

2024 Annual SHARE Initiative Spending Plan Template

Due: December 31, 2024

Overview

The SHARE Initiative (Supporting Health for All through Reinvestment) was created through Oregon House Bill 4018 (2018). It requires coordinated care organizations (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](#).

Per 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. 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 2023 financials and report their 2024 SHARE designation.

The CCO contract requires CCO's annual SHARE Initiative designation to 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).

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 decision-making role for the community advisory council(s) related to its SHARE Initiative funds.

(See OHA's [SHARE Initiative guidance document](#) for more details.)

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 meet these contractual requirements.

SHARE Initiative Reporting

- A. By June 30, each CCO must report its
 - **Annual SHARE Initiative Designation** in [Exhibit L, Report L6.7](#) to identify its SHARE Initiative designation based on the *prior year's financials*.
 - **Annual SHARE Initiative Spend-Down** in [Exhibit L, Report 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** in [Exhibit L, Report 6.71 to track spend-down to each SDOH-E partner each year](#).
- B. By December 31, each CCO must complete the **Annual SHARE Initiative Spending Plan** described in this document for the *prior year's financials*.

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CCO name: PacificSource Community Solutions Central Oregon (PCS-CO)

CCO contact: Erin Fair Taylor

Instructions:

- Respond to items 1–9 below using this template.
- Be clear and concise.
- CCOs no longer need to submit partner agreements to OHA. CCOs still must have partner agreements in place that include all elements outlined in guidance prior to disbursing funds.
- Use clear file names (for example, CCOname-SHARE-Spending-Plan-2024).
- Submit your plan in the [CCO Contract Deliverables Portal](#) by December 31. (The submitter must have an OHA account to access the portal.)

Section 1: SHARE Initiative Designation

1. What is the dollar amount of your CCO’s SHARE Initiative designation represented in this spending plan? This amount must meet or exceed your CCO’s designation amount recorded in cell G40 in [Exhibit L – Report L6.7](#). If the amount does not match, please explain.

\$ 1,303,413.56 is the total amount of SHARE Initiative funding for PCS-CO. PCS-CO reported \$497,536.83 on Exhibit L and contributed an additional \$805,876.73 as a corporate allocation.

Section 2: SHARE Initiative Spending Plan

Spending plan project summaries

2. Provide a summary of the work your CCO is funding through this year’s SHARE Initiative. Duplicate the row below and complete it for each funded project included in your spending plan. Note: SHARE funds may not be used for any covered Medicaid benefits or delivery of covered Medicaid benefits, including health-related social needs (HRSN) covered services and substance use disorder (SUD) covered services.

Project #	Project name	Brief project description, including project goals, objectives and expected outcomes	Is this a housing project? If yes, indicate project type. ¹	SDOH-E domain	Populations served (list) ²
1	NeighborImpact – HRSN Program Expansion	Workforce Development: Funds will expand NeighborImpact's capacity to facilitate referrals for HRSN and other non-billable housing program supports. Expected outcomes include a minimum of 1,200 eligible members receiving HRSN services.	<input checked="" type="checkbox"/> Housing services and support <input type="checkbox"/> Permanent supportive housing <input type="checkbox"/> Other (write in; for example, transitional housing, emergency shelter, affordable housing):	<input checked="" type="checkbox"/> Neighborhood and built environment <input checked="" type="checkbox"/> Economic stability <input type="checkbox"/> Education <input checked="" type="checkbox"/> Social and community health	Households in Crook, Deschutes, Jefferson, and northern Klamath counties who experience

¹ For definitions of “housing services and supports” and “permanent supportive housing,” see the [SHARE guidance document](#).

² If applicable, please use standardized race, ethnicity, language and disability (REALD) categories (see [REALD form](#)).

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					housing insecurity, including people from marginalized communities, regardless of their race/ethnicity or spoken language.
2	Thrive Central Oregon – HRSN Program Expansion	Workforce Development: Funds will expand Thrive Central Oregon's capacity to facilitate referrals for HRSN and other non-billable housing program supports. Expected outcomes include a minimum of 1,600 eligible members receiving HRSN services.	<input checked="" type="checkbox"/> Housing services and support <input type="checkbox"/> Permanent supportive housing <input type="checkbox"/> Other (write in; for example, transitional housing, emergency shelter, affordable housing):	<input checked="" type="checkbox"/> Neighborhood and built environment <input checked="" type="checkbox"/> Economic stability <input type="checkbox"/> Education <input checked="" type="checkbox"/> Social and community health	Households in Crook, Deschutes, Jefferson, and northern Klamath counties who experience housing insecurity, including people from marginalized communities, regardless of their race/ethnicity or spoken language.

CHP/statewide priorities

3. Which specific priorities, topics, or domains within your CCO's most recent shared community improvement plan does this SHARE spending plan address? List single CHP topics in bullets and *briefly* describe how your SHARE spending plan aligns with your CCO's shared community health improvement plan.
 - The CCO's 2025-2029 Regional Health Improvement Plan (RHIP) identified the need to *reduce disparities in housing by improving and developing access to holistic housing options and services*.
 - SHARE Initiative funded projects support households at risk of homelessness by increasing access to HRSN services available to marginalized and underserved communities by strengthening the capacity for the HRSN benefit.
4. Briefly describe how your SHARE Initiative spending plan addresses the statewide priority of housing-related services and supports, including supported housing, and helps people find and

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maintain stable housing. In the description, please reference the specific housing projects using the project numbers from the table above (question 2).

SHARE Initiative-funded projects #1 and #2 will advance the statewide priority of housing-related services and supports. By providing funds to these organizations, they will be better positioned to deliver the housing benefits within the HRSN framework fully. The organizations involved offer various essential services, including short-term supported housing, emergency shelter, rental assistance, financial support for utilities, and tenancy supports.

The funding will enhance each organization's capacity to facilitate HRSN housing requests effectively. Additionally, dedicated HRSN capacity funding will enable existing staff to support other housing and SDOH requests that are not eligible under HRSN. This increased capacity will allow these organizations to serve a greater number of members across the region.

SDOH-E partners and agreements

5. Complete the table below for each funded SDOH-E partner. Duplicate the row below 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 total SHARE budget (dollar amount) being allocated to the partner.

C) Briefly describe how the partner will be using the SHARE funds.

Note: For each partner, your CCO must have a partner agreement in place that meets requirements in guidance. You don't need to submit the agreements to OHA.

Project (match # above)	Partner name	SHARE budget for partner (\$)	Partner agreement	Describe the specific items, activities or services being funded with SHARE
1	NeighborImpact	\$651,706.78	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	Funds will be used to hire staff and support program development and growth so that the program can accept a greater volume of HRSN referrals.
2	Thrive Central Oregon	\$651,706.78	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	Funds will be used to hire staff and support program development and growth so that the program can accept a greater volume of HRSN referrals.

6. Are any of your partner agreements a subcontract as defined in CCO contract? ☐ Yes ☒ No
If yes, which ones?

Partner selection and community advisory council (CAC role)

7. Describe the process for identifying and selecting the SDOH-E partners for SHARE Initiative projects.

A. Below are some examples of CAC roles in SHARE. Check all boxes that apply.

- ☐ CAC determined SHARE priority areas.
- ☒ CAC created or approved the overall SHARE decision-making process.
- ☐ CAC developed a scoring rubric for reviewing SHARE proposals.
- ☐ CAC members recommended organizations to fund using SHARE dollars.
- ☐ CAC members reviewed SHARE proposals and made recommendations to CCO leadership.
- ☐ CAC made final SHARE project funding decisions.
- ☒ CAC will have a role in ongoing monitoring of SHARE projects.

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- B. Briefly describe what steps were taken to identify and select partners and who were involved (for example, CCO leadership, CCO staff, committee, advisory group, CAC). Be sure to include your CAC's designated role in SHARE Initiative spending decisions. (If applicable, also describe the ongoing engagement and feedback loop with the CAC as it relates to SDOH-E spending.)

PCS-CO engaged the CAC in 2024 to identify funding opportunities for its 2023 SHARE designation. During the CAC meeting, PCS expressed concerns about CBOs' capacity to support the region's significant incoming referrals for HRSN benefits, particularly housing. The CAC supported PCS-CO's recommendation to hold off on using SHARE Initiative funds until early 2025, after it assessed current capacity needs and gaps to administer the HRSN benefit more effectively.

In early 2025, PCS-CO consulted with the Central Oregon Social Care Network, a group of community providers focused on HRSN service delivery, to assess gaps and determine where additional capacity was needed to ensure adequate service delivery in the region. During this gap assessment, PCS-CO identified NeighborImpact and Thrive Central Oregon to support with SHARE Initiative funding, due to their trusted partnership in the community and their capacity to grow the HRSN program, especially in more rural parts of the PCS-CO region.

PCS-CO returned to the CAC in April 2025 to present its process for identifying SHARE Initiative funds proposals, present oversight opportunities, and request feedback. There was a robust discussion about the HRSN benefits and PCS-CO shared various quantitative and qualitative information, including lessons learned during the HRSN benefits implementation. The CAC elected to provide ongoing monitoring of SHARE-funded projects, and requested tracking the number of members served, enrollment requests, approved requests, invoices submitted over time, and the breakout of HRSN requests by PCS-CO city. Finally, the CAC expressed interest in inviting NeighborImpact and Thrive Central Oregon to future CAC meetings to provide updates, share stories of impact and their experience providing HRSN services, and learn more about how SHARE Initiative funds helped increase capacity to serve members across the region.

Section 3: Additional details

8. 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 personal identifiable information and electronic health records and hard copies thereof. Does the project require data sharing?

☐ Yes ☒ No

9. (*Optional*) CCOs may choose to include an evaluation plan. If so, describe or attach the evaluation plan for the SHARE spending plan portfolio or for each project, 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.

N/A