



# Special Olympics *Program Quality Standards*

## Helping Programs Improve and Grow

### What are Program Quality Standards and why do we need them?

The Program Quality Standards are a tool to help Programs develop and grow. They allow Programs to identify what to focus on or change to keep moving forward. Change can be continuous and incremental, or it can be a significant change in direction or practice designed to take a Program forward in a major way (e.g. starting a new initiative like Unified Sport or launching a new fundraising strategy).

As a movement, we recognize the need to be clear about what is important to us in what we do. This is why, with the help of Program Leaders all over the world, we have developed Program Quality Standards. The Standards help us paint a picture of success and are the foundation for a number of ways to help Programs push forward, such as training for Program Leaders and recognition for progress and growth. They are intended to spark **honest conversations** about what is happening and what can be better in your Program.

### How were they developed?

The Program Quality Standards came from you. The strategic plan called for the creation of the standards, but defining them was a 'ground-up' initiative. This process took place over year (2012-2013) and included a global consultation with input from Programs in all Regions. The standards were finalized at the end of 2013 and endorsed by The International Advisory Council (IAC) Committee of the Special Olympics International Board of Directors.

### Who are they for?

Program Quality Standards are for Special Olympics Accredited Programs, specifically for use by Program Leaders. They enable Program Leaders to understand, manage and support activities and deliver them at a high standard. Within Programs, National Directors, CEOs and Program Boards should 'own' the Standards.

The Standards cover the essentials for Program Leaders. They do not take the place of detailed technical standards in other areas to help coaches, event managers or other managers.

As well as Program Leaders, we hope that the standards will also be useful for working with sub-Programs, athlete committees, family committees, youth committees and even Founding Committees.



## How are they structured?

The Program Quality Standards are easy to use. They are grouped into 10 'building blocks' that represent the areas that Program Leaders need to know about and be able to oversee or implement well. These same 10 building blocks will be used for the development of training modules.

Within each building block the standards are set out in logical steps, or stages, that build on each other. The simple idea is that as you progress through the stages, you're getting better all the time.

Most standards have three stages which allows them to be relevant **for all types of Programs** – from small to large, new to mature and from Programs lacking resources to those that are well- resourced.



All Programs are at different levels of development – even within each building block. For this reason, we don't use the stages as overall labels for Programs (i.e. so we would never say "My Program is a Stage 2 Program"). The stages are just descriptions of a developmental level **for a particular standard** and Programs will always have a mix of stages across each building block.

## How can the quality standards be used?

There are several ways you can use the standards. A few are listed below.

- **Review how you are doing.** Program leaders can use the standards to self-assess and find ways to improve. That is the primary purpose of the Standards. This may be done within your Program or jointly with your Region.
- **Use them like a Roadmap.** Integrate the Program Quality Standards into your plan. They can help with setting goals as you develop your annual operational plans and longer term strategic plans. If you are starting a new plan, use them to identify what should be included. If you're in the middle of a strategic plan, focus on improvements that fit with and support your current strategy. Don't use them in isolation or "on top of" the work your Program is doing.
- **Track your progress and celebrate success.** Meeting new standards means your Program is growing and improving! These are measurable results. Achievements are relative, so what may seem small to one Program could be a huge achievement for another. Recognize and celebrate growth.



## Tips for using the standards

Using a new tool can be tricky. Here are some helpful tips.

- Don't tackle all 10 building blocks at once. Select the most urgent and important blocks for your Program to focus on at a particular point in time.
- Read them from left to right – starting with Stage 1 and moving in the direction of Stage 3
- Use the tools provided. In addition to the Program Quality Standards, self-assessment tools will soon be available to help you.



## What are the benefits of Program Quality Standards?

The standards have benefits for many different groups – for Programs, athletes, Program leaders and for the Movement.

### For Programs

The primary reason the Program Quality Standards exist is to help your Program grow and improve. In addition to helping with assessment, planning and tracking progress, they allow you to engage with constituents to spark important, honest conversations about Program priorities. And because the standards are structured in stages, they will continue to work for your Program as it evolves.

### For Athletes

Improvements to a Program bring improvements to the lives of athletes. The standards are a great communication tool to get athletes involved and provide them with a reference point to input on what they think a Program should focus on.

### For Program Leaders

The standards help Program Leaders (National Directors, CEOs, Boards of Directors) focus on quality. They set the stage for realistic plans and help answer the question “what’s next?”

They are also useful in transferring knowledge to new or inexperienced Board members, staff and key volunteers by helping define success for your Program.

### For the Movement

Program Quality Standards are a consistent reference tool which pushes us to raise the bar. This is important because it moves us away from subjective ‘judgements’ of progress. They also support our message that “Quality Matters”, inside Special Olympics and to the wider world. This message of quality is important to donors, governments, and corporate partners.

They are the foundation for our drive towards Program Excellence. This includes several initiatives aimed at developing the leadership in our Movement, such as Program Leadership Training and Recognition for Program achievements.

# Helping Special Olympics Accredited Programs to improve and grow

## Quality Standards for Accredited Programs

### Notes

There are 10 'building blocks' of quality standards. The intent is for Accredited Program leaders and/or SOI staff to select the most urgent and important blocks to focus on at a particular point in time. Aside from this format, additional tools are available to help everyone use these standards.

*Special Olympics*



Leading a Program	Stage 1	Stage 2	Stage 3
<b>Leadership</b>	Program leaders set and adhere to goals and plans that grow the Program and align with the Movement strategy	Program leaders have set a clear, structured strategic direction for growth and development of the Program	Program leaders have established a long term vision for the Program
	Program leaders advocate Special Olympics values, promote teamwork and lead by example	Program leaders have established a positive culture consistent with Special Olympics mission, vision and values	Program is recognized as a model by other SO Programs and external stakeholders
	Program is well organized and coordinated to enable staff and key volunteers to work efficiently	Program staff and key volunteers operate as an integrated team and consistently deliver against goals	Program leaders promote excellence in implementation and lead by example
	Program has clear process for communication between Board and key staff and/or volunteers	Program Board proactively supports and motivates key staff and/or volunteers	
	Program leaders engage in positive, ongoing communication with SOI	Program leaders engage in SOI activities, meetings and events to share, learn and implement best practices	
	Program is assessed against quality standards	Program is formally reviewed with SOI resources	
	Program leaders continuously seek new ideas and opportunities to make changes that grow or improve the Program	Program implements a formal professional development plan for leaders, staff and key volunteers	Program leaders provide formal mentorship for staff or other SO Program leaders
<b>Recruitment</b>	Program has a written recruitment plan including personnel needs, written role descriptions, and actions required	Program has a formal recruitment process and advances diversity/inclusion in all recruitment and employment	Program conducts exit interviews to inform future recruitment
	Program proactively seeks volunteers (e.g. holds recruiting events)	Program implements and tracks a plan for increasing volunteer numbers every year	

Leading a Program	Stage 1	Stage 2	Stage 3
<b>Training</b>	Program has regular internal and external training opportunities for leadership	Program has regular internal and external training opportunities for volunteers and staff	Program conducts training needs assessment for leaders and staff and provides specific training
	New leaders and staff do formal orientation within 3 months of hire	New general volunteers do formal orientation within 3 months	
<b>Performance Management</b>	Program agrees and documents goals for each staff member each year	Program agrees and documents goals for key volunteers each year	Program has a formal performance management and development process
		Staff are evaluated at least twice a year based on agreed goals	Key volunteer performance is reviewed annually based on agreed goals
<b>Recognition &amp; Retention</b>	Program provides basic recognition for staff and volunteers (e.g. thank you letters/calls, newsletter/ website thank you articles)	Program has a formal approach to recognition for staff and volunteers (e.g. awards, special events)	Program recognizes key volunteers and staff by offering opportunities to deliver training or attend external events as a Program representative
	Program monitors its staff retention for planning purposes	Program track its volunteer retention rates and implements a volunteer retention plan	Program evaluates volunteer experiences (e.g. working at event) to improve retention rates
<b>Risk Management</b>	Program keeps personnel records and meets regulatory requirements	Program has written HR Policies & Procedures	Program has succession plans for Program staff and key volunteers
	Program conducts background checks for selected volunteers and staff	Program has a screening process for all volunteers and staff	
	Program communicates importance of risk management to staff and key volunteers	Program communicates importance of risk management as part of volunteer orientation and training	Risk management is implemented at all levels of the Program



Sports Essentials	Stage 1	Stage 2	Stage 3
<b>Sport Development (incl. Unified)</b>	Program has a written annual sport development plan and seeks to recruit new athletes/partners every year	Program has a written three-year sport development plan that includes athlete/partner recruitment	Program improves athlete/partner recruitment every year in keeping with multi-year targets in the plan
	Program develops and builds relationships with Sport Governing Bodies	Program has formal partnerships with 25% of relevant Sport Governing Bodies	Program has formal partnerships with 50% of relevant Sport Governing Bodies
	Program offers at least three Special Olympics sports, one of which is a team sport	Program offers seven Special Olympics sports and Motor Activities Training Program	Program offers more than seven Special Olympics sports
<b>Athlete Development (incl. Unified)</b>	Program communicates the importance and impact of training and nutrition to all athletes, partners, coaches and families	Program has introduced a structured plan for athlete development (per SOI Athlete Development Model)	Program has fully implemented the Athlete Development Model
	Program assesses and tracks athlete and partner performance	Program tracks athlete and partner retention and facilitates progress	Program improves athlete and partner retention and promotes athlete ownership of assessment and training
	All athletes and partners in the Program train at least twice a week	Athletes and partners engage in some form of exercise every second day	Athletes and partners exercise daily
<b>Coach Development (incl. Unified)</b>	Key coach information is registered on a database: contact information, sport(s) coached, certification type and status	Program has a written, multi-year coach recruitment and retention plan that includes growth targets	Coach recruitment and retention improve year to year in alignment with multi-year targets from plan
	Program targets coaching staff of schools, youth leagues and sports clubs to work with Special Olympics	Program targets individuals that have formal sports training, education and/or certification	All head coaches are certified through local Sports Governing Bodies and recertification process is adhered to
		Program improves the ratio for sports with high athlete to coach ratios	Program implements the 'Athletes as Coaches' program
	Program provides regular, certified sport-specific teaching (per SOI Coach Development Model)	Program provides regular updates to certified coaches (e.g. rules changes, nutrition tips, new training drills, etc)	Program enables coaches to improve Sports Science knowledge (e.g. nutrition, psychology)
	Program implements a basic coach recognition plan	Program formally recognizes coaches that complete certification and re-certification requirements	Program recognizes coaches based on evaluation of performance
<b>Unified Sports</b>	Program offers one Unified Sports model	Program offers two Unified Sports models	Program offers all Unified Sports models
	10% of Program athletes participate in Unified Sports	20% of Program athletes participate in Unified Sports	35% of Program athletes participate in Unified Sports
	10% of coaches are certified as Unified Sports coaches	20% of coaches are certified as Unified Sports coaches	35% of coaches are certified as Unified Sports coaches



Games and Competitions	Stage 1	Stage 2	Stage 3
<b>Competition Management</b>	Sport Rules, including Divisioning, are consistently applied ensuring fair play and competition for all athletes	All technical officials have met minimum Sport Governing Body certification requirements	Technical Delegates and sport-specific juries are in place and duties carried out efficiently, including handling protests
	Athletes have multiple competition opportunities, including Unified Sports, and Programs adhere to protocol for advancing to next level of competition	Program offers or participates in all levels of competition (local to World Games), including Unified Sports	
	Program collects accurate, timely event registration data	Web-based registration and GMS are used to gather data and run competitions	
	Awards presentations comply with awards protocol	Awards areas are designed to provide access for all awards participants	
<b>Event Management</b>	Program promotes competitions locally and makes schedules and results available in a timely fashion	Program promotes spectator attendance and proactively seeks wide coverage for events	Events are professionally promoted and event production delivers positive spectator experiences
	Event Management teams, including athlete leaders, are implemented appropriate to the size of the event	Functional area plans (e.g. medical, transport) are well integrated in the event plan and venue drawings are used	
	Program implements basic system for identifying event participants	Program uses credentialling system to manage event access and entitlements	Access control is implemented at all events
	Opening and Closing Ceremonies are athlete-focused and comply with protocol	Opening and Closing Ceremonies include an influential leader or celebrity	Opening and Closing Ceremonies are professionally produced
	Basic evaluation of events is conducted	Evaluation includes stakeholder feedback and is used to improve events	Event legacy plans are developed in advance and implemented after events
	All managers and other volunteers receive general orientation and job specific training prior to the event day	All volunteer roles have written job descriptions and volunteers are matched with roles according to their skills	
<b>Risk Management</b>	Events stay within budget and insurance is in place, including with third parties		
	Venues are set up according to local health & safety standards and Article 1 of the Sports Rules	Events have an emergency action plan which include crisis communication	Program implements a system for reporting, tracking and analyzing incidents

Raising Funds	Stage 1	Stage 2	Stage 3
<b>Planning &amp; Tracking</b>	Program has written annual fundraising plan with targets aligned with budget	Program uses Special Olympics best practice to improve its fundraising	Program uses external best practice to analyze and improve its fundraising
	Program tracks results and reviews progress against targets twice a year	Program tracks results and reviews progress quarterly against targets	Program tracks results and reviews progress monthly against targets
<b>Capacity</b>	Program has basic fundraising materials and capacity to prepare/ present basic proposals to prospects	Program has identified what it can sell to sponsors, assigned a value and created a sponsorship package for each one	Program has capacity to prepare customised, professional proposals, including sponsor rights packages
	Program has tasked individuals with identifying/contacting potential funders	Program has a fundraising committee and involves athletes in fundraising	Program integrates fundraising as a core Board responsibility
	Board understands the importance of its role in supporting fundraising	Board actively pursues donations/gifts	Board secures regular, significant gifts and/or gives a personal gift
	Program has ability to complete and submit basic grant applications	Program has ability to create and submit complex grant applications	Program has a strategy for pursuing large gifts or grants
<b>Diversity of Sources</b>	Program has at least one source of cash funding, excluding SOI grants	Program has three or more sources of cash funding, excluding SOI grants	Program has five or more sources of cash funding, excluding SOI grants
	Program receives two or more in-kind donations of goods and services	Program receives three or more in-kind donations of goods and services	Program receives five or more in-kind donations of goods and services
		Program helps SOI to implement global or regional partnerships and campaigns	Program participates in collaborative fundraising to benefit both the Program and SOI
<b>Sustainability</b>	Program has a pipeline of potential funders, with solid rationale for each one	Program secures at least one new source of funds each year	Program secures at least one multi-year source of funding
	Program has a written plan to retain funders	Program has demonstrated success in maintaining existing sources of funding	Program increases support from existing funders
<b>Donor Management</b>	Program reports to and engages with donors and funders at least once a year	Program reports to and engages with donors and funders at least twice a year	Donor communication includes both qualitative and quantitative data highlighting donation impact
	Program implements basic donor recognition, involving athletes, such as thank you letters, phone calls, etc	Program has a formal approach to recognition, involving athletes, that is based on various levels of giving	Program has written strategies for advancing top donor relationships, involving athletes
<b>Risk Management</b>	Program does research to avoid disreputable donors	Written agreements are executed with donors as necessary	Program conducts risk analysis on sources of funding
	Fundraising by/with an outside party is evaluated in relation to cash control, use of SO brand and the party's reputation		

Brand & Comms	Stage 1	Stage 2	Stage 3
<b>Branding</b>	Program implements SOI brand guidelines for visual identity for basic materials (e.g. banners, stationery)	Program consistently implements visual identity on all tools and materials (e.g. website, uniforms)	Program consistently implements visual identity at all levels of the Program
<b>Marketing Commu- nica- tions</b>	Program has one identified spokesperson and athletes support marketing activities	Program has at least two spokespersons, one of whom is an athlete leader	Program has a group of spokespersons including influential leaders (e.g. celebrity, politician)
	Program ensures key media are informed about Special Olympics and seeks coverage	Program secures media coverage of major events and activities	Program has established relationships with media outlets and secures year-round media coverage
	Program has an established, managed social media presence	Program leverages social media to support marketing activities	Program integrates social media into its website and evaluates social media to guide marketing strategy
	Program issues a generic newsletter (or similar) twice a year to communicate with external audiences		Program issues newsletters (or similar) to specific audiences (e.g. Schools, Health providers) and publishes an annual report
	Program promotes its activities and events to generate public awareness	Program conducts ongoing marketing activities to raise awareness and understanding	Program collaborates with partners and sponsors in ongoing marketing activities
<b>Marketing Planning</b>		Program has an annual plan, with metrics, for raising awareness	Program has multi-year marketing strategy and evaluates marketing activities annually
<b>Marketing Relation- ships</b>	Program has established relationships with marketing and communication professional(s) for guidance and support	Program has a VIK arrangement with one or more marketing agencies	Program has sponsorship arrangement with at least one marketing agency
	Program has established relationships with media professionals for guidance or support	Program has a VIK arrangement with one or more media outlets	Program has media sponsorship from at least one media outlet

Brand & Comms	Stage 1	Stage 2	Stage 3
<b>Internal Communications</b>	Program provides updates to key stakeholders such as staff, key volunteers, Sub-Programs, local Programs and Board on a regular basis	Program has a dedicated page (or pages) on its website for internal communications	Program seeks and uses feedback from key stakeholders and has platform that allows for collaboration and sharing of ideas (e.g. social media or intranet)
		Program produces communication materials for athletes	Program has formal channel for athletes and partners to express opinions
<b>Marketing Resources</b>	Program uses basic marketing materials (e.g. fact sheets, press release, brochure, t-shirt, poster, event flyer, presentation)	Program uses advanced marketing materials (e.g. videos, infographic, advertising, media kit)	Program uses customized marketing materials for specific audiences (e.g. for government, corporate, law enforcement, potential donors)
	Program has up to date contact information, news, stories, events and sports on 'Program locator page' at <a href="http://www.specialolympics.org">www.specialolympics.org</a>	Program has a professionally designed website with up to date news, stories, events and sports offered; and usage is tracked	Program website has interactive features designed to attract and engage the public (e.g. online giving, volunteer)
	Program designates a skilled person to capture good-quality photo/video for marketing materials	Program maintains an e-library and takes high-quality photos/videos	Program promotes itself using professionally produced print and electronic media
<b>Risk Management</b>		Program has a crisis communication plan and a designated spokesperson for crisis situations	All Program staff are prepared to implement crisis communication plan

Community building	Stage 1	Stage 2	Stage 3
<b>Athlete Leadership</b>	Program provides opportunities for athletes to serve in one or more leadership roles in addition to Board membership (e.g. Spokesperson, Committee member, Employee)	Program increases the number of athletes serving in leadership roles each year and creates opportunities for athletes to participate in external/ partner events	Athlete Leaders are actively involved in all aspects and levels of the Program
	Program has an informal group of athlete leaders who provide input to Program leaders	Program has formal athlete committee to represent athletes throughout the year	Program implements a formal process for the athlete committee to provide input to Program leaders
	Program has a system to track number of athlete leaders serving in each leadership role and implements an athlete leader recognition plan	Program increases and tracks the frequency of athletes serving in leadership roles	
<b>Athlete Health &amp; Wellness</b>	Program requires all athletes to submit timely, accurate medical forms, including evidence of referral follow-up	Program submits all Healthy Athlete screening forms according to grant requirements	Program has electronic health records for each athlete
	Program offers at least one Healthy Athletes clinic per year run by a trained Clinical Director	Program offers at least three Healthy Athletes disciplines per year	Program offers five or more Healthy Athletes disciplines per year with a strategy to reach new athletes
	Program has at least one cash or VIK supporter for Healthy Athletes	Program locally funds at least 30% of Healthy Athletes event costs	Program locally funds at least 75% of Healthy Athletes event costs
	Program ensures athletes, families and caregivers receive results of screenings	Program refers athletes to specific health providers for follow-up care	Program has formal health partnerships to provide free or reduced-cost follow-up care
	Program communicates the importance and impact of health and wellness to all athletes, partners, coaches and families		Programs offers health and wellness programming outside of clinics for athletes, partners, coaches and families
<b>Youth Activation (age 12-25)</b>	Program actively recruits youth (with and without ID)	Program implements and tracks a formalized plan for increasing numbers of youth every year	Program implements a formalized plan for retaining youth as they get older

Community building	Stage 1	Stage 2	Stage 3
<b>Youth Activation (continued) (age 12-25)</b>	Programs actively involve youth as volunteers and partners	Youth are provided opportunities for leadership roles (e.g. as Board members, officials, coaches, interns, committee members, etc.)	Youth are provided formal leadership development opportunities to advance as leaders in the Program
	Program leaders seek informal input from youth involved in the Program	Program has a formal youth activation committee to carry out activities (e.g. Unified Sports, youth activation summit) throughout the year	Program implements a formal process for the youth activation committee to provide input to Program leaders
	Program builds relationships with educational institutions that cater for ID and non-ID students (e.g. schools, universities)	Program partners with educational institutions to conduct inclusive sport and education activities (e.g. Unified Sports, SOGII, youth summit)	Inclusive sport and education activities engage schools and the wider community
		Program has a formal youth activation strategy and implements a youth recognition plan	Program measures the effectiveness of its youth activation strategy through research and evaluation
<b>Families and Young Athletes</b>	Family representative on the Board consults with families	Program has an active family committee with defined goals to support, engage and motivate family members	Family committee implements process for gathering and using feedback from family members to inform Program decision-making
	Program recruits family members and provides them with orientation	Program provides family forums and implements a family recognition plan	Family members are actively involved in all aspects of the Program
	Program actively recruits family members to serve as leaders	Program has at least four family members who serve in leadership roles	Program has at least four family members who serve as 'Community Builders' outside of Family program
	Program provides regular information targeted to the needs of family members	Program engages community partners to participate in outreach to current and prospective family members	
	Program offers Young Athletes program	Program engages family members to implement young athletes programming including home training	Program offers a sustainable and expanding Young Athletes program that provides a transition to training and competition
		Program completes evaluations after every Young Athletes demonstration	Program analyzes and documents child and family progress over time

Gov't & Partner Relations	Stage 1	Stage 2	Stage 3
<b>Government &amp; Political Relations</b>	Program has identified and documented a list of influential political stakeholders	Program has a system or tool to monitor changes in politics and policy that impact Special Olympics	Program has a written strategy that aligns Special Olympics initiatives with political structures and priorities
	Program provides relevant political leaders with status updates on Special Olympics at least once a year	Program makes proactive and sustained efforts to educate and engage relevant political leaders	Program utilizes internal stakeholders at all levels of the Program to influence policy
	Relevant political leaders attend Special Olympics events	Program has cultivated political leaders who use their influence to advance Special Olympics	Relevant political leaders utilize influence to advance the rights of people with ID
	Program understands best potential chances to get Government grants/funds and actively pursues them	Program secures budget relieving cash or in-kind support from Government	Program secures multi-year budget relieving cash or in-kind support from Government to support operational and programmatic costs
	Program is actively developing relationships with government ministries and agencies	Program collaborates with various ministries and government agencies to provide services	Program has formal partnership(s) with national/state political institutions that leads to direct support
	Relevant political leaders in Program's jurisdiction understand Intellectual Disability and Special Olympics	Relevant political leaders in Program's jurisdiction understand how Special Olympics fosters inclusion in sport, education, health, and communities	Relevant political leaders involve Special Olympics in policy setting related to inclusion and disability
<b>Public Sector Partnerships</b>	Program knows who the potential public sector partners are, including SOI partners, and has made clear attempts to engage them	Program is working with at least one public sector partner whose work is complimentary and beneficial to Special Olympics	Public sector partnerships are delivering support and resources that is making a significant difference to implementation of Special Olympics program
	Program has a system for finding out about public sector grant opportunities	Program submits public sector grant applications that meet criteria	Program secures grants from public sector sources



Program Governance	Stage 1	Stage 2	Stage 3
<b>Board &amp; Committee Composition</b>	Board has an active membership, at least two active members who are influential leaders in business and politics	Board has high-profile members who are influential leaders in various aspects of society (e.g. celebrity, sportsperson, education leader)	Program convenes an honorary group of high-profile supporters for specific purposes
	Board conducts a formal skills assessment and recruits new Board members to address possible gaps	Program has a committee that implements a strategy for board building and succession planning	
	Board has a Finance Committee and has identified other committees required and their responsibilities	Board has an active committee structure, with documented deliverables for each committee	
	A youth leader is a member of the Board		
<b>Responsibilities &amp; Policies</b>	Program conducts formal orientation for all Board members	Board continuously improves its knowledge and skills	Board implements board mentoring program
	Board and CEO/Program Director agree goals and budget for the annual operational plan	Board evaluates Program performance against annual operational plan and budget	Board performance is evaluated annually and Board has a succession plan
	Board members have documented roles, responsibilities and deliverables (e.g. raising funds, securing partnerships)	Individual Board member participation and performance is evaluated annually against deliverables	Board members act as leaders of important projects
	Board adheres to term limits	Board reviews bylaws/memorandum of association annually	
	Board and CEO/Program Director agree goals and targets for CEO/Program Director	Board evaluates CEO/Program Director performance annually	Board has a CEO/Program Director succession process
	Board has a process for getting input and feedback from key internal and external constituent groups, such as Sub-Programs and/or local Programs	Board has a proven track record of acting on input and feedback from key internal and external constituent groups	

Planning & Finance	Stage 1	Stage 2	Stage 3
<b>Planning Process</b>	Program has an annual planning process that includes timelines and deliverables	Program projects revenues prior to creation of annual plan	
	Program plan is circulated to key constituents when complete	Program gets input from key constituents such as athletes as part of planning process	Program has a formal, annual consultation process in place to get feedback from all constituent groups
	Board has a clear role in the planning process and approves the plan	Program has a planning group or committee that coordinates planning	
<b>Plan Type/ Content</b>	Program has an annual operational plan with basic elements - goals, actions, metrics, timelines, budget - aligned with SOI's strategic plan and relevant Regional plan	Program has a multi-year strategic plan (min. 3 years) with detailed elements, including a budget for each year, aligned with SOI's strategic plan and relevant Regional plan	Program has a long-term strategic vision and conducts in-depth analysis of strengths, weaknesses, opportunities, threats and trends that impact the work of the Program
<b>Tracking the Plan</b>	Staff and/or key volunteers report on key metrics at least twice a year	Staff and/or key volunteers report on key metrics at least quarterly	Program conducts in-depth analysis of metrics and gets feedback from key groups to help guide strategies
	Progress report is provided to the Board once a year	Progress report is submitted to the Board at least twice a year	Progress report is submitted to the Board at least quarterly
<b>Financial Processes</b>	Program has written financial policies and procedures that comply with applicable accounting standards and are reviewed annually	Board has a standing Finance committee with financial expertise	
	Board forms a group to assess and approve CEO/Program Director salary and benefits		
	Program has annual written financial statements approved by the Board	Financial statements are audited independently (e.g. by audit firm)	
	Program operates within Board approved budget	Program has a minimum of 1 month operating financial reserves on hand	Program has a minimum of 3 months operating financial reserves and reserves are used to generate a return

Planning & Finance	Stage 1	Stage 2	Stage 3
<b>Financial Processes (continued)</b>	Program reconciles bank accounts with books and records monthly	Program leaders review financial reports against budget quarterly	Program leaders review financial reports against budget monthly
	Program has procedure for expense reimbursement, including cash handling, and a system for receipts		
<b>Financial Systems</b>	Program's accounting procedures state who is responsible for each set of funds and who is responsible for cross checks	Program is able to trace funds in financial systems and expenditure is linked back to funding sources	Program uses a centralized accounting software system to manage all income and expenditures and analyze key trends
	Program implements a system for tracking value in-kind (VIK)	Program maintains an inventory of capital goods and assets	
<b>Budgeting</b>	Program projects income and expenses annually and budget is approved by Board	Multi-year (min. 3 years) income and expenses are projected and linked to strategy	Program has a long-term financial plan based on the Program's strategic vision
	Program implements a budgeting process involving people responsible for each area of activity	Administrative and fundraising costs are within expected non-profit standards in the Program's country	
<b>Grant management</b>	Program complies with terms and conditions of grants, including SOI grants	Program maintains a full historic set of grant records according to grant and local legal requirements	Program uses an grants management system to track and report activities by grant
<b>Risk Management</b>	Program identifies key risks and actions that will be taken to address each risk	Program conducts a formal risk assessment and implements risk management plan for areas such as crisis, fraud, athlete protection, etc.	Program embraces risk management and ensures it is implemented at all levels of the Program
	A business (not private) bank account is held in the Program name, and separate accounts are used to segregate operating and grant funds	Audited financials are checked by an independent individual or group other than the Finance Committee and approved by the full Board	
	Program policies and procedures require more than one signatory for approval of transactions and cash handling over specific thresholds	Program uses purchase orders to manage costs over specific thresholds	Program has written procurement policy

Digital & Technology	Stage 1	Stage 2	Stage 3
<b>Planning</b>	Program identifies technology needs in writing; needs are outlined in an annual action plan	Program has a structured multi-year plan for technology improvement	Board or technology advisory group meets at least once a year to review and approve technology strategy and plans
<b>Hardware</b>	Program has access to basic phone, computer, dedicated email, and internet connectivity	Program has phone, computer systems, email, and internet in place with consistent connectivity and availability	Program has a shared internal network that can be accessed by staff and key volunteers wherever they are
<b>Applications, Data &amp; Reporting</b>	Program has basic office applications	Program has a shared electronic filing system for documents, photos, presentations, etc.	Program has capabilities that enable online information sharing, fundraising, marketing, social media, etc.
	Program uses spreadsheets or databases to manage data for competitions, athletes, partners and coaches	Program uses GMS or a similar databases to manage data for competitions, athletes, partners and coaches	Program uses GMS to manage data for competitions, athletes, partners and coaches
		Program tracks athlete engagement in non-sport Special Olympics activities	Program analyzes impact of athlete engagement over time
		Program has video conferencing capabilities (e.g. Skype)	Program has intranet for internal communication (within the Program)
	Program maintains spreadsheets or databases of all volunteers & family members	Program maintains a database of all volunteers & family members	Program tracks a history of job assignments/engagement for volunteers & family members
	Program has spreadsheet to track donor information and activity	Program has database to track donor information and activity	Program has a Constituent Relationship Management (CRM) that provides advanced tracking and analysis capabilities

Digital & Technology	Stage 1	Stage 2	Stage 3
<b>Applications, Data &amp; Reporting (continued)</b>	Program submits annual census data in electronic format to Special Olympics	Program submits annual census/ accreditation data online to Special Olympics	Program uses surveys to gather and analyze data for Program improvement
<b>Risk Management</b>	Program has hardcopy back-up system and uses virus protection software	Program has a secure data storage and off-site back-up system	Program implements comprehensive information security measures and policies and runs regular technology audits