

**Due: December 31, 2023**

### Overview

The SHARE Initiative (Supporting Health for All through Reinvestment) was created through Enrolled Oregon House Bill 4018 (2018) and requires CCOs to invest a portion of profits back into communities to address health inequities and the social determinants of health and equity (SDOH-E). For details, see OHA's [SHARE Initiative guidance document](#). SHARE Initiative guidance is posted to the [SHARE Initiative webpage](#).

In accordance with the requirements stated in [ORS 414.572\(1\)\(b\)\(C\)](#) and [OAR 410-141-3735](#), CCOs must designate a portion of annual net income or reserves that exceed the financial requirements for SHARE Initiative spending. Starting in 2023, CCOs are subject to a formula that determines their required minimum SHARE obligation. CCOs will follow the instructions in the [Exhibit L6.7](#) financial reporting template to apply this formula to their 2022 financials and report their 2023 SHARE designation.

According to contract requirements, a CCO's annual SHARE Initiative designation must be spent down within three years of OHA's approval of the same year's SHARE Initiative spending plan; a one-year extension may be requested (four years total).

As described in OHA's SHARE Initiative guidance document, SHARE Initiative spending must meet the following four requirements:

1. Spending must fall within SDOH-E domains and include spending toward a statewide housing priority;
2. Spending priorities must align with community priorities from community health improvement plans;
3. A portion of funds must go to SDOH-E partners; and
4. CCOs must designate a role for the community advisory council(s) related to its SHARE Initiative funds.

It is important to note that SHARE Initiative reinvestments must go toward upstream, non-health care factors that impact health (for example, housing, food, transportation, educational attainment or civic engagement).

By December 31 of each contract year, the CCO shall submit a SHARE Initiative Spending Plan to OHA for review and approval. The spending plan will identify how the CCO intends to direct its SDOH-E spending based on net income or reserves from the prior year for the SHARE Initiative. This annual SHARE Initiative spending plan will capture from CCOs how they are meeting these contractual requirements.

### SHARE Initiative Reporting

- A. By June 30, each CCO must report its
  - **Annual SHARE Initiative Designation** in [Exhibit L6.7](#) to identify its SHARE Initiative designation based on the *prior year's financials*.
  - **Annual SHARE Initiative Spend-Down** in [Exhibit L6.71](#) to track year-over-year SHARE spending and to tie such spending to the appropriate year's SHARE Initiative Spending Plan.
  - **Annual SHARE Detailed Spending Report** using the [detailed spending report template](#).
- B. By December 31, each CCO must complete the **Annual SHARE Initiative Spending Plan** described in this document for the *prior year's financials*.

## 2022 SHARE Initiative Spending Plan Template

**CCO name: Trillium Community Health Plan (Southwest)**

**CCO contact: Dominique Lopez-Stickney**

### *Instructions:*

- Respond to items 1–11 below using this template.
- Be clear and concise. Do not exceed 20 pages (not including the required attachments).
- Your submission must include the formal agreement with each of the SDOH-E partners as referenced in item 7. If any agreement with an SDOH-E partner is a subcontract as defined in the CCO contract, then your submission must include the Subcontractor and Delegated Work Report updated for the subcontract/s, as required by the CCO contract.
- All file names must clearly reflect the content (for example, CCOxyz\_SHARE\_Item8).
- Only submit materials pertinent to this spending plan.

Submit your plan to [CCO.MCOTDeliverableReports@odhsoha.oregon.gov](mailto:CCO.MCOTDeliverableReports@odhsoha.oregon.gov) by December 31.

### **Section 1: SHARE Initiative Designation**

1. **What is the dollar amount for your CCO's SHARE Initiative Designation? (as recorded in cell G40 in [Exhibit L – Report L6.7](#))**  
\$2,890,669

### **Section 2: SHARE Initiative Spending Plan**

#### **Spending plan summary**

2. **Summarize the work your CCO is funding through this year's SHARE Initiative. At a high level, briefly describe 1) project titles; 2) what activities are being funded; and 3) what populations will be served.**  
**Lane County**; 24/7 Stabilization Center; fund staff for planning and development of programs that will combat health inequities, address social determinants of health; support community engagement with individuals with lived experience, advise on program development to ensure peer delivered services are prioritized and individuals receive holistic care with connection to long term supports. Populations served are Lane County community members of all ages, for immediate access to behavioral health care.  
**Food for Lane**; Trillium Produce Plus Program and Trillium Veggie Rx in partnership with FOOD for Lane County Youth Farm. Will also fund fridges at sites as needed to store perishable goods. Trillium Produce Plus provides fresh produce in clinics and other settings that provide services to specific populations that have been identified as being impacted most by food insecurity. Veggie Rx is a produce program for designated Trillium members who have a health condition that will benefit from a greater intake of fresh fruit and vegetables.  
**Lane County**; FUSE; fund outreach to individuals identified on the FUSE by-name list; identify and help participants address barriers to housing; provide case management, connect participants to community resources, supportive housing placements that help minimize participants' utilization of crisis services. Populations served are those who are the most frequent users of its public services.

## 2022 SHARE Initiative Spending Plan Template

**Homes for Good;** Bridges on Broadway: fund the construction of the former Red Lion into 56 units of new, permanent supportive housing for people with high needs and experiencing chronic homelessness. Six units will be fully accessible. Second funding category: Capital expenses related to property damage at select sites; capital expenses related to building improvement, repairs; uncollectable rent; staffing for on-call security, janitorial, front desk. Populations served are those who meet qualifications for supportive housing in Lane County.

### CHP/statewide priorities

**3. Describe how your SHARE Initiative spending aligns with your CCO’s shared community health improvement plan.**

The Lane County Community Health Improvement Plan includes focus areas of establishing community conditions that support behavioral health and physical well-being. This aligns with the Lane County 24/7 stabilization center and FUSE program.

The Lane County Community Health Improvement Plan includes focus areas of ensuring incomes are sufficient to meet basic costs of living and ensuring basic needs are met for those most vulnerable. These CHP areas are in alignment with the FOOD for Lane and Homes for Good initiatives.

**4. Describe how your SHARE Initiative spending addresses the statewide priority of housing-related services and supports, including supported housing.**

Both the FUSE program and the Homes for Goods housing programs support the statewide priority of housing-related services and supports. FUSE identifies and helps participants address barriers to housing. Homes for Good increases capacity for Permanent Supportive Housing for those with high needs and experiencing homelessness; six units will be fully accessible. Additional funds will be used for capital improvements, rent, and staff costs to support operations at housing sites.

### SDOH-E partners and domains

**5. Using the box below, respond to items A–C for each SDOH-E partner. Duplicate the box for each partner included in your spending plan.**

**A) Identify each SDOH-E partner that will receive a portion of SHARE Initiative funding.**

**B) Identify the SDOH-E domains applicable to your SHARE spending for each partner.**

**C) Indicate whether the partner agreement is a subcontract and if yes, attach an updated Subcontractor and Delegated Work Report.**

**A. Partner name:** Lane County

**B. SDOH-E domain(s) for the SHARE activities being funded for this partner (check all that apply):**

- Neighborhood and built environment
- Economic stability
- Education
- Social and community health

**C. Is your CCO’s agreement with this SDOH-E partner a subcontract as defined in CCO contract?**

- Yes  No

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**If yes, your submission must include the Subcontractor and Delegated Work Report updated for the subcontract/s, as required by the CCO contract.**

**A. Partner name:** [Food For Lane County](#)

**B. SDOH-E domain(s) for the SHARE activities being funded for this partner (check all that apply):**

- Neighborhood and built environment
- Economic stability
- Education
- Social and community health

**C. Is your CCO's agreement with this SDOH-E partner a subcontract as defined in CCO contract?**

- Yes  No

**If yes, your submission must include the Subcontractor and Delegated Work Report updated for the subcontract/s, as required by the CCO contract.**

**A. Partner name:** [Lane County](#)

**B. SDOH-E domain(s) for the SHARE activities being funded for this partner (check all that apply):**

- Neighborhood and built environment
- Economic stability
- Education
- Social and community health

**C. Is your CCO's agreement with this SDOH-E partner a subcontract as defined in CCO contract?**

- Yes  No

**If yes, your submission must include the Subcontractor and Delegated Work Report updated for the subcontract/s, as required by the CCO contract.**

**A. Partner name:** [Homes for Good](#)

**B. SDOH-E domain(s) for the SHARE activities being funded for this partner (check all that apply):**

- Neighborhood and built environment
- Economic stability
- Education
- Social and community health

**C. Is your CCO's agreement with this SDOH-E partner a subcontract as defined in CCO contract?**

- Yes  No

**If yes, your submission must include the Subcontractor and Delegated Work Report updated for the subcontract/s, as required by the CCO contract.**

## 2022 SHARE Initiative Spending Plan Template

6. Describe how each of the SDOH-E partners identified above were selected for SHARE Initiative project(s) or initiative(s).

Trillium and our CAC wanted to continue to support existing partnerships with FOOD for Lane and the FUSE program. The remaining SHARE partners, Lane County and Homes for Good, were selected to align with projects related to CHP priorities of behavioral health, and housing. All partners and projects were reviewed by the CAC and Executive Leadership Team. Trillium continues to iterate on the annual SHARE process to align partners and projects with priority areas and populations, using data-driven approaches, and further integrating the CAC into the process.

7. **Attach** your formal agreement with each of the SDOH-E partners described in item 5. (See guidance for required contract components.) Have you attached an agreement for each of your SHARE partners?

Yes  No

If no, please explain why not. [Click here to enter text.](#)

8. **Attach** a budget proposal indicating the amount of SHARE Initiative funding that will be allocated to each project or initiative, including the amount directed to each SDOH-E partner. Did you attach a simple budget proposal with this submission?  Yes  No

### Community advisory council (CAC) role

9. Describe your CAC's designated role in SHARE Initiative spending decisions. (As appropriate, describe the ongoing engagement and feedback loop with the CAC as it relates to SDOH-E spending.)

The CAC was polled to indicate priority areas of focus. Trillium CAC consumer members reviewed all projects and provided feedback, then all projects were presented to the larger CAC for feedback. CAC feedback was shared with Trillium's Executive Leadership Team. We are using CAC feedback on the process itself and have a SHARE After Action Review planned to iterate on the CAC's role to continue improvements year over year.

### Section 3: Additional details

10. (Optional) Describe the evaluation plan for each project or initiative, including expected outcomes; the projected number of your CCO's members, OHP members, and other community members served; and how the impact will be measured.

[Click here to enter text.](#)

11. If the project or initiative requires data sharing, **attach** a proposed or final data-sharing agreement that details the obligation for the SDOH-E partner to comply with HIPAA, HITECH and other applicable laws regarding privacy and security of personally identifiable information and electronic health records and hard copies thereof. Does the project require data sharing?  Yes  No

## 2022 SHARE Initiative Spending Plan Template

SHARE Partner Name	Project Name	Region	Budget
Lane County	24/7 Stabilization Center	Southwest	\$922,255
Homes for Good	Bridges on Broadway & Capital Improvements, staffing, rent	Southwest	\$1,788,414
Lane County	Frequent User System Engagement (FUSE)	Southwest	\$100,000
FOOD for Lane County	Produce Plus, Veggie Rx	Southwest	\$80,000

\$2,890,669