

## 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 a 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 are meeting 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*.

## 2024 SHARE Initiative Spending Plan Template

**CCO name:** PacificSource Community Solutions Lane (PCS-L)

**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.**

\$1,597,988.77 is the total amount of SHARE Initiative funding for PCS-L.

PCS-L reported \$609,981.58 on Exhibit L and contributed an additional \$988,007.19 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. <sup>1</sup>	SDOH-E domain	Populations served (list) <sup>2</sup>
1	Family Resource Center Transportation Support	Provide flexible support to families to meet non-medical transportation needs. This could include, but is not limited to support for gas, car repair, mileage reimbursement, rides, car	<input type="checkbox"/> Housing services and supports <input type="checkbox"/> Permanent supportive housing <input type="checkbox"/> Other (write in; for example,	<input checked="" type="checkbox"/> Neighborhood and built environment <input type="checkbox"/> Economic stability	Families in Lane County including Hispanic and Latino/a/x,

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

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

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		seats, or other expenses that facilitate transportation.	transitional housing, emergency shelter, affordable housing):	<input type="checkbox"/> Education <input type="checkbox"/> Social and community health	Spanish and Mam speaking, rural
2	<b>Secure Spaces, Stronger Futures: A Strategic Investment in Support for the Unhoused</b>	There are three areas of this project which will support services that help unhoused people find and maintain stable and safe housing or shelter through resource access and navigation services.	<input checked="" type="checkbox"/> Housing services and supports <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	Unhoused individuals in Lane County including people from marginalized communities regardless of their race/ethnicity or language spoken
3	<b>Shangri-La – HRSN Program Expansion</b>	Workforce Development: Increase capacity at Shangri-La to facilitate increase in referrals processed for HRSN and other non-billable housing programs supports.	<input checked="" type="checkbox"/> Housing services and supports <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 Lane County experiencing housing insecurity including people from marginalized communities regardless of their race/ethnicity or language spoken
4	<b>Laurel Hill – HRSN Program Expansion</b>	Workforce Development: Increase capacity at Laurel Hill to facilitate increase in referrals processed for HRSN and other non-billable housing program supports.	<input checked="" type="checkbox"/> Housing services and supports <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 Lane County experiencing housing insecurity including people from marginalized communities regardless of their race/ethnicity or language spoken

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5	<b>Lane County HSD – HRSN Program Establishment</b>	Workforce Development and Technology: Lane County Human Services Division (HSD) will hire staff, provide training, and technology resources to begin delivery of HRSN services.	<input checked="" type="checkbox"/> Housing services and supports <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 Lane County experiencing housing insecurity including people from marginalized communities regardless of their race/ethnicity or language spoken
6	<b>Equitable Social Solutions – HRSN Program Establishment</b>	Workforce Development and Technology: Equitable Social Solutions will hire staff, provide training, and technology resources to begin delivery of HRSN services.	<input checked="" type="checkbox"/> Housing services and supports <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 Lane County experiencing housing insecurity including people from marginalized communities regardless of their race/ethnicity or language spoken
7	<b>Willamette Activity Center (WAC) Renovations</b>	Oakridge Food Box is renovating space at the WAC to relocate to this facility from their current space located a few miles outside of their rural town. The relocation to WAC will improve access to healthy food, increase collaboration with other social services, and create a more visible and dignified space for clients.	<input type="checkbox"/> Housing services and supports <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 Oakridge/Westfir experiencing food insecurity including people from marginalized communities regardless of their race/ethnicity or language spoken

### CHP/statewide priorities

3. Which specific priorities, topics or domains within your CCO's most recent shared community health 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.
- **Ensure incomes are sufficient to meet basic costs of living (i.e., housing, childcare, food, transportation, etc.)**
    - **Project #1:** Funding will address transportation needs for families, supporting their access to basic services, resources, and employment.
    - **Projects #3-6:** These projects support households at risk of homelessness by increasing capacity for the HRSN benefit.
  - **Establish community conditions that support behavioral health and physical well-being**
    - **Project #2:** Funding will support housing and tenancy services, directly correlating to improved behavioral health and physical well-being.

This SHARE spending plan aligns with our CCO's shared community health improvement plan by addressing critical needs in transportation, housing, and overall well-being.

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

**Project #2:** Community Supported Shelters will directly support individuals who are unhoused and seeking stable housing. This project will fund resource navigation and tenancy services and will allow CSS to increase their capacity to assist more unhoused members in the community.

**Projects #3-6:** Will directly support the HRSN Housing program by vastly increasing current capacity limits, allowing more referrals to be processed in a timely manner and keep families housed that are at risk of homelessness.

### 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 to partner (\$)	Partner agreement	Describe the specific items, activities or services being funded with SHARE
1	United Way of Lane County	\$200,000	<input checked="" type="checkbox"/> Yes	Flexible funds distributed to Family Resource Centers to support family transportation needs and/or United

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			<input type="checkbox"/> No	Way direct purchase of gift cards to support and facilitate non-medical transportation for families.
2	Community Supported Shelters (CSS)	\$500,000	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	Funds will be used to hire a Program (resource) Coordinator, build a modular office space for client support, and acquire or upgrade CSS property to expand services. The project aims to provide safe shelter and resources to help individuals achieve stability.
3	Shangri-La	\$125,000	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	Funds will be used to hire two full-time staff that will increase the organizations capacity to accept and process HRSN referrals.
4	Laurel Hill	\$350,000	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	Funds will be used to hire staff and support program development and growth to accept more HRSN referrals.
5	Lane County HSD	\$200,000	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	Funds will be used to hire staff, stand up processes, and support program development to begin accepting referrals for the HRSN Housing benefit.
6	Equitable Social Solutions	\$125,000	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	Funds will be used to hire staff, stand up processes, and support program development to begin accepting referrals for the HRSN Housing benefit.
7	Oakridge Food Box	\$97,988.77	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	Funds will be used to support renovations at the WAC to enable the Oakridge Food Box to relocate there. These renovations will include asbestos abatement, demolition, and spatial improvements, ensuring the Oakridge Food Box can continue its vital work in a more accessible and supportive environment.

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.

- B. Briefly describe what steps were taken to identify and select partners and who was 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.)**

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The Community Advisory Council (CAC) was surveyed in June to establish priority areas for SHARE spending this year.

Project #1 was selected in alignment with CAC priority areas and Elements 9, 11, and 12 of the SDOH Screening and Referral Quality Incentive Measure. Based on CAC-identified priority populations, the Family Resource Centers (via United Way of Lane County) were identified by CCO staff and leadership as a pathway for broad reach across Lane County.

Project #2 was chosen based on CAC priority areas and input from CCO staff and leadership, aligning with the housing priority to address a significant community need.

Projects #3-6 were selected due to a higher-than-anticipated demand for HRSN housing services in Lane County, necessitating a rapid increase in HRSN service provider capacity. This need was discussed extensively during CAC and subgroup meetings.

Project #7 was selected based on the CAC's guidance to improve access to food in rural communities. Renovations at the WAC will allow the Oakridge Food Box program to move to a more centralized location for food distribution in Oakridge.

The CAC played a crucial role in priority setting and selection for the 2024 SHARE process and will receive continuous updates from funded organizations to monitor the impact of these investments in the community.

### **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 personally 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.

We are not requiring the awarded organizations to track specific metrics for these funds. Instead, we are asking them to present to the CAC on how the funds have impacted their work in the community. The organizations funded to increase HRSN capacity and establish themselves as HRSN service providers will be monitored based on the number of HRSN referrals they can accept, ensuring that community needs are being met.