



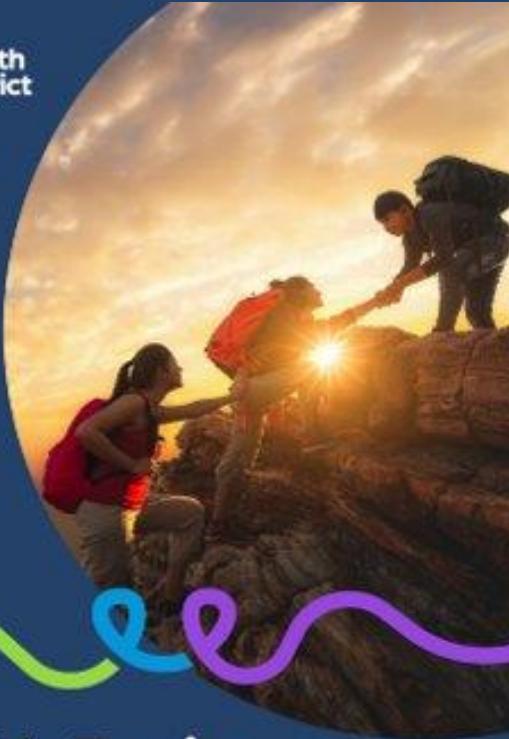
2025 Health Equity Strategic Plan

Cassi Niedziela, health equity strategist

August 28, 2025

Agenda

- 1 Our process
- 2 Plan overview
- 3 Next steps





Our process





Strategic alignment

2024-2025 Health District Strategic Plan:

GOAL 3



Implement new strategies for high-quality and fair treatment of Health District clients and community members.



Objective 3.1: Develop an organizational Health Equity Strategic Plan to transform systems, practices, and policies.

Operationalizing the Board's strategic direction.



Inputs



Research



Survey data



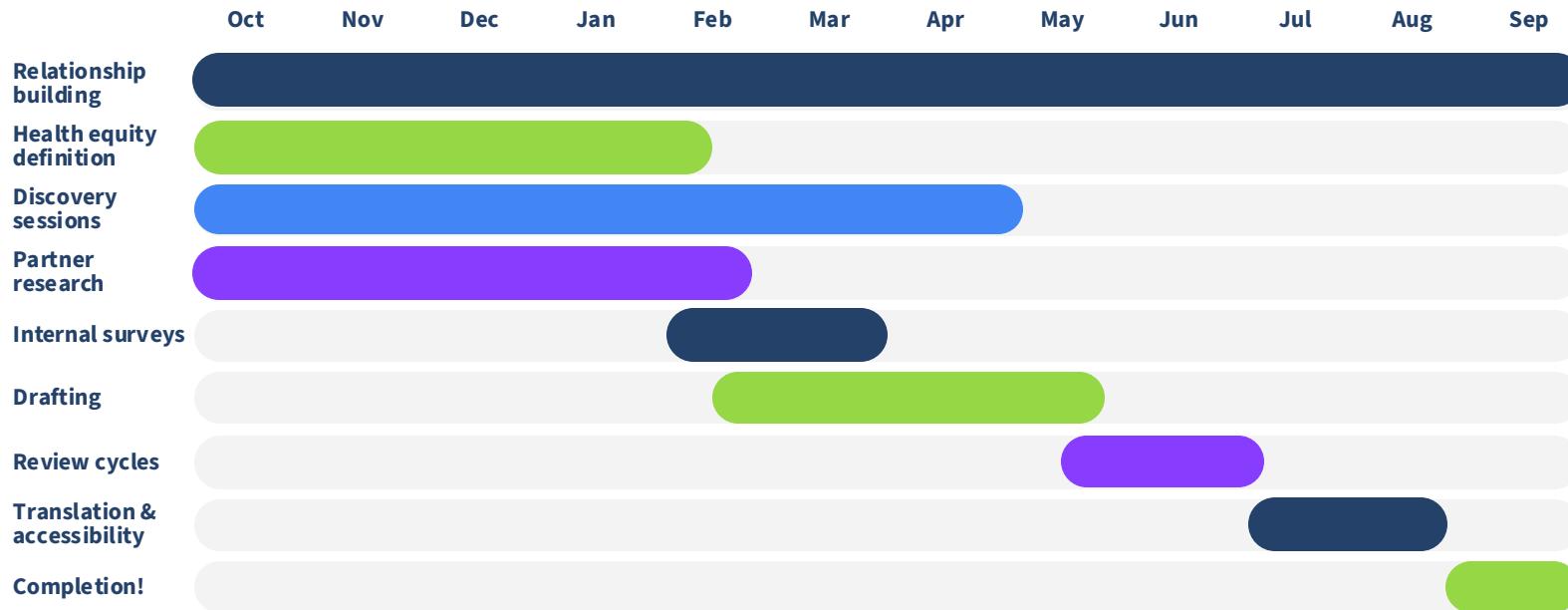
Discovery
sessions



SWOT analysis



Timeline





Plan overview



Summary

A roadmap for creating a community where all district residents can reach their highest level of health and well-being.



Strengthen organizational capacity

- Alignment and integration
- Workforce
- Internal and external communications
- Staff engagement and education



Support total well-being

- Communication and language assistance
- Accessibility of services
- Service integration
- Health-related social needs (HRSN)



Find and address barriers

- Data strategy
- Data collection
- Using data for decision making and improvement



Center community

- Community and client engagement
- Partnerships
- Community-driven data and accountability
- Belonging



Strengthen organizational capacity

Alignment and integration

- We value and integrate health equity as a core component of our work.

Workforce

- We recruit, promote and support diverse staff who reflect our community and those we serve.

Internal and external communications

- We clearly communicate and understand health equity as an essential component of all internal and external communications strategies.

Staff engagement and education

- Our staff members are engaged, supported, educated and valued in health equity efforts.



Support total well-being

Communication and language assistance

- We provide communication and language assistance in compliance with legal requirements, and apply Culturally and Linguistically Appropriate Services (CLAS) standards and language justice principles.

Service integration

- Our services are integrated across our programs and coordinated with partner organizations.

Accessibility of services

- Our services and facilities are accessible.

Health-related social needs (HRSN)

- We champion equitable solutions to health-related social needs for those we serve and district residents.



Find and address barriers

Data strategy

- We implement a clear health equity impact strategy.

Data collection

- We collect accurate and reliable data about demographics, experiences, outcomes and barriers to better health.

Using data for decision making and improvement

- We use data to drive equitable decision-making and continuous improvement.



Center community

Community and client engagement

- We prioritize community input and foster equitable engagement.

Partnerships

- We cultivate equitable partnerships that support the health and wellbeing of residents.

Community-driven data and accountability

- We champion community-driven data priorities and methodologies in alignment with data justice principles.

Belonging

- We foster places and spaces of belonging and connection for those we serve and district residents.



Next steps





Next steps



Staff rollout



**Implementation
plan**



Regular updates



Thank you

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Health  District



Compliance at the Health District

August 2025





Compliance Officer

Katie Wheeler

- Employed at the Health District since June 2024
- Licensed Colorado Attorney (non-practicing at HD)

Agenda



- 1 Compliance program timeline
- 2 Accomplishments to date
- 3 6 months from now
- 4 1 year from now
- 5 The future....



June 2024 to present





Accomplishments to date

- Established “Compliance Officer” responsibilities
- Fostering a culture of compliance
- Fall 2024 HCCA Basic Compliance Academy
- Board Policy project work (ongoing)
- 2025 Board Member Election
- Compliancy Group
 - 100% HIPAA training compliance
- Compliance strategic plan (ongoing)



Compliancy Group

Training

Incident
Portal

Policies &
Procedures

**Other: Risk Assessments, Vendors, Contracts,
Documents**



2025 – 2026

1 Internal policies

- Coordinate with HR

2 Compliance Strategic Plan

- In draft

3 Committees

- Internal compliance committee
- Governance committee

4 Ensure Compliance is built in

- Collaborate with program leads, training, documentation



+

A



Thank you

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Health  District



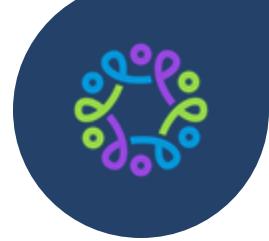
Employee Engagement Survey results

A look at our scores and areas for improvement



Our recent Employee Engagement Survey revealed valuable insights into how our team experiences their work, highlighting our strengths, as well as significant gaps in support and a pressing need to rebuild trust to move forward effectively.





Executive summary

01

Increase transparency in communications:
Employees want clear communication around organizational changes, decisions and direction.

02

Strengthen supports for and from supervisors and leaders: Feedback showed some feel unsupported and disconnected from leadership.

03

Develop recognition and retention strategies:
Employees shared concerns around turnover and the need to focus on retention.

04

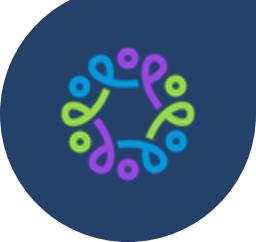
Improve work environment and well-being: Many employees reported feeling overworked and approaching burnout.



Next steps

- Sharing Employee Engagement Survey summary with Board and staff
- Incorporating regular cadence of culture-improvement initiatives with staff
- Beginning annual reviews in August – September 2025
- Conducting stay interviews in January 2026
- Holding Employee Engagement Survey in April 2026 at a regular cadence
- Conducting Pulse survey in October 2026



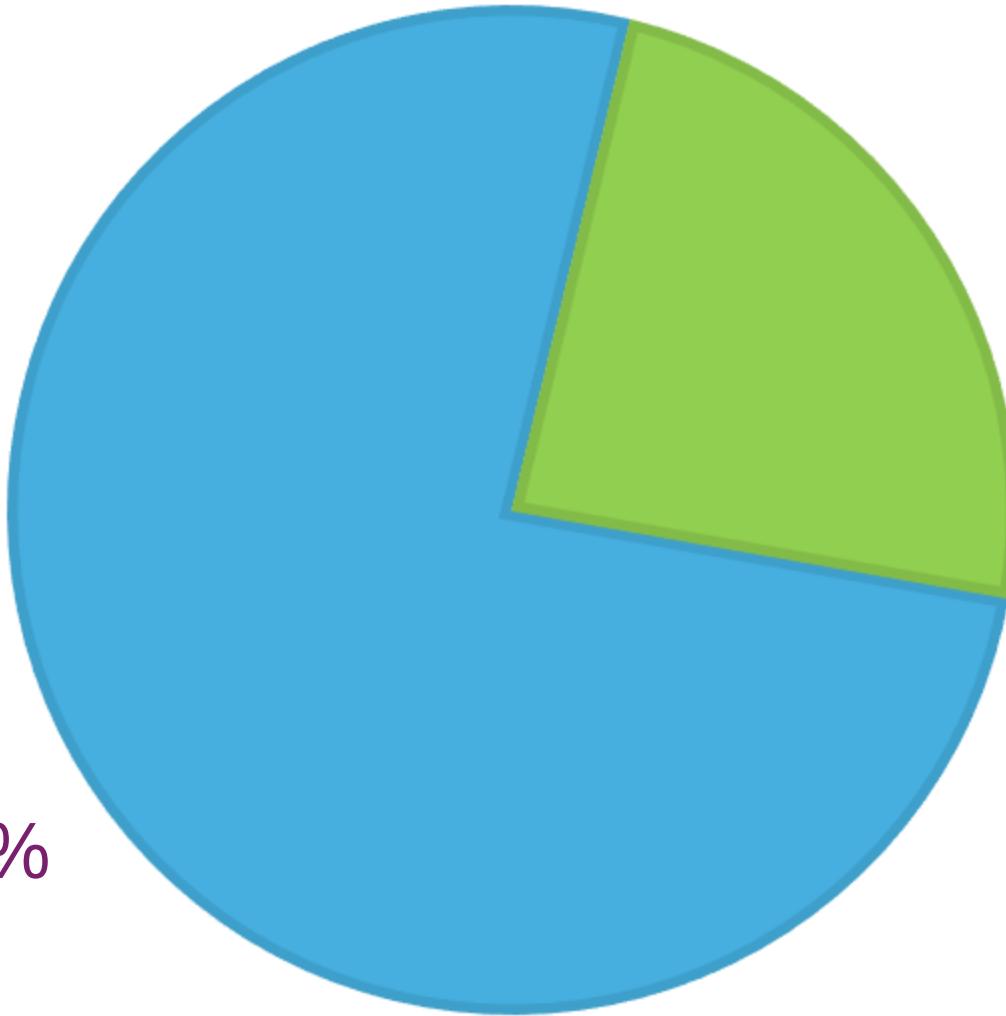


Response rate

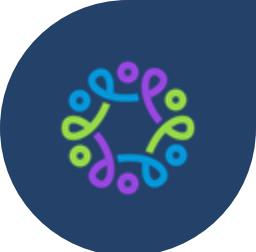
76% of employees participated in the Comprehensive Employee Engagement Survey, which is within industry standards (70% – 80%).

This indicates the survey results provide a comprehensive view of employee engagement. It also tells us our employees want to be heard.

76%

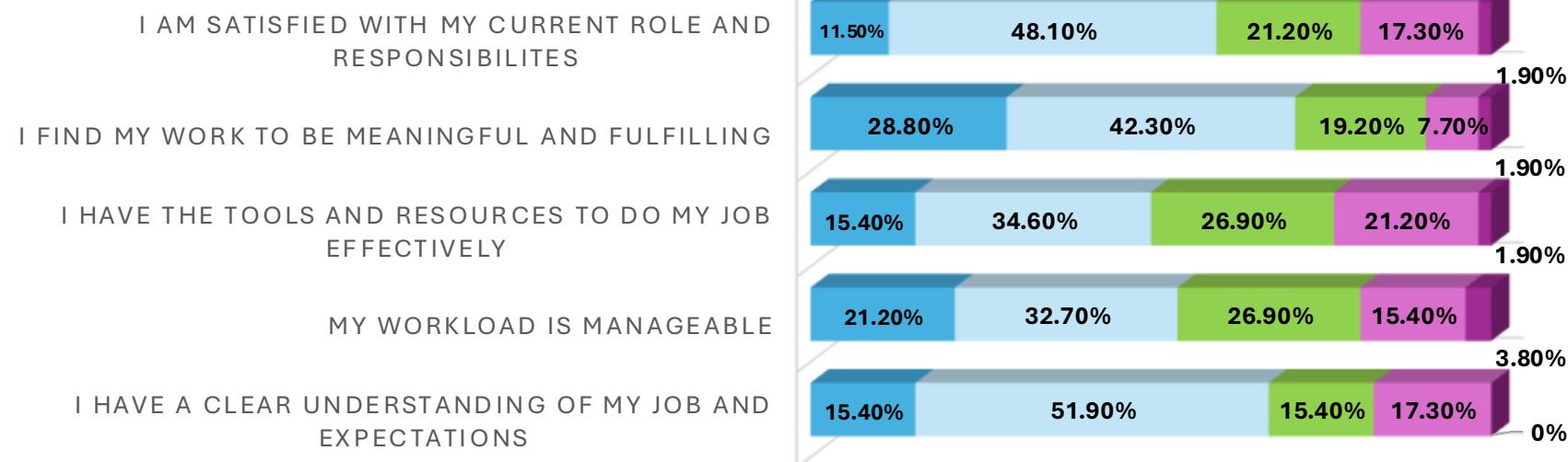


Participated Did not Participate

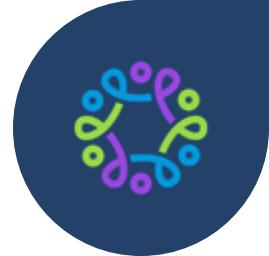


Job satisfaction

■ Strongly Agree ■ Agree ■ Neutral ■ Disagree ■ Strongly Disagree

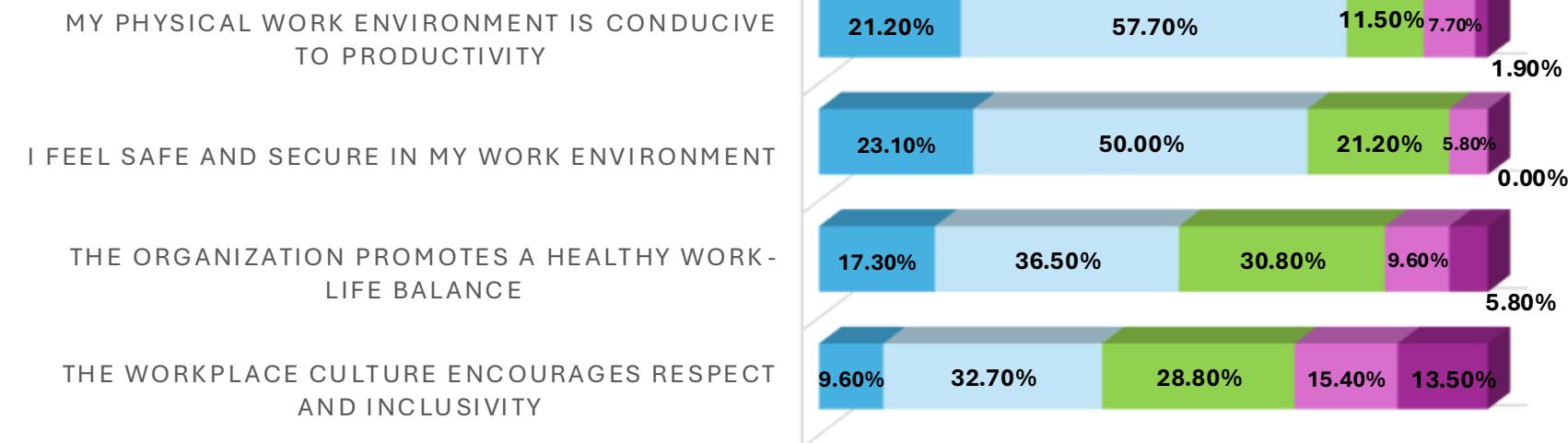


Takeaway: Employees are generally satisfied with their roles, but there are clear areas for improvement, particularly in work-life balance.

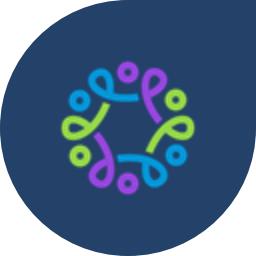


Work environment

■ Strongly Agree ■ Agree ■ Neutral ■ Disagree ■ Strongly Disagree



Takeaway: A positive work environment is crucial for maintaining high levels of employee engagement. There are concerns about staffing shortages, high turnover and strained administrative systems.



Communication

■ Strongly Agree ■ Agree ■ Neutral ■ Disagree ■ Strongly Disagree

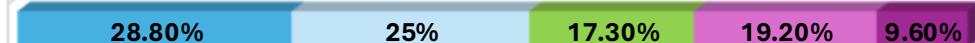
COMMUNICATION FROM MANAGEMENT IS CLEAR AND CONSISTENT



I FEEL COMFORTABLE SHARING MY OPINIONS AND IDEAS AT WORK



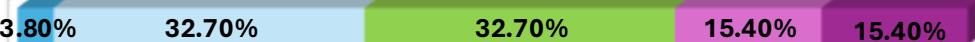
MY MANAGER LISTENS TO AND VALUES MY INPUT



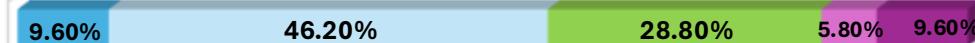
I RECEIVE REGULAR UPDATES ABOUT WHAT IS HAPPENING IN ...



MY FEEDBACK IS ACTED UPON



I HAVE THE INFORMATION I NEED TO DO MY JOB



I AM AWARE OF NEW INFORMATION IN A TIMELY MANNER



I AM COMFORTABLE SHARING CONCERN

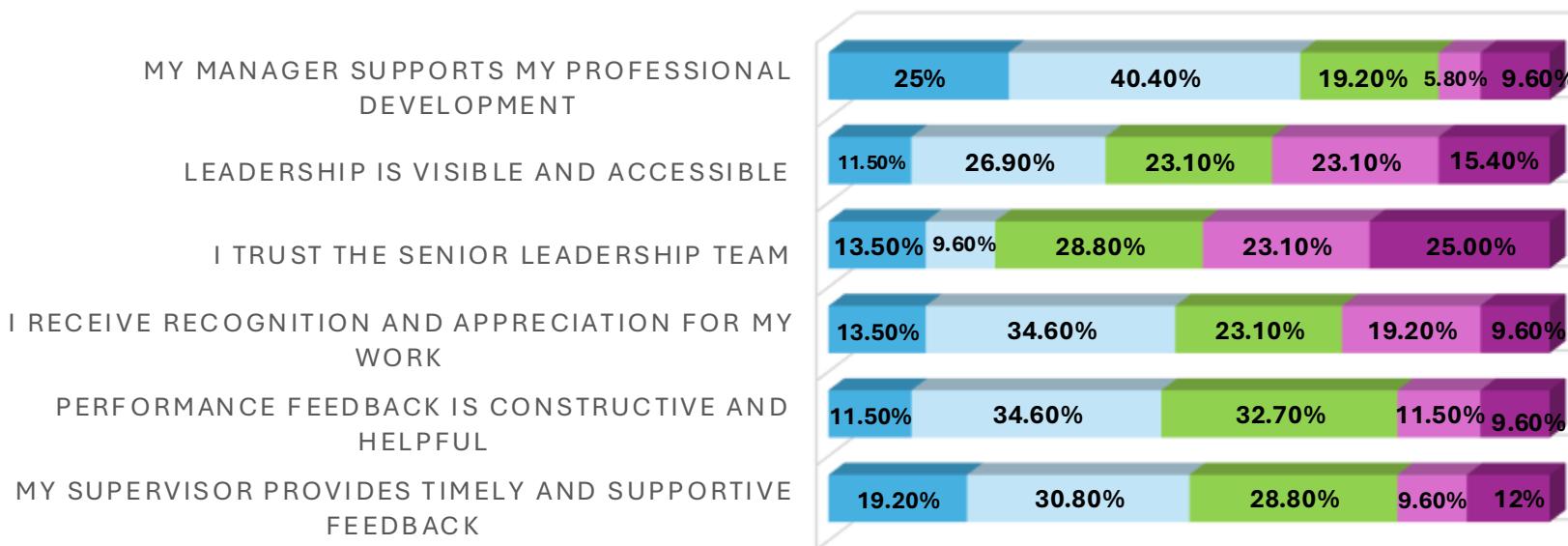


Takeaway: Clear and transparent communication is key to fostering trust and engagement. There's a clear need for improved communication from both leadership and the Board that is timely, consistent and honest.



Management and leadership

■ Strongly Agree ■ Agree ■ Neutral ■ Disagree ■ Strongly Disagree



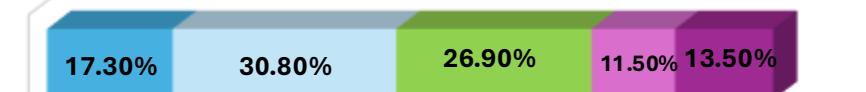
Takeaway: Employees expressed a need for better change management, actionable feedback and more visible support from leadership.



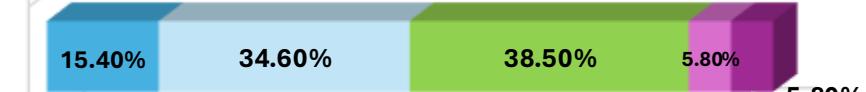
Professional growth

■ Strongly Agree ■ Agree ■ Neutral ■ Disagree ■ Strongly Disagree

I HAVE OPPORTUNITIES TO LEARN AND GROW WITHIN THIS ORGANIZATION



MY CAREER GOALS ARE SUPPORTED BY MY MANAGER AND THE ORGANIZATION



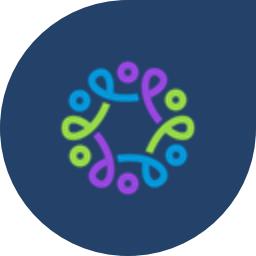
I FEEL ENCOURAGED TO TAKE INITIATIVE AND INNOVATE



MISTAKES ARE VALUED AS OPPORTUNITIES FOR LEARNING AND GROWTH

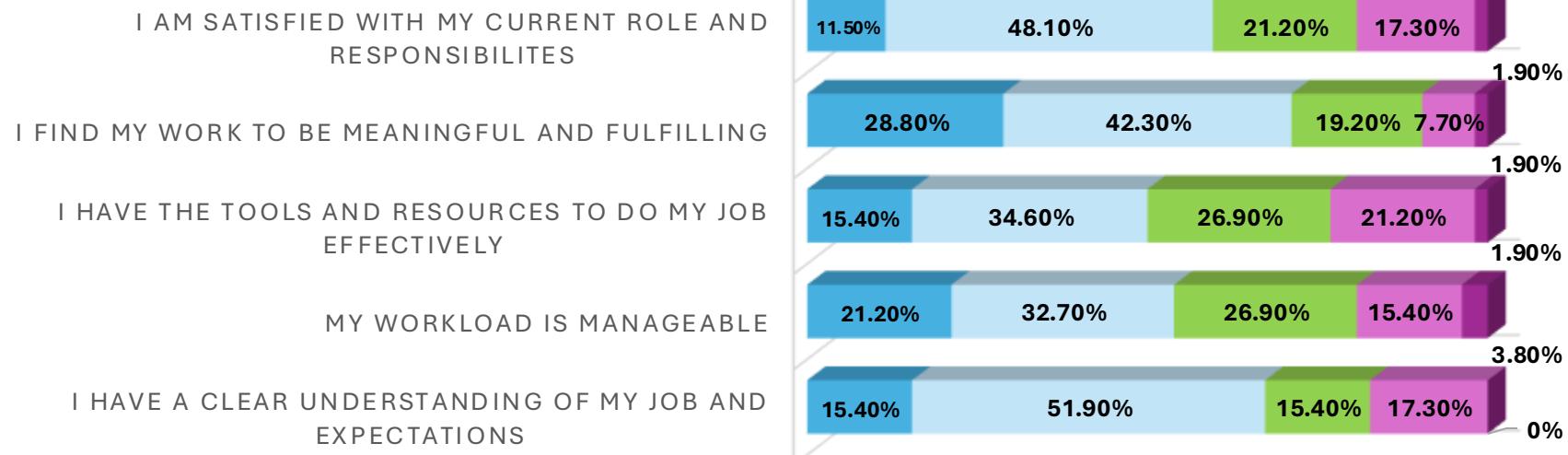


Takeaway: Providing opportunities for professional growth is key to keeping top talent. Employees shared a desire for promotions, leadership opportunities, advanced trainings, and recognition of skills and workload.

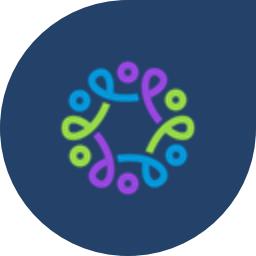


Team dynamics

■ Strongly Agree ■ Agree ■ Neutral ■ Disagree ■ Strongly Disagree

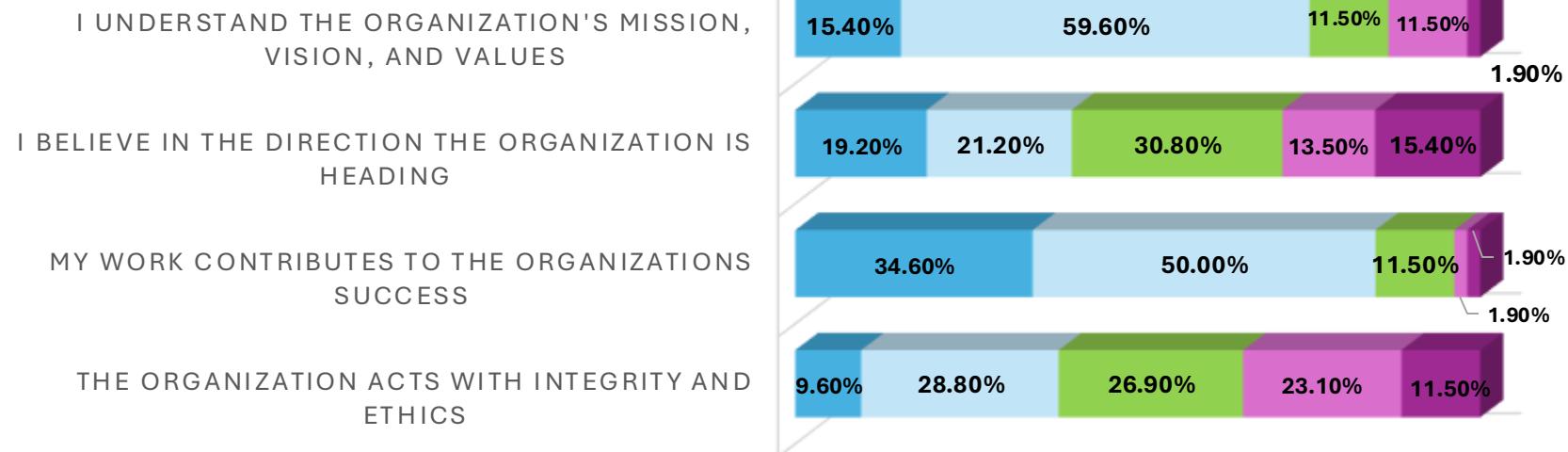


Takeaway: While most employees are content in their roles and view their work as important, they highlighted the need for improved resources, balanced workloads and clearer guidance.

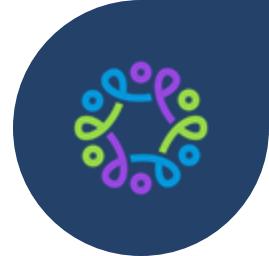


Organizational alignment

■ Strongly Agree ■ Agree ■ Neutral ■ Disagree ■ Strongly Disagree



Takeaway: There is a need for better alignment between leadership's intentions and frontline realities.



Engagement and retention

■ Strongly Agree ■ Agree ■ Neutral ■ Disagree ■ Strongly Disagree

I FEEL PROUD TO WORK FOR THIS ORGANIZATION



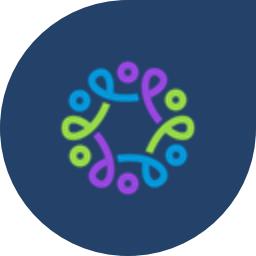
I AM MOTIVATED TO GIVE MY BEST EVERY DAY

I SEE MYSELF WORKING HERE ONE YEAR FROM NOW

I WOULD RECOMMEND THIS ORGANIZATION AS A
GREAT PLACE TO WORK

Takeaway: High levels of engagement are directly linked to better retention rates. Our current turnover rate appears to be damaging morale and hindering employees' ability to see a long-term future with the organization.

How do the current strategic plan priorities influence your work and your ability to make a difference in the community?



Alignment

Many employees felt the strategic plan reinforced our mission and their ability to serve the community effectively. Staff specifically mentioned the value of direct-service work, oral health, mental health support and partnerships as core elements that aligned with their roles.

Where clarity is needed

However, a significant number of employees shared concerns that the strategic plan felt abstract. They wanted a clearer understanding of how the plan ties to their roles and department goals.

Barriers to implementation

Many employees shared that staffing shortages and infrastructure needs made it harder to deliver services and programming as effectively as possible. They were also concerned about reputational damage stemming from multiple leadership changes.

Takeaway: There's some agreement that the strategic plan supports program alignment. There are also concerns about the operational infrastructure being under-resourced, which impacts how effectively staff can provide services.



What does success look like for your role over the next 3 – 5 Years?

Growth, development and pathways

A significant number of employees expressed a desire for professional growth, such as promotions, leadership opportunities, advanced trainings, certifications, and recognition of skills and workload. They shared that workloads didn't seem aligned with compensation.

Stability, infrastructure and strategic direction

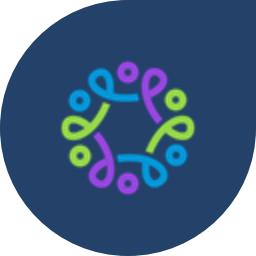
Many employees expressed that true success in their roles hinged on organizational stability, stronger operational foundations and clearer strategic direction.

Community impact, collaboration and health equity

A strong theme involved a clear commitment to community service, cross-team collaboration and equity-focused impact. Many employees want their roles to help improve lives, enhance access to care, and align with best practices and mission-driven work. Employees also want stronger interdepartmental collaboration.

Takeaway: Employees are aspiring to grow professionally and make a meaningful impact. They emphasized a need for strong internal systems, transparent governance, modernized technology, thoughtful staffing and effective leadership.

What is the organization doing well?



Community service and health equity

Many staff recognized the increased focus on health equity, community outreach and inclusivity. They reported feeling hopeful around this shared sense of purpose.

Improving systems and internal operations

Employees noted improvements in communication systems, reminder tools for patients, the transition to more centralized services, data collection and evaluation, and alignment with best practices.

Positive change and cultural healing

Although morale remains fragile, some employees noted hope around improved listening, communication and engagement from leadership over the past several months.

Takeaway: Serving the community and upholding health equity are key strengths. Employees also noted improvements in communication practices and internal operations.



What can the organization improve on?

Leadership, communication and change management

Employees reported wanting a more stable organization, clearer expectations, a sense that feedback is valued and transparent communication.

Morale, retention and internal alignment with mission

Recent turnover, lack of retention strategies and inconsistent internal practices have led to lower morale. Staff want to see inclusivity and accountability genuinely reflected inside the organization.

Employee Investment and Equity

Staff emphasized the need for better wages, modernized policies like improved PTO, career advancement and professional development opportunities. They also shared a desire to value lived experience in hiring decisions alongside academic credentials.

Takeaway: Leadership, communications and change management are critical areas for improvement. Employees expressed a need for more support, recognition and role clarity.



Is there anything else you'd like to share?

Work environment and equity concerns

Employees highlighted the need for improved work-life balance as they're feeling stretched and unsupported in their workload. There are calls for more equitable practices, including compensation structures as the 2% COLA increase was not sufficient in supporting staff members, as well as increased PTO accruals.



Is there anything else you'd like to share?

Hope for change and rebuilding

Despite the frustration, many employees believe the organization can recover. There's a desire to return to a mission-driven, community-focused workplace. Staff expressed appreciation for being asked for input and a willingness to engage in solutions. Several employees said they're hopeful the right leadership and commitment to change can lead to healing and progress.

Action plan



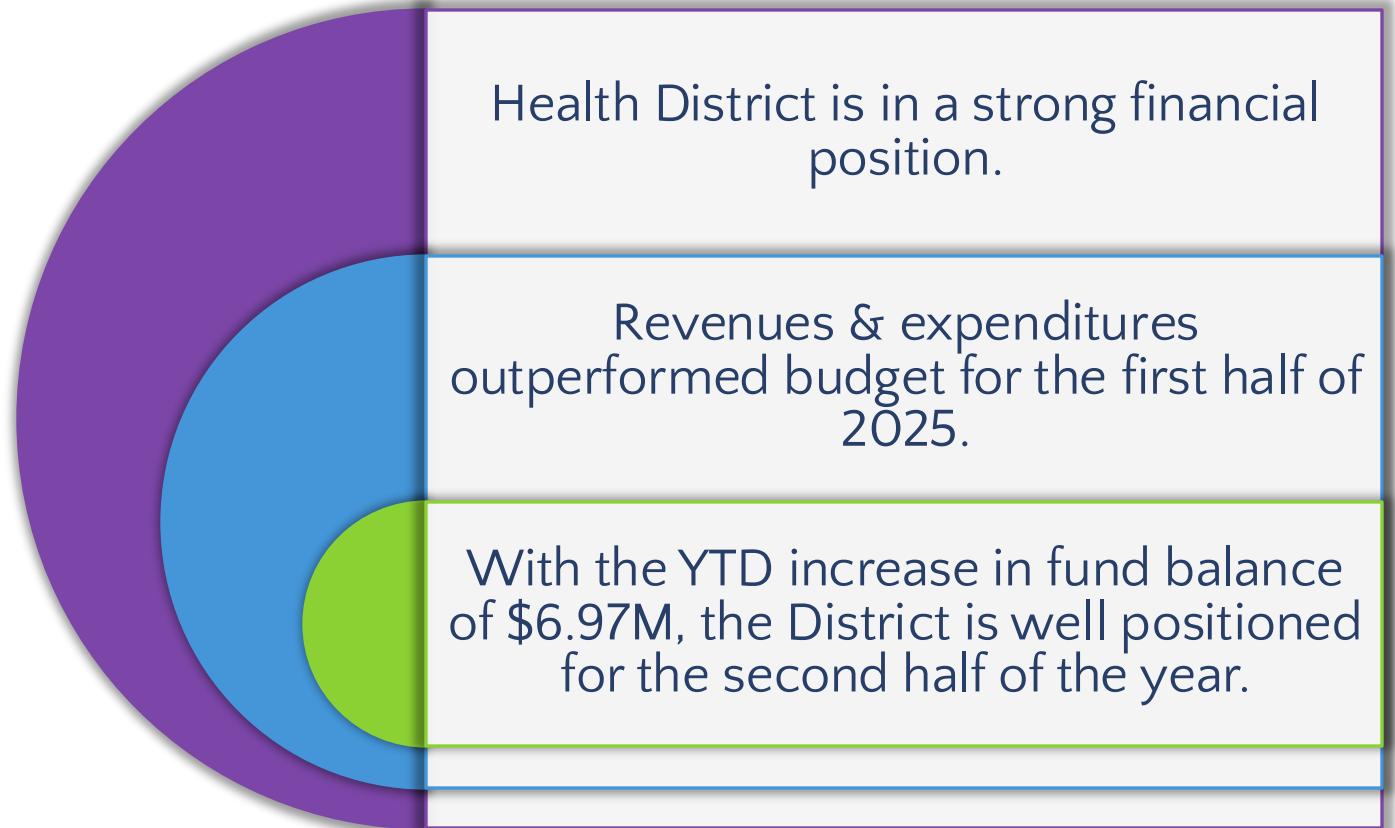
- 1 Provide clear pathways for advancement, training and recognition of skills gained. Show how compensation is aligned with job roles via a CBIZ assessment this fall. We're initiating regular performance management reviews and stay interviews.
- 2 Address turnover and strained administrative systems to better support the strategic plan. We're working with consultants to determine the right staffing levels, as well as bettering our HRIS and finance processes, and improving employee policies in an updated handbook.
- 3 Improve communication from leadership and the Board to be timely, consistent and honest. We recognize a need to slow down, hold transparent town halls and all-staff meetings, conduct additional focus groups and have regular engagement surveys. We'll also dedicate more space in one-on-one time between staff and managers to gather the feedback that will inform meaningful change.
- 4 Help managers nurture team collaborations and dynamics, and work with experts on best practices for creating a healthier culture. This will include a guest facilitator in upcoming all-staff meetings.
- 5 Ensure that all departments are aligned with organizational goals, helping employees better understand how their work contributes to the big picture. This means simplifying the strategic plan and helping teams collaborate on their respective work plans.



Financial Report: 2nd Quarter 2025

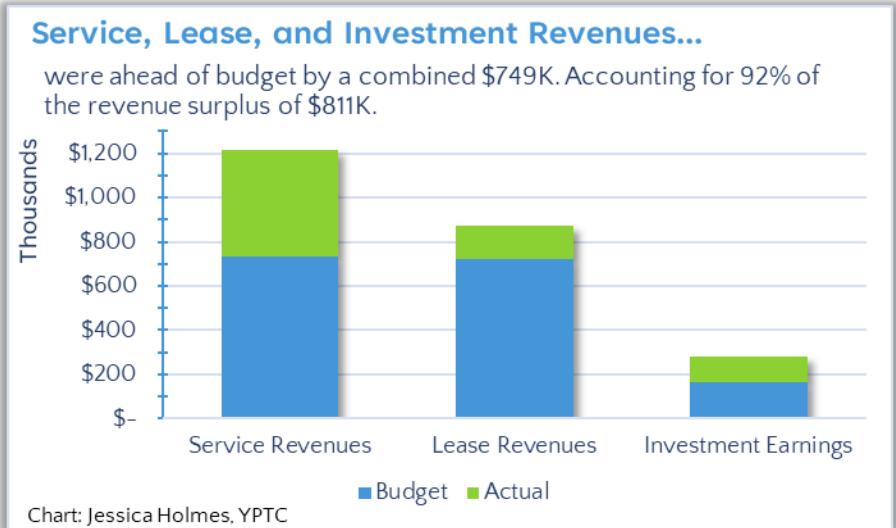
Prepared & Presented by Jessica Holmes

Overall Financial Position



Revenue Analysis

- Revenue has exceeded budget in all categories.
- Service Revenues performed well overall...
 - However, Behavioral Health programs fell short of budgeted expectations by 67%.
 - Oral Health revenues significantly outperformed expectations, driven by both strong patient service activity and a one-time recognition of \$418K.
 - Excluding this one-time item, Oral Health has still exceeded its service revenue budget by 39%.
- Lease Revenue and Investment Earnings were both budgeted conservatively.
- Over 95% of 2025 Tax Revenues have already been received from Larimer County.

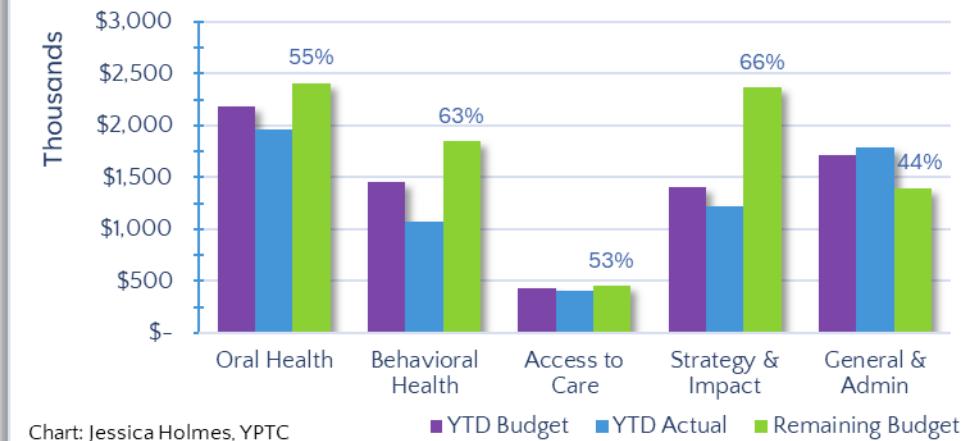


Expense Analysis

- Total expenditures were \$752K below budget. However, spending is expected to increase in the second half of 2025 as planned initiatives are implemented
- Personnel Compensation remains the District's largest expense, representing 66% of total spending. Despite this, it is currently \$976K under budget, contributing significantly to the overall savings.
- General & Administrative expenses slightly exceeded budget, but savings in other areas are expected to offset this overage.
- Strategy & Impact retained its full \$770K in Partnership funding, which is scheduled to be disbursed in the second half of the year.

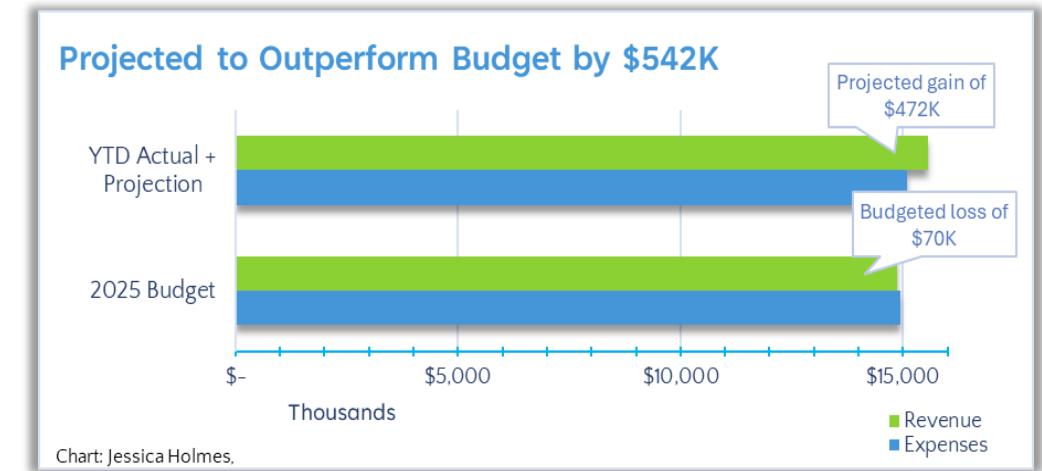
Overall Expense Performance

The District has 57% of total budgeted expenses remaining for the second half of the year, this indicates accurate overall budgeting with slight excess due to timing.



2025: Second Half Projections

- Revenues significantly exceed budget for the first half of 2025 due to the front-loaded nature of property tax receipts.
- Based on reliable annual trends, the District expects limited revenue through year-end. However, expenses are projected to increase, driven by active initiatives, seasonal program demands, and planned capital purchases.
- Despite this shift, the District remains well-positioned to manage these costs within the approved budget. Current projections show a positive change in fund balance of \$472K at the end of 2025.



Balance Sheet

Governmental Fund

- Key Insights:
 - Strong cash position.
 - Cash & Investments cover over 15 months of current average operating expenses.
 - Low debt, no loans.
 - \$9.3M of Unassigned Funds.

		June 2025	
ASSETS			
Cash & Investments		16,531,484	Assets: what we have or will have.
Receivables		3,051,509	Cash & Investments: Highly liquid, available for use.
Property Taxes		58,992	
Specific Ownership Taxes		193,914	
Clients, Net of Allowance		58,482,855	Receivables: Owed to us.
Leases		31,096	
Grants & Other		130,055	Prepays: expenses paid in advance of use.
Prepaid Expenses		<u>78,479,905</u>	
TOTAL ASSETS			
LIABILITIES, DEFERRED INFLOWS, & FUND BALANCE			
LIABILITIES			Liabilities: what we owe to others.
Accounts Payable		252,240	
Accrued Liabilities		306,106	
Payroll Liabilities		54,532	
Treasurer Fees		20,860	
Property Tax Escrow		13,972	
Tenant Deposits		83,133	
Unearned Revenue		<u>730,843</u>	
TOTAL LIABILITIES			
DEFERRED INFLOWS			Deferred Inflows: Owed to us but not yet received.
Property Tax Resources		325,285	
Lease Resources		59,068,086	
Service Resources		-	
TOTAL DEFERRED INFLOWS		<u>59,393,371</u>	
FUND BALANCE			Fund Balance: Funds we have available for operations.
Nonspendable Funds - Prepaid Expenses		130,055	
Restricted Funds - TABOR Reserve		470,801	
Assigned Funds		7,472,610	
Capital Funds		985,683	
Unassigned Funds		9,296,542	
TOTAL FUND BALANCE		<u>18,355,691</u>	How we plan to use those funds.
TOTAL LIABILITIES, DEFERRED INFLOWS, & FUND BALANCE		<u>78,479,905</u>	

Statement of Revenues, Expenditures, & Change in Fund Balance (Budget to Actual)

	YTD Budget	YTD Actual	\$ Difference	% Difference	2025 Budget	Budget \$ Remain	Budget % Remain
REVENUES							
Tax Revenues	10,765,139	10,802,377	37,238	0.35%	11,361,432	559,055	4.92%
Service Revenues, Net	731,375	1,213,105	481,730	65.87%	1,462,750	249,645	17.07%
Lease Revenues	721,158	873,233	152,075	21.09%	1,304,044	430,811	33.04%
Grant Funds	219,274	246,680	27,406	12.50%	394,048	147,368	37.40%
Other Revenues	176,482	289,117	112,635	63.82%	352,964	63,847	18.09%
TOTAL REVENUES	12,613,428	13,424,511	811,083	6.43%	14,875,238	1,450,727	9.75%
EXPENDITURES							
Personnel Compensation	5,217,558	4,241,494	976,064	18.71%	10,435,115	6,193,621	59.35%
Professional Development	173,072	92,816	80,256	46.37%	345,893	253,077	73.17%
Contracted Services	722,300	760,366	(38,066)	-5.27%	1,444,600	684,234	47.36%
Service Expenses	285,065	351,423	(66,358)	-23.28%	1,340,129	988,706	73.78%
Supplies, Equipment, & Software	206,557	394,091	(187,535)	-90.79%	413,113	19,022	4.60%
Occupancy Expenses	234,731	250,400	(15,670)	-6.68%	469,461	219,061	46.66%
Other Operating Expenses	371,773	368,295	3,478	0.94%	496,902	128,607	25.88%
TOTAL EXPENDITURES	7,211,053	6,458,885	752,169	10.43%	14,945,213	8,486,328	56.78%
CHANGE IN FUND BALANCE							
Beginning Fund Balance	5,402,375	6,965,627	1,563,252	28.94%	(69,975)		
	11,390,064	11,390,064			11,390,064		
ENDING FUND BALANCE	16,792,439	18,355,691			11,320,089		

Revenues are ahead of budget, but almost all Property Tax funds have been earned.

Expenses are below budget, with 57% of budgeted expenses remaining.

The Fund Balance is ahead of budget expectations by 29%.

Revenues: Funds earned through June 2025. Not all earnings are paid immediately; revenue does not equal cash.

Expenditures: Expenses incurred through June 2025.

Change in Fund Balance: Funds earned, minus expenses incurred through June 2025.

Statement of Functional Expenses

	Client Experience	Strategy & Impact	Total Program Operations	General & Administration	Health District
REVENUES					
Tax Revenues	-	-	-	10,802,377	10,802,377
Service Revenues, Net	1,168,609	44,496	1,213,105	-	1,213,105
Lease Revenues	-	-	-	873,233	873,233
Grant Funds	219,180	27,500	246,680	-	246,680
Other Revenues	4,142	-	4,142	284,975	289,117
TOTAL REVENUES	1,391,930	71,996	1,463,926	11,960,585	13,424,511
EXPENDITURES					
Personnel Compensation	2,327,771	899,105	3,226,876	1,014,618	4,241,494
Professional Development	47,800	18,065	65,866	26,950	92,816
Contracted Services	389,604	156,442	546,046	214,320	760,366
Service Expenses	314,778	11,333	326,111	25,311	351,423
Supplies, Equipment, & Software	221,909	69,796	291,705	102,386	394,091
Occupancy Expenses	117,265	60,030	177,295	73,105	250,400
Other Operating Expenses	32,068	6,740	38,808	329,486	368,295
TOTAL EXPENDITURES	3,451,196	1,221,511	4,672,707	1,786,177	6,458,885
IMPACT TO FUND BALANCE	(2,059,266)	(1,149,515)	(3,208,781)	10,174,408	6,965,627
					11,390,064
					18,355,691

Expense Ratios

53%

19%

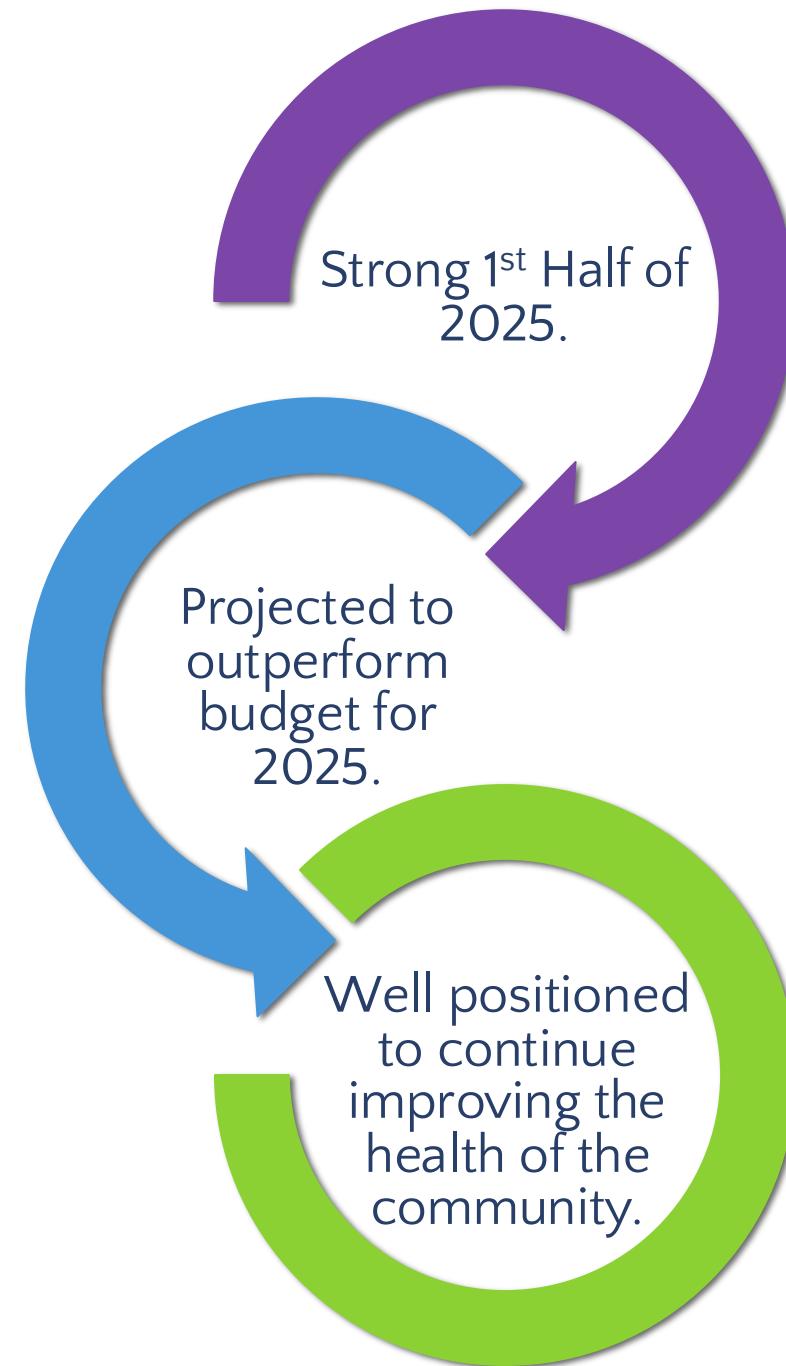
28%

■ Client Experience

■ Strategy & Impact

■ General & Admin

In Conclusion...

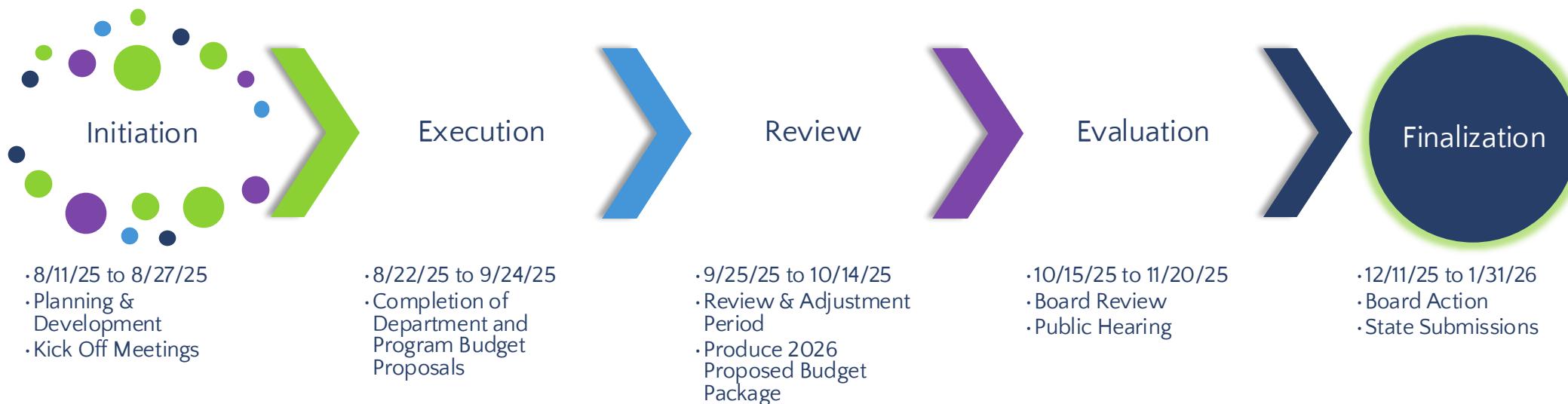




2026 Budget Timeline

Prepared & Presented by Jessica Holmes

Process & Timeline



Deadlines & Dates to Remember

- 8/25/25 Certificate of Valuation due from Larimer County Assessor
- 10/15/25 2026 Proposed Budget due to Board of Directors
- 10/23/25 2026 Budget Review Session
- 11/19/25 Notice of Budget to be published with public hearing details.
- 11/20/25 2026 Budget Public Hearing
- 12/10/25 Recertification of valuation due from Larimer County Assessor.
- 12/11/25 Board Action on 2026 Budget
- 12/15/25 Submission deadline for Certification of Mill Levies to Larimer County.
- 1/31/26 Deadline to file a certified copy of the adopted budget with DOLA.



Updates on the Impact of H.R. 1

Dana Turner and Alyson Williams



Regular Board of Directors Meeting- August 28, 2025



Federal Changes Communication Framework

Information Funnel





Goals of Presentation



01

Provide high-level understanding of what H.R. 1 has done to the health care landscape



02

Share knowledge about what we are learning about community impacts



03

Begin to communicate what this means for the Health District



04

Gather Board feedback on a pilot format for providing information



Policy

7,000

Lawful immigrants will lose
Medicaid coverage Oct. 2026

377K

Colorado Medicaid members
will be required to do Medicaid
renewals every 6 months

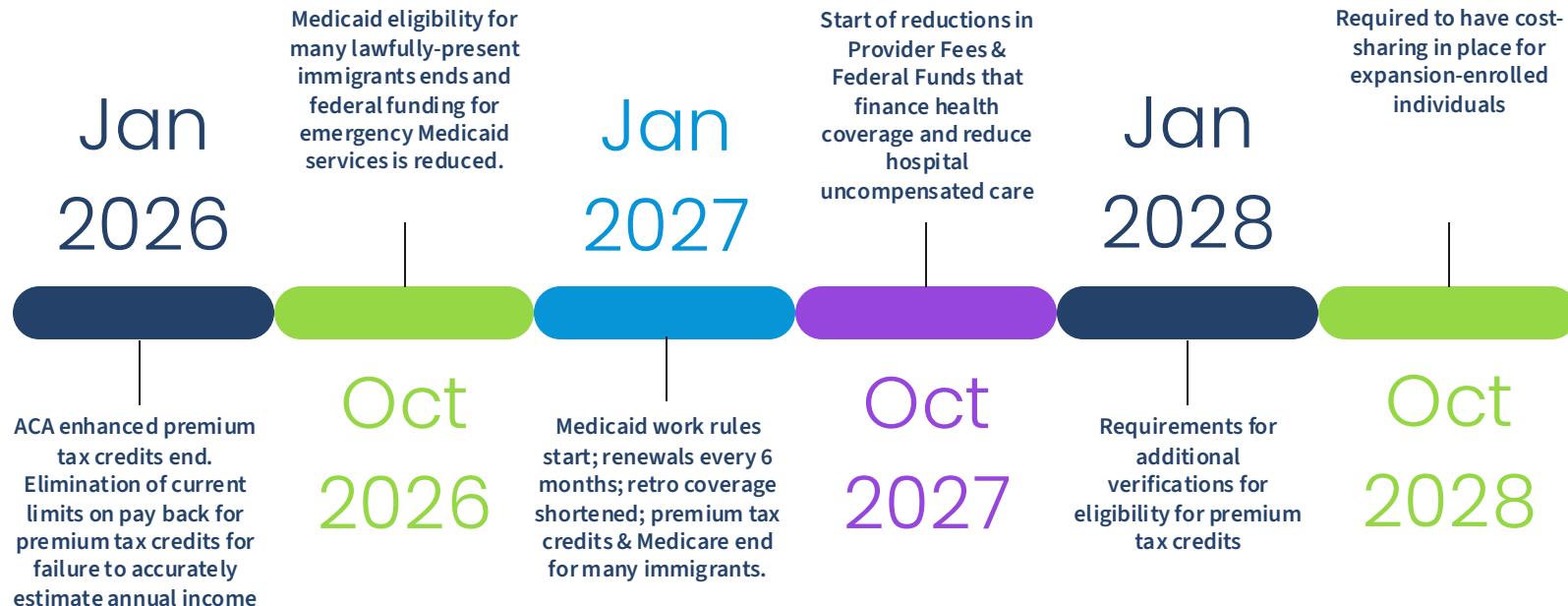
\$57M

Low-end estimate of what it
will cost to administratively
implement work requirements

On July 4, 2025, President Trump signed the Congressional Republican budget reconciliation bill into law (H.R. 1 or P.L. 119-21 which was previously entitled the “One Big Beautiful Bill Act”). Earlier, on July 1, 2025, the Senate passed its version of the budget reconciliation bill on a 51-50 vote (Vice President Vance cast the tiebreaking vote) with the House later passing the Senate bill 218-214 on July 3, 2025.



Policy Timeline



Community

What we are learning



1 Uncertainty from the state level

2 Partner convenings

3 Immediate impact on coverage

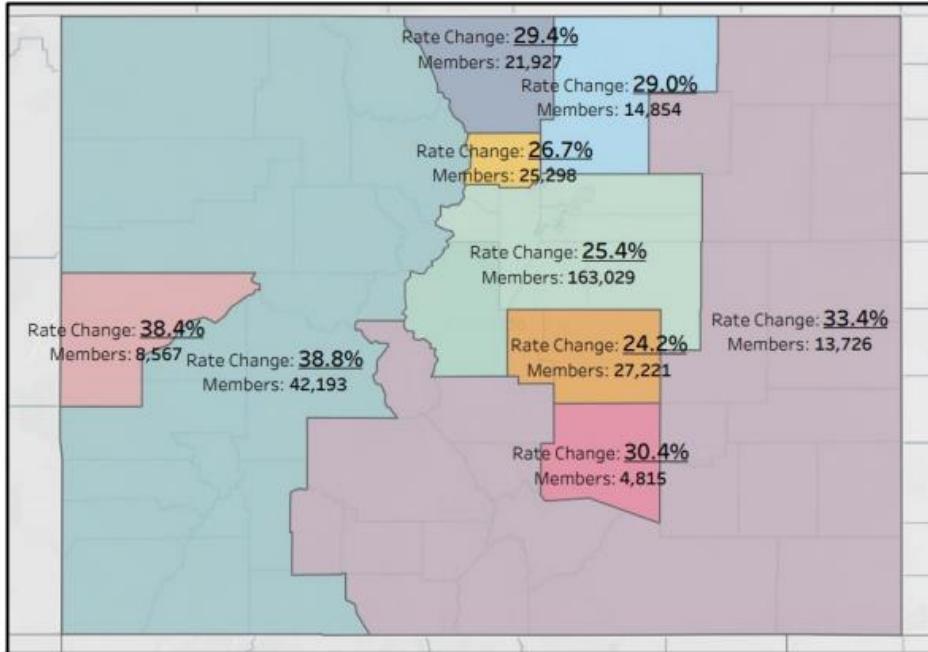
4 Compounding effects of federal changes



Community

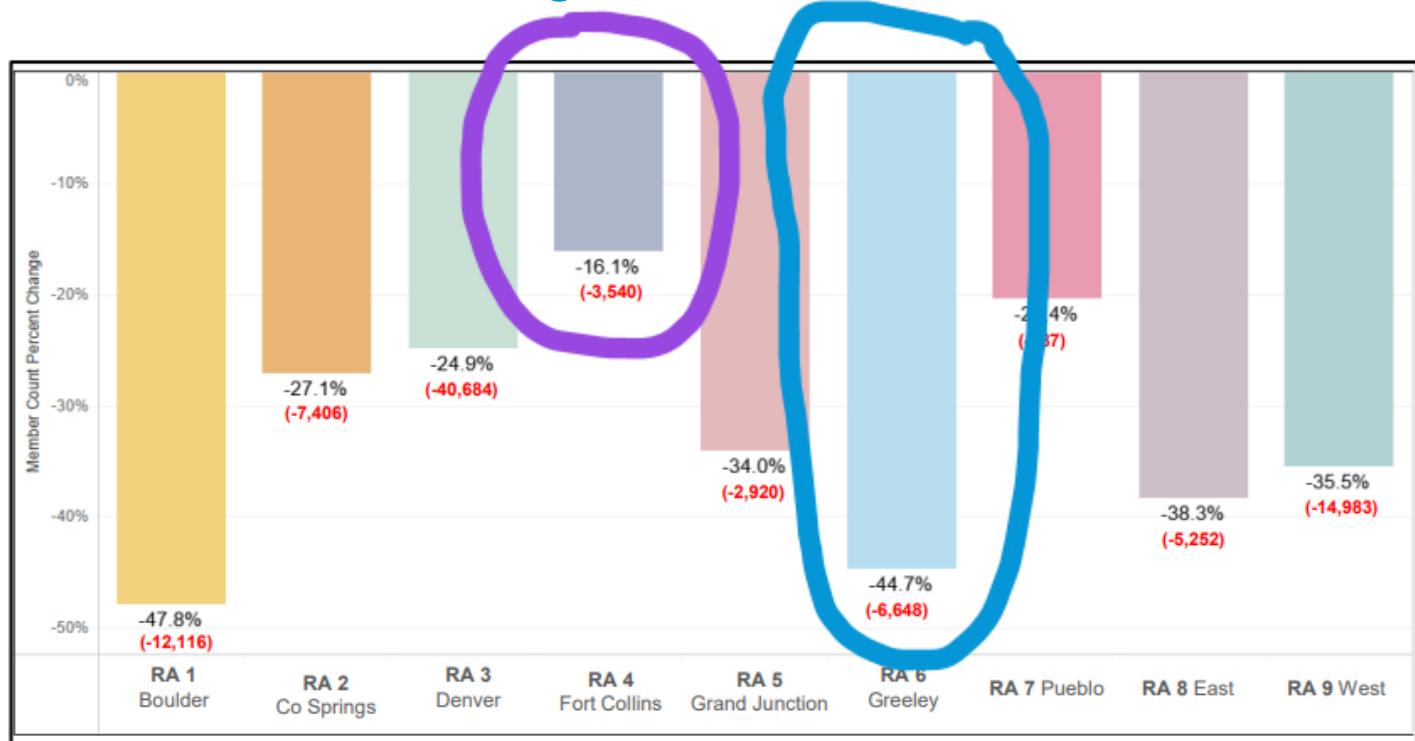
What we are watching

Rating Area	
1	Boulder
2	CO Springs
3	Denver
4	Ft Collins
5	Grand Junction
6	Greeley
7	Pueblo
8	East
9	West



Community

What we are watching





Health District

What we are watching



Increased community need across health and human services



Strategic community response



Funding constriction and benefit changes



Model exemplary community partnership and build organizational resilience



Health District

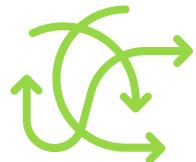
What we are preparing for



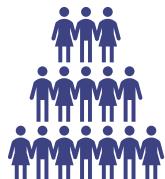
Loss of coverage



Compassion Fatigue



Confusion



Increased need for
affordable services



Federal policy change communication framework

Feedback?





Thank you

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