Dear Colleagues,

In just a few weeks we will all be together in Morocco for one of the most historic events in the history of our movement. Never in the history of Special Olympics has there been a more critical time for our family of Program leaders, supporters, volunteers, families and athlete leaders to unite together. At the culmination of the most amazing decade our movement has seen, we need to harness the outstanding efforts that have been the catalyst to our current success, as well as galvanize our leaders – future Founders – and together create our roadmap into the future. This is the most pivotal challenge of our time, and we need your input to make it a success.

Please find enclosed, materials that will help you prepare for your upcoming journey. In addition to travel checklists and logistic information, you will find many documents that will help you prepare for the meaningful and important discussions that will happen on the ground in Marrakech. Please take the time to look through everything in this packet so that you can fully prepare and contribute to the exciting discussion we will hold.

I look forward to seeing you in Marrakech in a few weeks and to witnessing the power of your collective efforts, insight, and innovation that will take Special Olympics to a new level throughout the world.

Sincerely,

J. Brady Lum
President and Chief Operating Officer
Special Olympics
Schedule of Events
As of 5/15

June 5

All Day
Arrivals and Official Registration for the 2010 Special Olympics Global Congress
Please refer to the enclosed information with specific details about your arrival, accommodation and transportation.

June 6

All Day
Arrivals and Official Registration for the 2010 Special Olympics Global Congress
Please refer to the enclosed information with specific details about your arrival, accommodation and transportation.

9:00am – 5:00pm
Global Athlete Congress
Location: Rissani Ballroom and Breakout rooms, Atlas Asni
Attire: Business Casual
More than 100 Special Olympics athlete leaders from around the world will join together to discuss the present and future of the Special Olympics movement and make collective recommendations to the Special Olympics International Board of Directors.
Delegates and guests are invited to attend the General Sessions of the Athlete Congress, however due to space limitations, must pick-up a ticket at registration.

6:00pm – 8:00pm
Global Athlete Congress Dinner
Location: Atlas Asni Hotel
Attire: National Dress or Business Casual
This event is by invitation only.

June 7

All Day
Founder’s Exchange
Location: Espace Menara-Asni, Level 0, Palais des Congres
Visit this exhibition area at the Congress and see the latest information about Special Olympics programs and initiatives from around the world. We invite each Delegate to drop by the Torch Tales video room and tape your video message about the impact of Special Olympics in your community.

9:00am – 10:30am
Opening Session of the 2010 Special Olympics Global Congress
Location: Salle des Ministres, Palais des Congres
Attire: Business Casual
Join more than 600 Special Olympics athletes and leaders from around the world as we celebrate the opening of the 2010 Special Olympics Global Congress. The Congress will begin with motivational messages from our host Her Royal Highness Princess Lalla
Amina, Special Olympics Chairman Timothy P. Shriver, athletes and representatives from the region that will reenergize our core across all pillars of the strategic plan and focus Delegates on the work at hand throughout the next few days and beyond.

10:30am – 11:00am  **Welcome Reception**  
*Location: Espace Menara-Asni & Medina-Agdal, Level 0, Palais des Congres*  
Immediately following the Opening Session, Delegates will be joined by local dignitaries for a coffee and tea reception.

11:00am – 12:00pm  **Strategic Plan Presentation Session**  
*Location: Salle des Ministres, Palais des Congres*  
*Attire: Business Casual*  
Listen and learn as Special Olympics President and Chief Operating Officer J. Brady Lum presents Version 2.0 of our Special Olympics 2011-2015 Strategic Plan, that is the product of input from Program Leaders, staff, key constituents and partners from around the world. This session will set the stage for the work of the Congress - to discuss, to debate and to align around the pillars of our future.

12:00pm – 12:30pm  **Proceed to Lunch**

12:30pm – 1:30pm  **Lunch and Networking Opportunity**  
*Location: Salle Royal, Level 0, Palais des Congres*  
*Attire: Business Casual*  

1:30pm – 2:00pm  **Proceed to Track Discussions**

2:00pm – 5:30pm  **Track Discussions**  
*Location: Various locations at the Palais des Congres and the Hotel Atlas Asni*  
*Attire: Business Casual*  
Tracks Discussions will engage specially designed teams of Delegates in discussions examining the Strategic Plan Pillars, and how they can implement the plan at the Regional and Local levels. Tracks include:

<table>
<thead>
<tr>
<th>Track</th>
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<tbody>
<tr>
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<td>Rissani Ballroom, Atlas Asni</td>
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<tr>
<td>Connect Fans &amp; Funds</td>
<td>Rissani Ballroom, Atlas Asni</td>
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<tr>
<td>Define Movement Leadership &amp; Establish Sustainable Capabilities</td>
<td>Koutubia Room, Level 1, Palais des Congres</td>
</tr>
<tr>
<td>Advance Sports &amp; Competition</td>
<td>Fez 1, Level 1, Palais des Congres</td>
</tr>
<tr>
<td>Establish Values that Define our Culture</td>
<td>Fez 2, Level 1, Palais des Congres</td>
</tr>
</tbody>
</table>

Please proceed to your assigned track and refer to the enclosed detailed information about the Track discussion topics.

5:30pm – 7:30pm  **Networking Opportunity**  
Delegates can enjoy free time to network with their peers and visit the Founder’s Exchange displays in the Palais des Congress. Organized tours of Marrakech will also be available at the Tourism desk in the Palais des Congress.

5/19/2010 11:19 AM
8:30pm  Official Dinner Hosted by His Majesty King Mohamed VI  
Location: Salle Royal, Level 0, Palais des Congres  
Attire: Formal or National Dress (Men - Dark Suit, Black Tie or National Dress; Women – Long or Cocktail Dress)

June 8

All Day  Founder’s Exchange  
Location: Espace Menara-Asni, Level 0, Palais des Congres  
Visit this exhibition area at the Congress and see the latest information about Special Olympics programs and initiatives from around the world. We invite each Delegate to drop by the Torch Tales video room and tape your video message about the impact of Special Olympics in your community.

9:00am – 12:00pm  Track Discussions  
Location: Various locations at the Palais des Congres and the Hotel Atlas Asni  
Attire: Business Casual  
Tracks Discussions will engage specially designed teams of Delegates in discussions examining the Strategic Plan Pillars, and how they can implement the plan at the Regional and Local levels. Tracks include:

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</tr>
<tr>
<td>Leverage Games</td>
<td>Fez 2, Level 1, Palais des Congres</td>
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Please proceed to your assigned track and refer to the enclosed detailed information about the Track discussion topics.

12:00pm – 12:30pm  Proceed to Lunch

12:30pm – 1:30pm  Lunch and 2013 Special Olympics World Winter Games Preview  
Location: Salle Royal, Level 0, Palais des Congres  
Attire: Business Casual  
During lunch, Delegates will get an exclusive preview of the 2013 Special Olympics World Winter Games Korea from Special Olympics Korea Chairman Woo Kee-Jung and Special Olympics Korea Honorary Chairperson Congresswoman Na Kyung-won.

1:30pm – 2:00pm  Proceed to General Session

2:00pm – 3:30pm  General Session  
Location: Salle des Ministres, Palais des Congres  
Attire: Business Casual
Delegates are invited to join together and hear from leaders from diverse perspectives who will share knowledge, inspire participants, and frame important discussions that address how to bring our new strategic plan to life.

*Keynote Panel Discussion: Marketing and Fund Raising in a Global and Competitive Environment*

Hear from The Coca-Cola Company Chairman and CEO Muhtar Kent, the Managing Partner of Kleiner Perkins Caufield & Byers Ray Lane, the creator of the (Product)RED Campaign Bobby Shriver, Special Olympics Sargent Shriver International Global Messenger Kester Edwards and the Chairman of Arnell Peter Arnell, one of the world’s leading branding and marketing agencies, as they discuss what drives their global success and how we can learn from their experience to help us achieve our strategic objectives as a movement. The session will be moderated by Sports broadcaster and Olympic Swimming Gold Medalist Donna de Varona.

3:30pm – 4:00pm  
**Break**  
*Location: Espace Menara-Asni & Medina-Agdal, Level 0, Palais des Congres*  
*Attire: Business Casual*

4:00pm – 5:30pm  
**General Session Continued**  
*Location: Salle des Ministres, Palais des Congres*  
*Attire: Business Casual*

*Keynote Panel Discussion – Coaching Excellence and the Athlete Experience*

In true Special Olympics fashion, this panel will examine the issue of coaching excellence through the lens of athletes. Some of the world’s greatest competitors and organizers, such as AC Milan Midfielder and Humanitarian Clarence Seedorf, Tennis Legend and Author Monica Seles, Olympic Gymnastics Gold Medalist Nadia Comaneci, Olympic Athletics Gold Medalist and UNICEF Goodwill Ambassador Hicham El Guerrouj, Special Olympics Australia Athlete and Coach Ben Haack, and Special Olympics Italy Chairman and Vice-Chairman of SARAS S.p.A. Angelo Moratti, will talk about the coaches who helped them achieve greatness. We will also hear about the impact that well-run competition can have on athlete motivation and performance. The session will be moderated by Sports Broadcaster and Olympic Gymnastics Gold Medalist Bart Conner.

5:30pm – 7:30pm  
**Networking Opportunity**  
Delegates can enjoy free time to network with their peers and visit the Founder’s Exchange displays in the Palais des Congress. Organized tours of Marrakech will also be available at the Tourism desk in the Palais des Congress.

8:30pm  
**Official Dinner Hosted by Her Royal Highness Princess Lalla Amina**  
*Location: Salle Royal, Level 0, Palais des Congres*  
*Attire: Formal or National Dress (Men - Dark Suit, Black Tie or National Dress; Women – Long or Cocktail Dress)*

**June 9**

**All Day**  
**Founder’s Exchange**
Visit this exhibition area at the Congress and see the latest information about Special Olympics programs and initiatives from around the world. We invite each Delegate to drop by the Torch Tales video room and tape your video message about the impact of Special Olympics in your community.

8:00am – 9:30am  
**Special Olympics International Board of Directors Meeting**  
*Location: Salle Tinmel, Atlas Medina*  
*Attire: Business Casual*

10:00am – 11:00am  
**General Session**  
*Location: Salle des Ministres, Palais des Congres*  
*Attire: Business Casual*  
Delegates will once again join together and hear from community and youth leaders who will share knowledge, inspire participants, and frame important discussions that address how to bring our new strategic plan to life.

**Keynote Panel Discussion – Youth Activation and Engagement**
Hear from members of the Global Youth Advisory Council and young leaders from across the Special Olympics movement Namibia Unified Partners Rosevindi Tsei-Tsei-Mou and Hilma Petrus; Poland Unified Partners Pawel Dulski and Marcin Wolski; New Jersey (USA) Unified Partners Jason Newbury and Jenni Newbury; Youth Activation Council Members Xiaoyue “Rockie” Zhao (China), Wael Al Shehab (Bahrain) and Soeren Palumbo (Illinois) as they inspire Delegates to take action in their local communities through activating and engaging young leaders. The session will be moderated by Special Olympics Panama Board President Yolanda Eleta de Varela.

11:00am – 11:15am  
**Break**  
*Location: Espace Menara-Asni & Medina-Agdal, Level 0, Palais des Congres*  
*Attire: Business Casual*

11:15am – 12:30pm  
**General Session Continued**  
*Location: Salle des Ministres, Palais des Congres*  
*Attire: Business Casual*

**Keynote Panel Discussion – Bringing Together Agents of Change to Build Stronger Communities for our Athletes**
In this session, we will hear from community leaders who have a proven record of building and implementing change in communities around the world. Peace Corps Director Aaron Williams, Special Olympics Korea Honorary Chairperson Congresswoman Na Kyung-won, Special Olympics International Global Messenger Dina Galal will discuss their work and ways that Special Olympics programs can form partnerships that will help achieve our strategic objectives. The session will be moderated by First Lady of California Maria Shriver.

12:30pm – 12:45pm  
**Proceed to Lunch**

12:45pm – 1:45pm  
**Lunch and 2011 Special Olympics World Summer Games Preview**  
*Location: Salle Royal, Level 0, Palais des Congres*
Attire: Business Casual
During lunch, Delegates will hear from the Chairman of the Special Olympics World Summer Games Athens 2011 Joanna Despotopoulou about the next World Games and exciting plans underway to celebrate the achievements of our athletes.

1:45pm – 2:00pm  Proceed to Closing Session

2:00pm – 4:30pm  Closing Session and Ceremony
Location: Salle des Ministres, Palais des Congres
Attire: Business Casual
On this closing day of the Congress, we will invite Delegates to make their commitments for the future, bringing our strategic pillars to life for the global Special Olympics movement.

4:30pm – 5:30pm  Closing Reception
Location: Salle Royal, Level 0, Palais des Congres
Attire: Business Casual

5:30pm – 6:00pm  Transfer to Sports Experience

6:30pm – 8:00pm  Sports Experience
Location: Sidi Youssef Ben Ali Stadium, Marrakech
Attire: Casual Attire
Delegates and athletes will join together in fun Special Olympics Unified Sports activities, joined by the athletes of Special Olympics Morocco and Moroccan Olympic legends. Upon check-in, you will be invited to sign up for a sports activity if you wish to participate on the field.

8:00pm - 9:00pm  Proceed to Closing Dinner
Immediately following the Sports Experience, Delegates will be transported directly to the Closing Dinner.

9:00pm  Official Closing Dinner hosted by Ministry of Tourism
Location: Terre des Fêtes, Marrakech
Attire: Casual Attire

June 10

All Day  Departures
Please refer to the enclosed information with specific details about your departure and transportation.
Official Hotels

Mansour Eddahbi
Boulevard Mohamed VI - 40 000 Marrakech, Morocco
Phone: +212(0) 24 33 91 00
www.hotel-mansoureddahbi.com

The Mansour Eddahbi is part of the Palais Des Congrès Conference Centre in Marrakech. The rooms of this 5-star garden hotel are surrounded by lush and luxuriant gardens, and the property features a choice of dining and recreation opportunities.

<table>
<thead>
<tr>
<th>Property Information</th>
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<tbody>
<tr>
<td>3 swimming pools</td>
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<tr>
<td>Spa and Fitness Center</td>
</tr>
<tr>
<td>Shopping Gallery</td>
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</table>

Atlas Medina
Avenue Hassan Ier Marrakech, Morocco
Phone: +212(0) 24 33 99 99
www.hotelsatlas.com

The Atlas Medina is a modern 5-star hotel nestled in a beautiful palm grove park, facing the Palais Des Congrès Conference Center. This charming and luxurious establishment is a mixture of Moorish and 30’s architecture, featuring a large pool, spa, and other amenities for business and pleasure.

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<tr>
<th>Property Information</th>
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<tbody>
<tr>
<td>Outdoor Swimming Pool</td>
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<tr>
<td>Spa, Fitness Center and Squash Room</td>
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<tr>
<td>Shopping Gallery</td>
</tr>
</tbody>
</table>

Atlas Asni
Avenue de France 40-000, Marrakech, Morocco
Phone: +212(0) 24 33 99 99
www.hotelsatlas.com

The Atlas Asni is a comfortable 4-star property located near the market with a big pool, nice nearby restaurants, and modern and spacious rooms. The hotel offers many choices for business and recreation, and is conveniently located across the street from the Palais Des Congrès Conference Center. This property is designated primarily for Athlete Congress participants.

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<tr>
<td>2 on-site Restaurants</td>
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<tr>
<td>4 on-site Bars, Lounges and Nightclubs</td>
</tr>
<tr>
<td>Wireless Internet</td>
</tr>
<tr>
<td>4 on-site Bars, Lounges and Nightclubs</td>
</tr>
<tr>
<td>Hair Salon</td>
</tr>
<tr>
<td>On-site Restaurant</td>
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</table>
Trip Preparation

In just a few short weeks we will meet in Marrakech, Morocco for the 2010 Special Olympics Global Congress. Enclosed in this package are details to help you get ready for your departure. Please spend some time reviewing this information so that you will be certain to be best prepared for your trip.

Important Information for Your Arrival and Departure

Arrival Procedure

Official Arrival Services begin on 5 June:
Upon your arrival at your final destination (Casablanca or Marrakech airports) you will be greeted by representatives of the Global Congress Organizing Committee Hospitality Staff. You will be escorted to a special VIP room where your photo will be taken and your official Global Congress credential will be issued. After clearing customs and immigration, the Hospitality Staff will assist you with collecting your luggage, and you will be transported by car, bus or train to your hotel.

Arrivals prior to 5 June:
If your arrival date is prior to 5 June, and you are arriving for official Congress or Regional Business (not personal vacation), you will be met at the airport by Global Congress Hospitality Staff and escorted to your ground transportation that will take you to your hotel. Your official Global Congress credential will be issued at your hotel following check-in.

Hotel Check-in Procedure

Your hotel reservation has been confirmed by the Global Congress Organizing Committee, and your room and tax has already been pre-paid as part of your registration fee. However, each Delegate is responsible for his or her own incidental expenses at the hotel and must provide a credit card at check-in. If you do not have a credit card, please contact your Regional Managing Director to make alternate arrangements. Upon arrival at the hotel, you will be provided with your room key and Official Global Congress Welcome Packet.

Departure Procedure

Official Departure Services will begin on 10 June and end on 11 June:
Enclosed in your Official Global Congress Welcome Packet (that you will receive at check-in), there will be specific information about your departure from the Congress, including the time you are to report to the lobby of your hotel to obtain transportation. If you have any questions about your departure, please contact the Global Congress Hospitality Desk in the lobby of the Palais des Congrês.

Departures after 11 June:
If your departure date is after 11 June, and you were participating in a Regional Meeting, service will be provided to you by the Global Congress Hospitality Staff. If you are remaining in Marrakech for personal reasons, you will need to arrange your own departure through your hotel.
Trip Preparation

Attire
The acceptable attire for the general sessions of the Congress is Business Casual. On the 7th and the 8th, the attire for the Official Dinners is Formal or National Dress. On the 9th, Special Olympics Morocco will host a Special Olympics Unified Sports Experience where Delegates will have the opportunity to play in fun sports demonstrations with Athletes. If you wish to participate, please bring proper Sports Attire. The dinner on the 9th will be Casual Attire. During leisure time, casual, comfortable dress is appropriate. Additionally, the hotels have swimming pools so don’t forget to bring your swim suit! See below a description of appropriate attire:

**Business Casual**
*Men:* Sport Coat, Slacks, Long-sleeved shirt, Tie optional (Not Acceptable: Jeans, T-shirts)
*Women:* Slacks, Blouse, Dress, Skirt and Top (Not Acceptable: Jeans, Mini-skirts)

**Formal or National Dress**
*Men:* Dark Suit and Tie, Tuxedo, Smoking Jacket, Formal National Dress (Not Acceptable: Light-colored suit, Jeans)
If you have a Long Dress, we recommend you wear this to the Official Dinner on the 7th Hosted by His Majesty King Mohamed VI.

**Casual**
*Men:* Slacks, Khakis or Nice Jeans, Long-sleeved shirt, Sport Coat optional (Not Acceptable: Old Jeans, T-shirts)
*Women:* Nice Jeans, Blouse, Summer Dress, Skirt and Top (Not Acceptable: Old Jeans, Mini-skirts)

**Sports Attire**
*Men & Women:* Sneakers/Running Shoes, Sweat Suit, Shorts and Exercise Shirts (Not Acceptable: Jeans)

**Other Suggested Items to Pack**
- Sunglasses with UV protection
- Hat
- Sunscreen (30+)
- Light jacket or wrap for cooler nights or air conditioning
- Moisturizing lotion
- Lip balm
- Camera, batteries, accessories
- Power converters or adaptors
- Comfortable walking shoes
- Swimsuit

Currency
The official currency of Morocco is the dirham (MAD; abbreviated to dh within Morocco), divided into 100 centimes. Coins are issued in denominations of 1dh, 2dh, 5dh, and 10dh, as well as 10, 20, and 50 centimes. Banknotes are issued in denominations of 20, 50, 100, and 200. Many establishments will also accept Euros and US Dollars.

**Currency Exchange rates as of 5/5**
1 USD = 8.58 MAD
1 Euro = 11.05 MAD
1 GBP (UK) = 12.97 MAD
1 NCY (China) = 1.25 MAD
1 BRL (Brazil) = 1.86 MAD
1 ZAR (South Africa) = 1.12 MAD

Changing Money and Cash
Cash and traveler's checks can be exchanged at tourist hotels and major banks. The official currency of Morocco is the Moroccan Dirham, but many establishments will also accept Euros and US dollars for payment, if you do not have Dirhams on hand. However, note you will need to use cash for taxis and shopping in the souks.

Credit Cards & ATMs
Most major credit cards (e.g. VISA, MasterCard and American Express) are widely accepted throughout Marrakech and other major cities in Morocco. Credit cards can be used at tourist hotels and in many retail stores and restaurants however cannot be used for taxis. ATMs are also located throughout Morocco, but we recommend you check with your bank to find out any fees that will be charged for withdrawals.

Electricity
Electricity is generally reliable and available throughout Morocco. Moroccan power points accept the European two-pin plug only, and run on a 220V/55Hz current. The hotels will not have a large amount of adaptor plugs on hand, so we recommend you bring your own international adaptor plugs.

Food and Local Cuisine
Moroccan cuisine is often reputed to be some of the best in the world, with countless dishes and variations proudly bearing the country's colonial and Arabic influences. During the Congress, you will have the privilege of enjoying some traditional Moroccan cuisine such as Tagine, Couscous, Pastilla and the famous Moroccan Tea. Additionally, International cuisine is abundant in Marrakech. Throughout the Congress, vegetarian and other dietary options will be offered to the Delegates.

Ground Transportation
In addition to providing transportation to and from the Casablanca and Marrakech airports, ground transportation will be provided by the Global Congress Organizers to offsite special events and activities. Shuttles and Taxis will also be available to enjoy local tourism opportunities. For more information, please visit the Hospitality Desk at the Palais des Congrès.

Hospitality Staff
In order to provide you with the best possible experience at the Global Congress, the Congress Organizers will have skilled staff working in all areas of the hospitality program. The multi-lingual staff will make every effort to assist with your needs. From being greeted at the airport to providing information about the Congress and local tourism activities, the Hospitality Staff will be on hand to make your visit enjoyable.

Language
Moroccan Arabic (sometimes called Darija) is the official language of Morocco. French is also widely spoken throughout the country. Simultaneous translation will be provided at the Congress for English, French, Arabic, Russian, Spanish and Mandarin.
Medical and Security
The Global Congress will have medical and security staff on hand at each venue and event to secure the safety of all Congress participants. If you have any special medical concerns, please alert the Hospitality Staff upon your arrival.

Time Zone
Morocco is GMT +1 hour for DST (Daylight Savings Time).

Tipping
Tipping is acceptable in Morocco. The expected minimum tip for most services is 10%.

Tourism
The Global Congress Organizers have secured a top local tourism agency to provide unique tours, day-trips and travel packages exclusively for our Delegates. Please visit the Tourism desk at the Palais des Congrès upon your arrival to Marrakech for more information and to make a booking.

Weather
The climate in Marrakech is very pleasant with a dry arid heat with low humidity. There is almost no chance of rain during the month of June. Temperatures during the day are warm, with a hot sun if you are outdoors, and will cool down at night.

Average Temperatures in June
Low: 16.3 C  61 F
High: 31.3 C  88 F

Water
Drinking water in Morocco is potable, however we advise international travelers to use the bottled drinking water provided in your room.
Delegate Checklist

Things to do before you leave to prepare for the Global Congress:

- Double-Check the flight information printed on your itinerary and inform Kevin Gully (kgully@specialolympics.org) immediately if there are any discrepancies
- Confirm you have your travel visa (if needed)
- Read through the Strategic Plan
- Note your assigned Track Sessions and review the information about the discussion items for your Track
- Prepare questions and discussion topics to fully participate in the program and gain the most from the experience at the Global Congress
- Connect with fellow program leaders and staff not attending to bring their questions and comments with you to the Congress
- Bring a photo that represents the power of Special Olympics in your community. If you have the photo digitally, please send it to globalcongress@specialolympics.org.
- Bring a credit card to provide to the hotel at check-in to cover all incidentals during your stay

What to Pack:

Clothing:

- Business Casual Attire (for General Sessions)
- Formal Attire (for Official Dinners)
- Sports Attire (for the Sports Experience)
- Casual Attire (for leisure activities and the Closing Dinner)
- Light summer clothing for warm days
- Light jacked for cooler nights
- Swimsuit
- Comfortable walking shoes
- Hat or Visor

Other Items:

- Sunscreen (SPF 30+)
- Moisturizing Lotion
- Sunglasses with UV Protection
- Lip Balm
- Camera, film and accessories
- International plug adaptors
Delegate List as of 5/14/10

Note: This list does not include Hospitality Guests

Global Athlete Congress

Ms. Mariela Alejandra Dominguez Pierini; Athlete Leader Special Olympics Argentina
Mr. Benjamin Haack; Athlete Special Olympics Australia
Mr. Andrew Robert Williams; Global Athlete Congress Special Olympics Australia
Mr. Theo Tebele; Global Athlete Congress Special Olympics Botswana
Mr. Shawn Fevens; IGM Mentor Special Olympics Canada
Ms. Christina Judd-Campbell; Global Athlete Congress Special Olympics Canada
Mr. Marc Theriault; Athlete Special Olympics Canada
Mr. Matthew Williams; International Global Messenger Special Olympics Canada
Ms. AO LEONG In; Athlete Special Olympics Macau
Ms. Li Juan; Organizational Development Leader Special Olympics East Asia
Ms. HUANG Min Min; International Global Messenger Special Olympics China
Ms. JIA Si Rui; Athlete Special Olympics China
Ms. ZHONG Yulian; International Global Messenger Mentor Special Olympics China
Ms. MA Yun Li; Athlete Special Olympics China
Mr. CHEN Wei-Chieh; International Global Messenger Special Olympics Chinese Taipei
Mr. Ariel Ary Chinchilla; International Global Messenger Special Olympics Costa Rica
Mr. Carlos Francisco Valverde Gomez; Global Athlete Congress Mentor Special Olympics Costa Rica
Ms. Dina Mohamed Galal Moussa; Former International Global Messenger Special Olympics Egypt
Mrs. Fatma Abdel Fattah Sakr; Escort Special Olympics Middle East/North Africa
Mr. Nelson Alberto Ceron; Global Athlete Congress Special Olympics El Salvador
Ms. Melissa Jeangrand; Mentor Special Olympics France
Ms. Caroline Verdenal; Athlete Special Olympics France
Mr. Marios Kritsonis; Athlete Special Olympics Greece
Mr. Kostas Theodoropoulos; Mentor Special Olympics Greece
Mr. José Luis Mejia Rodriguez; Global Athlete Congress Special Olympics Honduras
Mr. TAM Wai Yip; Athlete Special Olympics Hong Kong
Mr. Jerson Fernandes; Athlete Special Olympics Bharat
Mr. Vincent Napoleon Menezes; Athlete Special Olympics Bharat
Ms. Neha Prakash Naik; International Global Messenger Special Olympics Bharat
Ashley Nazareth; Global Family Summit Special Olympics
Ms. Juanita Rodrigues; IGM Mentor Special Olympics Bharat
Mr. William Gould; Athlete Special Olympics Israel
Ms. Yaffa Tzur; Mentor Special Olympics Israel
Ms. Miho Nakamura; Athlete Special Olympics Nippon
Ms. Fusa Sensui; Acting National Director Special Olympics Nippon
Ms. Mariya Belikova; Mentor Special Olympics Kazakhstan
Mr. Andrei Kossikhin; European Athlete Representative Special Olympics Kazakhstan
Mr. Joshua Agare; International Global Messenger Special Olympics Kenya
Mr. Rispan Ojuwa; IGM Mentor Special Olympics Kenya
Ms. KO Miae; Mentor Special Olympics Korea
Mr. HWANG Suk Il ; **Athlete** Special Olympics Korea
Ms. KIM Yoo Na ; **Athlete** Special Olympics Korea
Mr. Sami Chahine ; Special Olympics Lebanon
Mr. Ziad Saeed Khoiss ; **Director of Sport Programs** National Rehabilitation and Development Center
Mr. Zakaria Aquedim ; **International Global Messenger** Special Olympics Morocco
Mr. Said Zay ; **IGM Mentor** Special Olympics Morocco
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Mr. Peter R. Franklin; Group Director, Worldwide Sports and Event Mgmt. The Coca-Cola Company
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Mr. Shail Kapri ; Manager, Fundraising Special Olympics Asia Pacific
Mr. Simon Koh ; Director, Operations Special Olympics Asia Pacific
Mr. Björn Köhler ; Initiative Manager, Healthy Athletes Special Olympics Europe/Eurasia
Mr. Mirek Krogulec ; Senior Manager, Organizational Development and Sp Special Olympics Europe/Eurasia
Mr. Krzysztof Krukowski ; Director, Organizational Development Special Olympics Europe/Eurasia
Ms. Mabel Kwan ; Director of Marketing and Communications Special Olympics East Asia
Mr. David Lenox ; Vice President, Leadership Development and Educ. Special Olympics, Inc.
Ms. Rebecca Liu ; Senior Administration Manager Special Olympics East Asia
Ms. Janet Louis ; Senior Manager, Accounting Operations Special Olympics, Inc.
Ms. Robyn E. Markey ; Director, Organizational Development Special Olympics North America
Ms. Yony McCloskey ; Partner, Sorelle Group Special Olympics International
Ms. Kate McKenna ; Director, Editorial and Multimedia Special Olympics, Inc.
Ms. Sabine Menke ; Senior Manager, Youth Education & Unified Sports Special Olympics Europe/Eurasia
Ms. Marian Murphy ; Director, Organizational Development Special Olympics Europe/Eurasia
Mr. Joe Mutua ; Manager, Organizational Development Special Olympics Africa
Mr. Mohamed Nasser Al Hussein ; Manager, Sports and Competitions Special Olympics Middle East/North Africa
Mr. Steve Neill ; Vice President of Strategic Gifts Special Olympics, Inc.
Mr. Charles L.S. Nyambe ; Program Development and Sports Manager Special Olympics Africa
Ms. Fiona O’Loughlin ; EU Development Officer Special Olympics Europe/Eurasia
Mr. Trevor O’Rourke ; Global Football Advisor Special Olympics Europe/Eurasia
Ms. Maria Gabriela Pelaez ; Organizational Development Coordinator Special Olympics Latin America
Ms. Maureen Rabbitt ; Director of Communications Special Olympics Europe/Eurasia
Ms. Nancy Rawles ; Vice President, Human Resources Special Olympics, Inc.
Ms. Adrienne Regan ; Director of Corporate Partnerships Special Olympics Europe/Eurasia
Mr. Terry Richey ; Chief Marketing and Development Officer Special Olympics, Inc.
Ms. Leslie Riehm ; Executive Assistant to the President and COO Special Olympics, Inc.
Ms. Amy Roden ; Special Olympics International
Ms. Yee Saengsawang ; Coordinator, Program Development & ALPs Special Olympics Asia Pacific
Mr. Will Schermerhorn ; Director of Web Products Special Olympics, Inc.
Mrs. Kirsten Suto Seckler ; Vice President, Branding and Communications Special Olympics, Inc.
Ms. Nahla Shaker ; Administrative Assistant Special Olympics Middle East/North Africa
Mr. Harpreet Singh Gambhir ; Manager, Organizational Development Special Olympics Asia Pacific
Mrs. Stabiso Sithole ; Program Development Manager Special Olympics Africa
Ms. Ancilla Smith ; Football Initiatives Manager Special Olympics Africa
Ms. Yasmin Soliman ; Senior Manager, Regional Growth Special Olympics International
Mr. Douglas K. Stevens Jr.; Chief Financial Officer Special Olympics, Inc.
Ms. Gemma Sturdy ; Executive Assistant to the Managing Director Special Olympics Europe/Eurasia
Mr. Charles G. Takouet ; Manager, Program Development Special Olympics Africa
Mr. Kris Tase ; Corporate Travel Consultant FCm Travel Solutions
Ms. Kristine Templin ; Vice President, Corporate Partnerships Special Olympics, Inc.
Mr. Lee Todd ; Chief of Sports, Training and Competition Special Olympics, Inc.
Ms. Stella Treas ; Director, Strategy Development Special Olympics, Inc.
Mr. Kai Troll; Director, Organizational Development and Strategic Special Olympics Europe/Eurasia
Mr. Drake Turrentine; Secretary and Senior Strategic Advisor Special Olympics, Inc.
Ms. Annemarie L. van Wieringen; Chief Executive Officer Special Olympics South Africa
Ms. Joan Wheatley; Vice President, Donor Development Special Olympics, Inc.
Mr. Peter Wheeler; Chief of Strategic Properties Special Olympics, Inc.
Ms. Kim B. Widdess; Vice President, Strategic Properties Special Olympics, Inc.
Mrs. Maha M. Yacoub; Budget Manager Special Olympics Middle East/North Africa
The 2010 Special Olympics Global Congress will not only unite and energize the leaders of our Special Olympics movement, but it will provide a forum for important discussions around the future of our Global Movement. It is vision that delegates will:

**Feel** inspired by belonging and contributing to a global movement.

**Think** differently and deeply about what it takes to bridge from an event-based organization to a movement that important, urgent, relevant and inclusive.

**Act** by making a personal and leadership commitment to align and strengthen our Programs locally, embedding the core pillars of our strategic framework.

Enclosed please find the Draft 2011-2015 Strategic Plan and the Track Discussion overviews. It is our expectation that each delegate will study these documents to prepare themselves to contribute to the on-going discussion and decisions around the future of our movement.
# Track Sessions

Overview and Discussion Briefings for Delegates

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<th>Track Sessions</th>
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<td>Advance Sports &amp; Competitions</td>
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<td>Build Communities</td>
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<td>Connect Fans &amp; Funds</td>
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<td>Define Movement Leadership &amp; Establish Sustainable Capabilities</td>
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<tr>
<td>Establish Values that Define our Culture</td>
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<tr>
<td>Leverage Games</td>
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</table>
ADVANCE SPORTS & COMPETITION

Track Session Overview

Date and Time

June 7       2:00pm – 5:30pm
June 8       9:00am – 12:00pm

Location

Fez 1, Level 1, Palais des Congress
ADVANCE SPORTS & COMPETITION

Track Session Overview

Track Staffing
Track Leaders: Deborah Bright; Lee Todd
Facilitator: Lynn Doyle

Session Logistics
Date & Time: June 7: 2:00pm - 5:30pm
June 8: 9:00am - 12:00pm
Location: Fez 1, Level 1, Palais des Congres

Desired Outcomes
By the end of the track session, delegates will:
- Understand and provide formal feedback on the overall Vision, Goals, and Strategies of the pillar.
- Provide feedback on which strategies and targets they understand and endorse; which they do not understand; and which they disagree with as a vehicle for achieving the Vision.
- Assess feasibility of Athlete Development Model based on participant interest and commentary and identify key elements of such a model at the Program level (3-5).
- Determine global interest in Unified Sports development and outline major barriers to implementation across Regions.

Session Format
This Track will be conducted over two days into two distinct sessions. Some delegates will remain in the Track for both days. Others will join either for Day 1 or Day 2 only. Tracks will be professionally facilitated and will operate under consistent SO Global Congress Rules of Engagement (attached separately).

Day 1 is an overall review of the Vision, Objectives, and Strategies. Delegates will hear how the Vision was developed and how the proposed Objectives are designed to help us achieve that vision. Then the delegates will break into discussion groups (formed primarily according to language) to discuss the Vision and Objectives and ask questions or provide input. At the end of this day, delegates will rank the top three tactics in order of importance to achieve goals as well as the three least important tactics to achieving the goals. Delegates will rate all proposed strategies and targets as: One they understand and see as helpful; One that they either don’t understand or feel is neither helpful or harmful; or One they feel is not helpful or even harmful for programs working toward the Vision.

Day 2 is dedicated to in-depth discussion and feedback on two of the pillars strategies: 1) Unified Sports; and 2) Sport Development Model. On this day, delegates will be asked for feedback on these issues/proposals and answer questions related to implementation at the Program level. This is the day for people who want to delve into more detail on a specific topic. Delegates will be asked to discuss the specific “Questions for Engagement” which are listed below:

Sport Development Model – Breakout Questions:
- What is required to identify the maximum potential for each athlete?
- What would an Athlete Development Model look like at the Program level?
- What is the main obstacle to establishing/enhancing coach certification programs?
- Should all Programs offer the Young Athlete Program?

Unified Sports – Breakout Questions:
- Should every SO Program worldwide embrace Unified Sports as a key aspect of programmatic development?
- Is it realistic to expect that every Program will introduce Unified Sports opportunities in at least 10% of sports offered?
- What are the primary obstacles for Unified Sports development in each of the Regions?
- Should Unified Sports feature “equal skill levels” and “unequal skill levels” component to address competitive as well as recreational/developmental opportunities?
**Vision 2015:** Special Olympics is recognized as a global leader in sports providing excellence in coaching, training, and competition management at all levels, offering each athlete the opportunity to develop to their personal best through the development and activation of an enhanced athlete and coach model.

**Situation Assessment & Problem Statement**
- Too few certified coaches and coaches with higher level of sport specific certification involved with SO. Globally, the number of coaches decreased by 6% while the number of athletes increased by 8%;
- Coaching education materials need to be enhanced and provided to the local Program level.
- Unified Sports and Young Athletes Programs have been growing but the growth has been limited regionally and still represents a very small part of the athlete population.
- Difficulty in finding core information about divisioning and SOs competitions, even within our own materials.
- No consistent approach and principles for enhanced and integrated training and competitive opportunities.
- Core processes of “divisioning” and competitions are still not well understood, shared nor consistently applied.

**Proposed Strategic Recommendations for 2011-2015**

**START:**
- Develop Athlete Development Model providing age and skill level appropriate enhanced training and competition opportunities.
- Set higher standards for training and competitions and increase the training expectations for athletes of all ability levels.
- Establish a Coaches Online Academy for access to education materials and sharing of best practices.
- Develop Coach Model that has excellence as its foundation; develop or enhance a standardized coach certification program.
- Provide coaches with a tool to track athlete performance and progress.
- Establish sustainable relations and partnerships with Sport Organizations, Fitness/Health Organizations, Universities, and Physical Education faculties to recruit coaches, officials, Unified Partners, and expand competition opportunities.

**CONTINUE:**
- Grow Unified Sports, Young Athletes, and other enhanced sporting opportunities.
- Increase number of Special Olympics competitions for a broader spectrum of opportunities and ensure that all competitions are conducted to Sport Governing Body standards, and that the advancement criteria are enforced.
- Source professional development partnership opportunities for coach development and post links on-line.
- Promote coaching education at Regional and Program level.
- Develop recognition program for coaches.

**Recommended Business Model – Role of SOI HQ, SOI Regions, and SO Programs**

<table>
<thead>
<tr>
<th>SOI Global HQ</th>
<th>SOI Regional</th>
<th>Accredited Programs</th>
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</thead>
<tbody>
<tr>
<td>• Develop minimum standards for coaches and develop a standard certification system for coaches</td>
<td>• Develop plans and implement Train the Trainers seminars to implement Athlete and Coach Models</td>
<td>• Offer flexible models for coaches’ education and track certification</td>
</tr>
<tr>
<td>• Develop guiding principles for the Athlete Model and Coach Model</td>
<td>• Establish sustainable relations with Regional Sports Federations and other relevant institutions</td>
<td>• Organize Unified Sports and Young Athletes Programs and integrated opportunities with Focus on Youth Development opportunities</td>
</tr>
<tr>
<td>• Establish sustainable relations with International Sports Federations</td>
<td>• Support translation of materials</td>
<td>• Implement tracking of coach certification program</td>
</tr>
<tr>
<td>• Manage the Sport Resource Teams</td>
<td></td>
<td>• Cooperate with Sports Organizations, and Universities to recruit coaches, officials and Unified Partners</td>
</tr>
<tr>
<td>• Develop on-line Coach Academy</td>
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</table>

**Questions for Engagement at the Global Congress**
- What is required to identify the maximum potential for each athlete?
- What would an Athlete Development Model look like at the Program level?
- What is the main obstacle to establishing/enhancing coach certification programs?
- Should all Programs offer the Young Athlete Program?
Key Initiative: UNIFIED SPORTS

Vision 2015: Special Olympics will become a Movement of inclusive experiences reaching at least 25% of our athletes with Unified Sports opportunities.

Situation Assessment & Problem Statement

- Unified Sports represents a demonstrated model of achieving SO goals in self-development and relationship building.
- Unified Sports fulfills the organization’s brand promise around acceptance and skills development.
- Globally we still face challenges with respect to matching ability levels of Unified athletes and partners effectively.
- Concepts of Unified/inclusive participation in sports still face resistance in certain areas of the world.
- Unified Sports selection and training rules and frameworks are perceived as difficult to implement in a number of Programs.
- With Unified Sports® participation increasing by 57 percent in 2009, Unified Sports® program participants constitute the fastest growing segment of the overall Athlete population. For the third consecutive year, participation in Unified Sports® continues to accelerate from 28 percent growth rates achieved in 2006 and 2007, to 35 percent growth rate in 2008, and 57 percent growth in 2009. However, growth remains uneven across Regions as well as across athlete and partner groupings.

Proposed Strategic Recommendations for 2011-2015

START:
- Requiring evidence of at least one type of inclusive or Unified Sports programming in every program.
- Training for Program leaders in how to establish and support Unified Sports programs.
- Rewarding Programs with Unified Sports programs by allowing access to more grants and sponsored Unified competitions as well as seeking Unified competition opportunities at NGB and mainstream events.
- Evaluate Mentoring Division concept to address equal ability level requirements.

CONTINUE:
- Offering Unified Sports at Regional and World Games.
- Sharing best practices and encouraging collaboration between programs offering Unified Sports.
- Monitoring Unified Sports tracking via Athlete Census and PDS.

Recommended Business Model – Role of SOI HQ, SOI Regions, and SO Programs

<table>
<thead>
<tr>
<th>SOI Global HQ</th>
<th>SOI Regional Offices</th>
<th>Accredited Programs</th>
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<tbody>
<tr>
<td>Re-assert a committed leadership position in the area of Unified Sports</td>
<td>Create Regional goals and strategies for Unified Sports implementation and growth; work with Accredited Programs to develop country/state-specific Unified Sports targets</td>
<td>Establish Program-specific growth target for Unified Sports in at least 10% of the sports offered</td>
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<tr>
<td>Develop and update definitions, business models and options for implementation (including recreational version, globally aligned principles and expectations)</td>
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<tr>
<td>Develop templates for resource generation and fundraising</td>
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<tr>
<td>Position Unified Sports at the core of brand development efforts to become an agent of change at schools</td>
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</table>

Questions for Engagement at the Global Congress

- Should every SO Program worldwide embrace Unified Sports as a key aspect of programmatic development?
- Is it realistic to expect that every Program will introduce Unified Sports opportunities in at least 10% of sports offered?
- What are the primary obstacles for Unified Sports development in each of the Regions?
- Should Unified Sports feature “equal skill levels” and “unequal skill levels” component to address competitive as well as recreational/developmental opportunities?
BUILD COMMUNITIES

Track Session Overview

Date and Time

June 7       2:00pm – 5:30pm
June 8       9:00am – 12:00pm

Location

Rissani Ballroom, Atlas Asni Hotel
BUILD COMMUNITIES

Track Session Overview

Track Staffing
Track Leaders: Yolanda Eleta de Varela, AnnMarie Van Weirengen
Facilitator: Susan Lenox

Session Logistics
Date & Time: June 7: 2:00pm - 5:30pm
June 8: 9:00am - 12:00pm
Location: Rissani Ballroom, Atlas Asni Hotel

Desired Outcomes
- Understand and provide formal feedback on the overall Vision, Goals, and Strategies of the pillar.
- Provide feedback on which strategies and targets they understand and endorse; which they do not understand; and which they disagree with as a vehicle for achieving the Vision.
- Identify key supports Special Olympics must provide to encourage broader participation in Athlete Leadership programs.
- Outline key family engagement strategies and appropriate Special Olympics involvement across levels of the organization.
- Determine the major drivers of youth engagement and best practices for increasing youth retention and participation.
- Outline best practices for sports/health integration.

Session Format
This Track will be conducted over two days into two distinct sessions. Some delegates will remain in the Track for both days. Others will join either for Day 1 or Day 2 only. Tracks will be professionally facilitated and will operate under consistent SO Global Congress Rules of Engagement (attached separately).

Day 1 is an overall review of the Vision, Objectives, and Strategies. Delegates will hear how the Vision was developed and how the proposed Objectives are designed to help us achieve that vision. Then the delegates will break into discussion groups (formed primarily according to language) to discuss the Vision and Objectives and ask questions or provide input. At the end of this day, delegates will rank the top three tactics in order of importance to achieve goals as well as the three least important tactics to achieving the goals. Delegates will rate all proposed strategies and targets as: One they understand and see as helpful; One that they either don’t understand or feel is neither helpful nor harmful; or One they feel is not helpful or even harmful for programs working toward the Vision.

Day 2 is dedicated to in-depth discussion and feedback on four of the pillars strategies: 1) Athlete Leadership; 2) Families; 3) Healthy Athletes; and 4) Youth. On this day, delegates will be asked for feedback on these issues/proposals and answer questions related to implementation at the Program level. This is the day for people who want to delve into more detail on a specific topic. Delegates will be asked to discuss the specific “Questions for Engagement” which are listed below:

Athlete Leadership & Enablement – Questions for Engagement:
- How do we make the Athlete Leadership Programs more extensive and robust to help more athletes achieve the associated broader life goals such as independence and employability?
- Which of the existing ALPs offerings will be most effective in helping us reach the Vision above?
- How do we evaluate ALPs programming?

Families -- Questions for Engagement
- What are some of the common obstacles to family participation in Special Olympics?
- What roles should different levels of the Movement play in family engagement?
- How can we best engage web-based family collaboration and engagement opportunities in the next five years?
- What DOES a quality Special Olympics Program look like in the areas of Family support and engagement?

Healthy Athletes -- Questions for Engagement:
- What are the primary obstacles to implementing effective, sustaining health programs down to the local level?
- What are the most important health services for your program to deliver to SO athletes?
- How can sport and health programs be integrated effectively?

Youth -- Questions for Engagement
- What obstacles exist that prevent us from expanded youth engagement as volunteers and program leaders?
- What roles are best suited to youth participation? What roles should be off-limits to youth?
Key Initiative: ATHLETE LEADERSHIP

**Vision 2015:** Special Olympics will become a Movement that utilizes Athlete Leadership training to build collaborative partnerships that directly and indirectly improve the lives of athletes and the communities that surround them in a holistic manner, as evidenced by 10% of our athletes having completed at least one Athlete Leadership Training and fulfilled a meaningful leadership role at the Program level.

**Situation Assessment & Problem Statement**
- Athlete Leadership Programs (ALPs) represent a demonstrated model of achieving SO goals in the areas of self-determination, development, relationship building, and various component skills of leadership, advocacy and governance.
- SO has a strong base of experience related to ALPs implementation challenges and opportunities across the Movement.
- ALP’s fulfills Special Olympics brand promise around the notion of being Athlete Centered and Athlete-Led.
- ALP’s training and practical experience enhances confidence, skills and employability resulting in an improved quality of life.
- Recognition of athlete ability and potential is still a challenge.
- Athlete participation in governance still faces some resistance resulting in poor quality participation.
- ALPSs training and frameworks are perceived as optional to implement at the Program level.
- In 2009 ALPs Programs grew by 4.5%. Six of the seven Regions expanded ALPs, most notably Asia Pacific and the Middle East/North Africa which both grew their ALPs programming by over 80%. Despite these advances, less than 1% of Special Olympics athletes participate in ALPs.

**Proposed Strategic Recommendations for 2011-2015**

**START:**
- Requiring evidence of athletes in leadership and employee roles as part of regular program evaluation.
- Training for Program leaders in effective models of inclusive governance and strategies to support them.
- Requiring evidence of Athlete Input Councils in all Programs
- Recognizing and encouraging high quality ALPS programming through our various grant processes

**CONTINUE:**
- ALPs training in public speaking (Global Messenger) and Governance at the Program level.
- Input Council training and support networks
- Monitoring ALPs training and participation via Athlete Census and PDS.

**STOP:**
- ALPs funding for any proposal that does not include training of BOTH athletes and Program leadership.

**Recommended Business Model – Role of SOI HQ, SOI Regions, and SO Programs**

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<thead>
<tr>
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</thead>
<tbody>
<tr>
<td>Re-assert a committed leadership position in the area of ALPs</td>
<td>Create Regional goals and strategies for ALPs implementation and growth; work with Accredited Programs to develop country/state-specific ALPs targets</td>
<td>Establish Program-specific ALPs implementation strategies that result in at least 10% of athletes in documented leadership roles.</td>
</tr>
<tr>
<td>Develop and update ALPs training and implementation requirements</td>
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<td>Comply with the global standards on quality athlete participation on the Board as well as meeting the athlete Program employee quota requirement</td>
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<tr>
<td>Develop position statements leveraging ALPs in fundraising</td>
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<tr>
<td>Position ALPs at the core of brand development</td>
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<tr>
<td>Develop global standards for quality participation of athletes on Boards and as program employees</td>
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</table>

**Questions for Engagement at the Global Congress**
- How do we make the Athlete Leadership Programs more extensive and robust to help more athletes achieve the associated broader life goals such as independence and employability?
- Which of the existing ALPs offerings will be most effective in helping us reach the Vision above?
- How do we evaluate ALPs programming to determine if it is both meaningful AND worth our investment of time and resources?
Key Initiative: FAMILIES

Vision 2015: Special Olympics is a Movement that celebrates and supports athletes and families as they share a sense of purpose and pride/confidence with the Special Olympics athlete who is a member of their family. As their pride, confidence and sense of purpose grows, Special Olympics is prepared to address family interests and needs at all levels of the movement.

Situation Assessment & Problem Statement

- Special Olympics family members are a diverse population whose interest in and support of Special Olympics ranges from very enthusiastic to non-existent.
- Some community-based programs are built on extensive and effective family participation, while others so not involve or engage families at all.
- Family members can be extremely effective spokespersons for the Movement.
- Currently Special Olympics family leadership opportunities are executed and delivered sporadically because of varying conditions at the Program and sub-Program level.
- Predominantly family services and support mechanisms exist at the local level without a comprehensive global system.
- Special Olympics does not offer a clear range of family engagement opportunities and support.
- Family recognition opportunities exist sporadically and predominantly at the local level.

Proposed Strategic Recommendations for 2011-2015

START:

- Creating dynamic ways to assess family interests and support needs necessary to engage in active and clear roles in Special Olympics -- drafting a framework for family involvement from local to international levels with incentives for active participation.
- Recruiting and training family members to become active community builders for themselves and for other families.
- Ensuring that all Accredited Programs demonstrate involvement of families at all levels of their Program.
- Requiring evidence of family programming as part of regular program evaluation.

CONTINUE:

- Global Family Leaders program as a source of input for HQ and Regional Family Initiatives.
- Family (especially sibling) involvement in Unified Sports and Program leadership where already established.
- Options for family support and recognition at all Special Olympics events.

Recommended Business Model – Role of SOI HQ, SOI Regions, and SO Programs

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<tbody>
<tr>
<td>- Develop a family engagement model – guidelines for playing a role and becoming a part of the program and the community</td>
<td>- Ensure development of regional models for family recruitment, engagement and recognition as a means of helping programs address family interests and concerns.</td>
<td>- Encourage and support family committees at all levels of the Program</td>
</tr>
<tr>
<td>- Family stories of change should be incorporated as a foundational element of the brand as an effort to share the sense of pride experienced through Special Olympics.</td>
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Questions for Engagement at the Global Congress

- What are some of the common obstacles to family participation in Special Olympics?
- What roles should different levels of the Movement play in family engagement?
- How can we best engage web-based family collaboration and engagement opportunities in the next five years?
- What DOES a quality Special Olympics Program look like in the areas of Family support and engagement?
**Key Initiative: YOUTH**

**Vision 2015:** Special Olympics will become a Movement that provides consistent opportunities for young people with and without intellectual disabilities to engage in Unified Sports, Young Athletes, cheer teams, volunteerism, and leadership development activities worldwide. Youth will become a significant component of the Movement, matching athletes 1:1 and forming a part of governance structures at all levels of the Movement.

**Situation Assessment & Problem Statement**

- Youth play active roles in Special Olympics as unified partners, advocates for the movement, supporters of campaigns, volunteers and coaches.
- Engaging youth in SO is an effective means of changing negative attitudes and fostering a culture of inclusion.
- Special Olympics has begun using the power of social media to advance the mission of Special Olympics and involve youth as fans, however this medium could be employed more extensively and creatively.
- Youth do not presently play any role on SO governance and their leadership potential is not being harnessed efficiently.
- Retention of youth within the Movement remains a critical concern, requiring new avenues and approaches.

**Proposed Strategic Recommendations for 2011-2015**

**START:**

- Special Olympics will increase the number of youth aged 8-22 serving as Unified partners, volunteers, advocates and fans to match that of athletes within this age group by 2015.
- Engaging youth at governance levels to create a parallel but integrated youth led movement that results in youth supporting athletes on a 1:1 basis; Including young leaders on Accredited Program Boards of Directors.
- Capturing and retaining 50% of youth registered as volunteers in projects, events and/or volunteer work at all levels.
- Widening the age bracket for youth to include individuals up to the age of 21 to ensure that colleges and universities be included in the youth campaign.
- Recognizing and rewarding thoughtful youth programming through various grant mechanisms.

**CONTINUE:**

- Provide consistent opportunities for young people with and without intellectual disabilities to engage in Unified Sports, Young Athletes, cheer teams, volunteerism, and leadership development activities worldwide.
- Using the powerful platform of social media to recruit, engage and retain youth.

**Recommended Business Model – Role of SOI HQ, SOI Regions, and SO Programs**

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<tbody>
<tr>
<td>- Lead a dynamic social media campaign that can be replicated at different levels of the Movement</td>
<td>- Create Regional goals and strategies for youth implementation and growth; work with Accredited Programs to develop country/state-specific youth targets</td>
<td>- Establish youth implementation strategies that result in a match of youth to athletes at 1:1 by 2015</td>
</tr>
<tr>
<td>- Position youth as an essential part of the brand moving forward with representation across the Movement</td>
<td></td>
<td>- Where applicable, utilize social media as a means of recruiting and retaining youth</td>
</tr>
<tr>
<td>- Develop creative roles for youth, their retention and incentives for activism</td>
<td></td>
<td>- Determine approach to have youth leadership on governance structures</td>
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</table>

**Questions for Engagement at the Global Congress**

- What obstacles exist that prevent us from expanded youth engagement as volunteers and program leaders?
- What roles are best suited to youth participation? What roles should be off-limits to youth?
Vision 2015: All Special Olympics Programs will offer athletes opportunities for access to health screening, education, health improvement, and referral services.

Situation Assessment & Problem Statement
- Special Olympics has implemented a growing health screening program over the past decade that has served 1 million athletes, trained 120,000 health professionals and reached more than 100 countries.
- Currently, 102 Special Olympics Programs have offered Healthy Athlete services
- Persons with intellectual disabilities (ID), and SO athletes in particular, have been documented to have high levels of untreated disease, little access to care and almost no opportunity for health improvement.
- Health professionals have little to no training and experience in treating people with ID.
- Public policies do not adequately support health care and support for health improvement for people with ID.
- This program may not yet fully address the global range of local health needs, healthcare delivery systems, and cultures.
- Significantly more resources will be required to make access to essential health services available to SO athletes around the world so that they can train and compete safely and without pain.

Proposed Strategic Recommendations for 2011-2015

START:
- Requiring each SO Program and Region to have some health goals and planned activities to improve the health of athletes;
- Enhancing HA protocols, content, and implementation to better address global variations in need, systems, and culture;
- Encouraging Regional/Program-level HA self-sufficiency by actively pursuing sources of cash, VIK, and government support
- Administering a reliable compliance protocol to assure timely submission of required reports to SOI on Healthy Athletes grants

CONTINUE:
- Scheduling athletes formally at Healthy Athletes events to increase percentage of athletes served
- Making strategic decisions about allocation of scarce resources in areas with the greatest ROI
- Promoting Healthy Athletes events and results as part of education and fundraising
- Being vigilant in the submission of health screening results for reporting and policy development

STOP:
- Awarding large HA grants to Programs that have not developed continuing HA development plans

Recommended Business Model – Role of SOI HQ, SOI Regions, and SO Programs

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<tbody>
<tr>
<td>Continue a committed leadership position in the area of health</td>
<td>Make strategic recommendations about the best allocation of grant resources in Regions</td>
<td>Establish Program-specific objectives for health programming</td>
</tr>
<tr>
<td>Continue to update professional and clinical protocols and standards and explore new areas of health programming opportunity</td>
<td>Proactively facilitate Program-specific health planning</td>
<td>Actively seek cash and VIK resources and volunteers</td>
</tr>
<tr>
<td>Facilitate and support training of new clinical directors</td>
<td>Assure compliance with grant requesting, event implementation, and reporting requirements for HA</td>
<td>Commitment to grant making and reporting requirements in a timely way</td>
</tr>
<tr>
<td>Develop templates for resource generation and leveraging of health activities in the fundraising arena</td>
<td>Actively prospect and report cash and VIK support for HA</td>
<td>Active identification of Clinical Director needs</td>
</tr>
<tr>
<td>Develop cutting edge, impactful information systems to support HA</td>
<td>Help promote alternate/new effective models of HA services</td>
<td></td>
</tr>
</tbody>
</table>

Questions for Engagement at the Global Congress
- What are the primary obstacles to implementing effective, sustaining health programs down to the local level?
- What are the most important health services for your program to deliver to SO athletes?
- How can sport and health programs be integrated effectively?
CONNECT FANS & FUNDS

Track Session Overview

Date and Time

June 7  2:00pm – 5:30pm
June 8  9:00am – 12:00pm

Location

Rissani Ballroom, Atlas Asni Hotel
CONNECT FANS & FUNDS

Track Session Overview

Track Staffing
Track Leaders: Marc Edenzon, Terry Richey, Joan Wheatley
Facilitator: Nancy Rawles

Session Logistics
Date & Time: June 7: 2:00pm - 5:30pm
June 8: 9:00am - 12:00pm
Location: Rissani Ballroom, Atlas Asni Hotel

Desired Outcomes
By the end of the track session, delegates will:

- Understand and provide formal feedback on the overall Vision, Goals, and Strategies of the pillar.
- Provide feedback on which strategies and targets they understand and endorse; which they do not understand; and which they disagree with as a vehicle for achieving the Vision.
- Outline key strategies that can be used to engage athletes as fundraisers and how strategies must be tailored globally.
- List common needs and/or barriers to a global fundraising campaign.
- Crystallize brand images and messages that resonate most with Congress participants.

Session Format
This Track will be conducted over two days into two distinct sessions. Some delegates will remain in the Track for both days. Others will join either for Day 1 or Day 2 only. Tracks will be professionally facilitated and will operate under consistent SO Global Congress Rules of Engagement (attached separately).

Day 1
is an overall review of the Vision, Objectives, and Strategies. Delegates will hear how the Vision was developed and how the proposed Objectives are designed to help us achieve that vision. Then the delegates will break into discussion groups (formed primarily according to language) to discuss the Vision and Objectives and ask questions or provide input. At the end of this day, delegates will rank the top three tactics in order of importance to achieve goals as well as the three least important tactics to achieving the goals. Delegates will rate all proposed strategies and targets as: One they understand and see as helpful; One that they either don’t understand or feel is neither helpful or harmful; or One they feel is not helpful or even harmful for programs working toward the Vision.

Day 2
is dedicated to in-depth discussion and feedback on three of the pillars strategies: 1) Athlete as Fundraisers; 2) Integrated Campaign; and 3) Strengthening our Brand. On this day, delegates will be asked for feedback on these issues/proposals and answer questions related to implementation at the Program level. This is the day for people who to delve into more detail on a specific topic. Delegates will be asked to discuss the specific “Questions for Engagement” which are listed below:

Athletes as Fundraisers -- Questions for Engagement:
- What are the primary ways in which athletes can participate in fundraising and which of those ways could be implemented broadly across the movement?
- How do we assure that we are not relying on athlete fundraising for basic operational needs of Programs so that we are not asking athletes to “pay their way” in terms of Special Olympics participation?
- What geographic, economic and cultural differences affect our ability to make this type of athlete fundraising program movement-wide and can they be overcome?

Integrated Campaign -- Questions for Engagement:
- What areas of opportunity are there for an integrated campaign? What are the needs we share in common?
- How will those needs resonate with potential donors? What will inspire donors to give more?
- What barriers exist to being successful at an integrated campaign and how would we break though those barriers?

Strengthening our Brand -- Questions for Engagement:
- What messages and images best resonate with your audiences in your locale?
- What do you believe are the core messages of Special Olympics?
- Who do you believe are the most vital audiences for which Special Olympics should target its brand messaging? Why?
**Key Initiative: ATHLETES AS FUNDRAISERS**

**Vision 2015:** Engage athletes in building a program in which they can learn and contribute through their active fundraising efforts.

**Situation Assessment & Problem Statement**
- Athletes are the core of Special Olympics and many would like to contribute to fundraising for the movement.
- Some Programs currently engage athletes in fundraising activities. This is an area of competency in ALPs.
- Fundraising activity can contribute to skill building and empowerment.
- A systematic fundraising approach could generate funding and visibility for Special Olympics.
- The movement would benefit from an organized, consistent way to support athletes as fundraisers.
- A standard set of guidelines would ensure integrity through dignified engagement of our athletes.

**Proposed Strategic Recommendations for 2011-2015**

**START:**
- Work with our athlete community to determine the best approach to a fundraising endeavor.
- Build a system for athlete fundraising including training, support and recognition.
- Grow the program to a level that all interested athletes can participate.

**CONTINUE:**
- Understanding the diversity of our athlete community while providing this growth opportunity.
- Honoring the philosophy of our General Rules about expectations for athlete costs.
- Engaging athletes in the design and implementation of important programs in which they will be involved is essential.

**STOP:**
- Pre-determining what athletes can and want to do in regard to fundraising.

**Recommended Business Model – Role of SOI HQ, SOI Regions, and SO Programs**

<table>
<thead>
<tr>
<th>SOI Global HQ</th>
<th>SOI Regions</th>
<th>Accredited Programs</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Research best practices outside the movement for participant fundraising.</td>
<td>• Research current practices inside the movement.</td>
<td>• Engage athletes in providing feedback on a systematic fundraising program and reviewing approaches to a business</td>
</tr>
<tr>
<td>• Build a business plan on how a systematic athlete fundraising program would work.</td>
<td>• Determine Program by Program capacity and interest in participating in this initiative.</td>
<td>• Participate in training and recognition programs.</td>
</tr>
<tr>
<td>• Acquire funding to appropriately launch the program.</td>
<td>• Customize program and training to meet needs of the region and host training sessions</td>
<td></td>
</tr>
<tr>
<td>• Build training needed for success.</td>
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</tbody>
</table>

**Questions for Engagement at the Global Congress**
- What are the primary ways in which athletes can participate in fundraising and which of those ways could be implemented broadly across the movement?
- How do we assure that we are not relying on athlete fundraising for basic operational needs of Programs so that we are not asking athletes to “pay their way” in terms of Special Olympics participation?
- What geographic, economic and cultural differences affect our ability to make this type of athlete fundraising program movement-wide and can they be overcome?
Key Initiative: INTEGRATED CAMPAIGN

Vision 2015: Build a global, integrated fundraising campaign to seek major gifts from individuals and foundations to fund a collaboratively determined set of programmatic priorities.

Situation Assessment & Problem Statement

- Fundraising campaigns provide organizations with the opportunity to develop clear priorities and build a strong case for support.
- Campaigns inspire donors and provide a collective “ask” that can be much larger than any single program can develop alone.
- Campaigns also provide the means to engage volunteers in philanthropy...an essential element of major gift fundraising.
- During the five year window of the strategic plan, it would be helpful to our major gift fundraising efforts to create a campaign for Special Olympics around some aspect of growth that we collectively feel is vital. That campaign can be as focused as one for “coaching excellence” or as broad as “global growth”.

Proposed Strategic Recommendations for 2011-2015

START:
- Find a shared need that can benefit all Programs and will resonate with donors.
- Develop a case for support around that shared need.
- Identify potential donors to the campaign from all regions and who can help cultivate and solicit those donors.
- Recruit a group of key volunteers to help oversee the campaign and the cultivation and solicitation required for success.
- Develop infrastructure, protocols and business processes for integrated, donor-centric collaboration

CONTINUE:
- Building strong annual giving programs so that the campaign can focus on growth opportunities.
- Building relationships with key supporters so that we have a broad base to seek campaign gifts.

STOP:
- Working in silos from each.

Recommended Business Model – Role of SOI HQ, SOI Regions, and SO Programs

<table>
<thead>
<tr>
<th>SOI Global HQ</th>
<th>SOI Regions</th>
<th>Accredited Programs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Build consensus on campaign need(s)</td>
<td>Assist in developing the campaign need</td>
<td>Identify potential cross-boundary needs</td>
</tr>
<tr>
<td>Conduct a feasibility study on size of campaign</td>
<td>and case for support.</td>
<td>that can be funded thru a campaign</td>
</tr>
<tr>
<td>goal based on need(s)</td>
<td>Identify/cultivate regional prospective</td>
<td>Identify/cultivate local prospective</td>
</tr>
<tr>
<td>Cultivate potential donors for the highest level</td>
<td>donors.</td>
<td>donors.</td>
</tr>
<tr>
<td>gifts for the campaign</td>
<td></td>
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</tbody>
</table>

Questions for Engagement at the Global Congress

- What areas of opportunity are there for an integrated campaign? What are the needs we share in common?
- How will those needs resonate with potential donors? What will inspire donors to give more?
- What barriers exist to being successful at an integrated campaign and how would we break though those barriers?
**Key Initiative: STRENGTHENING OUR BRAND**

**Vision 2015:** Clarify and simplify our brand messages and story to promote relevance and assure consistent use across all Special Olympics Programs.

**Situation Assessment & Problem Statement**
- Special Olympics represents highly decentralized, grassroots organizations that share a common brand.
- The primary linkage between our diverse programs is a shared mission and the expression of that mission in the brand words and images we all use in common.
- Understanding what binds us together is vital to maintaining a successful brand and even more important to grow our resources and relevance in the communities in which we work.
- We will earn greater support if we can consistently describe *who we are, what we do, and why it matters*.
- The public perception of our brand may not engender support at the levels we need to grow. To grow to the scale necessary to serve our community, we must find a way to move the brand from “nice” to “important”.

**Proposed Strategic Recommendations for 2011-2015**

**START:**
- Apply greater focus on our brand images, messages for clarity and consistency.
- Provide tools that promote consistent branding
- Use research to build consensus on our messages among internal audiences and validate those messages with research among our external audiences.

**CONTINUE:**
- Using the General Rules as the basis for brand management.
- Improving our brand guidelines and messages
- Evolving the brand story in a way that reflects the true values of the movement.

**STOP:**
- Creating sub-brands that are not consistent with our overall brand approach.

**Recommended Business Model – Role of SOI HQ, SOI Regions, and SO Programs**

<table>
<thead>
<tr>
<th>SOI Global HQ</th>
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</tr>
</thead>
<tbody>
<tr>
<td>Develop methods to gather branding insights and inputs from across the organization.</td>
<td>Assist headquarters in building consensus on branding aspects including visuals and messages.</td>
<td>Share insights and inputs on branding and “what works” locally.</td>
</tr>
<tr>
<td>Create a proposed brand standard and test with key audiences.</td>
<td>Assure that cultural sensitivities are accounted for in promoting a more consistent brand standard.</td>
<td>Evaluate proposed approaches to a brand guide.</td>
</tr>
<tr>
<td>Launch an updated brand guide with tools and templates that programs can model in their locale.</td>
<td>Help roll out the new brand guide.</td>
<td>Adopt final brand guide standards by using the tools and templates offered on the final approach.</td>
</tr>
</tbody>
</table>

**Questions for Engagement at the Global Congress**
- What messages and images best resonate with your audiences in your locale?
- What do you believe are the core messages of Special Olympics?
- Who do you believe are the most vital audiences for which Special Olympics should target its brand messaging? Why?
DEFINE MOVEMENT LEADERSHIP &
ESTABLISH SUSTAINABLE CAPABILITIES

Track Session Overview

Date and Time

June 7  2:00pm – 5:30pm
June 8  9:00am – 12:00pm

Location

Koutubia Room, Level 1, Palais des Congres
DEFIN MOVEMENT LEADERSHIP & ESTABLISH SUSTAINABLE CAPABILITIES

Track Session Overview

Track Staffing
Track Leaders: David Rutherford, Doug Stevens
Facilitator: David Thomason

Session Logistics
Date & Time: June 7: 2:00pm – 5:30pm
June 8: 9:00am - 12:00p,
Location: Koutubia Room, Level 1, Palais des Congres

Desired Outcomes
By the end of the track session, delegates will:

- Understand and provide formal feedback on the overall Vision, Goals, and Strategies of these two pillars.
- Provide feedback on which strategies and targets they understand and endorse; which they do not understand; and which they disagree with as a vehicle for achieving the Vision.
- Describe attributes of “ideal” SO Leaders and elements of a Movement-wide leadership development program.
- List key characteristics to be included in a revised Program Evaluation/Development System.
- Outline most promising areas for global Shared Services implementation.

Session Format
This Track will be conducted over two days into two distinct sessions. Some delegates will remain in the Track for both days. Others will join either for Day 1 or Day 2 only. Tracks will be professionally facilitated and will operate under consistent SO Global Congress Rules of Engagement (attached separately).

Day 1 is an overall review of the Vision, Objectives, and Strategies of both topics (Movement Leadership and Sustainable Capabilities). Delegates will hear how the Vision statements were developed and how the proposed Objectives are designed to help us achieve each Vision. Then the delegates will break into discussion groups (formed primarily according to language) to discuss the Vision and Objectives and ask questions or provide input. At the end of this day, delegates will rank the top two tactics in order of importance to achieve goals as well as the two least important tactics to achieving the goals. Delegates will rate all proposed strategies and targets as: One they understand and see as helpful; One that they either don’t understand or feel is neither helpful nor harmful; or One they feel is not helpful or even harmful for programs working toward the Vision.

Day 2 is dedicated to in-depth discussion and feedback on four of the pillars strategies: 1) Leadership Development; 2) Program Development & Evaluation; 3) Global Recognition; and 4) Shared Services. On this day, delegates will be asked for feedback on these issues/proposals and answer questions related to implementation at the Program level. This is the day for people who want to delve into more detail on a specific topic. Delegates will be asked to discuss the specific “Questions for Engagement” listed below:

Leadership Development Questions for Engagement:
- What are the most important attributes of Special Olympics leaders?
- We will develop a Global System for attracting, selecting, training and developing People: What should be included?
- Training for Program and Sub-Program leaders will be created and/or enhanced. Where should it start, what should it include and who should deliver it?
- As Special Olympics creates new ways to find, support and retain new leaders, what programs should we focus on? Expanded EKS Fellowship Program? Program Exchanges?

Program Development and Evaluation Questions for Engagement:
- What characteristics should be included into the revised Program evaluation system?
- How should Program and Region-specific difference be captured to create a universal Scorecard?
- What should Special Olympics leadership do to maximize effectiveness of learning and development?

Global Recognition Questions for Engagement:
- We will develop a Global System for recognizing Programs and People: What categories should be included? Is there a way to design this system to enhance efforts at the Program level?

Shared Services Questions for Engagement:
- What are the most promising opportunities in your program and region for shared services?
- What are the business model and cultural obstacles to implementing shared services?
Key Initiative: LEADERSHIP DEVELOPMENT

Vision 2015: Special Olympics will become a Movement that attracts and carefully selects the people it needs to fulfill its mission. Special Olympics will attract, select and encourage the people who make Programs successful through highlighting the unique potential Special Olympics can offer them, through regular training and development, and through ongoing support that positions them to succeed.

Situation Assessment & Problem Statement
- SO attracts many talented and dedicated volunteers and staff people around the globe.
- Visionary and energetic leadership has been identified as one of the reasons for the most successful programs being successful. Attracting, selecting and retaining these people is critical to the success of Programs.
- Training of SO leadership is inconsistent in many places and non-existent in others.
- Training for Program and sub-Program leaders has existed in several forms over the years, and a great deal of time and energy went in to designing those modules. Revisiting them as a starting point is advisable.
- Globally we still face challenges with respect to recognition of the need for attracting high caliber leaders and developing a culture that harnesses their energy and ambition to help our Programs thrive.

Proposed Strategic Recommendations for 2011-2015
START:
- Developing a strong process to attract, train, develop and retain the people Special Olympics needs to succeed.
- The process would include training for Program and sub-program leaders in effective models of governance and program management.

CONTINUE:
- Program level Training, where it exists – but catalogue such efforts for future reference
- Programs such as the EKS Fellows as a means of developing new leaders

STOP:
- Equating Leadership with power, and instead looking for examples of effectiveness.

Recommended Business Model – Role of SOI HQ, SOI Regions, and SO Programs

<table>
<thead>
<tr>
<th>SOI Global HQ</th>
<th>SOI Regions</th>
<th>Accredited Programs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Commit to an investment in leadership development throughout the movement.</td>
<td>Create Regional strategies for recognition of leaders from a variety of constituent groups (Families, Volunteers, Athletes, etc.)</td>
<td>All Programs use the process to attract, train, develop and retain the people Special Olympics needs to succeed.</td>
</tr>
<tr>
<td>Develop a Global Leadership Development strategy that includes training, re-training, succession planning, and recognition.</td>
<td>Commit to regular training and support for key leadership in both Program management and leadership development.</td>
<td></td>
</tr>
<tr>
<td>Develop position statements leveraging Leadership Development in fundraising</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Position Leadership at the core of SO brand development</td>
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</tr>
</tbody>
</table>

Questions for Engagement at the Global Congress
- What are the key attributes of Special Olympics leaders?
- We will develop a Global System for attracting, selecting, training and developing People: What should be included?
- Training for Program and Sub-Program leaders will be created and/or enhanced. Where should it start, what should it include and who should deliver it?
- As Special Olympics creates new ways to find, support and retain new leaders, what programs should we focus on? Expanded EKS Fellows Program? Program Exchanges?
Key Initiative: PROGRAM DEVELOPMENT & EVALUATION

Vision 2015: Special Olympics will recognize Program success and support Program development through a system of evaluation and accreditation. We will encourage comparison of Programs performance in order to encourage learning from each other. When we compare performance we will take into account individual programs resources, challenges, and opportunities but also recognize that even those programs with the least resources and greatest challenges can be the best in the world in aspects of our work. Special Olympics will encourage Program self evaluation, encourage planning for growth and allow for incentive programs that are equitable and effective. The measurement of performance of athletes in sports and the measurement of the satisfaction of athletes with their Special Olympics experience will be central to the evaluation system that is developed.

Situation Assessment & Problem Statement

- The current Program Development System (PDS) offers an excellent platform from which to achieve the vision stated above however, there may be other platforms worthy of consideration.
- Measuring Program performance with scorecards is a clear opportunity for better measurement, recognition, support and incentive programs that provides a basis for learning.
- Globally we still face challenges with respect to recognition and leadership of SO Programs.
- The concept of ‘comparing Programs’ is not universally endorsed. Some think it is a valuable activity on many levels. Others are concerned that comparing contains within it a negative connotation. It is very important that the reason for comparison is stressed. The purpose is to enable learning and development and not to reward or punish.
- The concept of “tiers” of programs has been rejected because it can lead to negative labeling; creates unnecessary divisions between programs; is too blunt a tool to reflect the reasons for different levels of quality amongst programs, and the variances within them.

Proposed Strategic Recommendations for 2011-2015

START:
- A global effort to develop a new Program Development System (PDS) so scorecards can be created for all parts of SO
- Training Regional Staff and Program leaders on the value of continued assessment against PDS criteria
- Requiring evidence of Program performance measurement from Programs and evidence of progress against Program’s plans to improve performance.
- Basing eligibility for CRT and SOI sourced grants on progress made on PDS/Scorecard metrics

CONTINUE:
- PDS tracking as done for the Reach Report and Athlete Census
- Support for all Programs in efforts related to self-assessment and planning

STOP:
- Accepting plans or grant applications from any Program that are not based on PDS/Scorecard assessments and demonstrating progress on the metrics included there unless there are understandable reasons for not completing assessments or making the progress expected.

Recommended Business Model – Role of SOI HQ, SOI Regions, and SO Programs

<table>
<thead>
<tr>
<th>SOI Global HQ</th>
</tr>
</thead>
<tbody>
<tr>
<td>Re-assert a committed leadership position in the area of Program Evaluation.</td>
</tr>
<tr>
<td>Develop a PDS and regularly update PDS training and implementation requirements</td>
</tr>
<tr>
<td>Develop position statements leveraging of PDS as a tool for self-evaluation and program planning</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>SOI Regions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create Regional goals and strategies for PDS implementation that result in 100% of Accredited Programs with country/state-specific PDS implementation targets</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Accredited Programs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Establish Program-specific strategies for use of PDS on a regular schedule with reports to its Board of Directors and the Regional SO office.</td>
</tr>
</tbody>
</table>

Questions for Engagement at the Global Congress

- What characteristics should be included into the revised Program evaluation system?
- How should Program and Region-specific difference be captured to create a universal Scorecard?
- What should Special Olympics leadership do to maximize effectiveness of learning and development?
Key Initiative: RECOGNITION

Vision 2015: Special Olympics will recognize accomplishments and innovation at the Global, Program and sub-program levels on an on-going basis.

Situation Assessment & Problem Statement

- Special Olympics benefits from the fact that it attracts many talented and dedicated volunteers and staff people around the globe.
- Recognition of Special Olympics Programs and leaders represents the most effective means of communicating best-practices and providing motivation.
- Recognition programs already exist at the Program and sub-Program levels and have existed in several forms over the years. A great deal of time and energy went in to designing those programs. Cataloging the scope of those programs as a starting point is advisable.
- Globally we still face challenges with respect to recognition of and potential for leadership within Special Olympics and in the communities where our Programs thrive.

Proposed Strategic Recommendations for 2011-2015

START:
- A global effort to capture evidence of recognition programs at all levels of the movement for the purpose of sharing them later.
- A global recognition program that utilizes leadership initiative as a part of planning and support efforts in all regions

CONTINUE:
- Program level Awards where they exist – but catalogue such efforts for future reference
- Recognition of leaders via media vehicles

Recommended Business Model – Role of SOI HQ, SOI Regions, and SO Programs

<table>
<thead>
<tr>
<th>Special Olympics Globally (Headquarters)</th>
<th>Special Olympics Regional Offices</th>
<th>Special Olympics Programs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Commit to an investment in recognition throughout the movement.</td>
<td>Create Regional strategies for recognition of leaders from a variety of constituent groups (Families, Volunteers, Athletes, etc.)</td>
<td>Establish Program-specific recognition strategies that result in at least 75% of Programs with an established recognition program.</td>
</tr>
<tr>
<td>Develop a Global Recognition strategy that includes innovation and achievement in the priority areas of the Strategic Plan.</td>
<td>Commit to regular recognition of key leadership in both Program management and leadership development.</td>
<td></td>
</tr>
<tr>
<td>Develop position statements leveraging recognition Programs in the fundraising arena</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Position recognition at the core of Special Olympics brand development</td>
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</table>

Questions for Engagement at the Global Congress

- We will develop a Global System for recognizing Programs and People: What categories should be included? Is there a way to design this system to enhance efforts at the Program level?
Key Initiative: SHARED SERVICES

Vision 2015: We will significantly increase the professional effectiveness of our Movement globally, taking advantage of the economies of scale offered by using common procedures, processes and systems to keep our administrative costs in check and provide better tools Movement-wide.

Situation Assessment & Problem Statement

- The NGO and non-profit communities still lag behind corporations and governments in the adoption of “shared services.” A shared services approach typically involves centralization of a wide range of back office operations, almost always including Human Resources, Information Technology and Finance. The key business driver of the shared services model is that it enables realization of economies of scale and stimulates multi-function, organization-wide project work where there is potential to leverage synergies. This is driven, at least in part, because many share a “cooperative” or “collaborative” business model similar to ours. That model requires negotiation and agreement rather than the acceptance of new initiatives in more hierarchical organizations.
- Shared services also permits relatively small, geographically dispersed business units to take advantage of web-based technologies to use sophisticated systems to support activities analogous to our games and event management and donor, volunteer, coach and athlete tracking. The same technology can also allow business units to share experiences, collaborate on various fronts and share “products” similar to our coaching guides and fundraising materials.

Proposed Strategic Recommendations for 2011-2015

START:
- Thinking about areas where sharing can make us all more cost-effective.
- Adopting more of a business mindset around some of the core service areas.

CONTINUE:
- To collaborate as broadly as possible when addressing business challenges.

Recommended Business Model – Role of SOI HQ, SOI Regions, and SO Programs

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<th>SOI Global HQ</th>
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</tr>
</thead>
<tbody>
<tr>
<td>• Establish and resource a designated unit within SOI to be responsible for providing shared business services.</td>
<td>• Serve as “change advocates” for shared services within their regions.</td>
<td>• Be willing to experiment with the shared service model.</td>
</tr>
<tr>
<td>• Reach out to other Special Olympics offering effective and economically viable joint projects that will result in cost savings across the Special Olympics system.</td>
<td>• Consolidate opportunities for shared services in their regions.</td>
<td>• Provide candid feedback about services provided and obstacles to successful implementation.</td>
</tr>
<tr>
<td>• Provide feedback to SOI HQ about the successes/shortcomings of offerings.</td>
<td>• Look for region-wide shared service opportunities.</td>
<td></td>
</tr>
</tbody>
</table>

Questions for Engagement at the Global Congress

- What are the most promising opportunities in your program and region for shared services?
- What are the business model and cultural obstacles to implementing shared services?
ESTABLISH VALUES THAT DEFINE OUR CULTURE

Track Session Overview

Date and Time
June 7 2:00pm – 5:30pm

Location
Fez 2, Level 1, Palais des Congres
ESTABLISH VALUES THAT DEFINE OUR CULTURE

Track Session Overview

**Track Staffing**
Track Leaders: Peter Bukhala, Steve Corbin  
Facilitator: Angela Ciccolo

**Session Logistics**
Date & Time: June 7: 2:00pm - 5:30pm  
Location: Fez 2, Level 1, Palais des Congres

**Desired Outcomes**
By the end of the track session, delegates will:
- Understand and provide formal feedback on the overall Vision and Goals.
- Provide feedback on which strategies and targets they understand and endorse; which they do not understand; and which they disagree with as a vehicle for achieving the Vision.
- Foster understanding of the need for a global Special Olympics culture and a codified set of values.
- Build consensus around value statements that resonate most with Special Olympics Programs.

**Session Format**
This Track will be conducted in just one day. Tracks will be professionally facilitated and will operate under consistent *SO Global Congress Rules of Engagement* (attached separately).

The Culture and Values Track discussion will focus developing clear organizational values that will provide a compass for organizational and individual goal setting. Delegates will hear how the Vision was developed and how the proposed Objectives are designed to help us achieve that vision. Delegates will be asked for feedback on the vision and answer questions related to implementation at the Program level. Delegates will be asked to discuss the specific “Questions for Engagement” which are listed below:

1. Which core values will resonate across the Movement and drive achievement of mission?
2. For whom are such values created?
3. Should adoption of values be optional or mandatory?
4. What are the best ways to gain adoption and application of values down to the Sub-Program level?

**Recommended Preparatory Materials**
- SO Strategic Plan 2011-15 Version 2.0: pp 34-39
- Track Session Briefs: 1) Culture and Values
Vision 2015: The Movement will have adopted widely, implemented and evaluated organizational progress toward aligning with Movement values.

Situation Assessment & Problem Statement
• Clear organizational values provide a compass for organizational and individual goal setting, conduct and decision-making that affect organizational results and culture.
• Most successful organizations in the for-profit and non-profit sectors have adopted formal organizational values statements.
• Organizations with values statements are able to communicate both internally and externally about what the organization expects of others and what others can expect from the organization.
• Organizational values contribute toward unity and positive morale where actions are aligned with words.
• Neither the Movement nor SOI have a formal comprehensive set of organizational values, although some Programs do.

Proposed Strategic Recommendations for 2011-2015
START:
• Create, vet and adopt a set of organizational values from SOI on down
• Communicate the values widely within the Movement and make them transparent externally
• Assess progress of the Movement at all levels in aligning with the values in word and deed
• Use organizational values as an element in Program and individual evaluations, recognitions and rewards

CONTINUE:
• Strive to embed positive values in individuals and organizational units that will support unity of purpose, concept and action
• Position athletes as values leaders and models of positive behaviors that enhance the Movement
• Communicate consistently and proactively about the role of mission and values in achieving the overall goals of the Movement
• Increase the level of surveillance regarding organizational culture and its impact on employee morale and success

STOP:
• Viewing organizational culture and employee morale as an immutable or secondary factor in organizational success

Recommended Business Model – Role of SOI HQ, SOI Regions, and SO Programs

<table>
<thead>
<tr>
<th>SOI Global HQ</th>
<th>SOI Regions</th>
<th>Accredited Programs</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Leads proposition of organizational values</td>
<td>• Promotes organizational values to Programs</td>
<td>• Adopt SO values or comparable statements</td>
</tr>
<tr>
<td>• Aligns SOI behaviors with stated values</td>
<td>• Evaluates performance of the Region and staff against values</td>
<td>• Communicate values to staff, volunteers and partners</td>
</tr>
<tr>
<td>• Communicates the importance of values and culture relative to contributors and success throughout SOI and to the Movement</td>
<td>• Assesses program actions and results against values</td>
<td>• Recognize individuals, teams and organizations that support their programs and the Movement through values-based actions</td>
</tr>
<tr>
<td>• Applies the organizational values test to HQ and Regions</td>
<td>• Recognizes Programs and individuals that are exemplars of applying and reflecting values</td>
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</tbody>
</table>
LEVERAGE GAMES

Track Session Overview

Date and Time

June 8  9:00am – 12:00pm

Location

Fez 2, Level 1, Palais des Congres
LEVERAGE GAMES

Track Session Overview

Track Staffing
Track Leaders: Peter Wheeler
Facilitator: Angela Ciccolo

Session Logistics
Date & Time: June 8: 9:00am - 12:00pm
Location: Fez 2, Level 1, Palais des Congres

Desired Outcomes
By the end of the track session, delegates will:

- Understand and provide formal feedback on the overall Vision and Goals.
- Provide feedback on which strategies and targets they understand and endorse; which they do not understand; and which they disagree with as a vehicle for achieving the Vision.
- Identify approaches that Special Olympics International can utilize to demonstrate most effectively the impact and value of multinational Games at all levels for Programs around the world.
- Assess the overall interest in pursuing single-sport strategy(ies).
- Identify criteria for selecting sports that require development of specialized strategies and define what sports appear to resonate most with the audiences at the current stage in the Movement’s evolution.

Session Format
This Track will be conducted in just one day. Tracks will be professionally facilitated and will operate under consistent SO Global Congress Rules of Engagement (attached separately).

There will be an overview of the session and desired outcomes. The session will focus on how best to leverage Games to benefit both the host Special Olympics Program as well as the participating Special Olympics Programs. Looking at the use of a single-sport initiative such as football to accelerate Special Olympics awareness, growth and resources will also be examined.

The Games Track discussion will focus on two questions simultaneously: How to best leverage Games to benefit both the host Special Olympics Programs as well as the participating Special Olympics Programs; and The use of a selected sport such as football to accelerate Special Olympics awareness, growth, and resources. Delegates will be asked to select one of these two topics to address.

The Games discussion will ask delegates for input on the following questions:

- How do you define Games success?
- What do we do to make World and Regional Games your Games?
- How can the Games change to more effectively meet your recruitment, marketing, and fundraising goals?
- How can Athens 2011 best help your Program?
- What should our Games vision be for 2015?

The selected sport discussion will ask delegates:

- Should Special Olympics pursue development of single-sport strategies for more than one sport at a time?
- Does a single sports focus strategy help us in providing more awareness, athlete interest and participation opportunity?
- How should we assess the potential of Special Olympics aligning with single sports championships such as the FIFA World Cup?
- What sports would you recommend to focus on if we were to pursue a single sports focus strategy? Why?

Recommended Preparatory Materials
- Track Session Briefs: 1) Games; and 2) Single Sport Competition Model
**Key Initiative: GAMES MODEL**

**Vision 2015:** In addition to providing a world-class athlete experience for all participants, we will leave a lasting legacy around our Regional and World Games against key organizational priorities including increased public awareness, greater revenue generation, and successful engagement of new influential leadership.

**Situation Assessment & Problem Statement**
- Special Olympics Games have become the world’s best example of how sport can promote skill, inspire acceptance, overturn prejudices, and lead to real social change
- Games have continued to grow in scale and costs resulting in fewer cities/countries bidding to host Games due to financial guarantees and adequate facilities to accommodate such a major event. World Games budgets have grown in the past decade: Summer Games – 35 million USD to 80 million USD; Winter Games – 17 million USD to 34 million USD.
- Regional Games in Europe Eurasia, Latin America, Middle East/North Africa, China, and USA have gained in popularity.
- Less than 50% of respondents in the Mission Effectiveness study felt Word Games drive growth or fundraising locally.
- Examples of benefits of World Games beyond the host country need to be shared and best practices made available.

**Proposed Strategic Recommendations for 2011-2015**

**START:**
- Documenting Games legacy successes.
- Developing a Games playbook that provides Games Organizing Committees and Special Olympics Programs with effective strategies to further Special Olympics goals (sample media plans, fundraising campaigns and invitations)
- Broadening Games impact measurement practices (social, economic, programmatic).
- Promoting Games bid selection and overall Games plan to align with Special Olympics strategic priorities.
- Creating and monitoring overall Games movement-wide strategy.
- Establishing unambiguous goals for each Games with measurable outcomes.

**CONTINUE:**
- Measuring Games satisfaction by constituent group/audience.
- Developing regional marketing and communications networks to support Games efforts on behalf of Programs.

**STOP:**
- Increasing athlete participation and size of Games

**Recommended Business Model – Role of SOI HQ, SOI Regions, and SO Programs**

<table>
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<tr>
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<th>Accredited Programs</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Develop Games guide to more effectively leverage Games opportunities and best practices</td>
<td>• Enhance Regional Games profile and benefit</td>
<td>• Conduct Games training to include post Games strategy</td>
</tr>
<tr>
<td>• Ensure World Games alignment with Special Olympics strategic priorities</td>
<td>• Ensure Regional Games alignment with Special Olympics strategic priorities</td>
<td>• Actively support opinion leaders engagement strategy around Games</td>
</tr>
<tr>
<td>• Engage targeted opinion leaders through effective outreach and guest management efforts at World and Regional Games</td>
<td>• Conduct Games training to include post Games strategy</td>
<td>• Ensure National Games alignment with Special Olympics strategic priorities</td>
</tr>
<tr>
<td>• Create communications relationships to drive awareness</td>
<td>• Train Games Committees and Programs on how to measure the impact of Games</td>
<td></td>
</tr>
<tr>
<td>• Measure Games impact – socially, economically, and programmatically</td>
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</table>

**Questions for Engagement at the Global Congress**
- How do you define Games success?
- What do we do to make World and Regional Games your Games?
- How can the Games change to more effectively meet your recruitment, marketing and fundraising goals?
- How can Athens 2011 best help your Program?
- What should our Games vision be for 2015?
Vision 2015: Special Olympics will use the global power of a selected sport or sports to accelerate its awareness globally and to generate the needed resources to support Special Olympics overall growth worldwide. The successful integration of Special Olympics into a preexisting sports community such as football can lead to engagement and support of new fans, players and organizations benefiting Special Olympics at all levels of the Movement.

Situation Assessment & Problem Statement
- Until recently, Special Olympics has not made a major focus on building an integrated single sport business model to support its year-round efforts.
- Europe and Latin America Regions have successfully implemented “football weeks” and “basketball weeks,” driving increase awareness and athlete participation. East Asia recently initiated “football weeks” as well.
- In 2009, Special Olympics launched the Global Football initiative. As a result new commitments by football confederations around the world (AFC, OFC, CONMEBOL, CONCACAF) have been developed
- Currently, sports tie-ins with the NBA, PGA, ATP, UEFA, and FIFA have been more awareness building relationships. With the exception of UEFA, most of these relationships have not generated significant new funds
- Through the Global Football, Special Olympics has initiated the Team Ambassador Program targeting professional players, clubs and teams as a new way to raise awareness, profile, and funds for Special Olympics

Proposed Strategic Recommendations for 2011-2015
START:
- Creating a pitch document for marketing single sports targets
- Developing sports specific PSA’s, videos, photos for each use by sports teams and federations
- Initiating a stewardship program for key influencers within sports
- Integrating grass roots, media, publicity, online, promotional (consumer, retail, direct, licensing, etc.) and other marketing programs into single sports strategy
- Looking at tie-ins to existing coaching and sports academies for sports development

CONTINUE:
- Developing Global Football as a major focus worldwide
- Aligning outreach efforts to sports celebrities, teams, federations with target sports
- Developing partnership agreements with international federations and confederations in focus sports
- Activating Team Ambassador Program in football

STOP:
- Focusing on multiple sports partnerships. Instead focus on two to three large impact sports and do them with distinction

Recommended Business Model – Role of SOI HQ, SOI Regions, and SO Programs

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<tbody>
<tr>
<td>Develop sports development plan</td>
<td>Establish sustainable relations with Regional Sports Federations and other relevant institutions.</td>
<td>Establish sustainable relations with National Sports Federations, leagues, etc.</td>
</tr>
<tr>
<td>Develop marketing programs for each identified single sport</td>
<td>Steward and manage sports celebrities, teams and clubs within region</td>
<td>Recruit and train coaches</td>
</tr>
<tr>
<td>Develop “how to guide” to work with local clubs, teams and athletes</td>
<td>Offer Single Sports Tournaments</td>
<td>Support stewardship and manage sports celebrities, teams and clubs within regions</td>
</tr>
<tr>
<td>Offer Single Sports global event tie-ins</td>
<td>Support translation of materials</td>
<td>Offer additional competitive opportunities within the sport</td>
</tr>
<tr>
<td>Establish sustainable relations with International Sports Federations</td>
<td>Create supporting promotional materials (video, photos, etc)</td>
<td></td>
</tr>
</tbody>
</table>

Questions for Engagement at the Global Congress
- Should Special Olympics pursue development of single-sport strategies for more than one sport at a time?
- Does a single sports focus strategy help us in providing more awareness, athlete interest and participation opportunity?
- What would your reaction be to Special Olympics aligning with major single sports championships such as the FIFA World Cup?
- What sports would you recommend to focus on if we were to pursue a single sports focus strategy? Why?
Special Olympics

2011-2015

Strategic Plan

Version 2.0

May 2010
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WELCOME LETTER

Dear Fellow Special Olympics Leaders:

As we committed earlier this year, we are pleased to share with each of you Version 2.0 of our Special Olympics 2011-2015 Strategic Plan.

Over the last many months, we have journeyed together through input sessions, surveys, and forums. We have organized working groups of Program Leaders, staff, key constituents and partners to help develop the plan. Literally, hundreds of you have responded with input and guidance since February when we shared our initial set of Working Group Inputs on the Plan. It is with this kind of spirit, energy and passion that will “Ignite our Movement” to a stronger place of quality, growth and alignment. We hope you will see attached the fruits of your time.

We want you to review this draft with the same good energy and scrutiny you brought to the earlier work. This time, however, we want to begin moving from input to the next phases: “how can we make this plan work?” and “how can we use this plan to strengthen all levels of Special Olympics worldwide going forward?” You will see some familiar elements and you will see some elements that will challenge and stretch. We are thinking boldly about our future.

This current draft represents a major milestone but not the end of our journey. We have an unprecedented leadership opportunity in Morocco at our Global Congress to discuss, to debate and to align. We will continue that momentum through completion of the plan by November.

We appreciate your time and commitment to making this a real success. We share your optimism that this Plan can be a game change for our entire Movement and look forward to working with each of you to fulfill that goal.

Very Sincerely,

Timothy P. Shriver
Chairman & CEO
Special Olympics International

J. Brady Lum
President & COO
Special Olympics International
PLANNING PROCESS OVERVIEW

What are we trying to achieve?

We have launched an ambitious effort globally to create a unified, Movement-wide vision and strategic plan, establish bold goals and priority areas, and develop integrated approaches to Special Olympics programming in 2011-2015. Several important principles guide our work:

• **We are drafting a Special Olympics Movement-wide strategic plan, not an SOI plan.**
  It is important to stress upfront that we are developing a shared strategy for the global organization. To focus solely on SOI-specific goals represents a common misperception that is so important to correct whenever we hear it. This entire process has been designed to fundamentally change not only the way we share input and insights with each other but also the way in which we work together to implement our Mission. To do so, we can’t just talk; we have to get serious about mutual goals, aspirations, visions, and strategies.

• **We need to see ourselves as creators, not simply editors.**
  The easiest thing to do is to take someone else’s work and comment on it. The much more difficult task in any endeavor is creating something from scratch, being vulnerable to having others tear it apart, and owning the outcome. That is our challenge now – to create together. We firmly believe that when we approach a task as creators, we bring our whole selves into the conversation. We want the best ideas, the best thinking.

• **The June Global Congress is not the “finish line” for the plan.**
  Morocco is a turning point, not the end. There will be many subsequent steps that will involve Board review and the creation of Regional and Program level plans. We will know we have been successful when Program level plans have embedded many of the concepts and strategies introduced. And we will really know success when they are executed in ways that engage and support our athletes, families, and volunteers at a local level. All that notwithstanding, the Global Congress remains a critical milestone. The outcomes for the Congress are outlined separately and real strategic choices will be made.

• **We all have unique and mutually supportive roles in this planning process**
  SOI Staff, Program Leaders, Key Constituents and Partners have separate but mutually connected roles in the plan and in the execution. We respect all in the process.
Where are we in the strategic planning process?

**Phase I: Input and Assessment – {Completed}**
Our journey began with an initial phase of collecting preliminary feedback, identifying issues, concerns, and challenges that face our Programs worldwide and our global Movement. More than 1,700 Program representatives from over 120 Special Olympics Programs contributed deeply to the first phase of our efforts through focus groups, the Mission Effectiveness Survey and deliberations of various leadership groups and advisory councils.

**Phase II: Emerging Strategic Framework -- {Completed}**
Based on this feedback, five Strategic Planning Working Groups commenced intense discussions and development of goals and objectives in December 2009. These Working Groups engaged representatives of 15 Special Olympics Programs, as well as Special Olympics International Board members and staff focused on five areas of exploration: Athlete Experience, Building Communities, Fan Engagement, Movement Leadership and Sustainable Capabilities.

**Phase III: Content Drafts – {Completed}**
We committed to two content drafts before our Global Congress. The first draft was a set of Inputs from the five Working Groups. It was completed and distributed at the end of February. Multiple feedback mechanisms, including discussion blogs, e-mail, conference calls and direct conversations with Working Group members were utilized to promote informative conversations around the first collection of Plan inputs. Through the various channels, leaders from nearly 70 Special Olympics Programs provided their comments and recommendations.

The second draft, which we are now calling Version 2.0, is more comprehensive and further developed. While not every idea nor point of feedback found its way directly into the current draft of the strategic plan, Working Groups feel confident that all of the major themes, approaches, and aspirations were properly reflected and incorporated.

**Phase IV: Global Alignment**
We have arrived at this stage and will remain here up and through the June Global Congress. One of the primary goals of our Global Congress is to foster a real sense of alignment and ownership of this plan. This is an absolutely critical step to ensure that our efforts are not just nice talk but that they come to life across Programs and Regions.

**Phase V: Regional & Program Plans**
Our plan does not become real until the ideas and priorities are embedded in regional and program-level plan. That is where the real work is done. We are working with Regional Advisory Councils and leadership teams to help facilitate the work at all levels. And we understand that regions and programs will be at various stages of readiness.
Phase VI: Plan Approval and Communication

The Special Olympics International Board plays a critical role in shaping and ultimately approving the strategic plan. The SOI Board will convene in November 2010 for final plan approval. At that time, it will also outline a communication plan and process for next steps.

How we are organized to get the work done?

We have worked hard to establish a governance structure that is both clear in responsibilities, representative and inclusive in participation, and manageable in execution.

- **SOI Board**: This SOI International Board is the ultimate governing body for our Movement. We have involved many Board members in the process and have geared our process for final Board ratification and approval November 2010.

- **Strategic Planning Steering Committee**: This group was established to help steward and guide the creation of the strategic plan. It consists of a diverse group of representatives from across the Movement.

- **Strategic Planning Working Groups**: We established five working groups to date to lead the plan development for each pillar of our emerging strategic framework. Each of these working groups is chaired by a Program leader and then staffed by a SOI liaison.

- **Regional Advisory Groups and Leadership Teams**: We have encouraged each of the Advisory Councils and other leadership teams to become actively involved in the process. We see these groups as critical teams for discussion and debate. We also see these groups as critical links to truly operationalize the plans.
STRATEGIC ASSESSMENT

There were several primary inputs that drove the strategic analysis of our work to date: 2009 Reach Report, 2009 Mission Effectiveness Survey, Regional and Program-level Input Sessions, and programmatic evaluations (where available). Collectively, this analysis highlights some areas of strength to leverage and some clear areas for improvement.

Make no mistake: the Special Olympics Movement remains strong!

Special Olympics continued to grow steadily in 2009 and expanded its global reach to over 3.4 million athletes, a year over year growth rate of 8%. Since 2000, our Movement has added nearly 2.4 million new Athletes.

![Special Olympics Global Growth, 2000-2009](image)

We further solidified our global reach, rapidly expanding in high growth areas such as Asia Pacific (18% growth) and East Asia (10% growth). However, we also saw very solid growth in places like North America (8% growth).

Programs have experienced some notable trends in the demographic characteristics of the athlete population, particularly:

- The ratio of male to female athletes has decreased to 1.6-to-1 signaling a trend toward greater engagement of female athletes.

- The number of children ages 2-7, who train according to Special Olympics rules more than doubled in 2009 (to nearly 57,000 individuals) following a 50% jump in the previous year.

We continue to sharpen our focus on delivering year-round competition opportunities. In 2009, Special Olympics offered athletes 12,000 more competitions than the previous year and...
increased the overall number of competitions to 44,136 – equal to 121 competitions on average being staged every day around the world.

With Unified Sports® participation (combined SO Athletes and partners) increasing by 57 percent in 2009, Unified Sports® program participants constitute the fastest growing segment of the overall Athlete population. For the third consecutive year, participation in Unified Sports® continues to accelerate from 28 percent growth rates achieved in 2006 and 2007, to 35 percent growth rate in 2008, and 57 percent growth in 2009. However, growth remains uneven across Regions as well as across athlete and partner groupings.

The Special Olympics Healthy Athletes program thrives in more than 100 countries, led by more than 1,250 volunteer clinical directors. Each year more than 165,000 athletes receive free health screenings, including eye glasses, hearing aids, clinical tests/exams, education, preventive supplies and referrals. And in 2010, we screened our 1,000,000th athlete!

Our global Mission Effectiveness Survey reminded us that we’ve made great progress in building awareness of our mission around the globe. However, the level of that awareness varies greatly from region to region.
Members of the Special Olympics community are highly satisfied with the Movement itself and are extremely excited about the future. Over 70% of respondents to our worldwide survey are highly satisfied with their local Program, which means we’re doing a good job at the grass-roots level. And while we obviously strive for 100% satisfaction, we are encouraged that so many people’s lives are being positively impacted by the Special Olympics Movement. We also see significant energy aligned behind the Movement going forward as survey respondents almost unanimously believe that Special Olympics can and should continue to grow.

However, our Movement has room to improve

While the number of athletes we serve and the number of worldwide competitions we offer are both steadily increasing, the number of coaches participating in our Movement is not keeping pace – during 2009, we saw an overall decline of 6 percent. The athletes-to-coaches ratio improved in only two of the Movement’s seven Regions - Latin America and MENA.

At the end of 2009, Movement-wide revenue raised by accredited Programs amounted to more than 173 million USD in cash donations and more than 57 million USD in in-kind donations. U.S.-
based Programs continued to generate the vast majority of the Movement’s cash revenue, contributing over 80 percent of the total. Overall cash and in-kind donations have not grown in proportion to the growth of new Athletes.

In fact, our worldwide funding per athlete decreased from $117 in 2007 to only $92 in 2009. We’re doing more work with fewer resources. And it’s going to take even more resources to ensure our quality in the future. Assuming we grow our athlete count at a modest 8% rate, by 2015 we will need almost $300 million to support our athletes at a similar level, similar to what existed in 2007 - a 70 percent increase. Thankfully, the Movement already appears to be aligned behind this challenge: growth in fundraising is the most important issue according to respondents to our worldwide survey.

While there has been steady growth in Athlete Leadership programs globally, still less than 1 percent of all Special Olympics athletes are today serving in leadership positions.

Our Mission Effectiveness Survey revealed some additional insights and opportunities:
• There is a desire for clearer guidance regarding what activities we're going to focus on going forward, and their relationship to our Mission.

• Quality is top of mind for our leaders around the world, but there is no common agreement on what quality means and how it should be measured.

• There is a need to create additional leadership opportunities for our Athletes; only half of the survey respondents believe athletes have sufficient leadership opportunities.

• Finally, we were reminded that the World Games require a significant amount of effort from people across the Movement, and that as leaders of the organization we need to do a better job of providing education and support around our Games core value proposition.

The Special Olympics Movement has a number of strategic imperatives

After conducting this in-depth assessment, a number of clear imperatives have emerged.

• **Growth and Quality:** We must continue our focus on quality growth. In recent years, the Special Olympics Movement has emphasized the urgency of creating a culture of quality, growth, and focused expansion, and to great success. Since 2000, we have increased the number of athletes in our Movement more than three-fold driven by growth in programs all around the world. Conservative estimates suggest that there are at least 200 million people in the world with ID, so there is no question about whether we should continue to grow.

There is a question, however, about how much we should grow. While touching as many lives as possible remains a critical goal, we must be cognizant of the fact that our resources – coaches, volunteers, donations – have not kept pace with our growth in athletes. We must balance our baseline, organic growth level of 6-8% with additional stretch opportunities that could reach a growth rate of 10% per year through 2015. The key is to achieve this growth in a thoughtful way, one that considers each program’s local context and sets appropriate targets that not only grow the athlete numbers, but also grow all the elements of program effectiveness and sustainability.

What will be different for our Movement going forward is our focus on quality. We hope that this shift in emphasis comes as no surprise to people across the Movement, and we believe it won’t; quality was universally cited as a key issue for Special Olympics in our worldwide survey and is clearly an issue we need to address. We believe the Movement is aligned around the quality idea and is very much ready to embrace it. The hard work will be figuring out exactly how we should measure quality. We need to create a common definition of quality, identify the right set of metrics to track it, and determine how, if at all, that definition should vary across programs around the world.
• **Sustainability**: We must focus on generating revenue. As noted above, we will need to increase funding by almost 70% in the coming years to maintain baseline per athlete levels. We must fund our work with a revenue model that is sustainable for both accredited programs and the Movement overall. A Movement united in operating revenue will be a sustainable Movement.

• **Worldwide Awareness**: The Special Olympics Movement remains little known in many parts of the world and misunderstood in many others. Our survey reminded us that the power of the Special Olympics name varies around the world, and that the Movement could benefit from better visibility. We must brand (or rebrand) our Movement to communicate our powerful value propositions and attract millions of new fans.

• **Leadership**: We are dangerously dependent on a small number of dedicated and charismatic leaders around the world -- athlete leaders, family leaders, volunteer leaders, and Program leaders. Only half of our survey respondents believe athletes have sufficient leadership opportunities. Our Program leaders are being taxed beyond any reasonable measure. Clearly, we must find a way to recruit, retain, and develop a significantly expanded team of the highest quality leadership to champion our Movement in the future.

• **Flexibility**: We have not yet fully succeeded in adapting our business model to the realities of the developing world. We must ensure all programs are given the opportunity to succeed, and create policies and procedures to support this opportunity.

• **Organizational Unity**: Our organizational culture, while boasting a world class unity around our Mission, is often a source of fragmentation and misunderstanding. We must become one team with a common vision and a common set of goals.

The strategic plan is designed to address our key questions and strategic imperatives

As we consider the major trends facing our global Movement, our strategic choices can be best illuminated by asking a series of questions that are fundamental to our development over the next five years. Through our planning process, strategic questions tended to coalesce around five distinct areas – Sports & Competitions, Communities, Fundraising and Marketing, Movement Leadership and Sustainable Capabilities – that inspired our initial scope of work.

• **Athlete experience related questions**
  
  o What are the best measures of growth? How can we develop state of the art standards for achieving growth? What are the underlying elements of this growth?
  
  o What are the best measures of quality? How do we define standards of excellence in competitions and sports training? Frequency of competition? Fairness and dignity of games?
o Should our Athlete counts continue to grow? At what pace? Should there be a numeric and/or growth rate target? By Region? By Program?

o What new models can we implement to ensure Special Olympics leadership in sports, coaching excellence and athlete satisfaction? How do we ensure that we are taken “seriously” in sports?

- Community-building related questions
  o How important is attitude change and action at the community level, as defined geographically and socially?
  o What are the measures of growth and quality in our core community programs – ALPS, families, volunteers, youth engagement, and health screenings?
  o How does advocacy fit within the mission? What should be the boundaries for Special Olympics advocacy activities? What is the right balance of our policy and advocacy work and efforts, both in the US and internationally?
  o How can we continue to enhance the reach and impact of our work in health and fitness and strengthen our partnerships? How does this work intersect with our sports programs?

- Fundraising and Marketing related questions
  o How can we create a more “barrier-free” fundraising system? What holds us back from stronger revenue growth? What types of campaigns should we collaborate on as a Movement?
  o How do we define fundraising success – globally, regionally, Program level?
  o How should Special Olympics globally, regionally and at Program level diversify its funding sources to ensure long-term viability?
  o How can we ensure that our 44,000 events are conducted in ways that strengthen our marketing messages and fundraising appeal?

- Special Olympics leadership related questions
  o How do we define overall success within the Movement? What does a balanced scorecard look like for our Movement?
  o How can these measures serve as the foundation for establishing a defined recognition and accreditation standards for SO Program excellence?
  o How can we use General Rules and Accreditation Standards to define and drive Program Quality and Sustainability via a new set of Accreditation Standards of Excellence? What changes to our General Rules are recommended?
  o How do we ensure that SO recruits, trains and retains the best talent in the world while creating clear centers of knowledge? How do we ensure training, succession, and tools, to foster stronger leadership and sustainability across our Programs?

- Organizational capabilities related questions
• What are the defining elements of our culture and corresponding values needed to achieve the vision and objectives of our new plan?
• What processes, people and systems do we need across our Movement to ensure better effectiveness and efficiencies?
• How should our business model change to support the new plans? What are the changes in roles between SOI HQ, Regions, and Programs? What role do partners play in our new plan?
• How can research and evaluation be best leveraged to support Special Olympics at all levels of the Movement?

Many of these questions are addressed in the plan that follows. Others require continued analysis and discussion.
Last November, our planning team agreed to propose five major pillars: 1) Athlete Experience, 2) Building Communities, 3) Fan Engagement, 4) Movement Leadership and 5) Sustainable Capabilities. We received overall support for the five pillars, and they were a very helpful way to begin the content work. We also received helpful feedback in what the five pillars did not offer – no guidelines on prioritization, no centrality around athletes, no clarity on connection to Mission, as several examples. While the visual representation of the current approach will be further refined in the coming months, the fundamental aspects of this framework have withstood the debate and scrutiny by peers from all corners of the globe and constitute the first attempt to design our shared “Special Olympics Home.”

There are two enduring “building blocks” of this framework:

- **Athlete Experience:** We celebrate now and always that our Athletes are at the center of our work and the heart of our Movement.

- **Special Olympics Foundation:** We also celebrate and reaffirm the enduring and guiding nature of our current Mission while acknowledging the need to better articulate our unique model of change, value proposition, and scope of involvement.
At the core of this framework are five “pillars” of work that ultimately link together to provide a holistic, consistent and quality experience for Special Olympics athletes.

There are three Mission-Driving Pillars.

- **Advance Sports and Competitions**: Our Athletes are the center of our work. Special Olympics should be recognized as a global leader in sports, providing excellence in coaching, training, and competition management at all levels, offering each athlete the opportunity to develop to their personal best through the activation of sport and athlete development models.

- **Build Communities**: The transformative power of Special Olympics comes when we build powerful communities of change around our Athletes, creating demonstrable impact at multiple levels of society. Healthy Athletes, Families Program, ALPs, and schools and youth initiatives continue to position our Movement as being a change agent for whole communities – for all of us – not just as a service delivery program for a small population.

- **Connect Fans & Funds**: Special Olympics must become a more effective, sustainable and innovative marketing and fundraising organization. We must facilitate thoughtful, committed and diversified engagements with individuals, corporations, foundations, civic and service organizations, and government agencies from the local to the global levels aiming to increase operational funding and support for Special Olympics Movement-wide. We have an opportunity to translate communications into strategic storytelling, passive spectating into fan engagement, and community support into real collaborative and breakthrough fundraising.

There are two Enabling Pillars which help build the infrastructure for success:

- **Define Movement Leadership**: We must understand what makes us successful, work together to execute a common agenda, leverage the unique skills and gifts of each accredited Program, set standards of excellence, and develop leaders, effective systems and tools to “raise the bar” at all levels of the Movement. This is the definition of alignment.

- **Establish Sustainable Capabilities**: Special Olympics must have the core systems, infrastructure and processes to best support the growth and expansion of the global Movement and deliver measurable impact over time. It is critical that Special Olympics focus is not just what we do, but how we get it done. We have to acknowledge that rapid growth must be matched by quality in service and support.

What follows is an explanation of each of the parts of our Framework.
Strategic Plans call on us to question what we do and how we do it. Yet there are some elements at the foundation of who we are that are so deep in our work and culture that they will always be relevant and guiding. Our foundation is rock solid.

**Our origins**
Every Movement has a heart and a story. Ours began because one woman, Eunice Kennedy Shriver, deeply loved her sister. She became furious about the neglect and indifference she saw toward her sister and others with intellectual disabilities. She had deep faith that everyone counts. And she loved sport. In a moment that literally changed the world, she saw how sport could transform the lives of those who shared the challenges of her sister. Special Olympics was born of this compassion, fury and action.

**Our mission**
To provide year-round sports training and athletic competition in a variety of Olympic-type sports for children and adults with intellectual disabilities, giving them continuing opportunities to develop physical fitness, demonstrate courage, experience joy and participate in a sharing of gifts, skills & friendship with their families, other Special Olympics athletes and the community.

**Where the mission leads**
Our mission is further clarified in our General Rules to explain why we do what we do.

“The ultimate goal of Special Olympics is to help persons with intellectual disabilities participate as productive and respected members of society at large by offering them a fair opportunity to develop and demonstrate their skills and talents through sports training and competition and by increasing the public’s awareness of their capabilities and needs.”

We are working to establish a new paradigm and reposition ourselves and our work from:
- Once to Daily
- Sports to Sports Community
- Event to Movement
- Them to Us
- Nice to Important
- Service culture to Empowering culture
- Giving to Transforming
- Pity to Acceptance

This section will be outlined further at the Global Congress and in the subsequent Plan drafts.
Vision 2015
Special Olympics is recognized as a global leader in sports, providing excellence in coaching, training, and competition management at all levels, offering each athlete the opportunity to develop to their personal best through the activation of an enhanced athlete and coach model.

Overall growth goal: Grow Special Olympics participation to 5.5 M athletes and 600,000 certified coaches by 2015.

Overall quality goal: All Special Olympics athletes offered a minimum of 2 training sessions per week and have the opportunity to participate in at least 1 competition per season by 2015.

Current Situation Assessment
Athlete experience is at the center of our Movement’s mission. Creating a positive athlete experience is dependent on a number of factors, the most important of which are quality opportunities to train/compete coupled with professional, high-quality coaching.

Although the number of competitions we offer worldwide has increased in recent years (up to 44,000 competitions worldwide in 2009), we are uncertain about the consistent quality of these events. We are also concerned about our coaching core as the number of coaches participating in our Movement has not matched our athlete growth. Further, few of these coaches fulfill uniform Special Olympics certification requirements or have higher level sport-specific certification. While we are offering more opportunities for participation, we are not necessarily providing the quality opportunities required to create a positive experience for our athletes.

Our Movement also seeks to promote inclusivity, but has experienced limited and isolated growth in its Unified Sports program; in fact, in 2009 there were fewer than 325,000 total participants (athletes and partners) worldwide. There are many reasons for this situation, particularly the fact that the “Unified” concept in sports still faces resistance in certain areas of the world.

Strategies and Targets
Strategy #1: Quality training
It is crucial that athletes are provided with the right types of quality training at the applicable stage in an athlete’s development and performance objectives. Training will differ at all stages of an athlete’s sport development and the technical expertise that is needed based on the priorities required for each stage especially for those athletes advancing to higher levels.
• Every athlete is offered a minimum of two training opportunities per week with every training opportunity being at least 1 – 1 ½ hours in duration for a minimum of 12 weeks per sport (with consideration for parameters of each sport i.e. for winter sports with shorter cycles).

• At least 80% of Special Olympics athletes train and compete in venues that are equal in quality to facilities applicable to their level of training (i.e. offered to the secondary school students; by sport governing bodies; etc.).

• Increase, by 20%, the number of Special Olympics athletes whose performance and progress is tracked by;
  o Participating in a standardized fitness test 2 – 3 times in a program year to establish a benchmark to assess the quality of training.
  o Utilizing sport specific measurement tools.

• Grow, by a minimum of 8-10% annually on average, the number of Special Olympics athletes registered in Programs worldwide.

Strategy #2: Quality competition
With quality competition athletes with an intellectual disability can achieve high levels of athletic performance. Too frequently, low expectations limit an athlete’s ability to achieve maximum potential in competition.

• Every athlete has an opportunity to participate in several Special Olympics competitions per sport per season.

• Selection of athletes at the Program level and above is a transparent, documented process that is justifiable to athletes based on athletic performance at a sanctioned qualifying event.

• Athletes competing at Program level and above have been educated in the rules and have been trained to a level of competency to compete in their sport at that appropriate level.

• Competitions at Program level and above be conducted to Sport Governing Bodies standards (Program, Regional, National or International) and that minimum standard for sport specific competition volunteers (i.e. table officials in swimming) be developed for Special Olympics competitions and these sport specific competition volunteers be trained to that minimum standard (Program, Regional, National, or World level).
Strategy #3: Coaching excellence
Excellence forms the cornerstone of a coach’s philosophy and Special Olympics will continue to develop resources to be a leader in coach education by partnering with applicable agencies to provide the highest level and most current technical knowledge.

- Establish, or enhance, a standardized certification program for Coaches that includes tracking of a coach’s information and level of certification.
- Develop a Coach Model which utilizes the characteristics of an excellent coach; defines expectations for coach certification at each stage of development; outlines coach/athlete rations; provides key certification metrics; and establishes a coach recognition program.
- Increase the number of certified coaches by 30% and increase to 50% the number of coaches that attend professional development every second year.
- Explore the creation of an on-line coaching academy -- a worldwide portal of coach information inclusive of partnership opportunities, best practices, e-newsletters, motivation tools, and sports psychology information. Strengthen sport governing bodies to fulfill this vision.
- Increase by 40% the number of coaches that provide athletes with nutrition, fitness, and wellness guidelines and increase, by 60%, the number of the Programs have access to Sport Governing Bodies sports specific education and coach certification.

Strategy #4: Athlete Development Model
Create and implement an Athlete Development Model spanning local, regional, program, national, and international levels that provides the athlete with enhanced training and competition opportunities that are age appropriate and target all sport skill levels. This Athlete Development Model should reflect athletes at different stages of sport development and ensure that all athletes of all abilities are challenged to develop their personal best by being offered fair, challenging, and meaningful systems of training and competition.

- By fostering stronger wide-ranging linkages within the broader sport delivery system provide Special Olympics athletes with enhanced opportunities for sports training and competitions, increasing the options for athletes and coaches while at the same time ensuring organizational efficiencies.
- Develop health/fitness coalition partnerships to build physical literacy in sport training and provide athletes with the opportunity to benefit from instruction and competition according to growth and development principles.
- Provide coaches with a tool to track performance and progress.
• Provide materials and tools to help coaches select the best and most appropriate sport for each athlete.

Strategy #5: Unified Sports

Special Olympics will become a Movement of inclusive experiences reaching at least 25% of our athletes with Unified Sports opportunities.

• Require evidence of at least one type of Unified Sports inclusive programming in every Program worldwide.
• Provide training for Program leaders in how to establish and support Unified Sports programs, sharing best practices and encouraging collaboration.
• Evaluate Mentoring Division concept to address equal ability level requirements.
• Create the right model for Unified Sports at Regional and World Games.
BUILD COMMUNITIES

Vision 2015
Special Olympics widely uses the catalytic power of sport to build communities of dignity, acceptance, and joy around the world. These are strong and inclusive communities built by engaging individuals, families, schools, organizations, companies, services and governments with Special Olympics athletes and with all elements of the Mission.

Strong, inclusive communities foster an enabling environment for athletes to develop in while providing youth an opportunity to grow in an integrated and accepting climate. Families in turn benefit from the stigma-free environment and actively involve themselves with other community partners, schools, health services to strengthen the community structure. The synergy between all these stakeholders creates a powerful platform for enabling athletes, empowering families, engaging youth, revolutionizing services and building exemplary communities of change.

Overall growth goal: Special Olympics will increase the number of youth aged 8-22 serving as Unified partners, volunteers, advocates and fans to match that of athletes within this age group by 2015.

Overall quality goal: Generate 90% compliance with family member participation standards and athlete governance and leadership standards by 2015.

Current Situation Assessment
Historically, the Special Olympics Movement has worked hard to promote the notion of community development and impacts. However, this impact has been disperse across a number of important, but not always integrated, initiatives across constituent groups.

Special Olympics Athlete Leadership Programs (ALPs) represent a demonstrated model of achieving Special Olympics goals in the areas of self-determination, development, relationship building, and various social skills. We have been successful with this program, growing to over 22,000 participants in 2009, but that growth is stagnating and recognition of athlete ability and potential for leadership within Special Olympics and in the communities where athletes live is still a challenge.

Special Olympics family members represent a diverse group whose interest in and support of the Movement ranges from very enthusiastic to non-existent. Currently, family leadership opportunities are executed and delivered sporadically because of varying conditions at the Program and sub-Program levels, and family services and support mechanisms exist at the local
level without a comprehensive global system. We do not offer a clear range of family engagement opportunities and support, which further compounds the problem.

Youth currently play active roles in Special Olympics as Unified partners, advocates for the Movement, supporters of campaigns, volunteers and coaches. To capture the momentum associated with this demographic, Special Olympics has begun harnessing the power of social media to advance the Mission and involve youth as fans; however this medium could be employed more extensively and creatively. Additionally, youth presently play very limited roles in formal Special Olympics governance structures and major additional efforts need to be invested to ensure effective and meaningful engagement.

People with intellectual disabilities have been documented to have high levels of untreated diseases, little access to care and almost no opportunity for health improvement. Health professionals have little to no training and experience in treating people with intellectual disabilities, and public policies do not adequately support health care and support for this population. Special Olympics’ Healthy Athletes program has made great strides in addressing this problem, providing screenings to over 1,000,000 to date. However, this program is currently still far from fully addressing the global range of health needs of Special Olympics athletes and the broader population of people with intellectual disabilities. It is also overly reliant on a precious few sources of financial support, primarily the US federal government.

**Strategies and Targets**

**Strategy #1: Enable Athlete leadership**

Continue to capitalize on the benefits of sport participation (confidence, commitment, learning to be part of a team, and improved health and motivation) to improve the independence and employability of athletes through robust leadership initiatives and the mobilization of community resources and tools. Ensure early engagement of athletes in sports and then leadership through expanded, targeted programming. This includes strengthening Early Childhood Development through the expansion of the Young Athletes Program and inclusion of health screenings, education and toolkits for families; expanding the Athlete Leadership Programs reach to incorporate aspects that will improve athletes’ independence, employability and resourcefulness; and developing and meeting global standards of participation for athletes on Boards and Global Athlete Councils.

- Ensure that 10% of all Special Olympics athletes are provided Athlete Leadership opportunities that will directly improve their employability and daily living skills.
• Guarantee that in every national Program, every Board of Directors includes at least one athlete as a permanent Board member, and that every office include at least one Athlete employee.

• Develop global standards for participation of athletes on governance structures and ensure at least 90% compliance with those standards.

• Grow the reach of the Young Athletes Program by 100% by 2015.

Strategy #2: Empower Families
Create dynamic, trained constituent groups of families that play active and clear roles in Special Olympics. This will be done by creating a framework for family involvement from local to international levels with incentives for active participation; recruiting and training family members to become active community builders for themselves and for other families; ensuring that all Accredited Programs demonstrate involvement of families at all levels of their Program; and developing and meeting global standards of participation for family members on Boards and Regional Advisory Councils.

• 1,000 family members will be recruited and trained as active community builders

• Develop global standards for participation of family members on governance structures and ensure at least 90% compliance with those standards.

• Develop a framework for family engagement which is replicable at a Program level and includes incentives for active participation and leadership.

Strategy #3: Unify Schools and Communities
Provide consistent opportunities for young people with and without intellectual disabilities to engage in Unified Sports Young Athletes, cheer teams, volunteerism, and leadership development activities worldwide.

• Special Olympics will increase the number of youth aged 8-22 serving as Unified partners, volunteers, advocates and fans to match that of athletes within this age group by 2015

• All Boards of Directors will include a pair of young leaders to champion the involvement of youth in the Program and in the Movement

• SO will retain at least 50% of youth registered as volunteers or participants in projects, events and/or volunteer work at all levels of the organization.

• Social media and popular culture campaigns will register 1 million youth fans by 2015.
Strategy #4: Improve Athlete health and well-being

Improve the health of athletes through comprehensive health screening, education, and referral and the mobilization of global health resources to improve sustainability and impact of Healthy Athletes. Broaden health programming to include alliances to connect screening services to community-based follow-up care and treatment. Adapt current health protocols and implementation to better address global variations in need, systems, and culture. Formally integrate health programming to strengthen family support and early childhood development initiatives. Enhance partnership base at the state/national Program level to foster increased sustainability.

- SO Programs will document at least three health partnerships generated locally.
- At least 20 new relationships will be documented between SO Programs and state/national health ministries/agencies.
- New Healthy Athletes models to address varying global health needs, cultures, and systems will be developed, evaluated, and disseminated.
- Formal protocols will be developed and shared regionally for integrated health, family support, and early childhood development initiatives.
- 75% of Programs that have been conducting Healthy Athletes for five or more years will be able to secure at least 50% of the cash costs associated with their screening events.
- 25% of Healthy Athletes events will be fully locally funded.
CONNECT FANS AND FUNDS

Vision 2015
Special Olympics will become a more effective, sustainable and innovative marketing and fundraising organization to enable its operating revenues to double across all regions by the end of 2015.

We must facilitate thoughtful, committed and diversified engagements with individuals, corporations, foundations, civic and service organizations, and government agencies from the local to the global levels aiming to increase operational funding and support for Special Olympics Movement-wide.

Overall growth goal: Double SO operating revenues across all regions by the end of 2015.

Overall quality goal: Manage the Special Olympics brand so that 100% of Accredited Programs are in compliance with an organization-wide brand standard.

Current Situation Assessment
Nearly 230 Special Olympics Programs throughout the world are unique in their operations yet very similar in their needs for financial support. While leadership and management require local interpretation for delivery of services, access to the appropriate pool of funding is essential to guarantee consistently high quality experiences delivered to Special Olympics athletes around the world.

Over the last 10 years, Special Olympics implemented a campaign for global expansion, growing from below 1 million athletes to over 3 million. However, the Movement-wide fundraising base struggled to grow at similar rates. Lack of consistent stewardship approaches, revenue-sharing agreements and thoughtful cultivation of new donors underpinned challenges that currently exist in terms of generation, sustenance and growth of funding for current programming and future growth. These challenges underscore the need to deliver consistent training resources and tools for our fundraising leaders so that they in turn can help build and efficient and barrier-free fundraising machine worldwide.

The foundation of growth (in terms of revenue, fans, and advocates) relies on the strength of the Special Olympics brand. To accomplish the ambitions of the Strategic Plan, the Movement must clarify, simplify and consistently use messages and images that best tell our story and earn both respect and support. In a global Movement, that is a steep challenge but one that can distinguish Special Olympics from other organizations.
Strategies and Targets

Strategy #1: Build new sources of revenue

1.1 Study options, build a robust business plan, find investments and execute on bringing one major new revenue source into the Special Olympics funding streams.

Building new revenue streams will take a focused effort from both headquarters and program staff. These revenue streams include foundations, mid-level donors (in a membership-like program), major individual donors, call to action campaigns including new tools such as “text to give”, planned gifts (such as bequests), and licensing and merchandising. Any one of these would require a substantial investment of resources to grow to a level to be a major revenue stream. These opportunities should be evaluated in a business plan including key analysis of operational efficacy, attractiveness at multiple levels in our Movement, investments required, and projected returns both short-term and long-term.

- Select at least one new or under-developed revenue stream and invest it sufficiently to grow to a level higher than our current direct mail or corporate partnership funding.

1.2 Develop a digitally-based call to action campaign that can be tailored for use around the globe and which focuses on generating revenue and broadening awareness.

The purpose of a call to action campaign is to use the brand equity and corporate relationships of Special Olympics to bring potential donors to a special web site where they can select ways to “sponsor an athlete” at Special Olympics whether in their backyard or around the world. We will build revenue as well as an enduring donor base with a younger profile who will engage with us online. Over time, this can become an important donor acquisition method with opportunity to replicate globally.

The campaign should be built on “Be a Fan,” as Special Olympics has invested in awareness-building around “Be a Fan” and we should now drive that to tangible support. The campaign should be designed to integrate with corporate promotions. This is essential in order to have the marketing vehicle to bring the campaign to new supporters. And the campaign must produce measurable, tangible results that directly increase support for the Movement.

While it is not the intention to make the campaign only US-focused, the reality of deploying a call to action campaign in 170 countries is daunting given language, cultural, legal and organizational issues. For this reason, we should develop marketing assets within the call to action campaign that can be deployed strategically and adapted to different circumstances around the world. For example, in many countries, brand
awareness for Special Olympics could be the most important measurable goal of the campaign and elements of the call to action campaign could be used for that objective. Success in this campaign should be measured in both fundraising and in building a new class of on-line donors that we can continue to engage for support across many dimensions.

- **Add a minimum of 1 million new fans worldwide who participate in an SO call to action campaign.**

### 1.3 Develop a Grant Resource Center as a support system for programs and regions to promote the acquisition of funding from government and foundation sources.

The Special Olympics Movement has grown to a scale that it merits the investment of governments and foundations in advancing our support of athletes. We see real success in this emerging opportunity with such recent grants as the European Union to support programs in the region and regional and World Games and grants from the U.S. Government for the Healthy Athletes program.

SOI Marketing & Development organization can provide an important role in supporting such grant opportunities and communicating best practices from our Programs in finding these important funds. A Grant Resource Center would provide resources, tools and assistance in discovering, applying for and stewarding grants from governments and foundations.

- **Assist regions with access to grant dollars from foundations and governments to a level four times the current baseline.**

**Strategy #2: Improve results within our current sources of revenue**

### 2.1 Create a “fundraising college” to offer training, program audits, tools and resources which enable programs to deepen their fundraising skill.

With the diversity of our Programs and regions in size, maturity, and structure, challenges exist with the generation and sustainability of funding to for existing programs and supporting future growth and expansion. The plan acknowledges that on-going education and training is the foundation for fundraising in our Programs and that the long term sustainability of our Programs will require that we lead in the development of fundraising resources and training to our Program leadership.

With the cultural diversity of our Movement, the specific form, content, and delivery of the training will need to be customized, based on the unique needs of each region and Program. The infrastructure for this fundraising training, tools, and resources will be
developed by headquarters and it will rely not only on expertise of external resources but on the best practices of our current Programs and leaders.

- By the close of 2015, have more than 75% of Programs around the world using some services of the fundraising college.

2.2 Build a global fundraising campaign to seek major gifts from individuals and foundations to fund a collaboratively determined set of programmatic priorities.

Fundraising campaigns provide organizations with the opportunity to develop clear priorities and build a strong case for support. Campaigns also inspire donors and provide a collective “ask” that can be much larger than any single program can develop alone. Campaigns also provide the means to engage volunteers in philanthropy....an essential element of major gift fundraising.

During the five year window of the strategic plan, it would be helpful to our major gift fundraising efforts to create a campaign for Special Olympics around some aspect of growth that we collectively feel is vital. That campaign can be as focused as one for “coaching excellence” or as broad as “global growth”.

To accomplish a successful campaign in which all programs can participate in fundraising and benefit financially, we need to take four steps: 1) Find a shared need that can benefit all programs and will resonate with donors 2) Develop a case for support around that shared need 3) Identify potential donors to the campaign from all regions and who can help cultivate and solicit those donors and 4) Recruit a group of key volunteers to help oversee the campaign and the cultivation and solicitation required for success.

If Special Olympics began the design of this campaign in FY11, it is entirely possible for it to be launched and completed within the five year plan window.

- Increase major gifts from individuals by 500% annually by the end of 2015 through the deployment of an integrated campaign.
2.3 Establish revenue diversification standards and goals and provide programs with shared knowledge and best practices as they seek to broaden their revenue sources.

Many Special Olympics programs are highly dependent on one or two revenue sources. This creates a vulnerability to financial disruption. For most programs, there are five to ten revenue source options but to expand to new streams requires new capacity. The plan encourages all Special Olympics entities to engage in at least one revenue source that was minimally or not engaged or developed prior to 2009. Programs should select one or two existing funding sources and create a funding growth plan. Programs should strive to adjust their annual funding sources within fundraising plans and budgets so that no one source accounts for more than 30% of total annual revenue.

- By 2015, at least 80% of Programs will have diversified fundraising to the level that no single source represents more than 30% of annual revenue.

2.4 Work to strengthen the brand and codify the practices of the Law Enforcement Torch Run for Special Olympics and help to extend its use in every region where local conditions exist for its success.

The Law Enforcement Torch Run (LETR) is one of the most important strategic properties of Special Olympics. With the close partnership of the law enforcement community in the United States, the events bring together 85,000 law enforcement officers to help raise more than $34 million a year. This partnership continues to be a cornerstone for U.S. Programs and Canada. With more than 30 additional countries participating in 2009, LETR is now active in every region in the world. Now is the time to learn from our successes and from our law enforcement partners and develop tools to increase the fundraising activities and to introduce the value of this program to additional Programs where it might flourish.

- Increase utilization of the Torch Run outside North America to the level that it contributes at least 50% of the funding level raised inside the United States.
2.5 Strengthen the funding model for World and Regional games to deliver more revenue for program growth.

Special Olympics Games - from the local level to regional and World Games - have become the world's best example of how sport can promote skill, inspire acceptance, overturn prejudices, and lead to real social change. Moving forward, our work must be to expand that impact - to bring the message of those Games to a broader, worldwide audience - and to ensure that the legacy of every Games endures long after the competition is over.

Over the past decade Games have continued to grow in scale and costs. Regional Games have been introduced in most regions of the world and have gained in popularity. Both Regional and World Games are costly both for the entity organizing them as well as the Programs sending athletes to participate.

Although the Special Olympics World and Regional Games are the Movement’s most visible method for increasing worldwide sports training and competition opportunities for persons with intellectual disabilities, their impact in fundraising, public awareness, and growth areas has not been realized. As a result, a more effective strategy needs to be developed that will drive revenues and awareness for Programs while aligning the Games efforts more closely with Special Olympics Movement priorities.

Going forward tactics to better leverage the potential of Games should include: documenting Games legacy successes; developing a Games playbook; broadening Games impact measurement systems; promoting Games bid selection and linking to overall strategic priorities.

- **Manage the marketing of World and Regional Games in such a way that Host Program and Programs in the host region increase their annual funding levels by 25% as a result of the Games.**

Strategy #3: Create a stronger community of support for Special Olympics

3.1 Drawing from 10 million plus engaged supporters at our 44,000 events, build a web-based social network that provides a forum for sharing and engaging in the Movement.

Special Olympics can draw our fans, families and athletes together as a community around our events. Today’s technology, in many areas of the world, allows that sense of community to be re-created on the web or mobile phone through an active and engaging social network.

We can build a web and mobile phone community that brings SO fans and athletes together 365 days a year to share their photos and videos, their stories, challenges and accomplishments. With this site, everyone around the globe can upload their stories,
pictures, videos to one place. They can be shared with everyone to tell our story…the day to day images and videos of people participating in SO at 38,000 events a year.

SO would curate the files weekly and create a visually interesting story every week that is sent worldwide. The site speaks to a living passion to be part of Special Olympics.

- **By 2015, have more than 1 million fans registered on the SO social network.**

3.2 **Engage our athletes in building a program in which they can learn and contribute through their active fundraising efforts.**

With sports competition, Special Olympics athletes improve their fitness, enhance their self-confidence and take a visible role in their community. For a segment of our athletes, self-confidence and visibility in the community can be further developed through their participation in fundraising activities. Some athletes have asked for this opportunity for years as a way to give back to the program that they have come to value so highly.

The strategic plan challenges us to develop and at least test such a fundraising opportunity. This will take active engagement of our athletes, volunteers, families, and staff. Some programs today ask athletes to contribute to fundraising whether that is visiting EU representatives to support funding or meeting customers at a fundraising event at a local bank. The plan, however, envisions a broader, more systematic approach to fundraising opportunities that can be replicated in community after community, country after country. This offers an opportunity to become a signature event for the Special Olympics community of supporters.

The Girl Scouts provide such a fundraising program raising $700 million per year through the sale of cookies. This provides a primary source of financial support for the programs as well as builds a foundation of confidence and skill for the girls themselves. Many of our athletes today generate their own sponsorships for events such as the Polar Plunge.

- **Grow an athlete fundraising program to the level that at least 15% of all athletes participate and find value in the activity.**

**Strategy #4: Build a stronger global brand that drives our value to society.**

4.1 **Clarify and simplify our brand messages and story to promote relevance and assure consistent use across all Special Olympics programs.**

Special Olympics represents a highly decentralized, grassroots organization that shares a common brand. In fact, the primary linkage between our diverse programs is a shared mission and the expression of that mission in the brand works and images we all use in
common. Understanding what binds us together is vital to maintaining a successful brand and even more important to grow our resources and relevance in the communities in which we work.

As Special Olympics builds it brand around the world, we will earn greater support if we can consistently describe **who we are, what we do, and why it matters**. Presenting ourselves as one Movement while accommodating regional differences give us the power to leverage communications and generate more revenue.

Externally, we are challenged with a gap between the public perception of our brand and the depth and relevance of our work. Internally, there we can widen that gap with lack of clear language between our focus on sports, health, advocacy and inclusion. By not understanding how those link together, we cannot clearly articulate “why we matter.” The public perception of our brand does not engender support at the levels we need to grow. To grow to the scale necessary to serve our community, we must find a way to move the brand from “nice” to “important”.

Now is the time to create a brand standard for Special Olympics that tells our compelling story, provides our programs with a consistent set of messages that can be tailored to regional needs, and gives us the written and visual tools to engage new supporters.

- **Manage the Special Olympics brand so that 100 percent of Accredited Programs are in compliance with an organization-wide brand standard.**
DEFINE MOVEMENT LEADERSHIP

Vision 2015
Special Olympics is a globally aligned Movement. We understand what makes us successful, work together to execute a common agenda, leverage the unique skills and gifts of each accredited Program, set standards of excellence, and develop leaders, effective systems and tools to “raise the bar” at all levels of the Movement.

Overall quality goal: All Programs will show annual progress towards globally determined quality standards and Program development plan.

Strategies and Targets

Strategy #1: Develop leadership strength and depth
Special Olympics must attract, develop and retain key leadership talent at all levels of the Movement, including staff and Board. The visionary and energetic leadership of many of our Programs is clearly one of the critical success factors over the last several decades. A truly concerted and coordinated effort of recruiting, training, and succession planning across our Movement is now needed. We should aim at no less than having one of the strongest and most envied groups of leaders in the world.

- Establish a consistent global curriculum and set of training tools targeted for Program Executive Directors/CEOs and Board Directors
  - Executed at a regional level and including effective models of governance and program management.
  - Includes a collection of best practice examples of Program-level training.
  - Develop strong regional and global partnerships with organizations that can help build our effectiveness with recruiting, training, and retaining key talent.
- Triple the size of the EKS Fellows Program, with the goal of filling 60 new leaders from this key program.
- Convene a Global Congress of Special Olympics Leadership corresponding to each strategic planning period, once each five years.

Strategy #2: Build a Pathway to Program Excellence
Programs require direction and specific assistance if they are to develop rapidly and contribute to meeting the Movement’s strategic goals. Special Olympics will develop and implement a defined pathway of Program development that will guide Programs at all levels in their
evolution. Performance management will evolve over time to include a larger variety and depth of parameters. We will encourage comparison of Program performance to promote high levels of achievement, Movement alignment, partnerships, and learning. When we compare performance we will take into account Program-specific resources, challenges, and opportunities, but also recognize that even those Programs with the least resources and greatest challenges can be the best in the world in aspects of our work.

- Establish a holistic set of Program performance and development metrics (for example, a scorecard), including athlete growth, program quality, strength of leadership, and financial health in the spirit of transparency, knowledge-sharing and Movement-wide sustainability.
  - A measure of athlete satisfaction with their Special Olympics experiences will represent a critical component of the evaluation system.
- Create a new system for Program evaluation and development that:
  - Defines clearly the key characteristics of a successful Program;
  - Identifies areas of development and informs operations through the use of measurable performance targets;
  - Helps Programs understand and find resources to assist in their development.
- Engage in SOI-led bi-annual review of all Accredited Programs for the purpose of recognizing and commending areas of excellence and offering specific recommendations in areas that require development.
  - Encourage continuous SOI-enabled Program self-evaluation, including quarterly updates across established dimensions of Program operations, and finances encourage planning for growth and allow for incentive programs that are equitable and effective.

**Strategy #3: Recognize and Reward excellence**

Special Olympics will recognize success and innovation in all parts of Special Olympics and use recognition and reward mechanisms and tools to support the goal of raising the bar and Movement along the program development continuum. Recognition of Special Olympics Programs and leaders represents an effective means of communicating best-practices and providing motivation for others.

Recognition programs already exist in many Programs. We want to continue to leverage, and where appropriate, scale and spread those good ideas. We also see a gap in opportunities for better and more coordinated regional and global recognition efforts.
• Programs: Capture evidence of recognition programs at all levels of the Movement for the purpose of sharing them later.

• Global: Establish a global recognition program.

• Evaluate opportunities and criteria to channel grant monies towards Programs that demonstrate progress and excellence.

Strategy #4: Ensure that SO’s General Rules & Accreditation Standards are widely understood

The Special Olympics General Rules are the best tool we have to assure unity of the global Movement around the Mission and global standards in the areas of sports, competitions, governance, risk management, quality, and others. 2011 – 2015 will be a time to use this set of tools to define, encourage and enable the improvement of Program quality and sustainability via a new set of Accreditation Standards of excellence.

• Upgrade the Accreditation Standards to incorporate key aspects of the 2011-15 Strategic Plan and to reflect increasing Program maturity.

• Create and maintain document-based, web-based, and digital based General Rules and Accreditation Standards training programs for athletes, SOI staff, for Programs, and for GOCs.

• Consider specific, periodic General Rules and Accreditation training and certification requirements for athletes and for SOI, Program, and GOC staffs.

• Include General Rules training certification as an Accreditation Standard.

• Generate commitment from stakeholders on the benefits of the General Rules and Accreditation Standards for the Movement.

• Coordinate training opportunities to coincide with existing meetings and events (including Regional business meetings, orientation events, and the circulation of electronic newsletters).

• Build competency in General Rules knowledge and Accreditation Standards among leadership, staff and other stakeholders.
ESTABLISH SUSTAINABLE CAPABILITIES

Vision 2015
Special Olympics has the core systems, infrastructure and processes to best support the growth and expansion of the global Movement and deliver measurable impact over time.

"It is critical that Special Olympics focus is not just what we do, but how we get it done. We have to acknowledge that rapid growth must be matched by quality in service and support. Capabilities are best outlined when the plan is completed, as capabilities should follow strategy. However, several areas for exploration exist now while we continue to build greater clarify between now and November 2010."

Overall Quality Goal: Special Olympics is recognized as a best in class and professional non-profit organizations in the world.

Strategies and Targets

Strategy #1: Establish a Global Set of Organizational Values that Define our Culture
Values are explicit statements of intent by an organization that reflect character, intrinsic valuation and the way in which an organization goes about conducting its business, internally and externally. Culture is both the explicit and tacit totality of the organization’s being – how people, processes, structures and rules interact to produce outcomes, both intended and not. Organizational values are principles that reflect the “soul” of an organization and guide our actions as employees and as an organization.

Our values describe the basis for reward and recognition, describe our self expectations as corporate citizens, and will be part of review and evaluation of new programs, activities, people, and performance. These organizational values are governing values for SOI and suggested as values to be adopted/adapted by SO Programs and partners as deemed appropriate and useful to achieve mission goals.

The following are the proposed set of Values for discussion in Morocco.

- People Empowerment: Positioning and empowering athletes to be contributing and respected members of Special Olympics and society, and supporting the Special Olympics Community (athletes, families, staff, volunteers, and advocates) to achieve the mission through experiences, relationships, training, and encouragement.
• **Inclusion and Respect**: Welcoming and including all; valuing talents, views and unique cultural perspectives of the Special Olympics Community and providing respectful environments and personal and organizational models for everyone in the Movement, whether on the playing field, in offices, or on-line.

• **Excellence**: Recognizing and reinforcing the intrinsic rewards of sport and related achievements by all members of the Special Olympics Community and pursuing excellence on an individual and organizational level.

• **Valuing Contributions and Innovation**: Demonstrating that people and their contributions are the most critical resources in achieving the Special Olympics mission and encouraging bold actions to achieve the improbable.

• **Unity and Integrity**: Striving for unity throughout the Movement that incorporates integrity of action as a hallmark of good business and ethical corporate citizenship.

• **Sportsmanship with Joy**: Living of the “Athlete Oath” by all in the spirit of genuine, friendly and fair competition.

Once aligned with the Movement, we will implement these Special Olympics values in the following ways:

- **Communicate** them to relevant internal and external audiences (late 2010-early 2011)
- **Integrate** them into policy and procedure documents, events and programming, and individual goal setting and performance evaluations (late 2011-)
- **Assess their integration** into Movement structure and activities (late 2011)
- **Assess their impact** on organizational culture (2012)
- **Reassess and revise** the values as necessary (2013)

**Strategy #2: Evidence-based decision making**

Special Olympics will become a more mature evidence-based Movement, with research, analysis and evaluation driving resource development, programmatic improvements, communications, and public policy efforts, not only at SOI HQ, but also in the field. This will come with significant enhancements in accountability and use of information and data.

- Ensure global, uniform compliance with the accreditation and program development requirements to generate consistent multi-year parameters for analysis and evaluation of Movement-wide development.
• Develop quality, growth and effectiveness criteria for all levels of the organization and base our investments and global decision-making on these parameters.

• Ensure Movement-wide value of the Research & Evaluation efforts through geographic diversity of study sites/investigators and communicating them via an increased range of channels and mechanisms.

**Strategy #3: Leverage the depth and breadth of our Movement business model as a true asset**

We believe that the power of our Movement is a multiplier, not the sum, of our individual parts. We have not been as successful in tangibly bringing that power to life. Some of that is cultural and some of it is practical resistance. As stewards of our global brand and identity, we have a responsibility to leverage the best ideas, skills and information, wherever they reside, whether deep within a local Program or Programs or at a regional or global level.

• Explore actively opportunities for scale and synergy through targeted shared services applications.

• Establish a regional and/or Program-level enter of excellence for each strategic pillar and build a global network for knowledge sharing and idea generation.

• Create a best-in-class knowledge management system that will accelerate the idea generation and adoption curve for Programs.

• Create a robust internal communications process and protocol to share information and actions as a Movement.
NEXT STEPS

Several major steps await us as we continue refinement of the overall plan and then importantly prepare for our June Congress.

- **Pre-Congress (May-early June)**: We finalize the Input and Development phase of the Plan. The current draft of the Strategic Plan will guide our discussions in Marrakech and feedback is welcome in advance of the event and during the Congress around goals, objectives, targets, rationales and descriptions for each of the “pillars” of work. Multiple opportunities for engagement, including discussion logs and email, remain of relevance. We continue to share all information with Chairs and members of the corresponding Strategic Planning Working Groups as they prepare for presentations and debates in Morocco.

- **At the Global Congress (June)**: Our Global Congress in Morocco will serve as the key milestone for sharing key plan inputs and, in many instances, reaching decisions on key strategic recommendations regarding our global Movement. We anticipate that as a result of deliberations at the Congress we will be able to formulate positions and recommendations that will be shared back to the SOI Board of Directors.

- **Post-Congress (July-November)**: Our priority here is building operational details and plans across Regions and Programs to help make the plans real. Special Olympics is investing in developing sufficient capabilities to work with all Regional offices and Programs around the world to translate the language of the Movement-wide Strategic Plan into actionable Regional priorities and Program-specific plans that will collectively constitute our five-year roadmap.
  - Official summary of the Global Congress deliberations and decisions will be available within 30 days of the end of the Congress.
  - Leaders from around the world will be able to provide additional comments and recommendation with respect to strategies and targets via on-line forums and finalize the feedback process by August 2010.
  - Regional components of the Strategic Plan will have to be developed and available for discussion by early October.

- **November 2010 Board Meeting**
  The November Board meeting will be a clear decision making meeting to adopt and delineate our strategic direction; role of the Board in that strategy; composition of the Board and its Committees in support of that strategy; and relationships of the Board to the Accredited Programs (Alignment) and Staff Succession (Talent).

Again, many thanks to all for your incredible commitment!