



Sustaining Public Health Infrastructure Beyond the Grant Cycle:

A systems approach to sustaining staff, programs, and funding over time.





Funding Acknowledgement

This work is supported by funds made available from the Centers for Disease Control and Prevention (CDC) of the U.S. Department of Health and Human Services (HHS), National Center for STLT Public Health Infrastructure and Workforce, through OE22-2203: Strengthening U.S. Public Health Infrastructure, Workforce, and Data Systems grant. The contents are those of the author(s) and do not necessarily represent the official views of, nor an endorsement, by CDC/HHS, or the U.S. Government.



About Trailhead

Mission: Trailhead Institute advances innovation and collaboration in public and environmental health.

- ❖ We provide **administrative support & infrastructure** for organizations and health initiatives
- ❖ We serve as a **strategic business partner** to government, academia, and community
- ❖ We develop and implement programs that **meet unmet public health needs** across the state.



Agenda

Foundation

- Review objectives
- Define sustainability
- Systems approach to sustainability
- Sustainability lifecycle

Practical Strategies

- Explore how the lifecycle applies across staff, funding, programs, and partners
- Reflect on your organization within each area

Suggested Next Actions

- Develop your own plan
- Review and suggest available resources
- Q/A and conclusion

Session Objectives

- Learn about dimensions of sustainability and how they apply across staff, programs, funding, and external partnerships.
- Explore best practices, tools, and lifecycle-based strategies to support sustainability in changing environments.
- Preview practical resources and approaches to strengthen sustainability within organizations and programs.
- Introduce an organizational sustainability snapshot and identify priority actions for future planning.



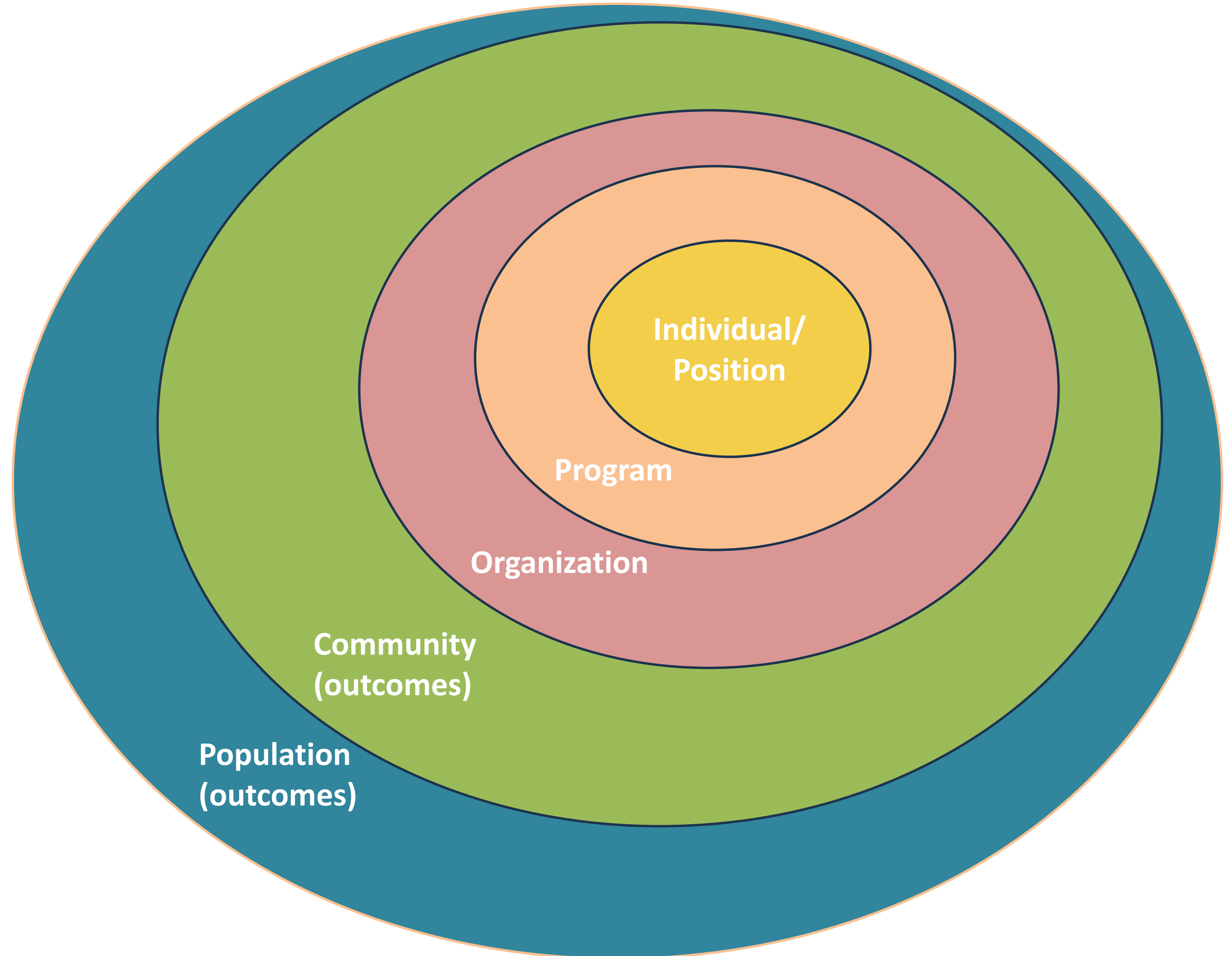
Why Sustainability Feels So Difficult

- Funding is often time-limited, but the needs are not.
- Programs are expected to continue without long-term support.
- Staff are impacted by funding uncertainty.
- Sustainability may not feel urgent, until it's urgent.
- Sustainability is a series of interconnected pieces.



Sustainability Scales

What are we trying to sustain?





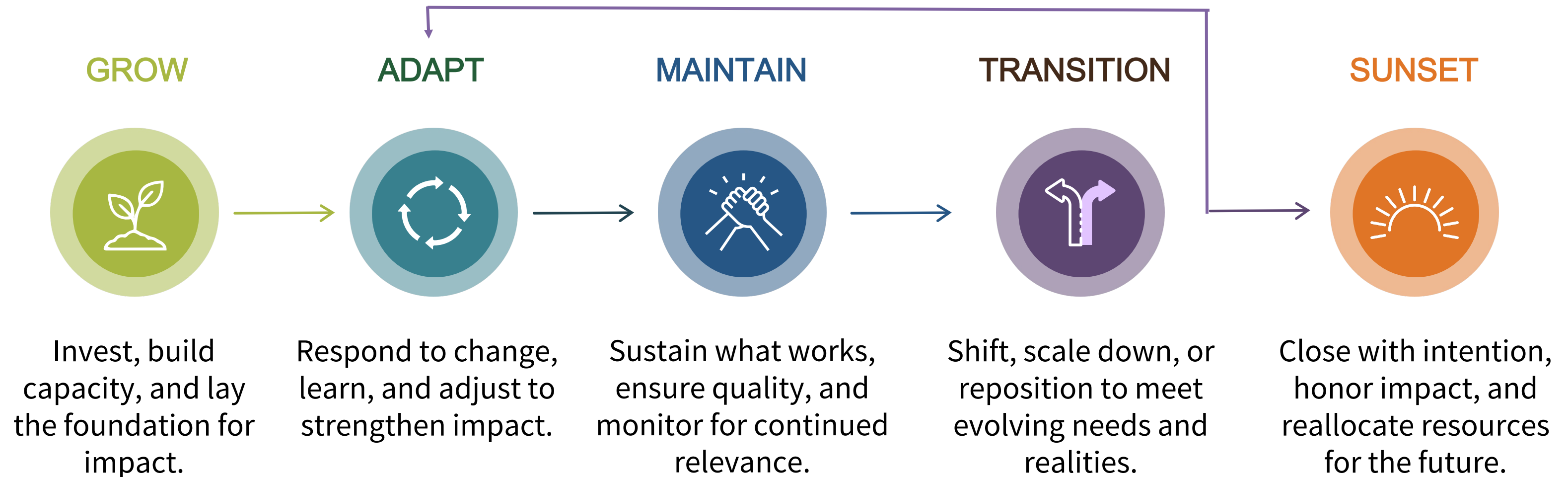
A Systems View of Sustainability

Sustainable organizations continuously align what they do internally with what is changing externally.



Sustainability Happens Over a Lifecycle

Every part of an organization moves through these stages.



Not everything is meant to last forever.
Strong organizations invest, adjust, and let go with purpose.

What Enables Sustainability Across the Lifecycle:

Early and Continuous Planning

- Sustainability is built-in from program inception, with periodic reassessment.

Diversification and Flexibility

- Financial sources, staffing models, and partnerships should be varied to minimize risk.
- Ability to shift across lifecycle stages.

People-Centered Approach

- Staff sustainability: recruitment, retention, career growth, and equitable practices.
- Transparent communication.
- Balancing the needs of both staff and the organization
- Trust as a core asset during transitions.

Relationships and External Alignment

- Strong partnerships with funders, community, and peers.
- Alignment with external environment and changing needs.

Structured Processes and Tools

- Decision frameworks (lifecycle thinking).
- Templates, assessments, and planning tools.



What Supports Staff Sustainability

- Organizational policies that support well-being.
- Mutualistic approach (staff to organizations).
- Human-centered (work with us and work beyond us).
- Retention of staff during financial stability and instability.

Staff Sustainability **in Action**

Develop organizational policies that support your team's well-being and development such as a **supportive work environment, room to learn, competitive pay, salary increases**, and offering comprehensive benefits.



Balancing People and Organizational Realities

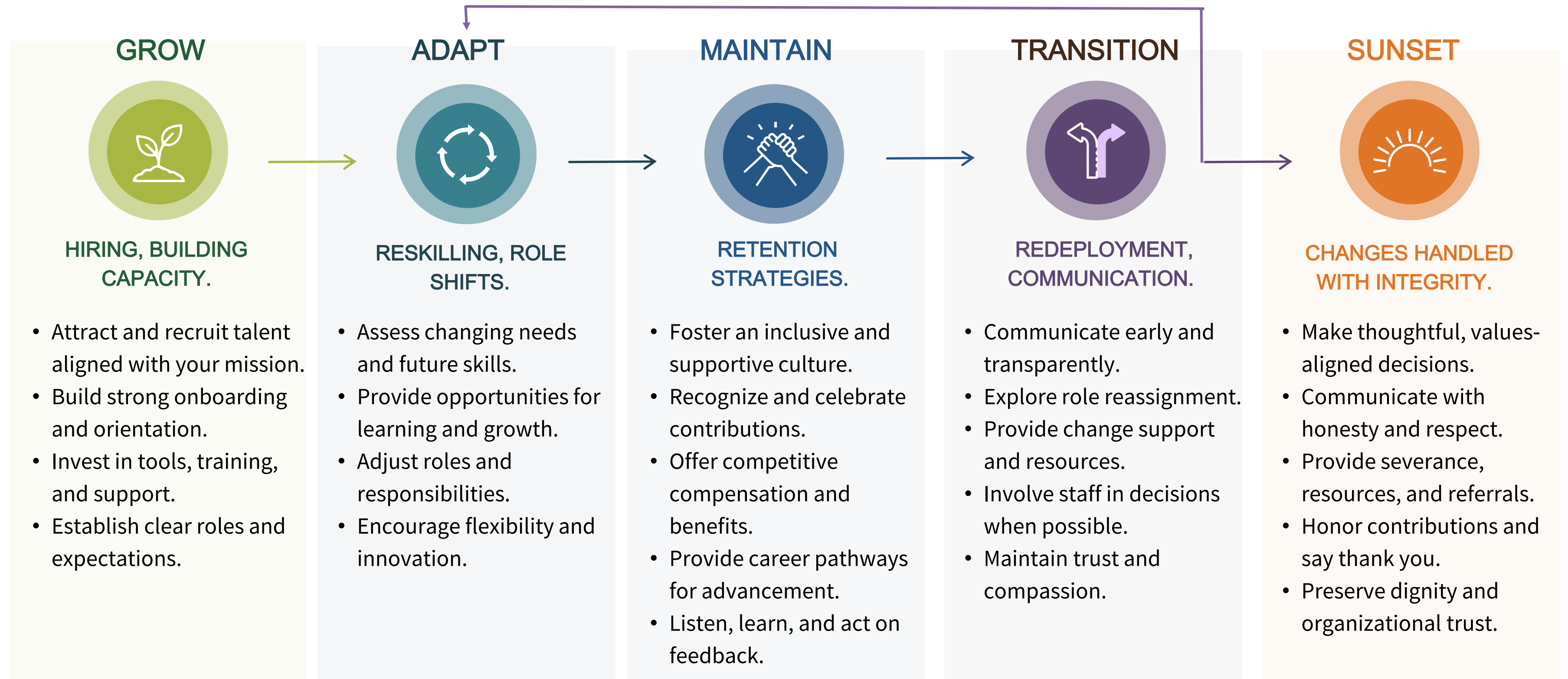
Sustainable for Staff	Sustainable for the Organization
Life balance	Budget constraints
Career growth	Program Needs
Stability	Funding uncertainty
Meaningful work	Shifting Priorities

Workforce sustainability is a balance between meeting the needs of staff and the needs and realities of the organization.



Staff Lifecycle: Applying Sustainability Across Stages

Support people. Strengthen the organization. Plan for what's next.





Staff Sustainability in Practice

Staff Sustainability Practices

Check all that currently exist within your organization:

- | | |
|--|--|
| ☐ Policies that support staff well-being | ☐ Mutualistic approach between staff and organization |
| ☐ Competitive compensation and benefits | ☐ Clear communication during transitions |
| ☐ Career growth pathways | ☐ Cross-training or depth of bench |
| ☐ Retention strategies during funding instability | |
| ☐ Other _____ | |

Action Planning

Identify one priority to improve to support staff sustainability in the next six months:

Action:

Owner:

First Step:

Pause for Q & As





What Supports Funding & Finance Sustainability?

- Budget transparency.
- Diversify funding for staff/FTE.
- Pooling funding or resources.
- Ensuring funding is utilized for the greatest impact and is equitably spent to meet program goals.

Funding & Finance Sustainability Strategies **in Action**

- Ensure budget managers understand how to spend down grants.
- Spend restricted funds first to save unrestricted funds for future expenses such as staff salaries.
- Use braided funding as a strategy.



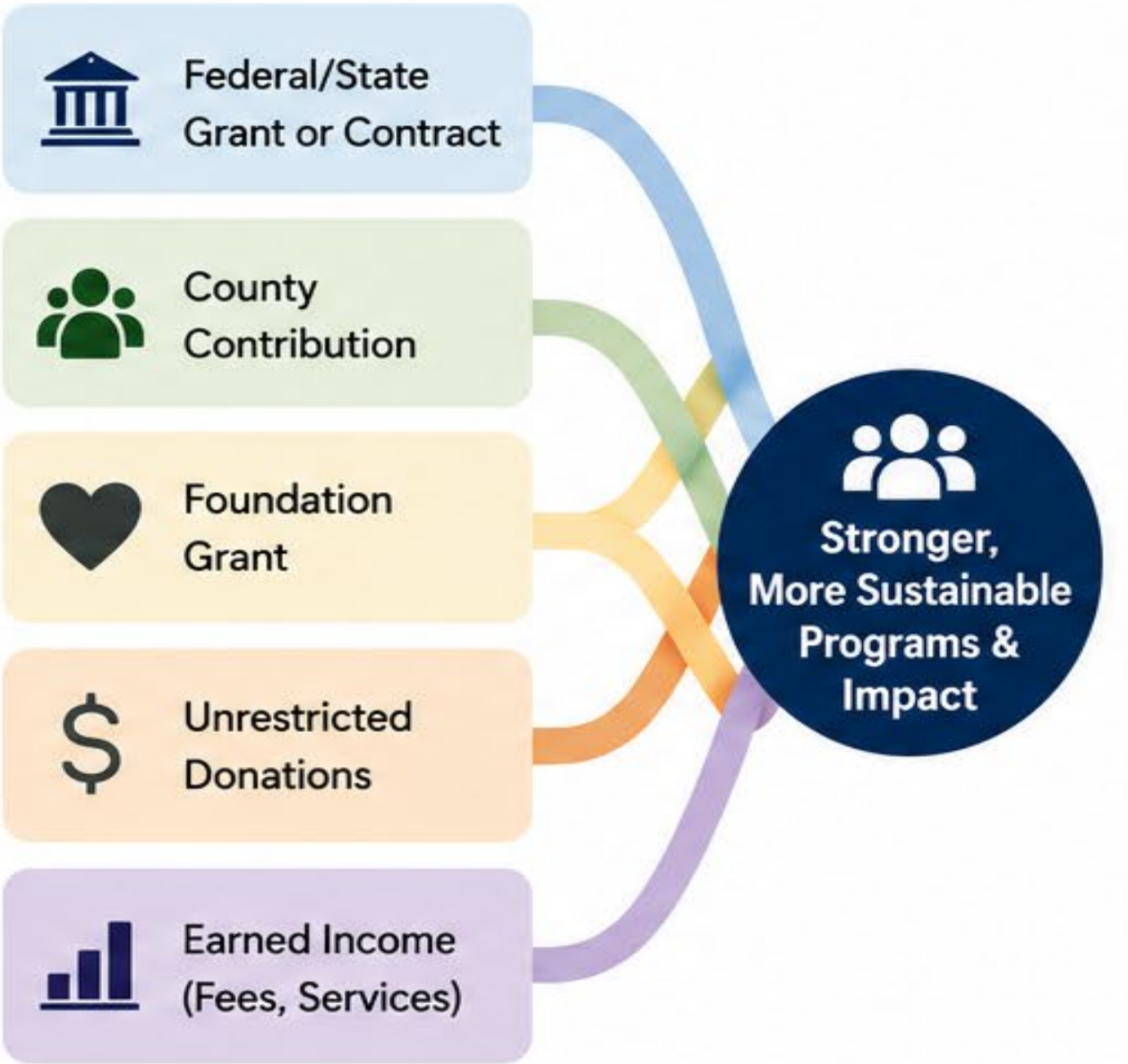
BRAIDED FUNDING: A Smart Strategy for Sustainability

Diverse funding. Shared purpose. Stronger impact.

WHY USE BRAIDED FUNDING?

-  Reduces reliance on any single funding source
-  Creates flexibility to address gaps and emerging needs
-  Builds resilience when funding priorities change
-  Supports long-term program stability and growth

EXAMPLE: HOW IT LOOKS



PROS & CONS

PROS	CONSIDERATIONS
 Diversifies financial risk	 Requires strong financial tracking and systems
 Supports shared infrastructure and capacity	 Reporting requirements remain separate
 Provides flexibility through unrestricted funds	 Needs coordination across partners and funders
 Improves long-term sustainability	 If FTE are patched together, there is still vulnerability if one funding source is impacted. Requires planning around how to fill or shift that role.
	 Requires clear cost allocation processes

Sustainable Funding Is:

- **Diverse:** Multiple funding streams reduce risk.
- **Flexible:** Allows programs to adapt as needs change.
- **Aligned:** Matches program goals and community needs.
- **Reliable:** Predictable enough to plan ahead.



Internal Financial Controls Support Sustainability

POLICIES AND PROCEDURES

Tools and Actions

- Written fiscal policies manual.
- Standard operating procedures (SOPs).
- Staff training and onboarding materials.
- Approval workflows (e.g., spending thresholds).

COST ALLOCATION METHODS

Tools and Actions

- Formalize a written cost allocation plan.
- Time and effort reporting.
- Allocation formulas (FTE, % of use, square footage, etc.)
- Supporting documentation (invoices, payroll records).

FINANCIAL MANAGEMENT SYSTEMS

Tools and Actions

- Accounting software with fund/class tracking.
- Budget vs. actual reporting.
- Grant tracking spreadsheets or dashboards.
- Internal controls (segregation of duties, approval layers).

MONITORING AND RECONCILIATION

Tools and Actions

- Monthly financial reviews.
- Reconciliation of accounts (bank, payroll, grants).
- Variance analysis.
- Internal audits or periodic check-ins.





Funding & Financial Sustainability in Practice

Review the funding resiliency checklist.

Check all that currently exist within your organization:

- ☐ Budget transparency is practiced and understood
- ☐ Funding sources for staff/FTE are diversified
- ☐ Funding or resources are pooled when appropriate
- ☐ Funding is equitably aligned to community and program goals
- ☐ Budget managers understand spend-down expectations
- ☐ Restricted and unrestricted funds are strategically managed
- ☐ Budget projections are regularly created for future months and years

Action Planning

Develop a funding action plan focused on one funding resiliency priority area.

- **Action:**
- **Owner:**
- **First Step:**



Pause for Q & As





What Supports Program Sustainability

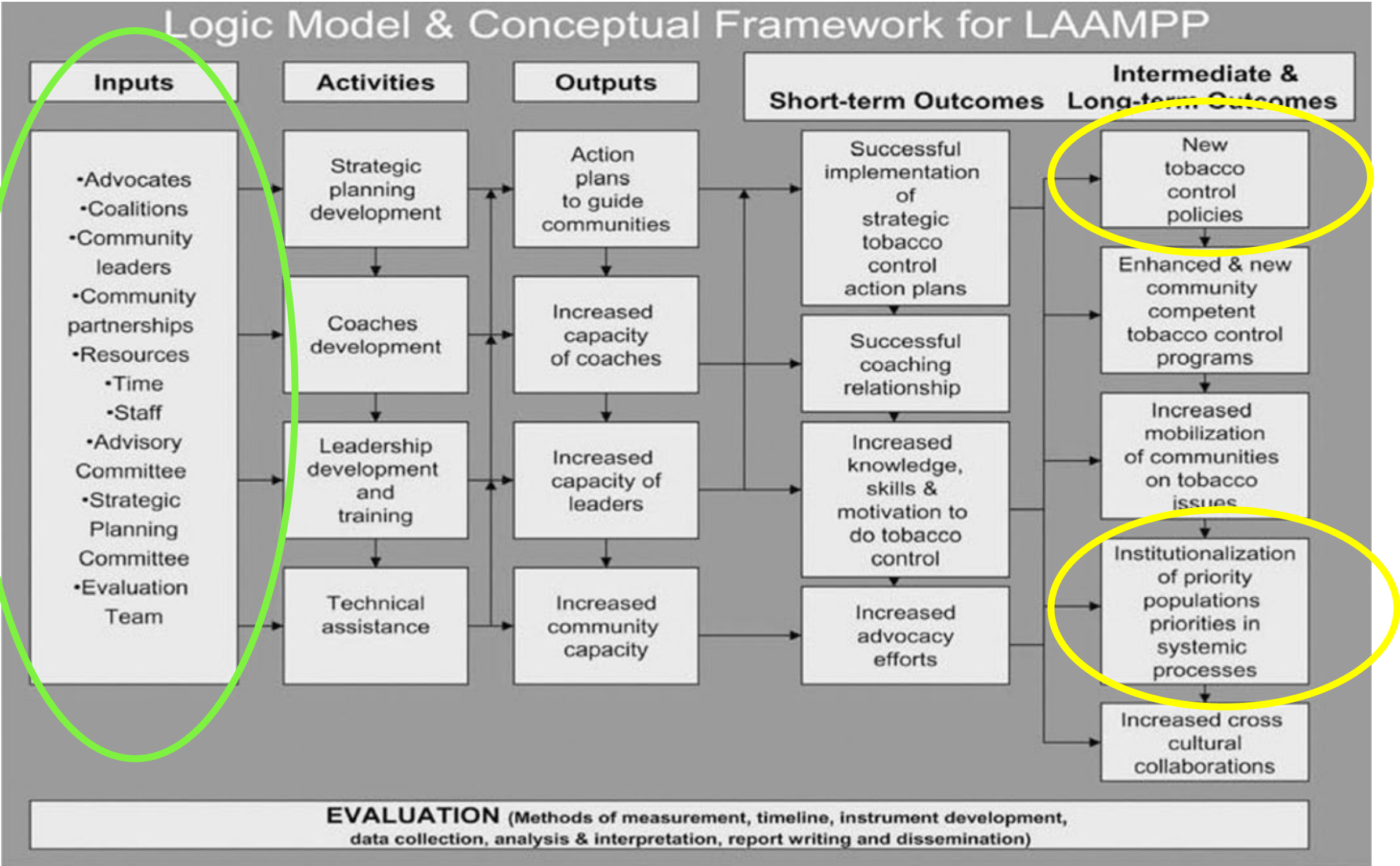
- Support communities and the people most impacted by shifts in programming.
- Program adaptability.
- Sharing program knowledge and skills across team members.
- Decision-making tree on program life cycle.

Program Sustainability **in Action**

- In 2024, the Colorado Cancer Coalition was in transition and moved under Trailhead as a program so it could more readily have access to a wide variety of organizational supports – including communications, program thought partners, accounting, etc.



Program Sustainability



Program Sustainability Strategies

STRATEGIC ALIGNMENT

- Ensure programs **remain aligned** with mission and community need.
- Regularly reassess relevance, outcomes, and impact.
- Avoid sustaining programs solely because funding exists.

WORKFORCE AND OPERATIONAL READINESS

- Cross-train staff and document core processes.
- Build depth of knowledge beyond one individual.
- Standardize tools and workflows where appropriate.

ADAPTABILITY AND LEARNING

- Build feedback loops into program design.
- Use **evaluation** data to refine approaches.
- Allow programs to **evolve** as needs change.
- Ask "what would happen if...?"

PARTNERSHIPS AND SHARED OWNERSHIP

- Develop collaborative relationships that strengthen sustainability.
- Share resources, expertise, or infrastructure when possible.
- Engage community voices throughout program evolution.



Key Questions for Program Sustainability



GROW

- Is there demonstrated need or opportunity?
- Do we have capacity to expand responsibly?



ADAPT

- What are we learning from implementation?
- What needs to shift to remain effective?



MAINTAIN

- Is the program still producing meaningful impact?
- Are staffing and funding models sustainable?



TRANSITION

- Should this program evolve, merge, or scale differently?
- What partnerships are needed for the next phase?



SUNSET

- Is this still the best use of resources?
- How do we close responsibly while honoring relationships and impact?



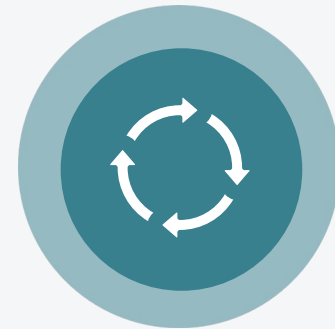
Recognizing When a Program Needs to Change

SIGNALS TO GROW



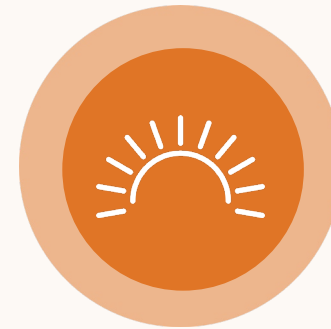
- Increased demand.
- New funding opportunities.
- Strong outcomes.
- Community momentum.

SIGNALS TO ADAPT



- Outcomes plateau.
- Staff burnout.
- Inefficient processes.
- Engagement declining.

SIGNALS TO SUNSET



- Community need has shifted.
- Funding no longer aligned.
- Duplication with another effort.
- Impact no longer justifies resources.

LOOK FOR
PATTERNS OVER
TIME



The Relationship Between Partnerships and Organizational Sustainability

- Sustainable organizations are networked.
- Partnerships enable organizations to create value that they could not generate alone.
- Partnerships stretch limited resources farther and reduce inefficiencies.
- Expand impact by reaching broader audiences.
- Diverse perspectives drive innovation.
- Alignment with shared goals and outcomes moves the mission forward faster.

Partnership Sustainability **in Action**

- Regional Health Connector Program relies on partnerships with CDPHE and CU
- Colorado Cancer Coalition and CDPHE Comprehensive Cancer program work in tandem to address cancer disparities

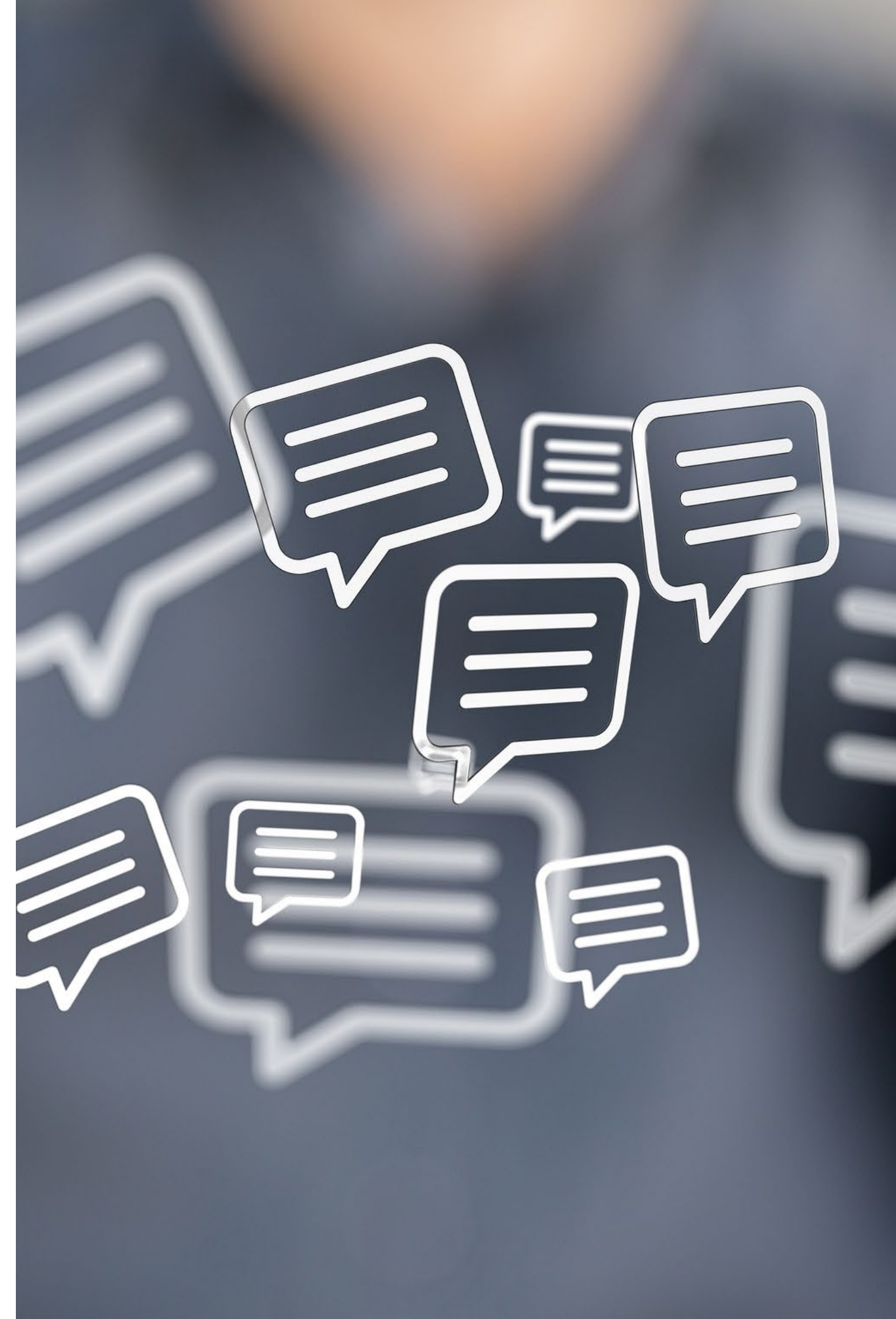


Key Questions for Assessing Partnerships

Sustainable partnerships are built through trust, communication, and intentional evolution over time.

Consider :

- Are our partnerships aligned with community needs?
- Are expectations and capacity clearly understood?
- Where are partnerships helping sustainability or are they creating duplication?



Partnership Spectrum

Associations/ Coalitions/ Collaboratives

- Aligned for shared goals
- Formal agreements in place
- Governance remains separate
- May have central staff

Joint Programming

- Co-deliver programs
- Formal agreements in place
- Governance remains separate
- May have joint staff

MOUs

- Agreement to have joint approach beyond a single program.
- Shared grant applications
- Contract preferences to scale up when needed
- Governance remains separate

Shared Support Functions

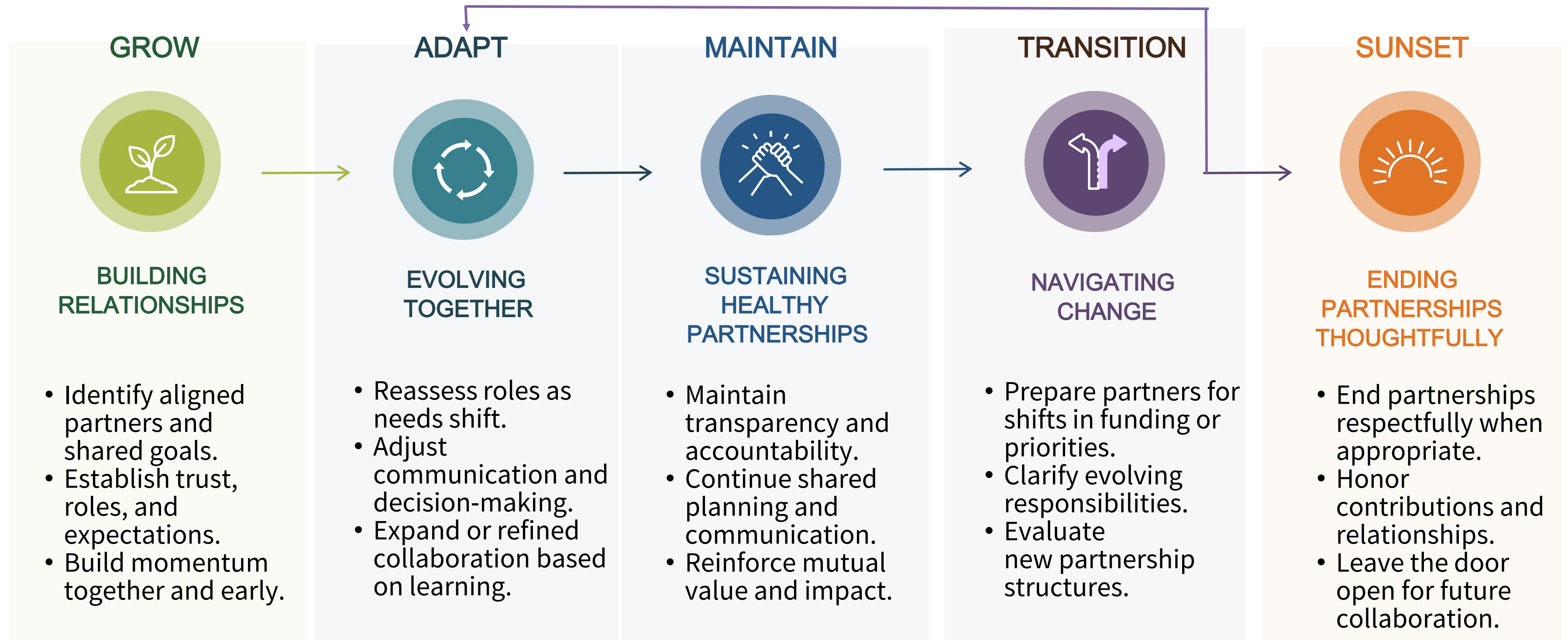
- Shared support and/or back-office functions
- Contracts
- Governance remains separate

Mergers

- Single entity formed or one merges into the other
- Governance is shared

External Partnerships Across the Lifecycle

Strong partnerships evolve over time just like programs, staffing, and funding.





Your Sustainability System Snapshot

Area	Current Strengths	Current Pressures or Risks	One Opportunity (Next six months)
Staff			
Programs			
Funding			
External Partnerships			



From Insight to Action

Choose One Priority Area:

- ☐ Staff ☐ Programs ☐ Funding and Financial ☐ External Relationships

Choose the Lifecycle Stage:

- ☐ Grow ☐ Adapt ☐ Maintain ☐ Transition ☐ Sunset

What Action Will You Take?

Why This Matters at This Time:

What is driving this priority?

In the Next 30 Days, I Will..

What is one action you can take?



Sustainability Workbook & Resources

Resources for Supporting Programs :

- Trailhead Building Impactful Program Office Structures
- PSAT/CSAT - Program Assessment Sustainability Tool

Resources for Supporting Staff :

- RESTORE: The Colorado Blueprint for Innovative Public Health Workforce Development
- Introduction to Administrative Equity Report
- B Corporation Certification
- PH Wins 2025 Findings

Resources for Supporting Funding and Finance :

- 2023 Colorado Public Health Workforce Gaps & Needs Assessment to inform personnel budgeting
- Clear messaging to support funder communication (e.g., developing a messaging platform or using communication resources like Mighty Ally)

Have a Resource to Share?

Email us at:

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Pause, Reflect, and Q/A

- What resonates with you?
- What support would help you implement your priorities?
- What additional tools would be useful?





For public health innovation

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