

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: Trillium Community Health Plan (Tri-County)

CCO contact: Dominique Lopez-Stickney

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.MCOTDeliverableReports@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](#))**
\$904,607

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.**
Clackamas County; 23-hour Stabilization Center; fund capital improvements to the facility including enabling access by members with disabilities. The Center will provide a safe, supportive environment and compassionate care to provide stabilization to medium- and long-term social determinants of health resources to support community members in their recovery journeys; Populations served will be those primarily in Clackamas County.
IRCO (The Immigrant and Refugee Community Organization); CHW Training and Workforce Development; funding will be used to provide the required 90-hour Community Health Worker training to 15 participants. After the training, CHWs will be qualified to provide health navigation and health education, which will support health equity and decrease health disparities for immigrant and refugee communities; The CHWs will serve Trillium's service areas in Tri-County and Southwest regions. Participants will be recruited from IRCO, and the community at large, recruiting and outreaching to diverse immigrant and refugee communities.
Samoa Pacific Development Corporation; Pacific Islander Housing Assistance; staff will be hired because of these funds and will implement community education initiatives, workshops, and outreach campaigns; address fears of accessing social services and provide accurate information to encourage more families to seek housing support; provide direct housing assistance, including rental

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support and homebuyer assistance. Activities will be primarily focused on addressing housing needs of Pacific Islander families, particularly Samoans, in Oregon.

Washington County; Center for Addictions Triage and Treatment (CATT); funding for capital improvements for the facility, which supports social determinants of health needs of members served, such as transition services, peer drop-in center, crisis services, co-located supports, care coordination, and preventative services to the Washington County community. To address unequal access to care, a culturally specific outpatient program supporting Latino/a community members will be co-located onsite. It will include access to the supportive housing system of care and integrated peer supports.

CHP/statewide priorities

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

The Tri-County CHP includes focus areas of improving integration between behavioral health and other types of care. Trillium’s SHARE plan aligns with this CHP priority through funding the Clackamas County 23-hour stabilization center and the Washington County CATT (Center for Addictions Triage and Treatment).

Increasing CHP priorities of access to care and language access are addressed by funding CHW certifications through IRCO. This also aligns with the THW strategy initiatives in the CHP.

Finally, Trillium’s SHARE plan aligns with CHP areas of equity and justice, and healthy families. The Tri- County CHP includes focus areas of “Building upon and creating BIPOC community solutions for housing”. Funding Samoa Pacific Development Corporation’s Pacific Islander Housing Assistance program will build family resiliency through trainings and other interventions.

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

Trillium’s SHARE spending addresses housing-related services and supports through the partnership with the Samoa Pacific Corporation. The Pacific Islander Housing Assistance program will serve 250 community members with housing service navigation, education, outreach, rental assistance, and homebuyer supports, primarily serving Pacific Islander families, particularly Samoans, in Oregon.

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: Clackamas County

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

Neighborhood and built environment

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- 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: [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: [Samoa Pacific 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: [Washington County](#)

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?

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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 continued our partnerships with IRCO for a second year in a row. Clackamas County and Washington County were both identified as strongly aligning with behavioral health priorities that also align with supporting community social determinants of health needs through their programming. Finally, Samoa Pacific Development Corporation was identified in alignment with a priority population that Trillium has identified as having a higher need for housing, using a data-driven approach.

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.)

Trillium's CAC has a designated role in the SHARE process. The CAC received a presentation on SHARE projects. The CAC reviewed the proposals, asked questions, and provided feedback on all projects. CAC feedback was shared with Trillium's Executive Leadership Team. We use and continue to use CAC feedback on the process, SHARE projects, and have a SHARE After Action Review planned to iterate on the CAC's role to continue improvements year over year.

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.

[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

2022 SHARE Initiative Spending Plan Template

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

SHARE Partner Name	Project Name	Region	Budget
Clackamas County	23-hour stabilization center	Tri-County	\$179,607
Samoa Pacific Development Corporation	Pacific Islander Housing Assistance	Tri-County	\$200,000
Washington County	Center for Addictions Triage and Treatment (CATT)	Tri-County	\$500,000.00
Immigrant and Refugee Organization (IRCO)	CHW Training and Workforce Development	Tri-County	\$25,000.00
			\$904,607