

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*.

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CCO name: PacificSource Community Solutions - Marion/Polk

CCO contact: Erin Fair Taylor, erin.fairtaylor@pacificsource.com, 503-802-5966

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.
\$1,504,186.19

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	Coral House Permanent Supportive Housing	Funds a property manager to oversee a 27-room, single-occupancy permanent supportive housing facility for women seeking to exit homelessness. Residents will be offered supportive services including non-medical transportation, tenant education, and social services and healthcare navigation.	<input checked="" type="checkbox"/> Housing services and supports <input checked="" type="checkbox"/> Permanent supportive housing <input type="checkbox"/> Other (write in; for example, transitional housing, emergency shelter, affordable housing):	<input type="checkbox"/> Neighborhood and built environment <input checked="" type="checkbox"/> Economic stability <input checked="" type="checkbox"/> Education <input checked="" type="checkbox"/> Social and community health	Women exiting homelessness with complex health and social needs

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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2	Greater Woodburn Opportunity Center	Funds the final predevelopment phase of a new human services center, including completion of the required assessments and studies for city annexation along with design of infrastructure (streets, sidewalks, and utilities) for a new farmworker housing development, and establishes a vehicle maintenance and repair relief fund for residents of low-income housing.	<input checked="" type="checkbox"/> Housing services and supports <input type="checkbox"/> Permanent supportive housing <input checked="" type="checkbox"/> Other (write in; for example, transitional housing, emergency shelter, affordable housing): 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	Farmworkers and other community members in the greater Woodburn area
3	Service Coordination at Affordable Housing	Funds Client Services Advocates to act as case managers and navigators to connect residents of affordable housing with stabilization services. Also funds drivers for ADA-accessible vans for non-medical-related transportation of residents and community members.	<input checked="" type="checkbox"/> Housing services and supports <input type="checkbox"/> Permanent supportive housing <input checked="" type="checkbox"/> Other (write in; for example, transitional housing, emergency shelter, affordable housing): Affordable housing	<input type="checkbox"/> Neighborhood and built environment <input checked="" type="checkbox"/> Economic stability <input type="checkbox"/> Education <input type="checkbox"/> Social and community health	Households living in and entering affordable housing
4	Preventing Family Homelessness in Marion-Polk Counties	Keeps families safely housed through the provision of one-time rental assistance to populations that are ineligible for HRSN as well as supports to retain employment, such as transportation and work clothing. Provides financial literacy and life skills classes for families at risk of homelessness.	<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): Affordable housing	<input type="checkbox"/> Neighborhood and built environment <input checked="" type="checkbox"/> Economic stability <input checked="" type="checkbox"/> Education <input type="checkbox"/> Social and community health	Families facing homelessness in Marion and Polk Counties
5	Affordable Home Ownership Development in Salem	Funds interior and exterior renovations to a new affordable single-family home which will be sold with a mortgage capped at 30% of household income. Project will be completed by the end of 2025 and foster both family stability and intergenerational wealth.	<input type="checkbox"/> Housing services and supports <input type="checkbox"/> Permanent supportive housing <input checked="" type="checkbox"/> Other (write in; for example, transitional housing, emergency shelter, affordable housing): Affordable housing	<input checked="" type="checkbox"/> Neighborhood and built environment <input checked="" type="checkbox"/> Economic stability <input type="checkbox"/> Education <input type="checkbox"/> Social and community health	Projected to serve a family of five individuals
6	Creating Equal Housing Opportunities Program	Funds the provision of housing supports for individuals that are not eligible for HRSN housing benefits and the certification of two instructors, one of whom will be bilingual, to deliver trauma-	<input checked="" type="checkbox"/> Housing services and supports <input type="checkbox"/> Permanent supportive housing <input type="checkbox"/> Other (write in; for example, transitional housing,	<input type="checkbox"/> Neighborhood and built environment <input checked="" type="checkbox"/> Economic stability <input checked="" type="checkbox"/> Education	Individuals and families experiencing homelessness or at risk of homelessness,

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		informed tenant education courses with provided meals to individuals and families experiencing housing instability. Supports also include covering the costs of bicycles, bus passes, and gas cards for non-medical-related transportation needs.	emergency shelter, affordable housing):	<input type="checkbox"/> Social and community health	particularly individuals or heads of households diagnosed with Intellectual or Developmental Disabilities (I/DD), mental health disorders, and/or substance use disorders
7	Punx with Purpose Community-Based Service Center: Stormie's Place	Funds a new center for at-risk youth aged 11-18 that will offer comprehensive support services such as case management, life skills activities, social connections, non-medical transportation, and basic needs to reduce youth homelessness and food insecurity.	<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 type="checkbox"/> Neighborhood and built environment <input checked="" type="checkbox"/> Economic stability <input type="checkbox"/> Education <input checked="" type="checkbox"/> Social and community health	Youth aged 11 to 18 living in Marion or Polk Counties
8	Host Home Purchase	Funds the purchase of a moving truck and a new temporary host home where recently arrived refugee families of up to nine people can stay and cook meals, saving them costly hotel bills and avoiding separation while they work to secure permanent housing. The lot has the capacity to be developed into additional housing in the future.	<input type="checkbox"/> Housing services and supports <input type="checkbox"/> Permanent supportive housing <input checked="" type="checkbox"/> Other (write in; for example, transitional housing, emergency shelter, affordable housing): Transitional 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	Recently arrived refugee families in Salem
9	Community Connections Program	Funds a bilingual outreach worker and the purchase of a wheelchair-accessible van to be used to transport shelter residents for non-medical purposes, helping to address transportation barriers in a rural area of Marion County. The van will enable those living at the shelter to obtain social services, housing, employment, and healthy	<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 type="checkbox"/> Neighborhood and built environment <input checked="" type="checkbox"/> Economic stability <input type="checkbox"/> Education <input checked="" type="checkbox"/> Social and community health	Residents of Sheltering Silverton's low-barrier homeless shelter

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		meals and participate in recovery/support groups.			
10	Confederated Tribes of Warm Springs-Culture & Heritage Committee (CTWS C&HC)	CTWS C&HC will identify a consultant to assist with the development of a Cultural Center Strategic Plan.	<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 checked="" type="checkbox"/> Education <input checked="" type="checkbox"/> Social and community health	American Indian/ Alaska Native
11	The Confederated Tribes of Grand Ronde	Grand Ronde Health and Wellness Center's public health program will incorporate Chinuk WaWa language in their programs through the support and work of their cultural specialist.	<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 checked="" type="checkbox"/> Education <input checked="" type="checkbox"/> Social and community health	American Indian/ Alaska Native
12	The Confederated Tribes of Siletz Indians (CTSI)	The Confederated Tribes of Siletz Indians plan to develop a community recreation center that will provide access to the revitalization of traditional food practices, healthy food activities, education and physical activities for CTSI Tribal Members and the Community of Siletz.	<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 checked="" type="checkbox"/> Education <input checked="" type="checkbox"/> Social and community health	American Indian/ Alaska Native
13	Chemawa Indian School	Chemawa Indian School is a federal boarding school for Native American students within Marion County. The school's campus emphasizes the languages, heritage, and culture of its diverse Native communities. Supporting the Chemawa Culture Club directly impacts and ensures each student has the opportunity to participate in culturally appropriate and enhanced educational opportunities.	<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 type="checkbox"/> Neighborhood and built environment <input type="checkbox"/> Economic stability <input checked="" type="checkbox"/> Education <input checked="" type="checkbox"/> Social and community health	American Indian/ Alaska Native

CHP/statewide priorities

- 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

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and *briefly* describe how your SHARE spending plan aligns with your CCO's shared community health improvement plan.

- **Housing:** The SHARE Initiative spending plan strongly aligns with the 2021-2025 Marion-Polk Community Health Improvement Plan (CHIP)'s priority of Housing and the associated goals and aims to decrease the rate of homelessness, to reduce the risk of residents becoming homeless or returning to homelessness, to increase the housing supply, and to decrease the percentage of renters who pay 30% or more of household income on rent. Nearly two-thirds (eight out of thirteen) of the projects selected for SHARE funding by the CCO this year seek to improve housing stability and sustainability by establishing new affordable housing, transitional housing, permanent supportive housing, and staffing or services to help people find and maintain stable housing, including resource connection, case management, and workshops on tenancy rights and responsibilities.
- **Substance Use:** The 2021-2025 Marion-Polk CHIP identified Substance Use as a priority area for intervention in the Marion-Polk region, and one of the aims was to "Promote a community environment that supports the relationship between substance use disorder recovery and overall health and wellness." Several SHARE projects, particularly 1, 3, 6, and 9, will serve people with substance use disorders and work to connect them not only to critical services like behavioral health or substance use treatment, but also recovery/support groups, housing, and employment, in order to promote their health and wellness holistically.
- **Behavioral Health Supports:** Behavioral Health Supports was the third and final priority of the 2021-2025 Marion-Polk CHIP. The aims of the CHIP in this arena were to reduce depression rates across the lifespan, improve mental health resilience, and improve access to behavioral health care. Many of the SHARE projects described in this spending plan will help people engage with behavioral health care through case management, system navigation, and peer support to address depression, trauma, and addiction. For example, project 3 will connect residents of affordable housing with stabilization services for behavioral/mental health needs, and project 7 will fund a community center where young adults can access peer support from people with similar lived experience.

All four of the tribal investments connect to the aim of improving mental health resilience (Aim E) by destigmatizing mental health struggles through teaching about historical traumas (project 10); by engaging children and families in language revitalization and education through cultural opportunities (project 11 and 13); and by reclaiming food sovereignty and engaging in traditional cultivation practices to create a sense of community, belonging and a connection to the past (project 12).

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).

Eight out of the thirteen projects selected for SHARE funding by the Marion/Polk CCO this year directly address the statewide priority of housing-related services and supports. Projects 1, 2, 3, 4, 6, and 9 will connect individuals and families in the Marion-Polk community with housing services and/or pre-tenancy supports. Project 1 will provide stable and permanent supportive housing for

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women exiting homelessness with complex social and health needs, projects 2 and 5 will establish new affordable housing for low-income families or individuals in the region, and project 8 will purchase a property to serve as transitional housing specifically for recently arrived refugees or “new neighbors.” Finally, project 7 supports upstream prevention of youth homelessness through increased engagement with community services.

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	Church at the Park	\$135,200.00	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	\$100,000 will cover the cost of salary/wages and fringe benefits for a 1 FTE property manager for permanent supportive housing as well as supplies, rental management software, and indirect costs. The remaining \$35,200 is an investment designated specifically for the provision of transportation supports for community members: the organization will purchase a vehicle to transport program participants to and from community services, excluding health services that are eligible for NEMT.
2	Community Resource Trust	\$135,320.94	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	\$100,000 will be used to host community meetings, pursue zoning approvals and city annexation of undeveloped/unincorporated land, and pay for infrastructure (streets, sidewalks, and utilities) design for the community services center and affordable housing development. The remaining \$35,320.94 is an investment designated specifically for the provision of transportation supports for residents of low-income housing: the organization will provide bus passes and pay for vehicle maintenance and repairs.
3	Crossroads Communities	\$123,200.00	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	\$88,000 will fund the salary/wages, fringe benefits, and indirect costs of administration for new Client Service Advocates who can connect program participants with system navigation. The remaining \$35,200 is an investment designated specifically for the provision of transportation supports: they will pay the wages for drivers of ADA-accessible vans to

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				transport residents to and from non-NEMT eligible appointments/services.
4	Family Promise	\$115,200.00	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	\$80,000 will be directed toward rental assistance for those who are not eligible for HRSN housing benefits and employment supports as well as the costs of delivering workshops on financial literacy and life skills for families and providing case management sessions. The remaining \$35,200 is an investment designated specifically for the provision of transportation supports: the funds will be used to purchase a vehicle to provide families with transportation to meet non-medical needs, such as transfers to and from shelters, employment, social services appointments, laundromats, etc.
5	Habitat for Humanity of the Mid-Willamette Valley	\$100,000.00	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	Funds will enable the organization to hire contractors and purchase construction materials to perform numerous renovations to a 3 bedroom, 1.5 bath property. This rehab work will prepare the property for sale to a family with limited income and include replacing interior and exterior doors, installing energy-efficient appliances and windows, replacing decking, painting the interior and exterior of the home, installing a roof, replacing flooring, and repairing plumbing. The organization also plans to add a garage or carport to accommodate family vehicles in a neighborhood without much on-street parking.
6	Marion County Health & Human Services	\$135,200.00	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	\$100,000 will cover the costs of removing barriers to safe and permanent housing for individuals with intellectual and developmental disabilities and/or mental health and substance use disorders who do not qualify for HRSN housing benefits, including security deposits, unpaid utility bills, moving expenses, first and last month's rent, and other housing costs. Additionally, it will fund the administration of a six-week tenant education class and the costs for the program to utilize shared software to collaborate with Marion County Housing Authority. The remaining \$35,200 will be used to provide transportation supports in the form of bicycles, bus passes, and gas cards.
7	Punx with Purpose	\$135,185.25	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	\$99,985.25 will cover the costs of operational expenditures for a new youth center, including 1.0 FTE staff to manage the project. An additional investment of \$35,200 will reduce transportation barriers for youth to participate in community

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				events and access non-medical services via ride-sharing services or by providing gas cards and/or reimbursements for self-transport.
8	Salem for Refugees	\$135,200.00	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	\$100,000 will provide the downpayment to purchase a new “host home” for recently arrived refugee families. The property will serve as transitional housing while new neighbors find their next home, seek employment, and enroll in school and services. The remaining \$35,200 is an investment designated specifically for the provision of transportation supports for refugees: the organization will use the money to purchase a moving truck to relocate families and transfer their possessions once they have secured permanent housing.
9	Sheltering Silverton	\$89,680.00	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	These funds will enable the organization to purchase and maintain an ADA-compliant minivan and hire a bilingual/bicultural outreach supervisor. The minivan will be used to transport shelter residents and program participants to and from services that address SDOH-E needs, excluding NEMT-covered services.
10	Confederated Tribes of Warm Springs (CTWS)	\$100,000.00	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<u>Confederated Tribes of Warm Springs:</u> Development of CTWS Cultural Center
11	Confederated Tribes of Grand Ronde	\$100,000.00	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<u>Chinuk Wawa Program:</u> Public Health Education & Chinuk Wawa Language Preservation
12	Confederated Tribes of Siletz Indians	\$100,000.00	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<u>Siletz Recreation Center:</u> Funds will pay for the cost of building materials, planning, labor etc. associated with the building of a new recreation center.
13	Chemawa Indian School	\$100,000.00	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<u>Chemawa Culture Club:</u> Travel, materials, supplies, and equipment for Chemawa Culture Club activities

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

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.

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- ☒ 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.)

The Marion/Polk CCO's Community Advisory Council was integral to the 2024 SHARE Initiative funding process. As a way to strengthen the CAC's role, based on feedback received from OHA in 2023, the Marion/Polk CCO incorporated SHARE Initiative funds into the Willamette Health Council (WHC)'s Community Impact Grants (CIG) program for the first time. All community-based organizations serving the Marion/Polk region were able to apply and simultaneously be considered for Community Benefit Initiative, Community Impact Fund, and SHARE Initiative dollars through a single, publicly posted application available in multiple languages. This unique partnership not only reduced funding barriers for community-based organizations, but also increased transparency and equity as entities with no preexisting relationship to the CCO or WHC were nonetheless able to pursue financial support and connect with both PCS and the CAC.

The process of incorporating SHARE Initiative funds into the CIG program began with initial meetings held between CCO and WHC staff in early 2024 to adjust application questions and funding timelines to accommodate OHA requirements for SHARE. The CAC had earlier helped to develop the CIG application questions and funding priorities, which included alignment with the regional Community Health Improvement Plan, as well as a scoring sheet for evaluating project proposals. CCO and WHC staff brought forward the plan for merging SHARE Initiative with the CIG program to the CAC in March and received their approval. The CCO's community health coordinator then delivered an overview presentation on SHARE Initiative to the CAC in June to orient CAC members to the unique capabilities and requirements of these funds when reviewing grant applications.

The CIG application was hosted on WHC's grant platform, accessible via its website, and was open for two months—May 13 through July 14—with technical assistance webinars held on May 1 and May 8; Spanish interpretation was available upon request. After WHC and CCO staff screened applications for adherence to funding requirements/capabilities and community needs, each organization identified for potential funding was required to deliver a short presentation during the August CAC meeting, giving OHP consumers and caregivers the opportunity to hear directly from the organizations and ask questions. CAC members then scored each application, and scores were tallied and discussed at the October meeting. Ultimately, CAC made a recommendation to the CCO to fund nine projects at their full requested amounts.

With \$646,520.94 in SHARE funds still remaining after funding all nine projects, CCO leadership made the decision to use \$400,000 to fund projects at each of the three federally recognized tribes in the region as well as Chemawa Indian School and allocate the remaining \$246,520.94 across seven of the intended grantees to create new transportation resources in the community in support of the SDOH quality incentive measure. CAC received an update on how the remaining funds would be

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allocated at their October meeting. The transportation investments were offered to intended SHARE grantees/SDOH-E partners in one-on-one meetings with the caveat that the services to be delivered would exclude emergency and non-emergency medical transportation (NEMT). To ensure that SHARE funds will not be used toward covered services, PCS staff will be organizing a special training for SDOH-E partners in early 2025 to outline how they can assist OHP members in accessing NEMT and to delineate clearly which kinds of trips are eligible under NEMT and which are not (such as trips to obtain groceries, wash clothing at laundromats, or obtain documents).

To create a feedback loop with the CAC, PCS staff will provide an overview of the final SHARE spending plan template with the CAC upon OHA's approval. Additionally, the memoranda of understanding established with each SDOH-E partner (other than tribal partners, with whom PacificSource is developing letters of agreement through its tribal liaison) requires a presentation to the CAC at the conclusion of the project that includes final project outcomes, total number of individuals reached or served along with any available REALD or other demographics, and a discussion of the project's impact on addressing health inequities and/or meeting SDOH-E needs.

For the tribal investments, The Confederated Tribes of Warm Springs, The Confederated Tribes of Grand Ronde and The Confederated Tribes of Siletz Indians convened with the PacificSource Tribal Liaison (PCS TL) individually to discuss SHARE funding. The PacificSource Tribal Liaison explained SHARE and answered questions for each of the tribes during their separate convenings. The PCS TL offered each tribe the choice to participate. All three tribes chose to move forward with SHARE. Each tribe was able to identify a need they had, and selected a project that supports sovereignty and self-determination of their tribes.

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.

Each SDOH-E partner funded through SHARE Initiative, other than tribal partners, has been asked to deliver a summary presentation to the CAC at the conclusion of their project, as outlined above in response to question 7. This reporting requirement was agreed to in the memoranda of understanding signed by each organization and PCS. In addition, each SDOH-E partner that is receiving an additional investment for transportation (as outlined above in the "SDOH-E partners and agreements" table) is required to adopt use of the Connect Oregon/UniteUs platform so that the Marion/Polk CCO may track screenings and referrals in support of the social determinants of health quality incentive measure. Moreover, the Marion/Polk CCO has asked SDOH-E partners to submit a brief narrative on successes and challenges with adopting Connect Oregon for the purposes of continuous quality improvement.

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Please note that in order to be culturally responsive, and to honor tribal sovereignty and self-determination, these requirements do not pertain to the tribal investments.