

2023 Annual SHARE Initiative Spending Plan Template

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-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 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 (PCS) Marion County & Polk County CCO (Marion-Polk CCO)

CCO contact: Erin Fair Taylor, erin.fairtaylor@pacificsource.com

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.MCOCDeliverableReports@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](#))
\$407,426.71

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.
 1. The Marion-Polk CCO intends to use SHARE Initiative funds to support three community-led projects in 2024: the **Epping Homestead Branch of the Boys & Girls Club of Salem, Marion and Polk Counties (BGC)**; the **Soaring Heights Recovery Homes (SHRH)'s Robin's Nest – Home for Women**; and **Habitat for Humanity of the Mid-Willamette Valley (HHMWV)'s Independence Affordable Homeownership Development**.
 2. Together, these three projects will provide property improvements to a transitional housing site and bus passes for individuals in recovery, support two staff positions at the BGC's Epping Homestead Branch to coordinate youth programming designed to promote academic success and healthy lifestyles, and cover the costs of foundational infrastructure for a new affordable housing development in the rural community of Independence, Oregon.
 3. SHRH's Robin's Nest transitional housing site will serve women recovering from substance use, all of whom are homeless or at risk of homelessness, and their children, many of whom have child welfare involvement. The BGC's Epping Homestead Branch will continue to serve youth from the surrounding urban area, of which 95% or more live below the Federal Poverty Level and 76% are from an underserved student group. HHMWV's Independence Affordable Homeownership

2023 SHARE Initiative Spending Plan Template

Development project, meanwhile, will provide 10 new affordable homes for an estimated 40 individuals with low incomes who do not qualify for a traditional mortgage. Historically, 64% of those living in HHMWV properties identify as Black, Indigenous, or People of Color.

CHP/statewide priorities

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

The projects outlined here align with all three of the priorities in the shared 2021-2025 Marion-Polk Community Health Improvement Plan (CHIP): **Substance Use, Behavioral Health Supports, and Housing.**

The 2019 Marion-Polk Community Health Assessment and 2021-2025 CHIP Priority Area Work Groups highlighted youth substance use as an area of particular concern within the domain of Substance Use and emphasized the need for further investment in prevention. Three of the five population outcome measures and goals selected were designed to decrease the percentage of 11th graders in Marion and Polk Counties ingesting harmful substances, and one of the chosen aims was to "Increase youth perception of harm of alcohol, tobacco, and marijuana to prevent substance use." BGC's Epping Homestead Branch fulfills an important function in the greater Salem community by offering youth programming that helps to prevent future substance use by encouraging the adoption of healthy habits. The same programming, by connecting youth to social support and positive role models, also constitutes an upstream form of Behavioral Health Support. The 2021-2025 CHIP noted that the Marion-Polk region is seeing an accumulation of mental health risk factors as youth advance through grade levels in school and that barriers to positive educative experiences for BIPOC youth and the prevalence of Adverse Childhood Experiences were concerning trends in the community. By engaging at-risk youth in structured programming in a trauma-informed space, the BGC is helping to address these challenges in the Marion-Polk region.

The 2021 CHIP Substance Use Priority Area Work Group also identified adult substance use, particularly opioid use, as a significant health issue for the Marion-Polk region, and especially for the unhoused population. For this reason, one of the stated aims of the 2021-2025 CHIP was to "Promote a community environment that supports the relationship between substance use disorder recovery and overall health and wellness," including connecting people in recovery with peer support and peer wellness specialists. SHRH's new Robin's Nest transitional home, once the necessary renovations and installations are complete, will provide housing-insecure women and their children with a safe and comfortable environment in which to rebuild their lives. At Robin's Nest, they will benefit from the support of traditional health workers who can connect them with employment and education resources. Moreover, in providing bus passes to residents with SHARE funds, SHRH will be helping to remove the barrier of transportation for those transitioning to self-sufficiency. By providing residents with a sense of security and stability, the Robin's Nest transitional home will also prevent the stress and anxiety that can lead to relapse. Thus, SHRH's project aligns

2023 SHARE Initiative Spending Plan Template

with the Substance Use, Behavioral Health Supports, and Housing CHIP priority areas for the Marion-Polk region.

Finally, HHMWV's Independence Affordable Homeownership Development project strongly aligns with the Housing priority in the 2021-2025 Marion-Polk County CHIP. The Marion-Polk region, like many in Oregon, places a high rental burden on those with modest incomes. The lack of affordable housing was a key theme that came up during the multiple townhall sessions held to inform the 2019 Community Health Assessment, and residents expressed that the shortage leads many in the community to become homeless. Given the situation, the CHIP targeted a decrease in the rate of homelessness and the percentage of renters who pay 30% or more of their household income on rent, in part by advocating for an increase in the housing supply. HHMWV's new housing development in Independence will provide homes to at least 10 households who have been unable to secure affordable housing and that experience health and safety issues, over-crowding, or a cost burden. It is significant to note that buyers who purchase their home through Habitat for Humanity receive an affordable mortgage with mortgage payments capped at 30% of their household income and also are offered courses in financial literacy and home maintenance. This means that the Independence subdivision will not only help to increase the housing supply, but also ensure that each family's home expenses are sustainable. Research has shown that low-income families who transition into homeownership are 37% less likely to experience subsequent residential mobility. Moving into more affordable and stable housing is also associated with a decrease in emergency department visits and greater utilization of primary care.

Over the long term, the stability of homeownership and property investment will begin to build security and even intergenerational wealth for these extended families. On average, each year of homeownership is associated with an additional \$9,500 in net wealth gain.

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

Both the Robin's Nest project and the Independence Affordable Homeownership Development project align with the statewide priority of housing-related services and supports. The Robin's Nest project will provide property improvements to a transitional housing site for individuals recovering from substance use, all of whom are homeless or face housing insecurity and are in need of an intermediary step between shelters or high-risk living conditions and permanent housing. Meanwhile, the Habitat for Humanity project will lay the groundwork for the construction of 10 new homes for low-income households in a rural part of Polk County. The development will feature a walking path that connects the neighborhood not only to a park and a garden but to a larger planned trail system leading to the downtown waterfront, enabling physical activity and social connections to promote health. Both projects will not only provide community members with safe and restorative living spaces, but also ensure residents' future success through the provision of supportive services, including social needs screening, resource navigation, and/or education.

2023 SHARE Initiative Spending Plan Template

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: Soaring Heights Recovery Homes

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: Boys & Girls Club of Salm, Marion and Polk Counties

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: Habitat for Humanity of the Mid-Willamette Valley

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.

2023 SHARE Initiative Spending Plan Template

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

The SDOH-E partners identified above were selected for potential SHARE Initiative project funding by the regional Health Council after their review of 50 separate letters of intent (LOI) submitted through a universal Community Impact Grants LOI process during the summer of 2023. Using a universal LOI process created a low barrier for community-based organizations/SDOH-E partners to access funding by enabling them to complete a single letter of intent for a variety of different funding sources available through the Health Council and CCO, including SHARE Initiative, Community Benefit Initiative, Community Impact Committee funds, and Shared Savings.

From the submission pool, the Willamette Health Council identified six projects that best met the criteria for SHARE Initiative spending as opposed to other funding streams and advised the CCO of their recommendations. The CCO director and CAC program manager together reviewed this select group of LOIs and identified three projects with the strongest adherence to SHARE requirements and CHIP priorities as well as the greatest potential for community impact in priority populations across the region. Prospective SHARE recipients were then invited to participate in an interview process, and each received a presentation on SHARE requirements. After assuring that prospective recipients fully understood the funding opportunity and verifying that their projects would meet SHARE criteria, the CCO asked these SDOH-E partners to submit a full SHARE funding proposal for consideration.

7. 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.

8. 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

9. 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 CCO delivered a presentation to CAC members on the SHARE Initiative in March of 2023, outlining the spending requirements and the four SDOH-E priority areas along with housing-related services and supports, to ensure that CAC members were fully informed of both the source and intended use of this funding stream. CAC members were integrally involved in creating the universal LOI process referenced above, and the CAC program manager reviewed potential SHARE projects and interviewed prospective SDOH-E partners alongside the CCO director. In October 2023, the CCO director presented to CAC on the three final projects moved forward for SHARE Initiative funding and secured approval from the CAC for use of these dollars. Throughout 2024, the CCO will report back to CAC on progress and outcomes

2023 SHARE Initiative Spending Plan Template

and provide the CAC with both a mid-year report and a copy of the final SHARE spending report submitted to OHA.

Section 3: Additional details

- 10. (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.**

In 2024, the Boys & Girls Club of Salem, Marion and Polk Counties plans to reach 500 youth through the Epping Homestead Branch, at least 300 of which will take part in healthy habits and lifestyle programming. Given that more than 95% of youth in a one-mile radius of the club come from families living below the Federal Poverty Line, virtually all of the youth served through the project are expected to be PacificSource or OHP members. BGC will evaluate progress toward these outcomes by collecting attendance using an internal data system which also gathers demographic information and tracks academic outcomes for participants.

SHRH's Robin's Nest transitional housing site plans to complete all of the identified repairs and renovations to the property by December 31, 2024 or sooner, benefitting at least 7 women in recovery with or without minor children. In addition, SHRH plans to distribute 220 monthly and daily bus passes to the residents to enable them to access work, education, and healthcare. Given the many challenges that this population faces, it is likely that most, if not all, of the women and children served will be PacificSource or OHP members. SHRH will measure the impact of SHARE funding by tracking the progress of the property improvements and documenting the bus passes distributed as well as the number of residents and children who benefit from services throughout the year.

The outcomes of the HHWMV's Independence Affordable Homeownership Development will be intensively tracked through permitting, contracting, and environmental reviews conducted by the City of Independence as well as HHWMV itself. The project's impact will be demonstrable by the completion of sidewalks, curbs, a paved street, and a walking path to the neighborhood park. Installed underground water, sewer, electrical, and stormwater systems, while less visible, will enable HHWMV to proceed with construction of the actual buildings for future occupancy by low-income households, many of which will be PacificSource or OHP members.

- 11. 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 Boys & Girls Club of Salem, Marion and Polk Counties, Inc. (“BGC”), 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 December 31, 2023 or PCS’s receipt of approval from the Oregon Health Authority (“OHA”) of PCS’s SHARE Initiative Spending Plan (the “Effective Date”).

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

1. **The SHARE Initiative Program.** BGC shall provide the services described in this section and further agrees to commit to all OHA requirements for SHARE recipients, as outlined in PCS’s SHARE Grant Guidelines 2023 and the application submitted by BGC. PCS shall provide compensation as provided in this section. Requirements are as follows:
 - a. **Scope of Work.** The BGC’s “Epping Homestead Branch of the Boys & Girls Club of Salem” will provide a safe space for youth to attend a variety of programs aimed at supporting academic success, character and citizenship development, and healthy lifestyles. The priority population for the Epping Homestead Branch is youth in grades 1 through 12. About 3,700 children and teens live within a 1-mile radius of the club and more than 95% of them come from families living below the Federal Poverty Line. More than 76% of students in the area are from an underserved student group.
 - b. **Social Determinants of Health and Equity (“SDOH-E”).** As a key SDOH-E partner, the “Epping Homestead Branch of the Boys & Girls Club of Salem” project will:
 - i. Assist families, including Marion-Polk CCO members, with navigating to and applying for benefits that address economic stability, neighborhood and built environment, education, social and community health, food and housing insecurity, transportation, and other identified SDOH-E needs.
 - ii. Utilize the Unite Us’ ConnectOregon Community Information Exchange platform to screen and refer BGC members and their families to resources and services that address identified SDOH-E needs.
 - c. **Compensation and Payment.** PCS will distribute \$100,000.00 in funds to BGC, pending OHA’s approval of PCS’s SHARE Initiative Spending Plan (which will be submitted to OHA no later than December 31, 2023). PCS will issue payment within 45 days of approval. These funds are intended to support two staff salaries at the BGC’s Epping Homestead

Branch in northeast Salem. Additionally, indirect costs, including staff benefits, shall not exceed 40% of the total amount of the SHARE Initiative dollars.

- d. **Program Evaluation.** BGC's Epping Homestead Branch is a new, 26,000-square foot facility that is projected to serve at least 500 youth in 2024. This estimate is based on the number of youth served since the branch opened in October of 2022 (400) with projected 25% growth. Expected final outcomes for this project include:
- i. 500 youth will attend the Epping Homestead Branch.
 - ii. 300 Epping members will take part in health habits and lifestyles programming, including "Passport to Manhood" and "SMART Girls."
 - iii. 290 Epping members will participate in homework help and tutoring programs.
 - iv. 245 Epping members will participate in do-it-yourself ("DIY") science, technology, engineering, and math ("STEM") activities.


BGC will evaluate progress toward its program goals and capture program highlights by tracking attendance at specific programs and workshops using their MyClubHub system, which also tracks member demographics, frequency of attendance, member tenure, high school graduation rates, and more. BGC also participates in ongoing evaluation of its programs and services through Boys & Girls Club of America's National Youth Outcomes Indicator survey; this real-time data will allow BGC to make adjustments to programming as needed. The program outcomes will align with the *Substance Use and Behavioral Health Support* priorities from the Marion-Polk CCO's Community Health Improvement Plan.

- e. **Reporting.** BGC will engage in data collection (as described in the SHARE Initiative Spending Plan), sharing, and reporting, including:
- i. Informal mid-cycle check-in between PCS and BGC (May or June 2024).
 - ii. 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 (CAC). BGC will share deidentified, aggregated data with the CAC, including: total number of youth attending the Epping Homestead Branch, number of youth taking part in healthy habits and lifestyles programming, number of youth participating in homework help and tutoring programs, and number of youth participating in DIY STEM activities.
 - iii. Number of youth and/or families screened and referred to community partners for services via the Connect Oregon Community Information Exchange platform.
 - iv. Number of youth and/or families assessed for screening status but not actually screened, so as to prevent over-screening.
 - v. A brief narrative on any challenges with use of the Connect Oregon Community Information Exchange platform.
 - vi. There will be no member-level data sharing between PCS and BGC as part of this grant.


2. **Term.** The understandings and commitments made by the Parties pursuant to this MOU shall remain in effect for one year.
3. **Non-Exclusive.** This MOU does not create an exclusive arrangement between PCS and BGC, 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: Peter F. Davidson
Title: Executive VP/CFD
Date: 11/21/23

**Boys & Girls Club of Salem,
Marion and Polk Counties, Inc.**

By: 
Name: Sue Bloom
Title: CEO
Date: 11/30/23

PacificSource Community Solutions- Marion and Polk

SHARE Initiative- Recipient Budget Description

Information in shaded boxes will be redacted before sharing this information

Date:	10/9/23
Organization:	Boys & Girls Club of Salem, Marion & Polk Counties
Person completing budget:	Anne Lewis, Director of Grants

Personnel name with Project Role and FTE	Salary Cost		Sub-Total	%
[REDACTED]	52,000	7,800	59,800	
[REDACTED]	34,957	5,244	40,201	
Sub-total	\$86,957	\$13,044	\$100,001	100%

Category	Description	Cost	Sub-Total	%
Equipment costs <i>Itemize any item over \$500</i>				
		0	0	0%
Materials and supplies <i>Group in broad categories</i>				
			0	0%
Travel and Other Expenses <i>Group in broad categories</i>				
			0	
			0	
			0	
			0	0
Total amount requested for project			\$100,001	100%

TOTAL

MEMORANDUM OF UNDERSTANDING SHARE INITIATIVE

This Memorandum of Understanding (“MOU”), by and between PacificSource Community Solutions (“PCS”) and Habitat for Humanity of the Mid-Willamette Valley (“HHMWV”), 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 December 31, 2023 or PCS’s receipt of approval from the Oregon Health Authority (OHA) of PCS’s SHARE Initiative Spending Plan (the “Effective Date”).

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

1. **The SHARE Initiative Program.** HHMWV shall provide the services described in this section and further agrees to commit to all OHA requirements for SHARE recipients, as outlined in PCS’s SHARE Grant Guidelines 2023 and the application submitted by HHMWV. PCS shall provide compensation as provided in this section. Requirements are as follows:
 - a. **Scope of Work.** HHMWV’s “Independence Affordable Homeownership Development” project will cover both soft and hard costs for installing the necessary infrastructure to prepare a new single-family home site for vertical construction. The homes will be sold to low-income households with affordable, income-based mortgages.
 - b. **Social Determinants of Health and Equity (“SDOH-E”).** As a key SDOH-E partner, HHMWV will:
 - i. Assist families, including Marion-Polk CCO members, with navigating to and applying for benefits that address economic stability, neighborhood and built environment, education, social and community health, food and housing insecurity, transportation, and other identified SDOH-E needs.
 - ii. Explore the feasibility of adopting Unite Us’ ConnectOregon Community Information Exchange platform to screen and refer individuals and families to resources and services that address identified SDOH-E needs.
 - c. **Compensation and Payment.** PCS will distribute \$157,427.00 in funds to HHMWV, pending OHA’s approval of PCS’s SHARE Initiative Spending Plan (which will be submitted to OHA no later than December 31, 2023). PCS will issue payment within 45 days of approval. These funds are intended to support the infrastructure phase of a new affordable housing development in Independence, Oregon. Additionally, indirect costs, including staff benefits, shall not exceed 40% of the total amount of the SHARE Initiative dollars.

- d. **Program Evaluation.** HHMWV's "Independence Affordable Homeownership Development" project, when complete (projected date: December 2027), will provide new, energy-efficient single-family homes to ten low-income households, or approximately 40 community members. The population served will be households in Marion and Polk Counties earning between 50 and 80 percent of the area median income.

Outcomes for this project include:

- i. Completing engineering and architectural work, including environmental reviews;
- ii. Receiving building permits;
- iii. Completing the installation of underground water, sewer, electrical, and stormwater systems;
- iv. Completing the installation of sidewalks, curbs, and a new street;
- v. Constructing a walking path to connect the subdivision to a neighborhood park.

HHMWV will demonstrate and evaluate progress toward these outcomes through intensive project management, documentation of contracting for engineering and architecture professional services, and passage of final inspection for the site. The program outcomes will align with the *Housing* priority from the Marion-Polk CCO's Community Health Improvement Plan as well as the *Economic drivers of health* priority from the 2020-2024 State Health Improvement Plan.


- e. **Reporting.** HHMWV will engage in data collection (as described in the SHARE Initiative Spending Plan), sharing, and reporting, including:
- i. Informal mid-cycle check-in between PCS and HHMWV (May or June 2024).
 - ii. 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 (CAC). HHMWV will share project updates and progress to date.
 - iii. Number of individuals and/or families screened and referred to community partners for services via the Connect Oregon Community Information Exchange platform, if available.
 - iv. Number of individuals and/or families assessed for screening status but not actually screened, so as to prevent over-screening, if available.
 - v. A brief narrative on any challenges with adoption or use of the Connect Oregon Community Information Exchange platform.
 - vi. There will be no member-level data sharing between PCS and HHMWV as part of this grant.

2. **Term.** The understandings and commitments made by the Parties pursuant to this MOU shall remain in effect for two years.

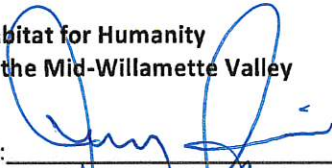
3. **Non-Exclusive.** This MOU does not create an exclusive arrangement between PCS and HHMWV, and either Party may enter into agreements with other parties for similar or the same services or projects.
4. **Liability.** No liability will arise or be assumed between the Parties as a result of this MOU.
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: Peter F. Davidson
Title: Executive VP & CFO
Date: 11/21/23

**Habitat for Humanity
of the Mid-Willamette Valley**

By: 
Name: Jerry Angris
Title: Executive Director
Date: 11/21/23

PacificSource Community Solutions- Marion and Polk

SHARE Initiative- Recipient Budget Description

Information in shaded boxes will be redacted before sharing this information

Date:	10/31/23
Organization:	Habitat for Humanity of the Mid-Willamette Valley
Person completing budget:	Adena Mikkelsen

Personnel name with Project Role and FTE	Salary Cost	35% Benefits	Sub-Total	%
	\$ 32,500	11,375	43,875	
	\$ 19,500			
	\$ 12,000			
	\$ 21,250	7,438	28,688	
Sub-total	\$85,250	\$18,813	\$72,563	46%

Category	Description	Cost	Sub-Total	%
Equipment costs <i>Itemize any item over \$500</i>				
		0	0	0%
Materials and supplies <i>Group in broad categories</i>				
			0	0%
Travel and Other Expenses <i>Group in broad categories</i>	<i>Land purchase</i>	\$395,000		
	<i>Engineering and Architecture Services</i>	\$65,000		
	<i>Site Development</i>	\$531,684		
		0		
		0		
		0		
		0		991,684
Total amount requested for project			\$157,427	676%

TOTAL

#DIV/0!

MEMORANDUM OF UNDERSTANDING SHARE INITIATIVE

This Memorandum of Understanding (“MOU”), by and between PacificSource Community Solutions (“PCS”) and Soaring Heights Recovery Homes (“SHRH”), 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 December 31, 2023 or PCS’s receipt of approval from the Oregon Health Authority (OHA) of PCS’s SHARE Initiative Spending Plan (the “Effective Date”).

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

1. **The SHARE Initiative Program.** SHRH shall provide the services described in this section and further agrees to commit to all OHA requirements for SHARE recipients, as outlined in PCS’s SHARE Grant Guidelines 2023 and the application submitted by SHRH. PCS shall provide compensation as provided in this section. Requirements are as follows:
 - a. **Scope of Work.** SHRH’s “Robin’s Nest-Home for Women-Small Building Projects” will provide property improvements to a transitional housing site in Keizer for individuals recovering from substance use and related issues. The priority population for Robin’s Nest-Home for Women are Marion County women, with or without minor children, who are in need of an intermediate step between permanent housing and shelters, homelessness, and other toxic living conditions. All of the individuals that move into SHRH homes are low-income and facing housing insecurity, and about half are homeless. Many children of the residents are in the foster care system.
 - b. **Social Determinants of Health and Equity (“SDOH-E”).** As a key SDOH-E partner, SHRH will:
 - i. Assist residents, including Marion-Polk CCO members, with navigating to and applying for benefits that address economic stability, neighborhood and built environment, education, social and community health, food and housing insecurity, transportation, and other identified SDOH-E needs.
 - ii. Explore the feasibility of adopting Unite Us’ ConnectOregon Community Information Exchange platform to screen and refer residents to resources and services that address identified SDOH-E needs.
 - c. **Compensation and Payment.** PCS will distribute \$150,000.00 in funds to SHRH, pending OHA’s approval of PCS’s SHARE Initiative Spending Plan (which will be submitted to OHA no later than December 31, 2023). PCS will issue payment within 45 days of approval.

These funds are intended to cover the costs of a number of property improvements to The Robin's Nest site which will increase the quality of life for residents and ensure that the space is in good repair and well-maintained. The funds will be used for heating, air conditioning, and duct/ventilation work; landscaping, including sprinkler installation and tree removal; fencing; structural repairs and updates to doors and windows; and installation of a storage shed, lockers for residents, a concrete walkway, and a covered deck. Together, this work is expected to cost \$120,550.00. Remaining funds will be used to provide bus passes to residents and cover .2 FTE staff time to manage the project. Additionally, indirect costs, including staff benefits, shall not exceed 40% of the total amount of the SHARE Initiative dollars.

- d. **Program Evaluation.** SHRH's "Robin's Nest-Home for Women-Small Building Projects" is projected to provide at least seven women with or without minor children, or as many as 25 adults and ten or more children annually, with safe and structured housing. This estimate is based on the fact that after opening in May of 2023, without advertising the site to the community, SHRH was able to fill 5 beds within two days. Expected final outcomes for this project include:

- i. Completion of all of the identified repairs and renovations to the property by December 31, 2025 or sooner.
- ii. Distribution of 100 monthly bus passes and 120 daily bus passes to residents.


These outcomes align with the *Housing, Behavioral Health Supports, and Substance Use* priorities from the 2021-2025 Marion-Polk Community Health Improvement Plan as well as the *Adversity, trauma, and toxic Stress, Behavioral Health, and Economic drivers of health* priorities from the 2020-2024 State Health Improvement Plan.

- e. **Reporting.** SHRH will engage in data collection (as described in the SHARE Initiative Spending Plan), sharing, and reporting, including:
- i. Informal mid-cycle check-in between PCS and SHRH (May or June 2024)
 - ii. 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 (CAC). SHRH will share deidentified, aggregated data with the CAC, including: total number of individuals served, percentage moved into transitional or permanent housing, and percentage of individuals connected to other resources that promote housing stabilization.
 - iii. Number of clients screened and referred to each type of social needs service (food, transportation, housing), if available.
 - iv. Number of clients assessed for screening status but not actually screened, so as to prevent over-screening, if available.
 - v. A brief narrative on any challenges with adoption or use of the Connect Oregon Community Information Exchange platform.
 - vi. There will be no member-level data sharing between PCS and SHRH as part of this grant.


2. **Term.** The understandings and commitments made by the Parties pursuant to this MOU shall remain in effect for two years.
3. **Non-Exclusive.** This MOU does not create an exclusive arrangement between PCS and SHRH, 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: Peter F. Davidson
Title: Executive VP/CEO
Date: 11/21/23

Soaring Heights Recovery Homes

By: 
Name: Eric Frazier
Title: Executive Director
Date: 11.21.2023

PacificSource Community Solutions- Marion and Polk

SHARE Initiative- Recipient Budget Description

Information in shaded boxes will be redacted before sharing this information

Date:	10/8/23
Organization:	Soaring Heights Recovery Homes
Person completing budget:	Eric Rasor

Personnel name with Project Role and FTE	Salary Cost	35% Benefits	Sub-Total	%
	18,111	6,339	24,450	
		0	0	
Sub-total	\$18,111	\$6,339	\$24,450	16%

Category	Description	Cost	Sub-Total	%
Equipment costs <i>Itemize any item over \$500</i>				
		0	0	0%
Materials and supplies <i>Group in broad categories</i>	Replace duct work	\$11,300		
	2 stage heat pump-central air	\$14,750		
	Landscape and sprinklers	\$34,500		
	Storage shed (12'x16')	\$10,000		
	Tree Removal	\$2,500		
	Fix dryrot by front door	\$3,500		
	Fence addition and repair	\$2,500		
	Update remaining windows	\$5,000		
	New back deck w/cover	\$20,000		
	Concrete walkway	\$10,000		
	Refrigerator outlet	\$1,000		
	Install lockers/storage	\$5,500		
			120,550	80%
Travel and Other Expenses <i>Group in broad categories</i>	Bus passes	\$5,000		
		0		
		0		
		0		
		0		
		0		
		0	5,000	3%
Total amount requested for project			\$150,000	100%

TOTAL

#DIV/0!