

**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*.

## 2022 SHARE Initiative Spending Plan Template

**CCO name:** PacificSource Community Solutions - Lane CCO

**CCO contact:** Erin Fair Taylor

### *Instructions:*

- Respond to items 1–11 below using this template.
- Be clear and concise. Do not exceed 20 pages (not including the required attachments).
- Your submission must include the formal agreement with each of the SDOH-E partners as referenced in item 7. If any agreement with an SDOH-E partner is a subcontract as defined in the CCO contract, then your submission must include the Subcontractor and Delegated Work Report updated for the subcontract/s, as required by the CCO contract.
- All file names must clearly reflect the content (for example, CCOxyz\_SHARE\_Item8).
- Only submit materials pertinent to this spending plan.

Submit your plan to [CCO.MCOCDeliverableReports@odhsoha.oregon.gov](mailto: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](#))**  
\$906,380.63

### **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.**

**Project 1:** McKenzie Valley Long Term Recovery Group (MVLTRG) | Holistic Recovery for Wildfire Survivors in Rural Lane County | \$185,081.75

The McKenzie Valley Long Term Recovery Group was established in the wake of the Holiday Farm Fire, with the mission to recognize needs, find resources, and help individuals and families recover from the disaster. This project will invest in community health by improving social determinants of health. The SHARE Initiative funding will support the payroll and benefits for the Senior Program Coordinator, two Disaster Case Managers, and a Director/Instructor for the Little Eagles Daycare. Anticipated operational needs include supporting a monthly social program for clients, Unmet Needs Roundtable funds, and curriculum for the childcare center. The population served will be community members in the McKenzie Valley that were affected by the Holiday Farm Fire in 2020.

**Project 2:** Junction City Local Aid | Project Uplift | \$208,180.80

Junction City Local Aid provides basic needs assistance and economic relief to people living in the Junction City community. Project Uplift will address historical injustices, provide food security, and support basic needs through expanding services. This will be accomplished through hiring an executive director and volunteer coordinator, update technology needs, supplement food supplies, and partner with the local High School to build a community garden.

## 2022 SHARE Initiative Spending Plan Template

### **Project 3:** Community Sharing | South Lane County Basic Needs Assistance | \$255,930

This project will support increase the capacity of this critical service provider in Rural South Lane County. Community Sharing provides basic needs programs such as rent assistance, water and utility assistance, food assistance, and hygiene supplies. The primary objective of this program is to support families and individuals remain housed, clothed, have access to healthy food, and keep the power and water on in their homes.

### **Project 4:** Upper Willamette Community Development Corporation | Oakridge Food Box | \$65,000

Oakridge Food Box provides healthy non-perishable food, fresh fruit, vegetables, meat, dairy, culturally specific, and dietary appropriate food options for individuals, and families with specific health and dietary needs. Upper Willamette Community Development serves the rural community in Eastern Lane County, the food box program often purchases and picks up bulk food items in Eugene/Springfield. These funds will be used to purchase a new box truck for the transportation of food, and a compressor will be purchased for the freezer and cooler for cold storage items.

### **Project 5:** Siuslaw Vision | Building Community in Siuslaw | \$192,190.99

Siuslaw Vision is a service connector in Rural Western Lane County that implements locally owned solutions to address community-identified goals in the Siuslaw region. Funding will support these efforts through addressing compensation gaps, supporting volunteer efforts through stipends, trainings, and expense reimbursement.

### CHP/statewide priorities

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

The CCO's 2021 CHP includes three priorities that consistently emerge as the most important to Lane County communities. These include ensuring incomes are sufficient to meet basic cost of living, establish community conditions that support behavioral health and physical well-being, and address current historical injustices that produce disparities.

The selected projects align directly with all these CHP priorities through support of housing, childcare, food security, culturally specific programs, and addressing compensation gaps.

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

The SHARE Initiative spending directly addresses the statewide priority of housing-related services and supports through the funding benefiting McKenzie Valley Long Term Recovery Group (project 1) with \$30,000 going toward the Rose Street Housing Project which is a project creating sustainable and affordable housing in Blue River. There is another \$30,000 being allocated for Unmet Needs which is accessible to community members who need support for home repairs, access to temporary housing, purchase of food, propane vouchers, and weatherization for residents living in recreational vehicles and trailers.

Community Sharing (project 3) directly addresses housing related services with the majority of funding providing rent assistance, deposits for housing, housing navigation, and water/utility

## 2022 SHARE Initiative Spending Plan Template

assistance.

### 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:** McKenzie Valley Long Term Recovery Group

**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:** Junction City Local Aid

**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:** Community Sharing

**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**

## 2022 SHARE Initiative Spending Plan Template

updated for the subcontract/s, as required by the CCO contract.

**A. Partner name:** Upper Willamette Community Development Corporation

**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:** Siuslaw Vision

**B. SDOH-E domain(s) for the SHARE activities being funded for this partner (check all that apply):**

- Neighborhood and built environment
- Economic stability
- Education
- Social and community health

**C. Is your CCO's agreement with this SDOH-E partner a subcontract as defined in CCO contract?**

- Yes       No

**If yes, your submission must include the Subcontractor and Delegated Work Report updated for the subcontract/s, as required by the CCO contract.**

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

In collaboration with the Community Advisory Council for Lane County, the CCO decided to place a priority on organizations which focus on rural populations and economic stability. This decision was reached through presenting a poll containing SDOH-E domains, CHP priorities, and population groups to the CAC. Through this poll, the CAC selected economic stability (47%), ensure incomes are sufficient to meet basic costs of living (47%), and rural populations (40%). When the priority population was narrowed down, 9 organizations were identified in the 5 rural regions of Lane County and the SHARE Initiative application was sent to all 9 organizations, with a 3-week deadline to submit a completed application. The CCO received 5 applications, one from each rural region.

**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.

## 2022 SHARE Initiative Spending Plan Template

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.)  
Please see the answer to question six above. The CAC is integral in the SHARE Initiative spending decision's and considered a true partner of CCO staff. The CAC was consulted prior to releasing applications for the 2023 SHARE Initiative and determined that the priority population for SHARE spending should be rural communities. This resulted in the application being released to organizations which primarily support the rural communities in Lane County. We received and are funding applications from all five of the of the rural communities of Lane County. The CAC was appreciative of the effort that was put into supporting the priorities that they put forward and would be grateful for the same level of transparency in years to come. The CAC will be kept informed of progress made from the organizations which are receiving funding through the SHARE Initiative grant.

### 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.
- Project 1:** All evaluation data will be collected by McKenzie Valley Long Term Recovery Group, outcome measures include meeting the immediate needs of 115 community members through the Unmet Needs Round Tables, provide scholarships for four children to attend Little Eagles Childcare, and serve approximately 40 adults each month through the Coffee Up emotional care program.
- Project 2:** All evaluation data will be collected by Junction City Local Aid, outcome measures include increasing capacity from 3,500 individuals served to 5,000 per year, grow the volunteer team from 35 to 50, and to offer more culturally specific food options.
- Project 3:** All evaluation data will be collected by Community Sharing, outcome measures include ensuring housing stability for an additional 60 households at risk of eviction, and serve an additional 15 households with water and utility assistance.
- Project 4:** All evaluation data will be collected by Upper Willamette Community Development, the primary outcome measured will be to provide food for 1,300 individuals in 600 households.
- Project 5:** All evaluation data will be collected by Siuslaw Vision, outcome measures include convene and support four workgroups, coordinate three celebrations, connect 45 individuals or groups with requested resources.
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

**PacificSource Community Solutions - Lane**  
**Response to SHARE initiative Spending Plan, Question 8**

The following table outlines the amount of funding from the SHARE Initiative that PCS has allocated for each project, including the amount of funds for each SDOH-E Partner.

<b>Partner</b>	<b>Item/Activity</b>	<b>Total by Item/Activity</b>	<b>Total by Partner</b>
McKenzie Valley Long Term Recovery Group	Salary Cost	\$87,750	\$185,081.75
	Coffee Up Gatherings	\$2,256.75	
	Unmet Needs Roundtable	\$30,000	
	Rose Street Housing	\$30,000	
	McKenzie Little Eagle Scholarships	\$18,893	
	McKenzie Little Eagles Director	\$14,073	
	McKenzie Little Eagles Curriculum	\$2,109	
Junction City Local Aid	Salary Cost	\$189,799	\$208,180.80
	Technology	\$881	
	Culturally Specific Food Program	\$12,000	
	School Organic Food Project	\$5,500	
Community Sharing	Salary Cost	\$19,800	\$255,930
	Rent Assistance	\$222,930	
	Water Assistance	\$5,000	
	Food	\$5,000	
	Hygiene Supplies	\$3,200	
Upper Willamette Community Development	Vehicle	\$50,000	\$65,000
	Freezer/Cooler Condensing Unit	\$15,000	
Siuslaw Vision	Salary Cost	\$129,281.99	\$192,191
	Office Supplies	\$1,000	
	Mileage	\$6,000	
	Consultants	\$8,000	
	Volunteer Stipends/Training/Expenses	\$30,909	
	Website/Technology/Communications	\$17,000	
<b>TOTAL FUNDS as reporting in 2022 Exhibit L – Report L6.7</b>			<b>\$906,383.55</b>

PCS has not allocated any of the SHARE funds for non-qualifying expenses as described in the Guidance.