
Supporting Health for All through REinvestment: the SHARE Initiative

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Today's OHA Presenters



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Agenda

- Welcome, introductions, and agenda
- SHARE Initiative
 - Background
 - Requirements
 - Spending reports
 - Annual Exhibit L, Report L6.7
 - Annual Spending Plan Template
 - Annual Spend-down Report, Exhibit L, Report 6.71
 - Annual Detailed Spending Report
- Q&A
- Additional resources

SHARE Initiative Background

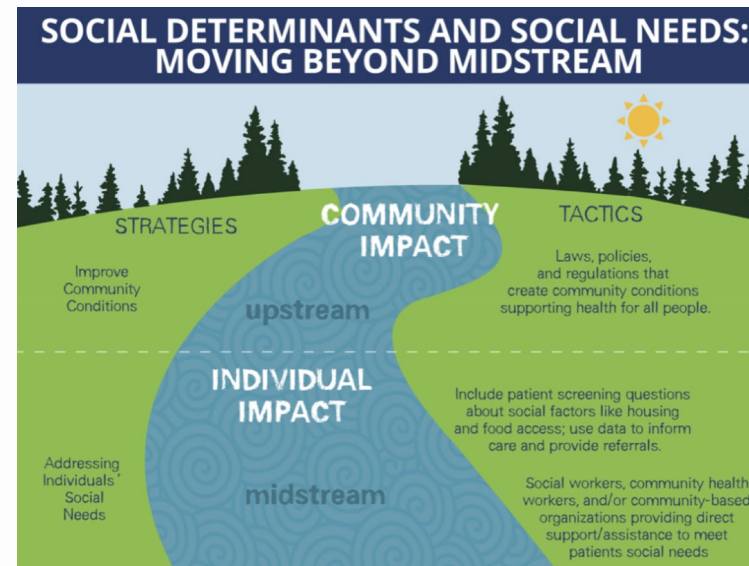
Social Determinants of Health and Equity (SDOH-E)

- Supporting Health for All through REinvestment: the SHARE Initiative was created by Oregon's legislature. House Bill 4018 (2018) requires CCOs to spend part of their profits in their communities to address health inequities and SDOH-E.
- SDOH-E have a far greater impact on overall health and well-being than medical care
- CCOs are already making strides in addressing SDOH-E and the social needs of their members
- CCO 2.0 requirements and incentives aim to
 - increase strategic, community-aligned SDOH-E spending, AND
 - increase tracking and transparency around this spending

SHARE Initiative Primary Goals

The primary goals are to:

- Safeguard public dollars by requiring that a portion of CCOs' profits are reinvested in their communities; and
- Improve member and community health by requiring reinvestments go toward upstream factors that impact health (for example, housing, food, transportation).



SHARE Initiative obligation

- CCOs that have an annual net income or reserves higher than their financial requirements are required to dedicate some of that profit on SHARE Initiatives.
- If a CCO does not exceed minimum financial reserve requirements, they are presumed exempt from the SHARE Initiative.

SHARE Initiative obligation timeline

- Beginning 2021, CCOs with a SHARE Initiative obligation are required to spend a portion of their previous calendar year's adjusted net income or reserves in excess of regulatory minimums
- For the first two years of the SHARE Initiative — that is, CCOs spending a portion of profits from Contract Years (CYs) 2020 and 2021— it is up to each CCO to decide how much of its profits it will contribute to the SHARE Initiative.
- OHA expects to revisit use of a formula to prescribe each CCO's annual SHARE Initiative requirement; earliest implementation would be 2022.

SHARE Initiative Requirements

SHARE Initiative requirements

- [Requirement 1](#): Spending must fall within SDOH-E domains and include spending toward a statewide housing priority.
- [Requirement 2](#): Spending priorities must align with community priorities from Community Health Improvement Plans (CHPs).
- [Requirement 3](#): A portion of funds must go to SDOH-E Partners.
- [Requirement 4](#): CCOs must designate a role for the Community Advisory Council(s) related to its SHARE Initiative funds.

Requirement 1: Spending must fall within SDOH-E domains and include spending toward a statewide housing priority.

Four domains of SDOH-E for SHARE Initiative spending

1. Economic stability
2. Neighborhood and built environment
3. Education
4. Social and community health

A portion of a CCO's SHARE Initiative spending must be spent on housing-related services and supports.

Requirement 2: Spending priorities must align with community priorities from Community Health Improvement Plans (CHPs).

- Until a CCO has a fully shared CHP, CCOs must identify spending priorities by looking at priorities in the CHPs of community partners (including local public health, hospitals, tribes, and CCOs in the area). Based on this process, CCO priorities might be fully aligned with other CHPs. For example, a CCO could identify supportive housing, which is a priority in all CHPs in its Service Area. However, alignment could also be based on:
 - **A common health outcome:** For example, a community priority is obesity and the CCO's SHARE spending priority is food insecurity to address obesity; or
 - **A common priority population:** For example, the community priority is children, and the CCO's SHARE spending priority is stable housing for children and families.

Requirement 3: A portion of funds must go to SDOH-E Partners.

As described in [OAR 410-141-3735](#) an SDOH-E partner is a single organization, local government, one or more of the federally recognized Oregon tribal governments, the Urban Indian Health Program, or a collaborative that delivers SDOH-E related services or programs, or supports policy and systems change, or both within a CCO's service area.

- SDOH-E partners are intended to be non-clinical partners
- CCOs must have a contract, which could include a grant agreement, or other agreement such as a memorandum of understanding (MOU) with each SDOH-E partner that receives SHARE funding.

Examples of SDOH-E Partners

- Nonprofit social and human service organizations (for example, organizations supporting economic opportunity; supporting individuals with disabilities; promoting safe housing, education, food security and environmental justice; and others)
- Culturally specific organizations
- Local public health authorities
- Regional health equity coalitions
- Local government and government-associated entities
- Tribal governments and the Urban Indian Health Program
- Early learning hubs
- Local housing authorities

Requirement 4: CCOs must designate a role for the Community Advisory Council(s) related to its SHARE Initiative funds.

Examples include:

- The CAC identifies and/or approves SDOH-E priorities that are in line with community priorities in the CHP.
- The CAC reviews SHARE Initiative related proposals and makes recommendations to the CCO leadership or board.
- The CCO designates a portion of funding for the CAC to direct to SHARE Initiative efforts.
- The CAC tracks and monitors outcomes of SHARE Initiative spending.

SHARE Initiative Spending Reports

SHARE Initiative Spending Reports Overview

Report	Description	Due
Annual SHARE Initiative Designation Exhibit L, Report L6.7	Annual report for CCO to identify its SHARE Initiative designation based on the prior year's financials (the portion of net income/reserves the CCO will contribute to the SHARE Initiative).	April 30, annually; first report is due in 2021 for CY 2020
Annual SHARE Initiative Spending Plan	Includes SDOH-E priorities, partner information, proposed budgets and other information as required by contract	June 30, annually for CCOs with a SHARE Initiative designation; first plan due in 2021 for CY 2020 funds
Annual SHARE Initiative Spend-Down Report Exhibit L, Report 6.71	Annual report of year-over-year spend-down of SHARE funds	April 30, annually; first report due 2022 for CY 2020 funds
Annual SHARE Initiative Detailed Spending Report	Annual reporting of detailed SHARE spending to date. Submitted to OHA with the CCO's SHARE Initiative Spending Plan, if relevant, or submitted as separate report if the CCO is not required to submit a spending plan for that year.	June 30, annually for CCOs with any unspent/unreported SHARE funds; first report due in 2022 for CY 2020

Annual Exhibit L, Report L6.7

- Annual report for CCO to identify its SHARE Initiative designation based on the prior year's financials (the portion of net income/reserves the CCO will contribute to the SHARE Initiative). This report also includes other related values for informational purposes: 1) annual risk-based capital prior to SHARE contribution; 2) annual pre-tax net income prior to SHARE contribution; and 3) dividends recorded.
- **Due: April 30, annually**
 - **first report is due in 2021 for CY 2020**
- SHARE Initiative designation is also recorded on Exhibit L6 OHP (I&E statement), line 38, and on Exhibit L5 (balance sheet), line 26.

Annual SHARE Initiative Spending Plan Report

- Includes SDOH-E priorities, partner information, proposed budgets and other information as required by contract
- **Due: June 30**, annually for CCOs with a SHARE Initiative designation
 - **first plan due in 2021 for CY 2020 funds**
- Total SHARE designation should match Report L6.7.
- Spending plan is reviewed and approved by OHA.
- CCO has two years from date of plan approval to spend designated amount.

Annual SHARE Initiative Spending Plan Report Template

- Template available in fillable Word document.
- Do not exceed 20 total pages for your report.
- This page count does not include the attachments referenced in items 7, 8 and 11.
- Submit the completed report to CCO.MCOCDeliverableReports@dhsoha.state.or.us **by June 30** of the Contract Year.
- Your submission must include the Subcontractor and Delegated Work Report updated for SDOH-E Partners as required by the CCO contract and referenced in item 7.

Annual SHARE Initiative Spending Plan Report Template

SHARE Initiative Designation

1. What is the dollar amount for your CCO's SHARE Initiative Designation? (as recorded in cell E30 in [Exhibit L](#) – Report L6.7)

Annual SHARE Initiative Spending Plan Report Template

SDOH-E Domains and CHP/Statewide Priorities

2. Indicate which of the four SDOH-E domains your CCO's SHARE Initiative Spending falls. (Check all that apply.)

- Neighborhood and Built Environment Economic Stability
- Education Social and Community Health

3. Describe how your SHARE Initiative spending aligns with your CCO's Community Health Improvement Plan (CHP).

4. Describe how your CCO's SHARE Initiative spending addresses the statewide priority of housing-related services and supports, including Supported Housing.

Annual SHARE Initiative Spending Plan Report Template

SDOH-E Partners

5. Identify each of the SDOH-E Partner(s) that will receive a portion of SHARE Initiative funding. (SDOH-E partners must have demonstrated experience delivering services or programs, or supporting policy and systems change, or both, related to SDOH-E.)
6. Describe how each of the SDOH-E Partners identified above were selected for SHARE Initiative project(s) or initiative(s).
7. Are the SDOH-E Partners described in item 6 included in your CCO's Subcontractor and Delegated Work Report? **(This is in addition to submitting the Subcontractor and Delegated Work Report updated for SDOH-E Partners.)**
8. **ATTACH** a budget proposal indicating the amount of funding from the SHARE Initiative that will be put toward each project or initiative, including the amount of funds that will be directed to each SDOH-E Partner. Did you attach a simple budget proposal with this submission? Yes No

Annual SHARE Initiative Spending Plan Report Template

Community Advisory Council (CAC)

9. Describe the designated role for your CAC with regard to decision-making on SDOH-E spending under the SHARE Initiative.

Annual SHARE Initiative Spending Plan Report Template

Optional: Additional Details

10. 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.

11. If the project or initiative requires data sharing, **ATTACH** a proposed 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

Annual Spend-down Report, Exhibit L, Report L6.71

- Annual report of year-over-year spend-down of SHARE funds.
- Tracks initial designated amounts from Report L6.7 by year as they are expended.
- **Due:** April 30, annually
 - **first report due 2022 for CY 2020 funds**

Annual Detailed Spending Report

- Annual reporting of detailed SHARE spending to date. Submitted to OHA with the CCO's SHARE Initiative Spending Plan, if relevant, or submitted as separate report if the CCO is not required to submit a spending plan for that year.
- **Due: June 30**, annually for CCOs with any unspent/unreported SHARE funds
 - **first report due in 2022 for CY 2020**
- Total spending should match Report L6.71
- Templates forthcoming



Questions & Answers



Additional Resources

Additional Resources

- [OAR 410-141-3735](#)
- For more information, visit the SHARE Initiative on the Transformation Center's website: <https://www.oregon.gov/oha/HPA/dsi-tc/Pages/SHARE.aspx>
 - [Guidance Document](#)
 - [Exhibit L](#)
- Contact SHARE.Initiative@dhsoha.state.or.us with comments and questions

Thank You!

Please complete the evaluation that will be emailed to you.