

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*.

2024 SHARE Initiative Spending Plan Template

CCO name: Jackson Care Connect

CCO contact: Alex Campbell

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.**
Click here to enter text.

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	OHRA Shelter Kitchen and Dining Room Renovation	Add an all-electric kitchen and dining room to the existing OHRA Shelter. Goals include improving guests physical and social health through improved nutrition and social dining and adding 10 Permanent Supportive Housing units thanks to dedicated meal prep space for guests/residents.	<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 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	Formerly homeless adults in Jackson County. A majority of OHRA shelter guests have a disability and are extremely

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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					low income per HUD definition.
2	OnTrack Emergency Lodging Expansion	Purchase a 12-room motel for use as emergency lodging for individuals awaiting Detox or residential Substance Use Disorder treatment.	<input checked="" type="checkbox"/> Housing services and supports <input type="checkbox"/> Permanent supportive housing <input checked="" type="checkbox"/> Other (Behavioral Health):	<input checked="" type="checkbox"/> Neighborhood and built environment <input type="checkbox"/> Economic stability <input type="checkbox"/> Education <input checked="" type="checkbox"/> Social and community health	Individuals with a Substance Use Disorder diagnosis.

CHP/statewide priorities

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

CHIP housing Goal 1: “Increase the number of people paying 30% or less of what they earn for housing”

- By enabling OHRA to convert units to PSH, the Project 1 expands the PSH supply, which is extremely scarce in Jackson County and enable a greater proportion of residents to have affordable housing.

CHIP housing Goal 2: “Increase the number of people living in homes that are safe, accessible, and are easily served by community services”

- By adding improved on-site nutrition services, Project 1 increases the proportion of people living in a situation that is “easily served by community services.”

CHIP Behavioral Health & Well-Being Goal 2: “Help young people and older adults feel less alone.”

- By adding communal dining, Project 1 will help guests and volunteers, both groups with a substantial proportion of elderly members, feel less alone.

CHIP Behavioral Health & Well-Being Goal 4: “Prevent use and misuse of substances.”

- Project 2 supports this goal by expanding access to treatment for Substance Use Disorder.

CHIP Health Equity Goal 2: “Remove barriers to accessing services and supports in our communities – especially those services intended to help individuals within groups that have been the most marginalized.”

- Project 2 supports this goal by making Substance Use Disorder treatment services more available to individuals that are unstably housed or unhoused.

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).

Project 1 expands and improves the nutrition supports (housing-related services and supports) at the

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OHRA Shelter and will allow OHRA to seek project-based vouchers, enabling them to make 10 additional Permanent Supportive Housing units available in Jackson County.

Project 2 expands Emergency Lodging owned and managed by OnTrack, a behavioral health provider. Guests at this facility will have access to counseling and peer supports, up to and including intensive out-patient Substance Use Disorder (SUD) treatment. SUD treatment is, of course, a critical health care service needed by many individuals in order to make progress on their housing goals.

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	Opportunities for Housing, Resources, & Assistance (OHRA)	\$320,180	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	This project will 100% executed by OHRA. SHARE funds will renovate the kitchen and dining area. This capital investment will enable (1) greatly improved nutrition supports on-site; (2) expanded opportunities for social engagement with other guests and volunteers; and (3) allow OHRA to seek project based housing vouchers, enabling the conversion of 10 units to Permanent Supportive Housing.
2	OnTrack, Inc.	\$680,000	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	All activities in this project will be carried out by OnTrack. The project includes the purchase and conversion of a motel to provide emergency lodging for housing unstable guests suffering Substance Use Disorder while awaiting residential treatment/detox or in support of intensive day treatment.

6. Are any of your partner agreements a subcontract as defined in CCO contract? Yes No
If yes, which ones?

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.
- CAC members reviewed SHARE proposals and made recommendations to CCO leadership.
- CAC made final SHARE project funding decisions.

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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.)

JCC staff reviewed the overall approach and possible priority areas with the JCC CAC in June. The CAC reviewed the selection criteria, supported a focus on housing, and suggested a particular emphasis on projects that (A) addressed behavioral health issues and (B) improved physical accessibility of units. JCC staff distributed a notice of funding availability to (A) members of the Jackson County Continuum of Care; (B) affordable housing developers active in Jackson County; (C) organizations providing supportive housing options; and (D) culturally-specific organizations active in housing navigation and affordable housing development. JCC staff developed a scoring rubric. Applications were scored by JCC staff and a volunteer member of the CAC. Scoring results and a proposed slate of projects were presented with the CAC, who concurred with the prioritization that resulted from the scoring process.

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.**

No on-going evaluation plan is proposed.