

**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-healthcare 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*.

## 2023 SHARE Initiative Spending Plan Template

CCO name: PacificSource Community Solutions – Central Oregon

CCO contact: Erin Fair-Taylor

### 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](#))**  
\$919,253.00

### 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.**

In alignment with the priorities the OHA and the Oregon Health Policy Board identified, this 2023 SHARE Initiative will improve access to housing-related services and support in Central Oregon by investing in community-based organizations (CBOs) offering street outreach, housing navigation, and supportive housing. This investment targets three SDOH-E domains: economic stability, neighborhood and built environment, and social and community health. SHARE funding will support two CBOs who have established strong partnerships in the community and demonstrated a history of positive impacts through their work with individuals experiencing homelessness.

**1) Project Titles:** Central Oregon FUSE (FUSE) operates a collaborative, regional program, the **Housing Barrier Busting Fund**, which mobilizes resources to enable unhoused clients of partner agencies to access stable housing. By quickly mobilizing funds to mitigate specific barriers to housing, this program is an efficient and effective resource that promotes collaboration among CBOs while empowering clients. FUSE also operates the **Neighborhood-Based Housing Program**, a “scattered-site” Permanent Supportive Housing that provides tenant-based affordable housing and supportive services for formerly chronically homeless individuals.

## 2023 SHARE Initiative Spending Plan Template

REACH Central Oregon (REACH) **Safe Parking Program** supports individuals experiencing homelessness by operating safe parking programs and mobile case management, bringing services and solutions directly to those in need, and reducing barriers to services. REACH also provides housing navigation and housing retention case management. In addition, it operates a low-barrier employment program and connects hundreds of individuals annually with social services, mainstream resources, and positive relationships.

**2) Activities Being Funded:** The SHARE Initiative will sustain and expand these critical programs by funding direct support staff, client expenses that would otherwise pose a barrier to accessing housing, client basic needs, and program development and administration.

**3) Population Served:** FUSE and REACH both serve the population of Central Oregon experiencing homelessness, with a focus on serving highly vulnerable individuals who are experiencing “chronic homelessness,” meaning those who are living with a disabling condition and have an extended history of homelessness. This subpopulation is likelier to live unsheltered (in a place not meant for human habitation) and has a markedly shorter life expectancy because of trauma, untreated health conditions, and comorbidities.

### CHP/statewide priorities

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

Central Oregon’s 2020–2024 Regional Health Improvement Plan (RHIP) identified “Stable Housing and Supports” as one of the region’s six priority areas. According to the RHIP, *“Central Oregon has a critical shortage of supportive housing units to meet the needs of people with disabilities, with co-occurring mental health or substance use disorders, and/or who have experienced an extended history of homelessness.”* This SHARE investment strives to prevent and end chronic homelessness in our region. Both FUSE and REACH are collaborative community partners who participate in RHIP workgroups and proactively support highly vulnerable clients.

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

The FUSE and REACH programs have demonstrated success in creatively and effectively addressing the statewide priority of housing-related services and supports. FUSE has led our region’s efforts to develop Permanent Supportive Housing by building bridges between affordable housing developers, homeless service providers, and healthcare providers. FUSE created Central Oregon’s first permanent supported housing program serving the chronically homeless population by mobilizing resources, implementing evidence-based practices in affordable housing, and leveraging client support from community partners and healthcare providers. As the contracted housing retention case management provider, REACH is a crucial partner in FUSE’s supported housing program. The lessons learned and

## 2023 SHARE Initiative Spending Plan Template

success demonstrated from this collaborative initiative have paved the way for project-based supportive housing development. FUSE and REACH programs are at the forefront of Central Oregon's efforts to address homelessness and housing insecurity through housing-related supports.

### 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:** Central Oregon FUSE

**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:** REACH Central Oregon

**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.**

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

People who have been living outside for a long period are likely to have a worsening disability,

## 2023 SHARE Initiative Spending Plan Template

chronic health condition, substance use disorder, or a mental health diagnosis. In addition, chronically homeless people suffer greater social exclusion and health inequities than many other vulnerable groups. This population is more likely to rely on emergency room services, account for more hospital admissions and extended stays, and have more police and emergency medical service provider contact. With input from the Community Advisory Council (CAC), the CCO partnered with FUSE and REACH because they provide stability and support that allows chronically homeless people to move to greater independence and self-sufficiency, substantially improving the outcomes of this underserved population.

FUSE and REACH's programs are based on peer-reviewed research and local conversations to effectively adapt and tailor best practices to meet the unique needs of vulnerable community members experiencing homelessness.

**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.](#)

7. **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

8. **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 asked the CCO to prioritize housing support, mobile outreach services, and housing retention services to wrap around rehoused people. Two consumer CAC members accepted an invitation to attend an in-person meeting earlier this year to learn more about Central Oregon FUSE and REACH Central Oregon. The CAC members had the opportunity to ask the CBOs questions and provide feedback about their programs. Each organization incorporated the feedback and presented it to the larger CAC during its September meeting, and it overwhelmingly agreed to award SHARE funds to FUSE and REACH.

Each organization will provide a brief presentation to the CAC during the fall or winter of 2024, including anonymous, aggregated data and the number of individuals served. They have agreed to provide additional updates as the CAC requests, either in writing or by attending a CAC meeting.

### Section 3: Additional details

## 2023 SHARE Initiative Spending Plan Template

9. **(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.

Approximately 76% of the individuals served by the Barrier Busting Fund are PacificSource Community Solutions members. The Barrier Busting Fund is expected to provide housing-related financial assistance for 110 households each year

10. 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

## MEMORANDUM OF UNDERSTANDING SHARE INITIATIVE

This Memorandum of Understanding (“MOU”), by and between PacificSource Community Solutions (“PCS”) and Central Oregon FUSE, Inc. (“FUSE”), collectively the “Parties,” is made for the purpose of memorializing the Parties’ support and commitment to PCS’s Supporting Health for All through Reinvestment (“SHARE”) Initiative. This MOU will be effective the later of November 30, 2023, or PCS’s receipt of approval from the Oregon Health Authority (“OHA”) on PCS’s SHARE Initiative Spending Plan (the “Effective Date”).

WHEREAS this MOU sets forth the Parties’ understandings and expectations with regarding to the SHARE Initiative requirements as outlined by the Oregon Health Authority in its Coordinated Care Organization (“CCO”) contract with PCS.

1. **The SHARE Program.** FUSE shall provide the services described in this Section 1 and further agrees to commit to all OHA-required terms of SHARE recipient requirements, as outlined in the grant requirements within PCS’s SHARE Guidelines 2023 and the information submitted by FUSE. PCS shall provide compensation as provided in this Section 1. Requirements are as follows:

<b>SCOPE OF WORK</b>
FUSE will support local individuals, including CCO members, experiencing homelessness by operating the Housing Barrier Buster Fund, which quickly mobilizes funds to mitigate specific barriers to housing. FUSE also operates the Neighborhood-Based Housing Program, “scattered-site” Permanent Supportive Housing, which provides tenant-based affordable housing and supportive services to formerly chronically homeless individuals. The priority population for FUSE is individuals experiencing homelessness, with a focus on those who are chronically homeless.
<b>Social Determinants of Health and Equity DOMAINS</b>
FUSE’s project will address <i>Social and Community Health</i> and <i>Economic Stability</i> , as specified in OAR 410-141-3735(3)(b), and housing supports.
<b>COMPENSATION AND PAYMENT</b>
PCS will distribute \$459,626.50 to FUSE, pending the OHA’s approval of PCS’s SHARE Spending Plan (which will be submitted to the OHA as early as November 30, 2023). PCS will issue payment within 45 days of approval. These funds are intended to support FUSE’s Housing Barrier Buster Fund and Neighborhood-Based Housing Program. Indirect costs, including staff benefits, shall not exceed 40% of the total amount of the SHARE Initiative dollars.
<b>PROGRAM EVALUATION</b>
FUSE will track outcomes using the following metrics: <ol style="list-style-type: none"> <li>1. Track the number of successful participants' placements.</li> <li>2. Track utilization of the Housing Barrier Buster Fund.</li> <li>3. Solicit and track qualitative feedback from participants and service providers.</li> </ol> <p>FUSE uses an adapted ‘Self-Sufficiency Matrix’ to track participant outcomes, goals, and program feedback. It is strengths-based, trauma-informed, and captures qualitative and quantitative outcomes of supportive housing placements.</p>

Expected outcomes for this project include: 1. The Housing Barrier Busting Fund will help at least 110 individuals access stable housing, and 2. 100% of participants in the Neighborhood Based Housing Program will remain successful in housing.

These outcomes will align with the *Stable Housing and Supports* priorities from the Central Oregon CCO's RHIP.

## REPORTING

FUSE will engage in data collection (as described in the SHARE Spending Plan), sharing, and reporting, including:


1. Informal mid-cycle check-in between PCS and FUSE (winter 2024)
2. Outcome reporting to PCS (based on program evaluation elements as described above), as well as a brief (5-10 minute) presentation to the Community Advisory Council (fall or winter 2024). FUSE will share anonymous, aggregated data with the Community Advisory Council, including the total number of individuals served.

There will be no member-level data sharing between PCS and FUSE as part of this grant.

2. **Term.** The understandings and commitments made by the Parties pursuant to this MOU shall remain in effect for three years.
3. **Non-Exclusive.** This MOU does not create an exclusive arrangement between PCS and FUSE, and either Party may enter into agreements with other parties for similar or the same services or projects.
4. **Liability.** No liability will arise or be assumed between the Parties as a result of this MOU.
5. **Governing Law.** This MOU shall be governed by and construed in accordance with the laws of the State of Oregon, without regard to conflict of laws principles.
6. **Counterparts.** This MOU may be executed in counterparts, each of which shall be deemed to be an original, but all of which, taken together, shall constitute one and the same agreement.

**IN WITNESS WHEREOF**, the Parties hereto have executed this MOU on the Effective Date.

### PacificSource Community Solutions

By: 

Name: Erick Doolen

Title: COO & EVP

Date: November 20, 2023

### Central Oregon FUSE, Inc.

By: 

Name: Colleen Sinsky

Title: Executive Director

Date: November 20, 2023



**SHARE Initiative Grant Application  
Attachment A - Budget**

**PacificSource Community Solutions- Central Oregon**

**SHARE Initiative- Recipient Budget Description**

Information in shaded boxes will be redacted before sharing this information

<b>Date:</b>	9/21/23
<b>Organization:</b>	Central Oregon FUSE
<b>Person completing budget:</b>	Colleen Sinsky

Personnel name with Project Role and FTE	Salary Cost	35% Benefits	Sub-Total	SHARE portion of line item sub-total	SHARE Annual	SHARE x 3 years	% of grant
Colleen Sinsky, FUSE ED & SHARE project lead. (.2 FTE)	69,000	24,150	93,150	20%	\$18,630.00	\$55,890.00	12.16%
Director of Programs (.4 FTE)	60,000	21,000	81,000	40%	\$32,400.00	\$97,200.00	21.15%
Program Coordinator (.25 FTE)	50,000	17,500	67,500	25%	\$16,875.00	\$50,625.00	11.01%
<b>Sub-total</b>	<b>\$179,000</b>	<b>\$62,650</b>	<b>\$241,650</b>		<b>\$67,905.00</b>	<b>\$203,715.00</b>	<b>44.32%</b>

Category	Description	Cost	Sub-Total	% of grant
<b>Itemized Equipment costs</b> <i>Itemize any item over \$500</i>	<i>Zoom account (3 years)</i>	\$600		
	<i>Laptop</i>	\$900		
			\$1,500	0.33%
<b>Materials and supplies</b> <i>Group in broad categories</i>	<i>Marketing, Web &amp; Printing</i>	\$2,300		
	<i>Community Meeting Expenses</i>	\$3,000		
			\$5,300	1.15%
<b>Program Expenses</b>	<i>Barrier Busting Fund client expenses (3 years)</i>	\$221,000		
	<i>PSH Client Basic Needs (3 years)</i>	\$28,112		
		0	\$249,112	54%
			<b>\$255,912</b>	<b>55.68%</b>

**Total amount requested for project**

**\$459,626.50**

## MEMORANDUM OF UNDERSTANDING SHARE INITIATIVE

This Memorandum of Understanding (“MOU”), by and between PacificSource Community Solutions (“PCS”) and REACH Out NP (“REACH”), collectively the “Parties,” is made for the purpose of memorializing the Parties’ support and commitment to PCS’s Supporting Health for All through Reinvestment (“SHARE”) Initiative. This MOU will be effective the later of November 30, 2023, or PCS’s receipt of approval from the Oregon Health Authority (“OHA”) on PCS’s SHARE Initiative Spending Plan (the “Effective Date”).

WHEREAS this MOU sets forth the Parties’ understandings and expectations with regarding to the SHARE Initiative requirements as outlined by the Oregon Health Authority in its Coordinated Care Organization (“CCO”) contract with PCS.

1. **The SHARE Program.** REACH shall provide the services described in this Section 1 and further agrees to commit to all OHA-required terms of SHARE recipient requirements, as outlined in the grant requirements within PCS’s SHARE Guidelines 2023 and the information submitted by REACH. PCS shall provide compensation as provided in this Section 1. Requirements are as follows:

<b>SCOPE OF WORK</b>
REACH will support local individuals, including CCO members, experiencing homelessness by operating Safe Parking and low-barrier employment programs. REACH will also connect clients to resources and provide housing navigation and housing retention case management. The priority population for REACH is individuals experiencing homelessness, with a focus on those who are chronically homeless.
<b>Social Determinants of Health and Equity DOMAINS</b>
REACH’s project will address <i>Social and Community Health</i> and <i>Economic Stability</i> , as specified in OAR 410-141-3735(3)(b), and housing supports.
<b>COMPENSATION AND PAYMENT</b>
PCS will distribute \$459,626.50 to REACH, pending the OHA’s approval of PCS’s SHARE Spending Plan (which will be submitted to the OHA as early as November 30, 2023). PCS will issue payment within 45 days of approval. These funds are intended to support REACH’s Clean Up Project and Safe Parking and hire one additional full-time employee. Indirect costs, including staff benefits, shall not exceed 50% of the total amount of the SHARE Initiative dollars.
<b>PROGRAM EVALUATION</b>
REACH is projected to serve at least 600 individuals during 2024. This estimate is based on the number of people who have accessed shelter services in recent years.
Expected outcomes for this project include: 1. increase Safe Parking by ten spaces, 2. Double the number of participants in the Clean Up Project by 2026, and 3. Hire an additional FTE to allow REACH to increase the number of individuals served. REACH will monitor progress toward these goals by tracking the number of participants each program serves in REACH’s database and the Homeless Management Information System when applicable.
These outcomes will align with the <i>Stable Housing and Supports</i> priorities from the Central Oregon CCO’s RHIP.

## REPORTING

REACH will engage in data collection (as described in the SHARE Spending Plan), sharing, and reporting, including:

1. Informal mid-cycle check-in between PCS and REACH (winter 2024)
2. Outcome reporting to PCS (based on program evaluation elements as described above), as well as a brief (5-10 minute) presentation to the Community Advisory Council (summer or fall 2024). REACH will share anonymous, aggregated data with the Community Advisory Council, including the total number of individuals served.

There will be no member-level data sharing between PCS and REACH as part of this grant.

2. **Term.** The understandings and commitments made by the Parties pursuant to this MOU shall remain in effect for three years.
3. **Non-Exclusive.** This MOU does not create an exclusive arrangement between PCS and REACH, and either Party may enter into agreements with other parties for similar or the same services or projects.
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5. **Governing Law.** This MOU shall be governed by and construed in accordance with the laws of the State of Oregon, without regard to conflict of laws principles.
6. **Counterparts.** This MOU may be executed in counterparts, each of which shall be deemed to be an original, but all of which, taken together, shall constitute one and the same agreement.

IN WITNESS WHEREOF, the Parties hereto have executed this MOU on the Effective Date.

### PacificSource Community Solutions

By: 

Name: Erick Doolen

Title: COO & EVP

Date: November 20, 2023

### REACH Out NP

By: 

Name: Stacey Witte

Title: Executive Director

Date: November 21, 2023



Attachment A - Budget

**PacificSource Community Solutions- Central Oregon**

**SHARE Initiative- Recipient Budget Description**

Date:	9/25/23
Organization:	REACH
Person completing budget:	Stacey Witte Executive Director

Personnel name with Project Role and FTE	Salary Cost	35% Benefits	Sub-Total	%
Maddy Cenac - projected project role 3 years 30 hours per week	128,700	45,045	173,745	
3 year project projection		0	0	
<b>Sub-total</b>	<b>\$128,700</b>	<b>\$45,045</b>	<b>\$173,745</b>	<b>38%</b>

Category	Description	Cost	Sub-Total	%
<b>Equipment costs</b> <i>Itemize any item over \$500</i>				
		0	0	0%
<b>Materials and supplies</b> <i>Group in broad categories</i>	<i>Client Assistance - housing preparedness,</i>	\$103,801		
	<i>Safe Parking</i>	\$61,200		
	<i>Building Resiliency - Toddler, youth, teen</i>	\$64,000	229,001	50%
<b>Travel and Other</b> <i>Group in broad categories</i>	<i>gas for FTE \$150 per month</i>	\$5,400		
	<i>Catherine Coleman Data Entry / HMIS</i>	\$51,480		
	<i>15 hours per week @ \$22 per hour</i>			
		0		
		0		
		0		
		0		
		0	56,880	12%
<b>Total amount requested for project</b>			<b>\$459,626.00</b>	<b>100%</b>

TOTAL

#DIV/0!