance the strategic plan. Activity leaders will not be solely responsible for activities. Instead, they will curate partners, solutions, and establish the next steps to move activities forward. Updating and tracking of next steps will be documented in a worksheet: [Strategic Plan Workbook 2025 to 2028.xlsx](#)



# GUIDING PRINCIPLES



<p>Vision: Everyone has the opportunity to be healthy and live in a healthy environment.</p>		
<p>Mission: Trailhead Institute advances innovation and collaboration in public and environmental health.</p>		
<p>North Star Goals: 1) There is a critical mass of support across the field of public health for community- driven solutions. 2) Communities and organizations that work in direct service to communities have the sustained resources, autonomy, and capacity to lead programs that effectively address community needs.</p>		
<p>Impact: Partners have the capacity to:</p> <ul style="list-style-type: none"> <li>• Allocate resources more effectively</li> <li>• Focus on collaboration, sharing resources and mutual support</li> <li>• Contribute to the overall robustness of the public health system, and</li> <li>• Identify and address programmatic gaps.</li> </ul> <p>Leading to a stronger public health system, which promotes continuous learning and improvement,</p>		
<p>Role: Serve as a strategic partner for building coordinated, community-informed solutions to public health needs through our knowledge and relationships across the public health system.</p>		
<p>Approach: Capacity, Justice, and Collaboration</p>		
<p>Values: Collaboration, Curiosity, Inclusion, Innovation, Reflection</p>		
<p>We make administrative systems accessible and effective for our partners.</p>	<p>We build relationships across the field of public health.</p>	<p>We strengthen and protect the public health system.</p>
<p><i>*Please visit Trailhead's <a href="#">Theory of Change</a> for more detail on the above content</i></p>		

# GOALS AND ACTIVITIES

<b>Goal 1: Clearly define, articulate, and evaluate Trailhead’s distinct role and value within Colorado’s public health ecosystem and to its partners</b>				
Activity 1.1: Define and articulate Trailhead’s role in the public health ecosystem		Activity 1.2: Ensure TH is delivering quality and value to partners		
<b>Goal 2: Explore learning systems within Trailhead and with partners to advance equity, collaboration, and consistent practices</b>				
Activity 2.1: Design and implement a knowledge-sharing system to support mutual learning		Activity 2.2: Identify and address content and training gaps that support Trailhead partners		
<b>Goal 3: Strengthen and protect the public health system by building advocacy, policy, and lobbying capacity</b>				
Activity 3.1: Determine and create a systematic and documented approach for informing policy				
<b>Goal 4: Develop and implement a clear decision-making framework rooted in the Theory of Change, that guides Trailhead’s engagement in public health initiatives and partnerships</b>				
Activity 4.1: Establish a process for assessing emerging PH issues and understanding gaps		Activity 4.2: Revise and require a Strategy Screen / APP Partner Screening Tool to better assess how Trailhead bridges institutions serving directly impacted communities.		
<b>Goal 5: Ensure supports for a rooted, strong, and stable organization</b>				
Activity 5.1: Conduct a systematic review of HR, Contracting, IT, and Finance systems: Prioritize policy & procedure improvements.	Activity 5.2: Pilot APP/Finance system for APP Partners	Activity 5.3: Centralize and systemize contracts across the organization in order to strengthen compliance & best practices	Activity 5.4: Continue to invest in Trailhead staff development	Activity 5.5: Evaluate Trailhead's physical space as a collaborative space, partner asset, and financial stability

# HIGH-LEVEL TIMELINES FOR IMPLEMENTATION

	Year 1				Year 2	Year 3
	Qtr 1	Qtr 2	Qtr 3	Qtr 4		
Goal 1: Clearly define, articulate, and evaluate Trailhead’s distinct role and value within Colorado’s public health ecosystem and to its partners						
Define and articulate Trailhead’s role in the public health ecosystem						
Ensure TH is delivering quality and value to partners						
Goal 2: Explore learning systems within Trailhead and with partners to advance equity, collaboration, and consistent practices						
Design and implement a knowledge-sharing system to support mutual learning						
Identify and address content and training gaps that support Trailhead partners						
Goal 3: Strengthen and protect the public health system by building advocacy, policy, and lobbying capacity						
Create a systematic and documented approach for informing policy						

# HIGH-LEVEL TIMELINES FOR IMPLEMENTATION

	Year 1				Year 2	Year 3
	Qtr 1	Qtr 2	Qtr 3	Qtr 4		
<b>Goal 4: Develop and implement a clear decision-making framework rooted in the Theory of Change, that guides Trailhead's engagement in public health initiatives and partnerships</b>						
Establish a process for assessing emerging PH issues and determining Trailhead's role						
Revise and require a Strategy Screen to better assess how Trailhead bridges institutions serving directly impacted communities.						
<b>Goal 5: Ensure supports for a rooted, strong, and stable organization</b>						
Conduct a systematic review of HR, Contracting, IT, and Finance systems: Prioritize improvements*						
Pilot APP/Finance system for APP Partners						
Centralize and systemize contracts across the organization						
Continue to invest in Trailhead staff development						
Evaluate Trailhead's physical space as a collaborative space, a partner asset, and for financial stability						

# ACTIVITY LEVEL TRACKING



These detailed plans by goal area identify the activities within each goal. It is at the activity level that we will convene leaders and advance the strategic plan. Activity leaders will not be solely responsible for activities. Instead, they will to curate partners, solutions, and establish the next steps to move activities forward. Updating and tracking of next steps will be documented in a worksheet: [Strategic Plan Workbook 2025 to 2028.xlsx](#)

Goal 1	Clearly define, articulate, and evaluate Trailhead’s distinct role and value within Colorado’s public health ecosystem and to its partners	Lead
Activity 1.1	Define and articulate Trailhead’s role in the public health ecosystem ( <i>Measure: 100% of staff feel they can articulate Trailhead’s role</i> )	Programs and APP
Activity 1.1.1	<i>Articulate a clear menu of existing and potential services offered by Trailhead.</i>	
Activity 1.1.2	<i>Promote Trailhead’s position as a statewide Public Health Institute, in conjunction with the National Network of Public Health Institutes and the Colorado Health Institute (the other statewide PHI).</i>	
Activity 1.1.3	<i>Develop a consistent organizational narrative that is integrated in all TH branding, communications and systems</i>	
Activity 1.1.4	<i>Define and demonstrate innovation at Trailhead</i>	
Activity 1.1.5	<i>Facilitate strategic conversations with partners to align messaging and reinforce ecosystem alignment.</i>	
Activity 1.1.6	<i>Align website with organizational narrative.</i>	

# ACTIVITY LEVEL TRACKING



Goal 1	Clearly define, articulate, and evaluate Trailhead’s distinct role and value within Colorado’s public health ecosystem and to its partners	Lead
Activity 1.2	Ensure TH delivers quality and value to partners. (Measure: “95% of partners feel their high expectations of Trailhead to be supportive, reliable, transparent, collaborative, inclusive, and community-centered are met or exceeded.”)	Evaluation team + APP/Programs teams
Activity 1.2.1	<i>Evaluate partner experience immediately after participation in Trailhead-hosted convenings, programs, and projects</i>	
Activity 1.2.2	<i>Launch an annual survey to assess responsiveness and partner experience (with options for ad hoc feedback).</i>	
Activity 1.2.3	<i>Implement 6- and 12-month follow-ups with “graduated” partners to assess lasting impacts.</i>	
Activity 1.2.4	<i>Conduct frequent outreach to current and past partnerships through mass communications and 1:1 engagement</i>	

# ACTIVITY LEVEL TRACKING

Goal 2	Explore learning systems within Trailhead and with partners to advance equity, collaboration, and consistent practices	Lead
Activity 2.1	Design and implement a knowledge-sharing system to support mutual learning by: 1) Inventory of existing content is created, 2) Rationale and options for knowledge-sharing platform are developed, 3) Increase engagement on website and toolkit links	Directors Team
Activity 2.1.1	<i>Define the purpose, scope, and intended outcomes of a knowledge-sharing system.</i>	
Activity 2.1.2	<i>Inventory and organize existing internal content (e.g., SASH, Admin Equity) mapping to Trailhead’s menu of services</i>	
Activity 2.1.3	<i>Inventory existing external content mapping to Trailhead’s menu of services</i>	
Activity 2.1.4	<i>Explore possible platforms for sharing content, including with partners</i>	
DECISION POINT: <i>Decide on whether to invest in a knowledge-sharing platform</i>		
Activity 2.1.5	<i>Select and implement a platform (i.e. the website, learning management system, etc.)</i>	
Activity 2.1.6	<i>Build a system for uploading, organizing, and maintaining internal &amp; external content</i>	
Activity 2.1.7	<i>Create a shared learning library with the materials above.</i>	
Activity 2.1.8	<i>Develop a plan to solicit and disseminate resources over time</i>	
Activity 2.1.9	<i>Plan and gather feedback on usefulness and what additional content might be needed</i>	
Activity 2.1.10	<i>Use feedback to improve the system</i>	

# ACTIVITY LEVEL TRACKING

Goal 2	Explore learning systems within Trailhead and with partners to advance equity, collaboration, and consistent practices	Lead
Activity 2.2	Identify and address content and training gaps that support Trailhead partners (Measure: 80% of partners share that content and training needs they have are being met by Trailhead or another partner)	Strategic Ops Team
Activity 2.2.1	<i>Determine what content needs to be created based on the Theory of Change and the feedback from the knowledge sharing platform and Trailhead's menu of services</i>	
<i>DECISION POINT: Determine what new content development Trailhead will invest in</i>		
Activity 2.2.2	<i>Create learning opportunities and processes across the organization to increase equity, collaboration, and consistency with partners</i>	
Activity 2.2.3	<i>Launch equity labs or skills-based webinars.</i>	
Activity 2.2.4	<i>Implement two events per year with built-in feedback loops</i>	

# ACTIVITY LEVEL TRACKING

Goal 3	Strengthen and protect the public health system by building advocacy, policy, and lobbying capacity	Lead
Activity 3.1	Determine and create a systematic and documented approach for informing policy (Measures: 1) Policy Approach Document is created, 2) Clear connection with policy is established and programs understand their role in the partnership, 3) Staff of Trailhead has clarity on where the organization stands on policy efforts)	Directors Team
Activity 3.1.1	<i>Determine and document Trailhead's internal policy approach to guide advocacy and external support.</i>	
Activity 3.1.2	<i>Build partnerships with other Public Health Advocates to determine where Trailhead needs to invest</i>	
<i>DECISION POINT: Determine how Trailhead will invest in the advocacy, policy, and lobbying space</i>		
Activity 3.1.3	<i>Invest in the approach from Activity 3.1.2</i>	
Activity 3.1.4	<i>Create a policy tracking process to support staff during legislative sessions.</i>	
Activity 3.1.5	<i>Develop onboarding training to articulate Trailhead's policy approach</i>	

# ACTIVITY LEVEL TRACKING

Goal 4	Develop and implement a clear decision-making framework rooted in the Theory of Change, that guides Trailhead's engagement in public health initiatives and partnerships	Lead
Activity 4.1	Establish a process for assessing emerging PH issues and understanding gaps (Measure: Process is developed for assessing emerging issues and understanding gaps are identified)	Sr Director of Programs
Activity 4.1.1	Conduct a resource and gaps analysis to understand what exists across programs and key partners to identify unmet needs	
Activity 4.2	Revise and require a Strategy Screen / APP Partner Screening Tool to better assess how Trailhead bridges institutions serving directly impacted communities. (Measure: 100% of new programs and partners utilize a screening tool to ensure alignment)	Sr Director of Programs & Sr. Director of Projects and Partnerships
Activity 4.2.1	<i>Clarify how and where the strategy screen is used, including decision-making responsibilities and feedback processes.</i>	
Activity 4.2.2	<i>Engage all staff in reviewing and updating the tools to increase clarity and accountability.</i>	
Activity 4.2.3	<i>Integrate staff input to assess internal capacity and readiness to apply the screening tools</i>	
Activity 4.2.4	<i>Develop accountability measures for centering impacted communities.</i>	
Activity 4.2.5	<i>Pilot and refine the strategy screen / APP Partner Screening Tool in 2028.</i>	

# ACTIVITY LEVEL TRACKING

Goal 5	Ensure supports for a rooted, strong, and stable organization	Lead
Activity 5.1	Conduct a systematic review of HR, Contracting, IT, and Finance systems: Prioritize improvements* (Measure: List of prioritized improvements is developed)	Sr Director of Operations
Activity 5.1.1	<i>Develop a methodology to prioritize systems.</i>	
Activity 5.1.2	<i>Identify review teams for each system.</i>	
Activity 5.1.3	<i>Develop a framework for technology and process improvements in the Operations Manual</i>	
Activity 5.1.4	<i>Determine evaluation metrics and develop a maintenance plan.</i>	
DECISION POINT: Determine whether to develop an implementation plan for identified improvements		
Activity 5.2	Pilot APP/Finance system for APP Partners (Measure: 1) Improved capacity as a coach/advisor for Trailhead finance staff, 2) Improved customer satisfaction with reports and data)	Director of Finance and Sr. Director of Projects & Partnerships
Activity 5.2.1	<i>Create standard operating procedures for implemented systems</i>	
Activity 5.2.2	<i>Train staff and partners on the use of the system</i>	

# ACTIVITY LEVEL TRACKING

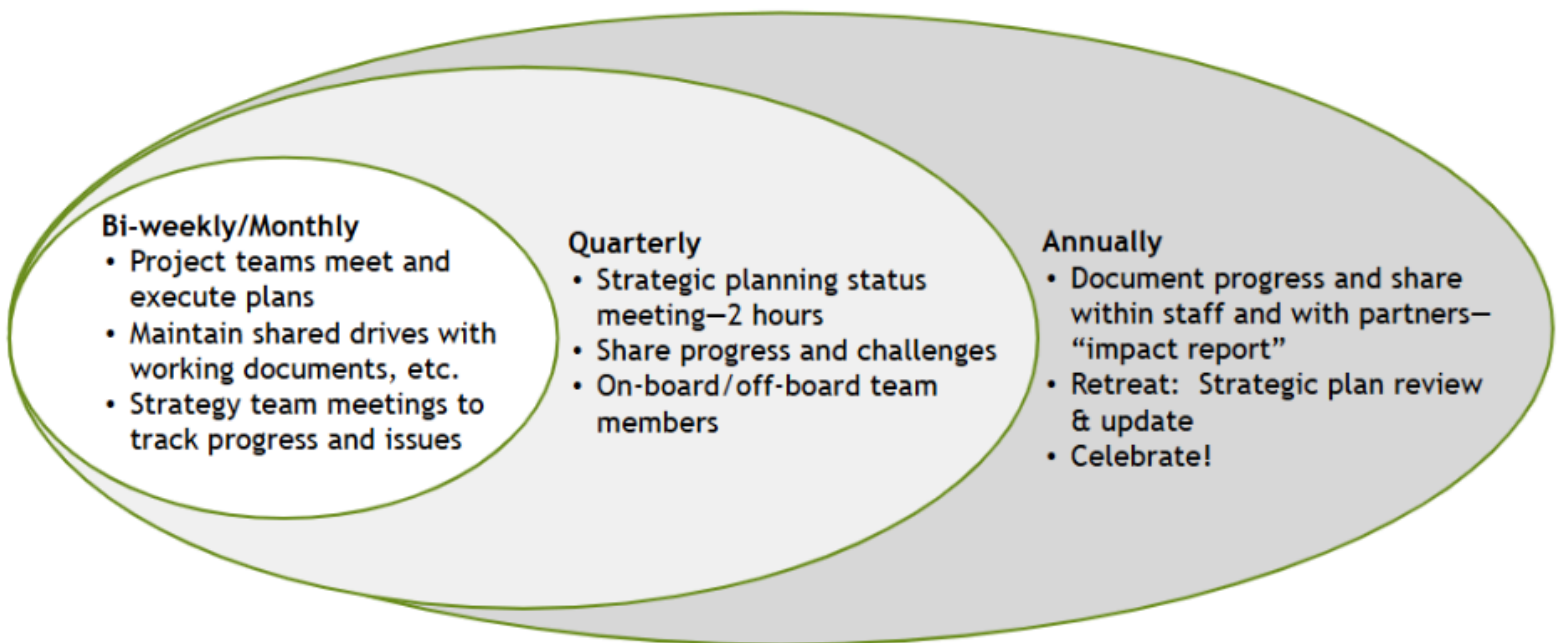
Goal 5	Ensure supports for a rooted, strong, and stable organization	Lead
Activity 5.3	Centralize and systemize contracts across the organization to: 1) Improve efficiency for Trailhead staff, 2) Increase visibility across the organization for grants and contracts	Dir. of Finance, President & Executive Dir.
Activity 5.3.1	<i>Assess the development of resources, skills, and capacities within Trailhead to support cross-program and project support in policy, advocacy, and grant/funding development.</i>	
Activity 5.3.2	<i>Create a development plan based on the assessment</i>	
Activity 5.4	Continue to invest in Trailhead staff development (Measure: 100% of Trailhead staff feel they have the skills they need to do their jobs effectively)	Sr. Director of Operations
Activity 5.4.1	<i>Continue to invest in staff development through Dare to Lead, Mental Fitness, Employee Coaching, and Ethical Commitments</i>	
Activity 5.4.2	<i>Facilitate an internal assessment for each team to understand the current state and goals for collaboration and inclusivity (e.g. <a href="https://www.ravnur.com/blog/how-to-increase-community-engagement/">https://www.ravnur.com/blog/how-to-increase-community-engagement/</a>)</i>	
Activity 5.4.3	<i>Develop a framework for addressing/acknowledging power across Trailhead programs and projects</i>	
Activity 5.4.4	<i>Hold regular check-ins with partners to evaluate Trailhead's role in shared efforts.</i>	
Activity 5.4.5	<i>Identify internal and community-based resources for ongoing staff development.</i>	
Activity 5.5	Evaluate Trailhead's physical space as a collaborative space, partner asset, and financial stability	Directors / Board

# ACCOUNTABILITY FRAMEWORK

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## **An accountability framework has:**

- A review cadence with meetings planned well in advance
- A plan for success measures
  - Completion of planned activities
  - Targets for movement on lead measures
- Clearly-defined and communicated roles and responsibilities
- A defined method for recovering when we get “off trail”



# ACCOUNTABILITY FRAMEWORK

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Trailhead will use existing teams to maximize impact and ensure efficient use of staff time and expertise to fulfil roles for implementation. Each activities

## Strategic Planning Committee

Team whose collective responsibilities include:

- Approve plans and identify resources
- Being a vocal champion for change; coordinate across efforts
- Creatively move efforts forward and removing barriers

## Project Teams

Ad Hoc and activity level teams whose responsibilities include:

- Coordinating detailed planning
- Managing execution and status reporting
- Surface opportunities and barriers

## Activity Leaders

Activities within goals each have a leader(s) whose responsibilities include:

- Creating a project schedule
- Executing tasks per the project schedule
- Reporting progress to Strategic Planning Committee via email/tracking log

# GRATITUDE



This Trailhead Strategic Plan would not have come together without the dedicated support and time and efforts of all staff.

## **Coordinating Team**

- Michele Shimomura
- Lisa Olcese
- Tara Hardy
- Bruno Sobral
- Jennifer Edwards
- Kaia Gallagher
- Benjamin Robb
- Blake Sholes
- Tess Burick

## **Workgroup 1: Strengthen Administrative Systems**

- Sara Scarim-Smith
- Tyler Shirey
- Gabriel Mansfield
- Andrew Stricker
- Tara Hardy

## **Workgroup 2: Strengthen Public Health**

### **Relationships**

- Adrienne Gomez
- Ben Robb
- Ida Nelson
- Blake Sholes
- Emma Logan
- Tara Hardy

## **Workgroup 3: Strengthen and Protect and the Public Health System**

- Ocean Candler
- Gillian Grant
- Kayla Cibic
- Tara Hardy

## **Internal Exploration Team**

- Andrew Stricker
- Kayla Cibic
- Mia Brewer
- Michele Shimomura
- Ocean Candler
- Lisa Olcese
- Sara Scarim-Smith

## **External Exploration Team**

- Adrienne Gomez
- Gabe Mansfield
- Lisa Olcese
- Michele Shimomura
- Taruni Donti
- Tess Burick
- Yuliza Hernandez

## **Staff Meeting Planning Team**

- Kayla Cibic
- Lisa Olcese
- Mia Brewer
- Ocean Candler

Trailhead appreciates the support from GPS. They provided invaluable help and guidance in our strategic planning journey.

