**Annual SHARE Initiative Spending Plan**

**Report Template**

**Overview**

Supporting Health for All through REinvestment: the SHARE Initiative was created through House Bill 4018 (Oregon Legislature, 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). OHA’s SHARE Initiative [guidance document](https://www.oregon.gov/oha/HPA/dsi-tc/Documents/SHARE-Initiative-Guidance-Document.pdf) is provided on the SHARE Initiative [webpage](https://www.oregon.gov/oha/HPA/dsi-tc/Pages/SHARE.aspx).

In accordance with the requirements stated in [ORS 414.572(1)(b)(C)](https://www.oregonlegislature.gov/bills_laws/ors/ors414.html) and [OAR 410-141-3735](https://secure.sos.state.or.us/oard/viewSingleRule.action?ruleVrsnRsn=265591), CCOs must designate a portion of annual net income or reserves that exceed the financial requirements for SHARE Initiative spending. According to contract requirements, a CCO's annual SHARE Initiative designation must be spent down within two years of OHA's approval of the same year’s SHARE Initiative Spending Plan.

For Contract Years 2020 and 2021, CCOs that exceed minimum financial requirements are expected to define their own SHARE Initiative portion in compliance with the statute and rules referenced above.

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 (CHPs);
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.

By September 30[[1]](#footnote-2) of each Contract Year, each CCO shall annually submit to OHA for review and approval its SHARE Initiative Spending Plan identifying how it 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 Report will capture from CCOs how they are meeting these contractual requirements.

**SHARE Initiative Reporting**

1. Beginning in 2021, by no later than April 30, each CCO must report its **Annual SHARE Initiative Designation** in [Exhibit L6.7](https://www.oregon.gov/oha/HSD/OHP/CCO/2020-Exhibit-L-Financial-Reporting-Template-CCOs.xlsx) to identify its SHARE Initiative designation based on the *prior year’s financials*.
2. Beginning in 2021, by no later than September 30, each CCO must complete the **Annual** **SHARE Initiative Spending Plan** described in this document forthe *prior year’s financials*.
3. Beginning in 2022, by no later than April 30, each CCO must report its **Annual SHARE Initiative Spend-Down** in Exhibit L6.71 to track year-over-year spending from a CCO's SHARE Initiative and to tie such spending to the appropriate year’s SHARE Initiative Spending Plan.

**Report Template**

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| CCO Name: |
| CCO Contact: |
| *Instructions:*   * Respond to items 1-11 below using this template. * Be clear and concise in your responses. Do not exceed 20 total pages for your report. (This page count does not include the attachments referenced in items 7, 8 and 11.) * Your submission must include the formal agreement with each of the SDOH-E Partners as required by the CCO contract and 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 and referenced in item 7. Refer also to the OHA [memo](https://www.oregon.gov/oha/HSD/OHP/Announcements/SDOH-E-Partner-Contracts0321.pdf) dated March 4, 2021, that clarifies SHARE Initiative SDOH-E Partner contract requirements. * All file names must clearly reflect the content (e.g., CCOxyz\_SHARE\_Item7). * When submitting materials, CCOs must ensure that only materials pertinent to the focus area are submitted.   Submit the completed report to [CCO.MCODeliverableReports@dhsoha.state.or.us](mailto:CCO.MCODeliverableReports@dhsoha.state.or.us) by September 30 of the Contract Year. |
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**Section 1: SHARE Initiative Designation**

1. **What is the dollar amount for your CCO’s SHARE Initiative Designation? (as recorded in cell E30 in** [**Exhibit L**](https://www.oregon.gov/oha/HSD/OHP/CCO/2020-Exhibit-L-Financial-Reporting-Template-CCOs.xlsx)**– Report L6.7)**

Click here to enter text.

**Section 2: SHARE Initiative Spending Plan**

**SDOH-E Domains and CHP/Statewide Priorities**

1. **Identify the SDOH-E domains applicable to your CCO’s SHARE Initiative Spending. (Check all that apply.)**

Neighborhood and Built Environment

Economic Stability

Education

Social and Community Health

1. **Describe how your SHARE Initiative spending aligns with your CCO’s Community Health Improvement Plan (CHP).**

Click here to enter text.

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

Click here to enter text.

**SDOH-E Partners**

1. **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.)**

Click here to enter text.

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

Click here to enter text.

1. **Do you have a formal agreement with each of the SDOH-E Partners described in item 5** (Please be sure to submit the formal agreement for each SDOH-E Partner.)

Yes  No

**If no, please explain why not**. Click here to enter text.

1. **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

**Community Advisory Council (CAC)**

1. **Describe the designated role for your CAC with regard to decision-making on SDOH-E spending under the SHARE Initiative.** (As appropriate, please be sure to include in your description the ongoing engagement and feedback loop with the CAC as it relates to SDOH-E spending.)

Click here to enter text.

***Section 3: Optional:* Additional Details**

1. **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.

1. **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

1. CCOs can submit their proposed Spending Plans at any time from 6/30/2021 through 9/30/2021. OHA will notify each CCO about the approval status of its plan within 30 days of receipt. In the event a CCO’s plan cannot be approved as submitted, OHA will work with the CCO to resolve the identified deficiencies as quickly as possible. [↑](#footnote-ref-2)