

## 2022 Annual SHARE Initiative Spending Plan Template

**Due: December 31, 2022**

### 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. According to contract requirements, a CCO's annual SHARE Initiative designation must be spent down within three years<sup>1</sup> of OHA's approval of the same year's SHARE Initiative spending plan; a one-year extension may be requested (four years total).

For contract years 2020 and 2021, CCOs that exceed minimum financial requirements are expected to define their own SHARE Initiative portion in compliance with the statute and rules referenced above.

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.

By December 31<sup>2</sup> 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*.

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<sup>1</sup> See the [2022 contract waiver memo \(12/13/2021\)](#), which extends the spend-down period from two years to three years. CCOs still have the option to request a one-year extension.

<sup>2</sup> See the [2022 contract waiver memo \(12/13/2021\)](#), which extends the spending plan due date to 12/31. (CCOs may submit it any time from 9/30/2022 through 12/31/2022). OHA will notify each CCO about the approval status of its plan within 30 days of receipt. In the event a CCO's plan cannot be approved as submitted, OHA will work with the CCO to resolve the identified deficiencies as quickly as possible.

## 2022 SHARE Initiative Spending Plan Template

**CCO name: Trillium Community Health Plan**

**CCO contact: Courtney Johnston**

### *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.MCodeliverableReports@dhsosha.state.or.us](mailto:CCO.MCodeliverableReports@dhsosha.state.or.us) 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 E30 in [Exhibit L – Report L6.7](#))**  
\$502,400

### **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.**

Community Development Corporation of Rockwood: This project helps support Rockwood's culturally specific food pantry and delivery program which provides meals to vulnerable families. The project also supports funding for a bilingual, multi-cultural Community Health Worker (CHW), responsible for providing housing services to houseless families/individuals living at Rockwood's transitional housing shelter hotel. The CHW will provide education and outreach to culturally specific community members and their respective communities.

Latino Network: La Plaza Esperanza: This project helps fund a capital campaign to expand a community center in which the Latino Network will expand Community Health Worker services to the Tri-County Community.

All: Ready Regional Kindergarten Readiness Network: The goals of this project are to support meeting the needs of the families served to promote kindergarten readiness, with a specific focus on Black, indigenous, and communities of color, including: Parents and caregivers have the resources to support their child's development and cultural wellness, children get the needed diagnosis around a developmental or learning disability, are supported by their community and get resources that

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support their families' home culture families and caregivers get what they need when they need rather than a complex patchwork of funding streams and programs.

IRCO (The Immigrant and Refugee Community Organization): This project provides funding to build a wheelchair ramp to provide ADA access to new IRCO bazaar, a storefront for free items like clothes, furniture, household and personal items.

Raices de Bienstar: This project funds Fomentando Fortalezas, a monthly program for Latine traditional health workers embedded in community organizations, parishes, social service agencies, or health care to join and practice culturally adapted self-care skills & exercises in Spanish. Over fifty different community health workers joined these circles in 2022, and the project will expand beyond that with these funds. The project will also fund 5-6 community talks (pláticas) on interpersonal & community violence or other community-directed concerns in the metro region. These will be held in partnership with other CBOs and alongside traditional health workers who will outreach to the community for participation. Finally, in the later part of the year, the project will launch processing groups in Spanish for Latine traditional health workers who have been part of our other programs. These will allow participants to engage with each other and a trained mental health clinical student about challenging cases they experience in their work or lives and how to support their community's mental health and wellbeing.

Harmony Academy: The project would help fund outreach to youth and communities impacted by substance use disorder, especially youth who might have experienced barriers to accessing appropriate support for substance use and co-occurring disorders. Outreach would also involve applying an equity lens to recovery school services, especially with regards to recruitment, enrollment, and retention. Providing continuing opportunities for professional learning communities with others who serve vulnerable youth would also fall under this umbrella. Funding Outreach, collaboration and expanded programming can help carry the important mission of the recovery school to more youth, families, and communities across the tri-county area.

Quest Integrative Health: The project will help support transitional housing for LGBTQIA+/African American, HIV positive clients. The project also supports community-based health improvement interventions, including group meetings to address health concerns related to substance use disorders. The project will provide resources to help transition to permanent housing and support individuals case manager who will work with clients to provide resources such as clothes for school and/or work, application fees, first and last month rent, etc. The funding does not cover services already covered under Oregon's 1115 SUD waiver.

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### CHP/statewide priorities

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

Trillium's SHARE plan helps Trillium meet many of our shared Community Health Improvement plan, including, increasing social connections, enhancing community resilience, increasing economic wellness through educational attainment, as well as supporting housing and food access.

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

Both the partnership with Rockwood Community Development Corporation and the partnership with Quest Integrative Health support the statewide housing priority by providing CHW housing navigation support and transitional housing for HIV positive clients.

### 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:** Community Development Corporation of Rockwood

**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:** Latino Network

**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

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**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:** IRCO (The Immigrant and Refugee Community Organization)

**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:** Raices de Bienstar

**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:** Harmony Academy

**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:** Quest Integrated Health

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### 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).

Trillium has developed a multi-year partnership with Rockwood to support access to culturally specific foods in the Rockwood community. This year we maintained that investment and increased our partnership to also support housing navigation and support services through their hotel housing project.

### 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. All Subcontractors have associated documentation provided. Executed MOUs will follow submission as approval will be necessary execution of MOUs in the case that projects may need to be further defined or amended. This will reduce administrative burden on SHARE partners.

### 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.)

Our Community Advisory Council member engagement subcommittee focused on 2022 SHARE spend. The CAC members reviewed the Community Health Improvement plan and SHARE domains and then identified partners in their community that they wanted to participate in our SHARE program in addition to continuing ongoing existing partnerships with Rockwood and All:Ready. CAC members identified the SHARE partners on this list and will be reviewing these projects on an ongoing basis.

## Section 3: Additional details

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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.

[Click here to enter text.](#)

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

Tricounty - 2022 SHARE (Based on 2021 Profits)	Committed
Community Development Corp of Rockwood	\$165,928
Latino Network: La Plaza Esperanza	\$25,000
All: Ready Regional Kinder. Readiness Ntwk	\$55,000
IRCO (The Immigrant and Refugee Community Organization)	\$3,500
Quest Integrative Health	\$84,324.00
Raices de Bienstar	\$84,324.00
Harmony Academy	\$84,324.00
	<b>\$502,400</b>