



Special Olympics

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Special Olympics

2011-2015 Strategic Plan

FINAL VERSION

December 2010

Table of Contents

Leadership Summary	3
Our Strategic Assessment	4
Our Strategic Framework	8
Our Special Olympics Foundation.....	10
Our Strategic Pillars	
Advance Quality Sports & Competitions	13
Build Communities	18
Connect Fans & Funds.....	24
Develop Movement Leadership	29
Establish Sustainable Capabilities	34
Strategic Choices & Financial Summary	39
Implementation Support.....	40
Glossary.....	41

LEADERSHIP SUMMARY

Dear Special Olympics Colleagues,

It is with great pleasure and excitement that we share with you the Final Version of our 2011-15 Special Olympics Strategic Plan – the visionary document that will guide our global Special Olympics Movement over the next five years.

When we embarked on this process more than one year ago, we were optimistic but also guarded. At the outset, we laid out four principles:

- We are drafting a SO Movement-wide strategic plan, not an SOI plan;
- We need to see ourselves as creators, not simply editors;
- The June Global Congress is not the “finish” line for the plan; and
- We all have unique and mutually supportive roles in this planning process.

We are proud and confident in saying that we collectively stayed true to all of these principles. The resulting Plan is a testament to the power of our Special Olympics Movement coming together towards common goals.

The following pages reflect the literally hundreds of thousands of hours of time spent and effort exerted by so many of you. We have unprecedented consensus and alignment across all levels of our organization and with the key stakeholders of our critical work.

While the final publication of this Plan is a critical milestone, we also recognize and believe that this will be a “living and breathing” document. This Plan will continue to strengthen and evolve as our work progresses. We expect to learn from each other throughout the process.

Again, we thank you for your steadfast support and enthusiasm for this important work. Let’s continue our great momentum as we quickly move to implement and make this plan a reality everywhere!

Very Sincerely,



Timothy P. Shriver
Chairman & CEO
Special Olympics International



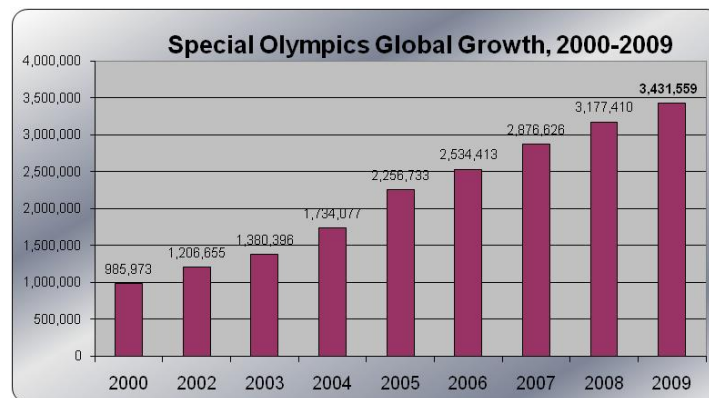
J. Brady Lum
President & COO
Special Olympics International

OUR STRATEGIC ASSESSMENT

We drew information from several sources in order to inform our strategic analysis. These included: 2009 Reach Report, 2009 Mission Effectiveness Survey, Regional and Program-level Input Sessions, and available programmatic evaluations. This analysis highlights strengths to leverage and areas for improvement.

Make no mistake: the Special Olympics Movement remains strong

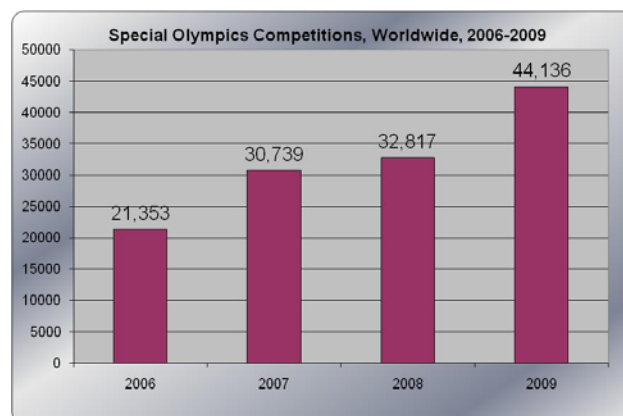
Special Olympics continued to grow steadily in 2009. It expanded its global reach to over 3.4 million athletes, a year-over-year growth rate of 8%. Since 2000, our Movement has added nearly 2.4 million new athletes.



In 2009, we further solidified our global reach, rapidly expanding in high-growth areas such as Asia Pacific (18%) and East Asia (10%). We also saw impressive growth in our most mature Region, North America (8%).

Programs have experienced notable trends in athlete population demographics, particularly:

- The ratio of male to female athletes has decreased to 1.6-to-1, signaling a trend toward a 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), after 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.



We must do a better job of clearly defining the difference between “Games” and “Competitions” and measuring our activities on each front. We must also do more to ensure that we provide quality and consistency across Games experiences.

With Unified Sports® participation (combined Special Olympics athletes and partners) increasing by 57% 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% growth rates achieved in 2006 and 2007, to 35% growth rate in 2008, and 57% 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. In 2010, we screened our 1,000,000th athlete.

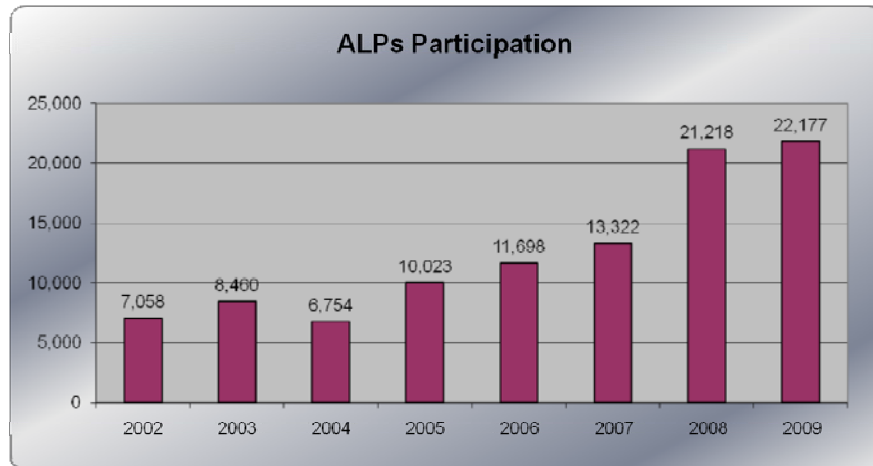
Our global Mission Effectiveness Survey reminded us that we’ve made great progress in building awareness of our mission around the globe. However, the level of that awareness varies greatly from Region to Region. Members of the Special Olympics community are enthusiastic about the Movement and extremely excited about the future. More than 70% of respondents to our worldwide survey are highly satisfied with their local Program, which means we are doing a good job at the grassroots level. And while we obviously strive for 100% satisfaction, we are encouraged that the Special Olympics Movement is having a positive impact on the lives of so many people. We also see significant energy aligned behind the Movement going forward, as survey respondents almost unanimously told us 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%. The athletes-to-coaches ratio improved in only two of the Movement’s seven Regions - Latin America and MENA.

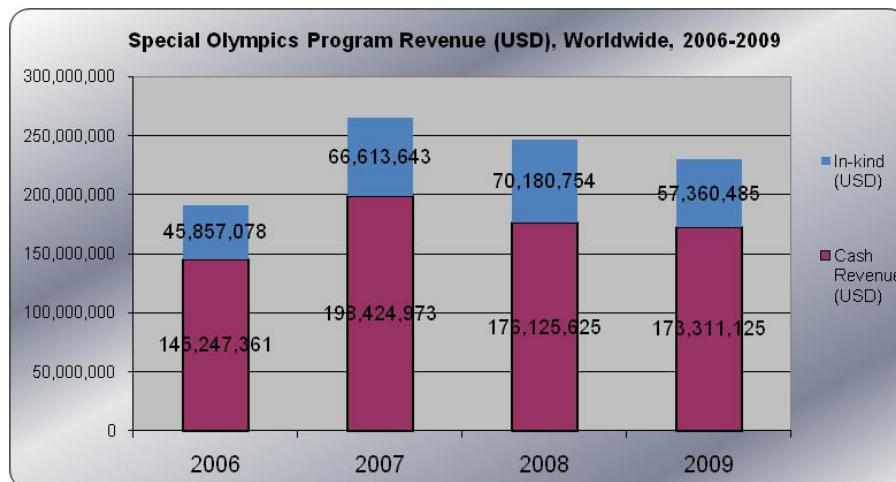


Despite a steady growth in Athlete Leadership programs globally, fewer than 1% of all Special Olympics athletes are now serving in leadership positions.



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 more than 80% of the total. Overall cash and in-kind donations have not grown in proportion to the increased numbers of new athletes.

In fact, our worldwide funding per athlete decreased from \$117 USD in 2007 to only \$92 USD in 2009. We are 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 even more money to support our athletes at a similar level. 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.

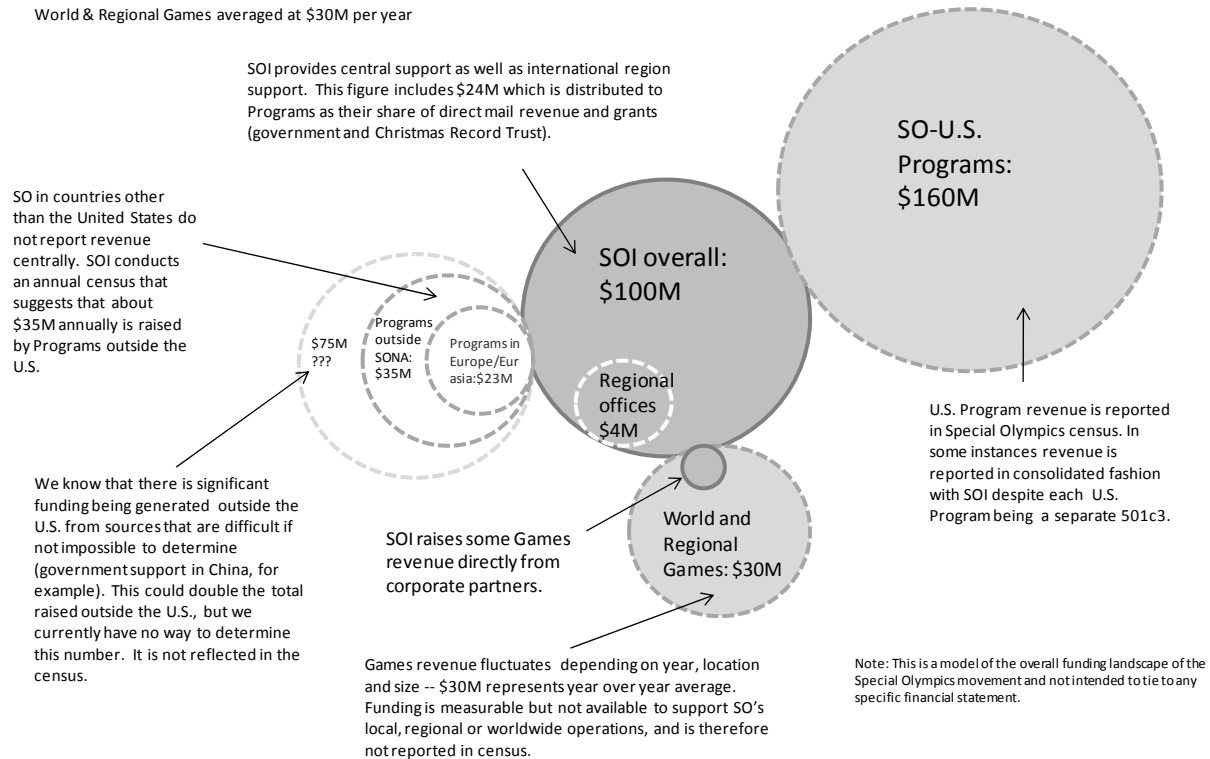


We are continuing to identify better ways of measuring and capturing the amount of revenue generated throughout the Movement. A new conceptual model, including all known Program-generated revenue, places our overall 2009 revenue at \$300M. Please know that this model includes estimates based on the best available information. This is a continued area of exploration.

Fundraising in the Special Olympics Movement:

\$325M - \$365M annually (including cash and in-kind donations)

World & Regional Games averaged at \$30M per year

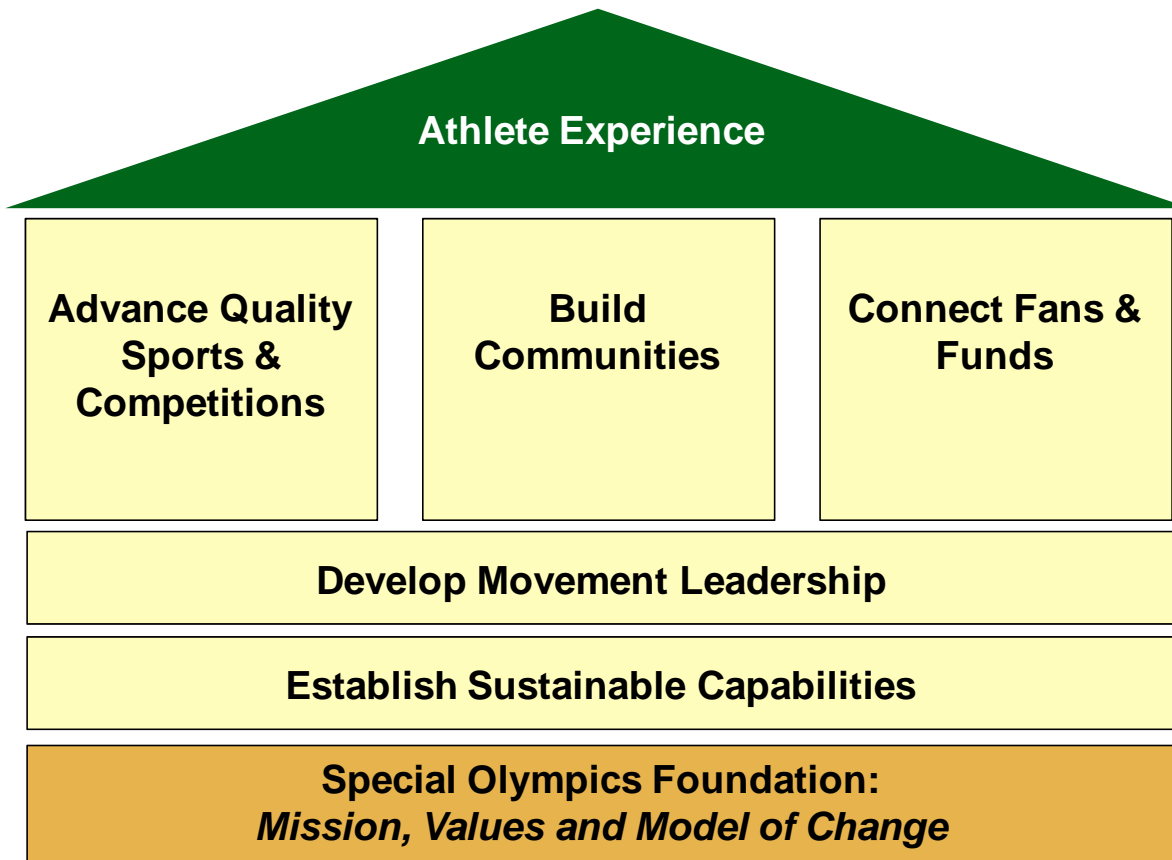


Our Mission Effectiveness Survey revealed some additional insights and opportunities:

- There is a desire for clearer guidance regarding what activities we are going to focus on going forward, and their relationship to the mission of Special Olympics.
- Quality is a priority 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.
- The World Games require a significant amount of effort from people across the Movement. As leaders of the organization we need to do a better job of providing education and support around our Games' core value proposition.

OUR STRATEGIC FRAMEWORK

Our Strategic Plan framework has been consistent since the very beginning of our planning process – a testament to its strength and simplicity.



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 Quality 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 his or her 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 initiate thoughtful, committed, and diversified engagements with individuals, corporations, foundations, civic and service organizations, and government agencies, from local to global levels, increasing 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 that help build the infrastructure for success:

- **Develop Movement Leadership:** We must understand what makes us successful and work together to execute on a common agenda. Each Program should leverage its unique skills and gifts to set standards of excellence. Programs should develop effective leaders, 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 focuses on not just what it does, but how it gets it done. We have to acknowledge that rapid growth must be matched by quality in service and support.

OUR SPECIAL OLYMPICS FOUNDATION

Strategic Plans call on us to question what we do and how we do it. There are some elements at the foundation of who we are, however, that are so deep in our work and culture that they will always be relevant and guiding. Our Foundation was laid as the Movement grew into the game-changing community that it is today. Appreciating who we are and how we got there is critical to assessing who we want to be in 2015 and beyond.

Our Origins

Eunice Kennedy Shriver was driven by a powerful combination of values: a love of her sister, a fury about the neglect and indifference she saw toward her sister and other people with intellectual disabilities, a faith that everybody counts, and a passion for sport.

In her own backyard, she decided to teach others a lesson that her sister had proved to her years before: people with intellectual disabilities are fully human, capable of skill, and deserving of opportunity. She did this through sport—providing opportunities to develop and demonstrate ability through training and competition.

When Eunice Kennedy Shriver said, “Let the games begin,” she awakened the world to the blindness of fear and inspired people accustomed to suffering to proclaim their humanity and the power of their spirit. She didn’t just change the world for people with intellectual disabilities. She changed the world for all of us.

Our Mission

Since our founding, the mission of Special Olympics has been 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.

This mission leads us to our ultimate goal: 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 sport training and competition, and by increasing the public’s awareness of their capabilities and needs.

The Magic of Special Olympics

In Special Olympics, change begins with the *athlete*. Many people with intellectual disabilities internalize the judgments of their communities and thus feel incompetent, unsuccessful, and humiliated. A change begins when a coach, volunteer, or other leader encourages potential athletes to join our Movement. Within Special Olympics, the athletes discover a different reality: they are defined by their sports, not by their disabilities. They are invited to excel, and they are celebrated. Special Olympics athletes no longer get by in a world where disability defines them; they live in a world where they are competitors, champions, role models, athletes.

Just as Special Olympic athletes undergo transformation, so do *family members* who have often been routinely confronted with adversity, financial challenges, stigma, shame, and embarrassment. Families are invited to join Special Olympics, and they too are offered a different world view, a different type of community. Families are congratulated on their athletes’ gifts and supported by others who value their athletes. Families joins others who

cheer for their brother, sister, son, or daughter with intellectual disabilities. Shame yields to pride and the possibility of a full and valued life.

But the power of Special Olympics extends beyond athletes and their families. All over the world, people fear and exclude others who are different, often dismissing the basic humanity of people with intellectual disabilities. Equally importantly, those who fear and exclude diminish themselves too and are enchained by their own misconceptions. However, when those same people come to Special Olympics and witness the bravery and skill of the athletes, they come to a new world view: Everyone has a gift, and everyone deserves the chance to be included, celebrated, and accepted. Special Olympics transforms how the community views our athletes, others who are different, and themselves.

Altogether, these moments of awakening and celebration and personal transformation create one of the world's most inspiring and effective social movements, powered by an estimated 21 million people, with and without intellectual disabilities, who have taken a stand for dignity, acceptance, and the human race. Together, these millions of people fight the exclusion of one group, they build a world where every person and group is valued and included, and they are part of a cause that is relevant to all humankind.

The day-to-day work of the people of Special Olympics has grown in scope and depth over the Movement's 42-year history. Today, Special Olympics includes 244,000 coaches and 3.5 million athletes who compete in scores of thousands of events each year – 44,136 events in 2009 alone – demonstrating that sport is about effort, integrity, discipline, and spirit. Special Olympics is the world's leading voice in elevating the needs and abilities of people with intellectual disabilities, and it is a catalyst for self-advocacy. It is the world's largest public health program for people with intellectual disabilities, delivering basic levels of health information and care to hundreds of thousands of people each year. It is a global network of youth who are transforming attitudes in their schools and communities. It is a worldwide collaborative of researchers who are highlighting barriers faced by Special Olympics athletes and their families. And ultimately, it is a powerful vehicle for building and sustaining communities around the world.

We Are Never Satisfied

In Special Olympics, we have always maintained a relentless dissatisfaction with the status quo. Although we applaud ourselves, our athletes, our family members, our staff, and our communities for embracing change and opening their hearts, we recognize the presence of continuing, pervasive injustice and scandalous neglect. We must continue the fight. And to do this, we must convince others that:

- We are a "Movement," not just an "event."

We are not about one-time participation; we offer a way of life. We have created an entire Movement dedicated to bringing tolerance and acceptance that will unify the world.

- It is about "us," not just about "them."

We don't exist to provide a service or help a single group. We are here to change society and demonstrate that change involves all of us. We facilitate and engage in experiences that are transformative—not just for our athletes, but for all who engage with open hearts and minds.

- It is “important” and “urgent,” not just “nice.”

The urgency of our work is based on the fact that the most vulnerable among us depend on us. We must awaken communities to their athletes’ humanity and the community’s own humanity. Tolerance relieves tensions, breeds acceptance, and prevents wars. This change has never been more important, and we are the agent of this change.

Our Values

Values are the principles that guide our actions and how we behave as members of the Special Olympics Movement. They should be stable, relevant, and meaningful, because real values reflect the “soul” of an organization. Our values are a set of organizational principles that will help to achieve the Special Olympics mission, while supporting individuals and organizations within the Special Olympics Community.

- **We value ... SPORTSMANSHIP WITH JOY**

- We believe in the transformative power of sports to change individual lives, families and society at large...daily.
- We embrace the purity of sports at all levels -- for recreation; for competition; for a lifetime.
- We witness incredible personal athletic triumphs that shatter stereotypes and assumptions.

- **We value ... ATHLETE LEADERSHIP**

- We position and empower athletes to be contributing and respected members of Special Olympics and society.
- We support athlete-leaders on and off the field.
- We believe that athletes inspire people at all levels of our Movement who, through their commitment, energy and contributions, form a powerful community to spread our Mission.

- **We value ... UNITY**

- We are united in our commitment to inclusion, respect and dignity, valuing talents, views, and unique cultural perspectives.
- We build communities of acceptance: loving families, inspired employees, coaches, volunteers, and fans.
- We are one team. We are one Movement, across every community and every country.

- **We value ... BRAVERY**

- We live our Athlete Oath: “Let me win. But if I do not win, let me be brave in the attempt!”
- We are resolute and resilient, celebrating personal achievements and best efforts without feeling any shame of failure.
- We are fearless.

- **We value ... PERSEVERANCE**

- We are capable, tenacious, and resilient. We don’t give up on ourselves or each other.
- We are urgent and relentless on the continued pursuit of our Mission.
- Together we display remarkable teamwork and push back boundaries to create new opportunities.

ADVANCE QUALITY SPORTS & COMPETITIONS

Vision 2015

Special Olympics is recognized as a global leader in sports, providing excellence in coaching, training, and competition management at all levels. It challenges athletes to develop to their personal best through the activation of enhanced athlete and coach models, including training techniques, interactive coaching, fitness, and optimal nutrition guides. Special Olympics athletes and coaches strive to be their best in competition and training, and to make physical fitness a way of life.

Growth Goal	<ul style="list-style-type: none"> • Grow Special Olympics participation to 5.3 million athletes and 530,000 certified coaches
Quality Goals	<ul style="list-style-type: none"> • All Special Olympics athletes will participate in at least two training sessions per week, at least one of which is coach-supervised, and have the opportunity to participate in more than one competition each quarter • 30% of athletes will register and participate in a comprehensive Personal Sports and Skill Development program that emphasizes personal excellence and lifelong passion for health and fitness as a way of life

Current Situation Assessment

The 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 and compete coupled with professional, high-quality coaching.

Although the number of competitions we offer worldwide has increased in recent years (up to 44,136 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 growth in athlete numbers. 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 all athletes.

Our Movement seeks to promote inclusion, but we have experienced limited and isolated growth in our Unified Sports program. 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. Other models of integrated sports are emerging.

Strategic Initiative #1: Build an Athlete Sports Development Model to Recruit, Challenge, and Retain All Athletes

Description:	Athletes must be provided with quality training at the applicable stage of an athlete’s development and performance objectives. The Athlete Sports Development Model should reflect athletes’ needs at different stages of sport development and ensure that athletes of all abilities are challenged to develop their personal best by being offered fair, challenging, and fulfilling systems of training and competition. Athletes will register and participate in an interactive Personal Sports & Skills Development program that empowers them to take ownership of their training and performance and motivates coaches to help athletes to achieve their personal best.
Targets & Measures:	<ul style="list-style-type: none"> • Every athlete is offered at least two training opportunity per week for a minimum of 10 weeks per sport,¹ with every training opportunity being at least 1 - 1 ½ hours in duration. Each training should be coach-coordinated, but the coach does not have to be present at each training opportunity. • 30% of athletes participate in Personal Sports & Skills Development program
Actions & Tactics:	<ul style="list-style-type: none"> • Develop a general Athlete Sports Development Model that will recruit, challenge, and retain athletes at all levels • Develop a Personal Sports & Skills Development program that centers on the creation of an interactive, easy-to-use training, nutrition, and fitness program with potential for web-enabled tools and personal training incentives and awards • Develop partnerships with international and regional sports organizations and national governing bodies to help create more training and competition opportunities and share best-practice approaches to skill development • Initiate a recognition program for athlete development
Issues to Address:	<ul style="list-style-type: none"> • Available resources, both human and financial • Recruitment of more coaches • The Athlete Sports Development Model will vary around the world

Business Model: Roles of SOI Global HQ, Regions, and Programs in Executing the Plan

SOI Global HQ	SOI Regions	Programs
<ul style="list-style-type: none"> • Develop relationships with international sports organizations and governing bodies • Develop sport selection materials and athlete tracking tools for Programs and coaches • Develop Athlete Sports Development Model using Movement-wide taskforce of experts • Develop Personal Sports & Skills Development program • Develop and implement athlete recognition program 	<ul style="list-style-type: none"> • Develop partnerships with regional sports, health, education, and other relevant organizations • Develop guidelines and training material • Train Programs on using guidelines and training material and on expectations • Provide training on the use of Personal Sports & Skills Development program 	<ul style="list-style-type: none"> • Provide more training opportunities for coaches and athletes at all levels of performance and aspiration • Teach coaches how to use training materials • Develop relationships with sports organizations • Encourage use of tracking tools by both coaches and athletes • Implement and track participation in Personal Sports & Skills Development program

¹ With consideration for parameters of each sport (i.e. for winter sports with shorter cycles)

Strategic Initiative #2: Enhance Games and Competition Model and Management

Description:	Quality competitive opportunities enhance the athlete and community experience by emphasizing the professionalism of our events and the seriousness of our approach to sports. Quality competition and Games experiences will enhance athlete development.
Targets & Measures:	<ul style="list-style-type: none"> • All Special Olympics athletes have the opportunity to participate in more than one Game and/or competition every three months
Actions & Tactics:	<ul style="list-style-type: none"> • Develop a Games and Competitions Model that outlines required components of Games and competitions at all levels and sets quality standards • Ensure that selection at Program level and above is a transparent, documented process, justifiable to athletes based on performance at sanctioned qualifying events • Ensure that athletes competing at Program level and above have been educated about rules and trained to a level of competency to compete in sports at the appropriate level • Develop sport-specific partnerships that focus on competition opportunities, coaches' education and officials' involvement • Seek free access to coaches' and officials' training certification courses offered by sport organizations and national governing bodies • Create sport-specific Competition Guides • Develop core Games management technical standards and guidelines and ensure use by every Program at every level of competition to ensure consistent competition management • Continue to develop and enhance management tools, such as World Games Guides • Set venue standards and increase access to quality venues • Engage people in Unity Sports events in which they interact with athletes • Involve sports organizations and federations in conducting sports events at Games
Issues to Address:	<ul style="list-style-type: none"> • Shortage of coaches and human and financial resources • Need for strong volunteer recruitment programs at Program and local levels

Business Model: Roles of SOI Global HQ, Regions, and Programs in Executing the Plan

SOI Global HQ	SOI Regions	Programs
<ul style="list-style-type: none"> • Develop informational materials about expanded competitions including league play, low-cost scrimmages, alternative competition formats and updated Games management systems • Develop sports-specific partnerships and protocol agreements that focus on providing coaches' and officials' training and support for competitions • Develop the Games and Competitions Model • Continue to develop Games and competitions management tools 	<ul style="list-style-type: none"> • Conduct Regional sport-specific coaching certification seminars • Monitor athlete selection process • Implement officials education system • Provide training and governance of the Games and Competitions Model • Provide Games and Competitions Management training 	<ul style="list-style-type: none"> • Increase the number of competition opportunities • Educate athletes, coaches, and officials on SO rules • Commit to implementing and enforcing standards and procedures • Train organizers of Games and competitions to implement and enforce the standards outlined in the Games and Competition Model

Strategic Initiative #3: Expand Coaching Excellence

Description:	The availability of quality coaches ensures we can grow our athlete base and provide quality experiences. Currently, we have an average of one coach for every 14 athletes. We must work to improve this ratio throughout the Movement at the same time as we grow our athlete base. 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.
Targets & Measures:	<ul style="list-style-type: none"> • Decrease the athlete to coach ratio to 10:1 by recruiting 286,000 new coaches • Increase number of certified coaches and administrators from 244,000 to 530,000 and ensure that all coaches can attend a professional development program every other year • Ensure that 60% of Programs have access to sport governing bodies sports-specific education and coach certification courses
Actions & Tactics:	<ul style="list-style-type: none"> • Explore the creation of an online coaching academy -- a worldwide portal of coach information that includes partnership opportunities, best practices, e-newsletters, motivation tools, and sports psychology information • Establish, or enhance, a standardized certification program for coaches that includes tracking coaches’ information and level of certification • Develop a Coaching Model that promotes the characteristics of an excellent coach, defines expectations for certification at various stages of development, recommends appropriate coach/athlete ratios, provides key certification metrics, and establishes a coaches’ recognition program that rewards coaches for enhancing the athlete experience • Develop and implement a plan for recruiting, retaining, and recognizing coaches • Explore the use of Coaching Webinars to expand reach of Coaching Seminars • Conduct assessment of nutrition, fitness, and wellness training being done by coaches • Dedicate key staff to develop and cultivate international sports organization relationships and facilitate connection between national governing bodies and Programs • Update Sport Administrator materials • Verify current baseline data through targeted surveys, and conduct on-site assessments of priority Programs to develop successful case studies and best practices
Issues to Address:	<ul style="list-style-type: none"> • How to continue to recruit and retain coaches; coach retention will be critical

Business Model: Roles of SOI Global HQ, Regions, and Programs in Executing the Plan

SOI Global HQ	SOI Regions	Programs
<ul style="list-style-type: none"> • Create online coaching academy • Develop baseline data on coaching certification levels • Create Coach Development Model • Strengthen relationships with national governing bodies • Develop a mentorship program • Update Sport Administrator materials 	<ul style="list-style-type: none"> • Establish a team of sport-specific instructors to conduct Regional Coaches’ Education and Certification Seminars • Identify Programs with strong coaching programs • Develop coaches’ development training • Strengthen relationships with national governing bodies 	<ul style="list-style-type: none"> • Push for coaches to obtain certification from other sports organizations • Encourage coaches to register for national governing bodies’ coaches’ education programs • Recruit coaches • Encourage coach attendance at all available trainings • Provide training for Sports Administrators

Strategic Initiative #4: Accelerate Unified Sports and Inclusive Opportunities

Description:	Unified Sports provide opportunities for athletes and other participants to develop through meaningful sporting interactions with each other. Special Olympics Unified Sports program provides Special Olympics athletes with sporting opportunities that encourage inclusion in the broader community.
Targets & Measures:	<ul style="list-style-type: none"> • Define Unified Sports and build consensus around this definition • Require evidence of at least one type of Unified Sports inclusive programming in every Program worldwide
Actions & Tactics:	<ul style="list-style-type: none"> • Assess and document successful Unified models in various Regions and Programs • Provide training for Program leaders on how to establish and support Unified Sports programs, share best practices and encourage collaboration • Evaluate Mentoring Division concept to address equal ability level requirements • Create the right model for Unified Sports at Regional and World Games • Review the existing definition of Unified Sports and ensure that it is reflective of current amateur sport systems around the globe • Seek support and assistance from sports organizations in developing Unified Sports opportunities • Develop a progression for Unified Sports participants to become SO coaches • Involve sports organizations and federations in conducting Unified Sports events • Review where and how involvement of athletes in mainstream sports ties into SO activities
Issues to Address:	<ul style="list-style-type: none"> • Consider multiple models for Unified Sports • Include targets and actions on involvement of schools in Unified Sports with government support (SO Maryland and SO Hellas model programs) • Determine how the integration of SO athletes into mainstream activities (for example, marathons) should be promoted and supported

Business Model: Roles of SOI Global HQ, Regions, and Programs in Executing the Plan

SOI Global HQ	SOI Regions	Programs
<ul style="list-style-type: none"> • Develop a task force to assess program requirements for Unified Sports opportunities • Review the existing definition of Unified Sports and ensure that it is reflective of current amateur sports models around the world • Clearly define Unified Sports and communicate expectations to field 	<ul style="list-style-type: none"> • Organize Regional coaches' education and certification courses that focus on Unified Sports; share best practices on a regular basis • Inventory current Unified Sports programs being offered in the field • Develop partnerships with sports organizations to facilitate Unified Sports opportunities 	<ul style="list-style-type: none"> • Incorporate and/or further Unified Sports opportunities within all Programs

BUILD COMMUNITIES

Vision 2015

We build strong, cohesive, and inclusive communities by engaging people in the Special Olympics experience. These communities foster a supportive environment for our athletes' development while providing youth an opportunity to grow in an integrated climate. Families in turn benefit from the welcoming environment and actively engage with other community partners, schools, and health service providers to strengthen the community structure. The synergy between all these stakeholders creates a platform for enabling athletes, empowering families, engaging youth, revolutionizing services, and building exemplary communities of change.

Growth Goal²	<ul style="list-style-type: none"> 90% of Programs in each Region meet at least one target in each of the Activate Youth and Influential Leaders initiatives, as well as the Young Athletes goal in the Families initiative. 60% of Programs in each Region meet all Program-relevant targets in the Youth and Influential Leaders initiatives as well as the Young Athletes expansion goal.
Quality Goal	<ul style="list-style-type: none"> 90% of Programs in each Region meet at least one target in each of the Athlete Leadership and Health initiatives, as well as the family involvement goal in the Families initiative. 60% of Programs in each Region meet all Program-relevant targets in the Athlete Leadership and Health initiatives, as well as the family involvement goal.

Current Situation Assessment

Special Olympics has worked to promote community development as a means to grow the Movement. However, impact is dispersed over a number of important, but not always integrated, initiatives across constituent groups.

Athlete Leadership Programs (ALPs) are a demonstrated model of achieving Special Olympics goals in the areas of self-determination, development, relationship building, and social skills development. We had grown to more than 22,000 ALPs participants by 2009, but that growth has hit a plateau. Lack of recognition of athletes' ability and potential for leadership within SO and in the communities where athletes live is still a daily challenge.

Family members represent a diverse group whose interest in and support for the Movement ranges from very enthusiastic to nonexistent. Family leadership opportunities are executed and delivered inconsistently because of varying conditions at Program and sub-Program levels, and family services and support mechanisms exist at the local level without a unifying global system or quality benchmarking.

Youth play active roles as Unified partners, advocates for the Movement, volunteers, and coaches. Our youth participation opportunities must be enhanced to ensure more effective, creative, and meaningful engagement, including better leveraging of the power of social media to involve youth as fans.

People with intellectual disabilities have high levels of untreated diseases, little access to care, and almost no opportunity for health improvement. The Healthy Athletes program has made great strides in addressing these problems. However, this program can do more to address the global range of health needs of athletes and other people with intellectual disabilities. It should also lessen its reliance on U.S. Federal Government for funding.

Finally, we can do more to develop meaningful relationships with influential leaders and organizations. Partnerships can lead to enhanced funding, more volunteers, and value-in-kind donations.

² We are continuing to develop goals for the Community Pillar that will be more galvanizing and ultimately more effective. The goals stated in this section should be considered near-term, internal proxies.

Strategic Initiative #1: Grow and Equip Athletes in Leadership Positions

Description:	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, acceptance, employability, and integration 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 expanding the Athlete Leadership Programs and developing and meeting global standards of participation for athletes on Global Athlete Councils. It also focuses on more effectively mobilizing athletes as spokespeople in communicating our mission and values.
Targets & Measures:	<ul style="list-style-type: none"> • Ensure that 150,000 ALPs qualified athletes from all Programs are serving in meaningful leadership roles³ at different levels in their Programs⁴
Actions & Tactics:	<ul style="list-style-type: none"> • Develop more opportunities for athletes to serve as spokespeople for the Movement • “Market” the diverse leadership roles that athletes may play in Programs and actively support the expansion of athlete leadership opportunities • Amend the General Rules to reflect that every Program office will include at least one athlete employee serving in a meaningful paid or volunteer capacity • Monitor Programs annually by tracking the nature of leadership roles filled by athletes
Issues to Address:	<ul style="list-style-type: none"> • Allocation of human resources to monitor implementation within Programs • How to create a diverse portfolio of leadership options in order to engage the widest possible range of ability levels

Business Model: Roles of SOI Global HQ, Regions, and Programs in Executing the Plan

SOI Global HQ	SOI Regions	Programs
<ul style="list-style-type: none"> • Revise ALPs training and implementation requirements • Develop position statements leveraging ALPs in fundraising • Position ALPs at core of brand development • Develop global standards for quality participation of athletes on Boards and as Program employees and volunteers • Develop model for monitoring quality indicators related to roles of athlete leaders 	<ul style="list-style-type: none"> • Work with Programs to develop country/state-specific ALPs targets • Create Regional goals and strategies for ALPs implementation and growth 	<ul style="list-style-type: none"> • Establish Program-specific ALPs implementation strategies that result in at least 5% of athletes serving in meaningful, documented leadership roles • Comply with the global standards on quality athlete participation on Boards and meet the athlete Program employee/volunteer quota requirement

³We are continuing to identify appropriate roles. Includes Global Messengers, Regional or International committee members (including an Athlete Input Council, an athlete advisory board), Program Level Board Members, Program level committee members (including an Athlete Input Council), sub-Program level committee members (including an Athlete Input Council), volunteers (including Games volunteers), coaches, officials, SO staff.

⁴ In the past three years, we have trained 44,259 athletes in ALPs. We estimate that twice this number may be currently serving in leadership roles. The five-year goal is just short of doubling the number.

Strategic Initiative #2: Create Trained, Empowered, and Involved Families at All Levels

Description:	Dynamic, trained constituent groups of families can play active and clear roles in Special Olympics. We will create a framework for family involvement from local to international levels with incentives for active participation. This will include recruiting and training family members to become community builders who actively recruit, orient and involve other family members, youth and community leaders; 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.
Targets & Measures:	<ul style="list-style-type: none"> • Guarantee that every Program and sub-Program have recruited and trained a minimum of two family members as community builders who are actively involved in at least one of many leadership categories such as training, advocacy, and Program leadership in order to: <ul style="list-style-type: none"> ○ Expand the reach of the Young Athletes Program by 100% in each Region⁵
Actions & Tactics:	<ul style="list-style-type: none"> • Develop a baseline and track family involvement in activities across the Movement (for example, volunteering, event organizing) and set more family involvement targets • Develop frameworks (recruitment, development, deployment) for general family and family community builder engagement (beyond support of individual athletes) that are replicable at a Region and Program level and include incentives for active participation and leadership • Develop clear global standards for Programs to ensure adequate and active participation of family members within governance structures and on Boards • Nominate a leader for Families at SOI and assign a Region staff member in each Region to oversee family communications • Award Young Athletes grants to Programs and Regions supporting the growth of the Young Athletes program • Provide planned and structured networking opportunities for families
Issues to Address:	<ul style="list-style-type: none"> • Capacity to manage Families programming • Availability and prioritization of funds to support Young Athletes growth

Business Model: Roles of SOI Global HQ, Regions, and Programs in Executing the Plan

SOI Global HQ	SOI Regions	Programs
<ul style="list-style-type: none"> • Develop a family recruitment, registration and engagement model – guidelines for playing a role and becoming a part of the community • Support Families programming by assigning staff to lead and manage 	<ul style="list-style-type: none"> • Ensure effective development of Regional models for family recruitment, engagement and recognition • Assign one staff member in each Region to lead and manage Families programming 	<ul style="list-style-type: none"> • Establish Program-specific family recruitment and engagement targets that comply with the global goal of at least two family members per Program and sub-Program • Uphold the global standards for adequate and active participation of family members on governance structures and Boards • Initiate new and expand existing Young Athletes programs

⁵ We are continuing to develop metrics for this initiative.

Strategic Initiative #3: Activate Youth at All Levels of Our Movement

Description:	Provide consistent opportunities for young people, ages 12-25, with and without intellectual disabilities to engage in Unified Sports, cheer teams, social networking, volunteerism, and leadership development activities worldwide.
Targets & Measures:	<ul style="list-style-type: none"> • Develop a baseline and then triple the number of youth participating in recreational and competitive Unified Sports⁶ • Reach goal of having 20% of all volunteers (280,000) as youth between the ages of 12-25 • All Boards of Directors, including the SOI Board, demonstrate a successful protocol for hearing from, engaging, and responding to youth at the Program leadership and Board level (which in some instances could entail having a youth representative on the Board)
Actions & Tactics:	<ul style="list-style-type: none"> • Create a model for youth engagement that will identify and structure opportunities for youth participation that will appeal to a wide range of youth • Establish a baseline figure of youth involved in leadership, volunteering, recreational and competitive Unified Sports, and other key roles and set new youth targets • Work with youth leaders to develop a model for youth participation (including, cheering, social networking, being a fan, or volunteering) that unites youth with athletes to provide meaningful experiences that enhance communities • Create a system for tracking youth involved in Unified Sports • Ensure that once a baseline figure has been established, Regional targets are set to meet the overall growth target • Actively engage youth as volunteers at Games and other SO activities
Issues to Address:	<ul style="list-style-type: none"> • Varied needs of different age groups and appropriate titles (e.g., children and youth)

Business Model: Roles of SOI Global HQ, Regions, and Programs in Executing the Plan

SOI Global HQ	SOI Regions	Programs
<ul style="list-style-type: none"> • Develop model for youth engagement and events such as the Global Youth Summit • Develop a system for tracking youth involvement • Create standards for engaging youth • Engage youth as volunteers at Games and other SO activities 	<ul style="list-style-type: none"> • Monitor and track the involvement of youth in Unified Sports in all Programs • Develop youth feedback channel • Engage youth as volunteers at Games and other SO activities 	<ul style="list-style-type: none"> • Take ownership of the youth model by developing program-specific initiatives • Track accurately the involvement of youth in Unified Sports • Develop youth feedback channel • Engage youth as volunteers at Games and other SO activities

⁶ SO North America had approximately 11,000 youth supporters/volunteers involved in Young Athletes and Unified programs during the 2009-2010 school year. Programs report engaging a total of close to 84,000 youth, but methods for measuring engagement are often inconsistent. SOI staff is working to institute better tracking mechanisms that will give us greater confidence in our reported levels of youth engagement.

Strategic Initiative #4: Improve Athlete Health and Well-Being

Description:	Our athletes commonly have a history of poor health along with inadequate access to, and quality of, healthcare. SO improves the health of athletes through comprehensive health screening, education, and referral, as well as through mobilization of global health resources to enhance the sustainability and impact of the Healthy Athletes Program (HA). In order to improve the ability of our athletes to train, compete, and live healthy lives, Special Olympics will continue to address health disparities by broadening health programming to include alliances to connect screening services to community-based follow-up care and treatment; adapting current health protocols and implementation to better address global variations in need, systems, and culture; formally integrating health programming to strengthen fitness, family support and early childhood development initiatives; and enhancing the partnership base at state/national Program levels to foster increased sustainability.
Targets & Measures:	<ul style="list-style-type: none"> • 50% of Programs that have been conducting Healthy Athletes for five or more years will secure at least 50% of the cash costs associated with their screening events, and 25% of Healthy Athletes events will take place without funding from SOI's HA grants • A minimum of 20 new countries will offer Healthy Athletes for the first time • Worldwide, a minimum of 60% of athletes competing at any event where Healthy Athletes is offered will participate in Healthy Athlete screenings
Actions & Tactics:	<ul style="list-style-type: none"> • Create new Healthy Athletes modules to address varying global health needs, cultures, and systems (for example, dietary management towards healthy weight, HIV education), including a plan for developed and developing countries, to be formulated, evaluated, and disseminated • Establish formal protocols for integrated health, sport, family support, and early childhood development initiatives • Pursue new relationships to support HA activities • Develop guidance to assist Programs in raising revenue • Launch HA events in Programs that have not previously participated in the program • Offer Healthy Athlete disciplines at sub-Program level within each Program providing HA
Issues to Address:	<ul style="list-style-type: none"> • Resource constraints • Leadership capacity and training • Challenges in delivering services and expanding HA in some parts of the world

Business Model: Roles of SOI Global HQ, Regions, and Programs in Executing the Plan

SOI Global HQ	SOI Regions	Programs
<ul style="list-style-type: none"> • Pursue new relationships with health providers/supporters • Develop at least 3 new Healthy Athletes modules • Develop formal protocols in collaboration with the Global Clinical Advisors and Regional Clinical Trainers • Assist Programs in raising revenue 	<ul style="list-style-type: none"> • Pursue new relationships with health providers/supporters • Encourage athletes to utilize HA opportunities • Assist protocol development • Share protocols for integrated health/sport/family support/early childhood development initiatives with Programs • Raise funds for HA events and other health programming • Assist new Programs with launching HA events 	<ul style="list-style-type: none"> • Establish relationships with state/national health ministries/health agencies • Enable athletes to take advantage of HA opportunities • Adopt formal protocols • Raise funds for local HA events • Document health partnerships with universities, healthcare providers, businesses, and professional associations that generate cash, VIK product and/or health services at the local and Program level

Strategic Initiative #5: Engage Influential Leaders and Organizations

Description:	The advancement of the Movement and realization of Special Olympics’ vision is dependent on support from influential leaders representing institutions at global, national, state, and local levels. The active engagement of these community organizations by leaders at all levels of the Movement will have direct and indirect benefits for athletes and families.
Targets & Measures:	<ul style="list-style-type: none"> • Each Program will engage at least one influential leader and/or organization⁷ to support the realization of the Special Olympics’ vision and share its progress at Regional, global or online forums
Actions & Tactics:	<ul style="list-style-type: none"> • Create a model for engaging critical leaders and organizations that will serve as a guide for Program leaders soliciting support and endorsements • Ensure consistent opportunities for Programs to share their experiences in face-to-face and online forums • Identify alliances and strategies to be pursued and assign appropriate staff resources to develop relationships • Invite influencers in the areas of sports, government, education, and health (for example, sports executives, prominent coaches, technical experts, and sports celebrities) to Games and involve organizations in volunteer opportunities at Games
Issues to Address:	<ul style="list-style-type: none"> • Role of the Regions in facilitating or supporting Programs in engaging targeted influential leaders and organizations • Early engagement of Program leaders where multinational agreements are to be developed

Business Model: Roles of SOI Global HQ, Regions, and Programs in Executing the Plan

SOI Global HQ	SOI Regions	Programs
<ul style="list-style-type: none"> • Develop a model for engaging influential leaders and organizations • Establish alliances with two United Nations organizations and two international development agencies • Pursue specified alliances • Create forums for sharing experiences at Global events • Involve influencers in Games 	<ul style="list-style-type: none"> • Assist with developing alliances at Program and Regional levels • Create forums for sharing experiences at Regional events • Involve influencers in Games 	<ul style="list-style-type: none"> • Engage at least one influential leader or organization and share the experience / progress at an appropriate forum • Involve influencers in Games

⁷ Such as governments, multinational institutions, religious organizations, and a wide range of other entities

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

Growth Goal	Double Special Olympics operating revenues across the Movement
Quality Goal	Manage the Special Olympics brand so that all strategic properties, initiatives, and campaigns as well as 75% of Accredited Programs support a Movement-wide brand standard

Situation Assessment

The nearly 230 Special Olympics Programs throughout the world are unique in their operations yet very similar in their need for financial support. Access to the appropriate pool of funding is essential to guarantee consistently high-quality experiences for Special Olympics athletes around the world.

Over the last 10 years, Special Olympics implemented a campaign for global expansion, growing from less than 1 million to more than 3 million athletes. However, the Movement-wide fundraising base struggled to grow at a similar rate. Current deficiencies in several key areas – consistent stewardship approaches, incentives for Programs and SOI to partner in fund development, revenue-sharing protocols, and thoughtful cultivation of new donors – challenge our ability to generate, sustain, and grow funds for existing 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 an efficient and barrier-free fundraising machine worldwide.

The foundation of our growth (in terms of revenue, fans, and advocates) is the Special Olympics brand: The stronger the brand, the stronger the foundation. To accomplish the ambitious goals 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, this is a formidable challenge – but one that can distinguish Special Olympics from other organizations.

Strategic Initiative #1: Grow our Current Sources of Revenue

Description:	This Plan challenges the organization at all levels to double its operating revenue to help assure that key strategies in the Plan can be executed and put Special Olympics on a strong growth footing. A direct growth strategy focuses on raising funds to be used by SOI or Programs. An indirect growth strategy focuses on helping Special Olympics disseminate best practices, tools, and support to grow fundraising for both Programs and Games. This strategic initiative attempts to address our plans for both direct and indirect fundraising activities.
Targets & Measures:	<ul style="list-style-type: none"> • At least 50% of Programs will have diversified funding to the level that no single revenue source represents over 30% of annual revenue • 40% of Programs will participate in an integrated campaign for major or strategic gifts • Revenue from the Torch Run will grow by 45% with \$3.5M of new revenue coming from an increase in the utilization of the Torch Run outside of North America • The World and Regional Games will create a lasting financial surplus legacy for host, Programs and SOI
Actions & Tactics:	<ul style="list-style-type: none"> • Fundraising college: Plan and develop fundraising college; publicize resource and engage Programs and Regions • Integrated campaign and major gifts: Find a shared need that can benefit all Programs and that will resonate with donors; develop a case for support around that shared need; identify potential donors; and recruit volunteers to oversee the campaign • Revenue diversification: Grow new or largely underdeveloped revenue streams. This could mean raising more money from governments, multilaterals, service organizations, major gifts, direct response, corporations, foundations, and/or events • Torch Run: Develop and implement expansion plan that takes into account cultural feasibility • Games: Develop a more effective strategy for driving revenues and awareness for Programs, and invite donors, sponsors, and prospects to engage in a guest program
Issues to Address:	<ul style="list-style-type: none"> • Different fundraising needs and opportunities across Regions and Programs • Resources to adequately develop funding sources

Business Model: Roles of SOI Global HQ, Regions, and Programs in Executing the Plan

SOI Global HQ	SOI Regions	Programs
<ul style="list-style-type: none"> • Develop infrastructure for fundraising training, tools, donor relationship management, and resources • Build consensus on campaign needs, conduct feasibility study, and cultivate donors • Develop Games revenue strategy through actively soliciting Region and Program input; share with Games and Programs • Manage stakeholders 	<ul style="list-style-type: none"> • Share best-practice fundraising methods • Assist in developing integrated campaign and cultivate donors • Assess and identify viable Programs for LETR expansion and support implementation 	<ul style="list-style-type: none"> • Assist in developing integrated campaign and cultivate donors • Engage at least one revenue source that was minimally or not engaged prior to 2009 • Select one or two existing fundraising sources and create a growth plan • Grow Law Enforcement Torch Run, if appropriate • Develop and implement revenue diversification plans • Participate in training and recognition programs

Strategic Initiative #2: Build New Sources of Revenue

Description:	While our current revenue streams have served us well in the past, future growth will depend on identifying, developing, and capturing new sources of revenue. We must do this at all levels of our Movement.
Targets & Measures:	<ul style="list-style-type: none"> • Select at least one new or underdeveloped revenue stream in each Program and invest in it sufficiently to contribute at least 15% of each Program’s revenue • Assist Programs in raising grant dollars from foundations and governments to support Program operations, to a level four times the Movement-wide current baseline
Actions & Tactics:	<ul style="list-style-type: none"> • Assess new sources of revenue and build business cases for those that would have the greatest overall benefit to the Movement • Develop a Grant Resource Center model as a support system for interested Programs to secure funding from government and foundation sources, and pilot the service in the early years of the Plan • Develop better mechanisms to disseminate best practices, tools, and techniques on new revenue sources to reduce ramp-up time • Evaluate digital “call to action” campaigns as a new fundraising source and pilot in early years of the Plan • Create an athlete fundraising program that contributes to the organization’s operating revenue and enables athletes participating in the program to find value in the activity • Train athletes and measure impact of program on both funds and athletes’ well-being
Issues to Address:	<ul style="list-style-type: none"> • Initial investment may take a few years before beginning to pay off • Unwillingness to invest money in making more money when it could mean reallocating funds • Lack of internal expertise in some necessary areas • Different funding needs and opportunities for Regions and Programs

Business Model: Roles of SOI Global HQ, Regions, and Programs in Executing the Plan

SOI Global HQ	SOI Regions	Programs
<ul style="list-style-type: none"> • Commit funds and support to developing necessary infrastructure • Develop revenue growth plan • Develop and launch Grant Center • Build revenue-sharing incentives for Programs • Research best practices outside the Movement for participant fundraising • Build a business plan for a systematic athlete fundraising program • Acquire funding to successfully launch the program • Develop and oversee training needed for success 	<ul style="list-style-type: none"> • Develop own revenue diversification plans and provide Programs with support in doing the same • Provide feedback on development of Grant Resource Center and help publicize progress and offerings to Programs • Determine Program-by-Program capacity and interest in participating in this initiative • Customize program and training to meet needs of the Region and host training sessions 	<ul style="list-style-type: none"> • Utilize available Grant Resource Center offerings • Engage athletes in providing feedback on a fundraising program • Participate in training programs

Strategic Initiative #3: Build a Stronger Global Brand

Description:	Special Olympics represents highly decentralized, grassroots organizations that share a common brand. Understanding what binds us together is vital to maintaining a successful brand and to growing our resources and relevance in the communities in which we work. As Special Olympics builds its brand around the world, we will earn greater support if we can consistently describe <i>who we are, what we do, and why it matters</i> . Presenting ourselves as one Movement while accommodating Regional differences gives us the power to leverage communications and generate more revenue. 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.
Targets & Measures:	<ul style="list-style-type: none"> • Manage the global brand so that strategic properties, initiatives, and campaigns as well as 75% of Programs support an organization-wide brand standard
Actions & Tactics:	<ul style="list-style-type: none"> • Form a brand advisory group of board members, Program leaders, athletes, youth leaders, key volunteers and SOI staff to guide the brand project • Inventory all brand assets and attributes currently in use and study the strength of brand attributes • Develop a final brand standard including messaging, sub-brand protocols, enhanced graphics and visual guidelines, including a roll-out and training process for implementation • Create Games branding guidelines • Continue to build and/or strengthen a few scalable global marketing assets and properties that can be leveraged for marketing and fundraising potential – for example, LETR, A Very Special Christmas, World and Regional Games, and Global Football
Issues to Address:	<ul style="list-style-type: none"> • Lack of brand awareness (especially in some parts of the world) • Gap between the public perception of our brand and the depth and relevance of our work • Lack of unified branding and proliferation of sub-brands

Business Model: Roles of SOI Global HQ, Regions, and Programs in Executing the Plan

SOI Global HQ	SOI Regions	Programs
<ul style="list-style-type: none"> • Spearhead brand process through engaging appropriate parties, allocating sufficient funds, and engaging appropriate Movement leadership • Develop processes to ensure compliance • Develop and share Games branding guidelines 	<ul style="list-style-type: none"> • Provide brand input • Ensure that tools, protocols, and guidelines are disseminated and appropriate education is done • Share Games branding guidelines 	<ul style="list-style-type: none"> • Provide brand input • Develop, document, and implement plan for ensuring Program and local area compliance

Strategic Initiative #4: Create a Stronger Community of Support

Description:	We should provide the SO Movement with ways to engage more active support by people both inside and outside of the Movement. We can strengthen our relationships with fans through building an active social network community.
Targets & Measures:	<ul style="list-style-type: none"> • Register 750,000 fans on an active Special Olympics social network that builds a stronger Special Olympics community for athletes, families, volunteers, and other key stakeholders
Actions & Tactics:	<ul style="list-style-type: none"> • Plan and create a Special Olympics social network with an integrated Call to Action Campaign • Solicit material and attract fans • Capture and convert Games volunteers and spectators into fans of Special Olympics
Issues to Address:	<ul style="list-style-type: none"> • Developing a committed fan base that actively engages in social networking program • Lack of internal expertise in some critical areas • Significant time and money to develop initiatives without a short-term return on investment

Business Model: Roles of SOI Global HQ, Regions, and Programs in Executing the Plan

SOI Global HQ	SOI Regions	Programs
<ul style="list-style-type: none"> • Plan and create SO social network • Launch network and implement plan for attracting fans • Develop program for engaging Games volunteers and spectators 	<ul style="list-style-type: none"> • Promote and publicize SO social network • Research current practices inside the Movement • Engage Games volunteers and spectators 	<ul style="list-style-type: none"> • Promote and publicize SO social network

DEVELOP MOVEMENT LEADERSHIP

Vision 2015

Special Olympics is a globally aligned Movement. We understand what makes us successful. We work together to advance a common agenda which is supported by our individual planning efforts. We are supported by the different skills and gifts of people representing Programs all over the world. We set standards and measure our success against them. We select and develop leaders, effective systems and tools to “raise the bar” throughout the Movement.

Overall Growth Goal	<ul style="list-style-type: none"> 75% of Board Chairs, National Directors, and Program CEOs have completed formal Special Olympics leadership training
Overall Quality Goal	<ul style="list-style-type: none"> 25% of Programs have multi-year strategic plans 100% of Programs have annual operating plans and budgets that include leadership development components

From our beginnings, strong visionary and realistic leaders ensured robust development of Special Olympics – first in North America and later through a massive expansion into more than 170 countries. Special Olympics leaders have brought innovations to the Movement, inspired people to engage in volunteer work, launched grassroots efforts in the most challenging environments, and kept an unwavering focus on the athletes.

Within Special Olympics, leaders provide support on many different levels. Board leaders set strategic direction, oversee, and review operations. Volunteers and staff lead the work on initiatives and in many cases spearhead innovation. Leadership at the level of communities, Special Olympics clubs, and local and Regional Programs across the world represents the foundation of our global organization. Our leaders do not come from a single source. In fact, our leadership group derives strength from its diversity and the power of athlete, family, and volunteer engagement.

As the organization grows in diverse countries, with competing developmental priorities, the skills and abilities of Special Olympics leadership will have to adjust to address new challenges. Leaders will have to broaden partnerships and networks of support, formalize leadership training and development, learn to measure successes rigorously and effectively, and share best practices among continents and generations.

We must now identify, recruit, develop, and mentor Special Olympics leadership. While sources of energy and leadership will continue to vary throughout the Movement in the next five years, we believe that the organization at large will benefit from a series of overarching leadership initiatives. Special Olympics will identify new generations of leaders and the meaning of leadership successes. We will create a consistent leadership development program and will provide effective combinations of learning and doing. Special Olympics will refresh and enhance the program development system and establish a global system of rewards and recognition.

Implied across all of our Pillars is the importance of strategic planning. We firmly believe that success in reaching strategic objectives, across Pillars, will depend on the dedicated planning effort of Movement leaders, both at an individual Program and global level. Our overall quality goals for this Pillar, emphasizing the importance of multi-year strategic plans and annual operating plans at the Program level, depend upon this dual commitment.

Strategic Initiative #1: Develop Leadership Strength and Depth

Description:	To continue effective delivery of services worldwide, Special Olympics must identify, attract, develop and retain key leadership talent at all levels of the Movement. Special Olympics has to develop a concerted and coordinated effort to identify leadership needs; build recruitment and training opportunities, and match training capacity to close “leadership gaps”; and develop succession plans. Creative combinations of “learning” and “doing” should constitute the basis of our worldwide training efforts. We should start by focusing on engaged and proven leaders, while opening opportunities for recruitment and training of new generations of Special Olympics leaders. Quality of our leadership is critically important to the future of the Movement. Accordingly, we will strive to demonstrate “best-in-class” results at the local, national, regional and global levels.
Targets & Measures:	<ul style="list-style-type: none"> 75% of Accredited Programs have a Board Chair and a Program Director/CEO who have benefited from formal Special Olympics training opportunities designed to further develop leadership skills
Actions & Tactics:	<ul style="list-style-type: none"> Conduct periodic (30-36 months) global talent reviews aimed at identifying current and potential leaders at the sub-Program, Program, Regional, and global levels and offering opportunities to create tailored leadership development tracks for potential leaders Establish a consistent curriculum that is used globally and a set of training tools targeted for local and Regional coordinators (paid as well as volunteer), Program Executive Directors/CEOs and Board Directors with the following features: <ul style="list-style-type: none"> Delivery at the Regional level and inclusion of effective models (best practices) of governance and program management, financial management, and sustainability Development of strong Regional and global partnerships with organizations that can increase effectiveness of recruiting, training, and retaining key talent Deployment of training modules appropriate to the diversity of Special Olympics Convene a Global Congress corresponding to strategic planning periods (one per 5 years) Create a mandatory orientation and training program for Games leadership
Issues to Address:	<ul style="list-style-type: none"> Difficulty in attracting and retaining leaders willing to commit time and effort required to develop their Programs Fragmentation of leadership development approaches; perceived differences that undermine greater commonalities and global leadership development solutions Lack of common baselines regarding sought-after leadership features and criteria; no coherent knowledge of leadership needs and gaps Little “mentorship” culture/opportunities for intergenerational knowledge transfer

Business Model: Roles of SOI Global HQ, Regions, and Programs in Executing the Plan

SOI Global HQ	SOI Regions	Programs
<ul style="list-style-type: none"> Spearhead development of the overall leadership framework Identify appropriate training delivery formats and options Invest consistently in developing and updating training curricula, case studies, and partnership networks Drive strategic agenda and inform Global Congress discussions 	<ul style="list-style-type: none"> Identify leadership needs, gaps Ensure consistent implementation of “core” leadership system Engage with Region-specific professional partners leading to effective customization Continuously identify and monitor emerging trends, challenges, and successes to inform strategy 	<ul style="list-style-type: none"> Inform Region-wide efforts aimed at identifying gaps, and development options Ensure effective dissemination of knowledge and best practices throughout the Program (sub/local Programs) Commit to filling gaps and retaining strong leaders for the long term

Strategic Initiative #2: Define, Track, and Measure Success

Description:	Accredited Programs require assistance if they are to expand rapidly, build lasting community linkages and contribute to meeting the Movement’s strategic goals. Special Olympics is determined to create tools that will guide development of Programs worldwide. Performance management will evolve over time to include a range of parameters, including financial stability, risk management, participant retention levels, and other indicators. Special Olympics will encourage comparisons of Program performance to promote achievements, Movement alignment, partnerships, and learning. Any performance comparisons will take into account Program-specific resources, challenges, and opportunities, but also recognize that even Programs with the fewest resources and greatest challenges can be the best in the world in some respects.
Targets & Measures:	<ul style="list-style-type: none"> • 100% of Special Olympics Accredited Programs self-report annually against key metrics of operational effectiveness and financial sustainability • 50% of Accredited Programs participate in biannual review of programmatic activities, with at least 70% of reviewed Accredited Programs demonstrating progress by 2015 across key developmental parameters
Actions & Tactics:	<ul style="list-style-type: none"> • Develop a uniform Performance Scorecard: establish key Program performance and development metrics, including progress against Strategic Plan goals, growth, athlete satisfaction, quality of international and Program-level training, competitions and events, strength of leadership, and financial health in the spirit of transparency, knowledge sharing, and sustainability • Create a new Program Development System for evaluation and development that: <ul style="list-style-type: none"> ○ Clearly defines 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 biannual review of target Accredited Programs (approximately 50% of all Accredited Programs) that continuously recognizes areas of excellence and offers specific recommendations in areas that require development <ul style="list-style-type: none"> ○ Encourage self-evaluation, including quarterly operation/finance updates ○ Stimulate planning for growth and allow for equitable incentive programs
Issues to Address:	<ul style="list-style-type: none"> • Existing disparities in the stage of development among Programs: We cannot stifle progress in more-developed Programs by measuring everyone against “the lowest common denominator”; nor can we discourage less-developed Programs by setting standards too high, or accept that any program cannot do better • Uneven levels of management skills and access to technology that complicate deployment of consistent assessment and recognition systems • The need to invest resources and attention consistently over long periods of time to ensure accuracy and coherence of results and progress

Business Model: Roles of SOI Global HQ, Regions, and Programs in Executing the Plan

SOI Global HQ	SOI Regions	Programs
<ul style="list-style-type: none"> • Lead development of a global system of measurements, development support/recognition • Ensure defined annual levels of investments aimed at quality programmatic assessments 	<ul style="list-style-type: none"> • Enable consistent access and training around management, data collection, and recognition • Support programs with planning and utilization of new metrics and evaluation tools 	<ul style="list-style-type: none"> • Follow the guidelines for self-reported reviews and biannual Program assessments • Actively use reviews to refine yearly planning and inform operating decisions

Strategic Initiative #3: Recognize and Share Achievements

Description:	Special Olympics will continue to identify achievements, successes, and innovation in all parts of the Movement. At all levels – from local to global – Special Olympics must use recognition and reward mechanisms and tools to promote quality sustainable growth, retain Movement leaders, and facilitate advancement of all Programs toward higher levels of development. Recognition of Accredited Programs and leaders will promote best-practice sharing and motivate individuals across the global organization. Effective recognition approaches already exist in many Programs. We want to leverage, and where appropriate, scale and spread good ideas. We also see a gap in opportunities for better and more coordinated Regional and global recognition efforts.
Targets & Measures:	<ul style="list-style-type: none"> • 100% of Accredited Programs have opportunities to recognize innovations, individual and team achievements and best practices through participation in a uniform global recognition system
Actions & Tactics:	<ul style="list-style-type: none"> • Launch and effectively promote a uniform global recognition system for individuals and Accredited Programs • Capture evidence of effective recognition programs at all levels of the Movement for the purpose of scaling, sharing, and application across the global organization • Establish a global recognition initiative for Special Olympics Accredited Programs and individuals across a range of specialties, skills, and areas of achievement • Evaluate opportunities and criteria to channel financial and intellectual resources toward Programs and individuals that demonstrate progress and achievements • Build communication and knowledge management expertise to capture, document, and disseminate recognized achievements and innovations
Issues to Address:	<ul style="list-style-type: none"> • Egalitarian nature of the Movement that in some instances discourages overt recognition of achievements, confuses “motions” with “actions,” and celebrates good intentions as true successes • Enormity of types and forms of achievements across the global organization, and major disparities in starting conditions and surrounding environments: What may be a given in an advanced post-industrial society may take longer in a developing country • The need to establish strong and lasting linkages between true achievements, recognition, subsequent additional support/investments and sharing of successes

Business Model: Roles of SOI Global HQ, Regions, and Programs in Executing the Plan

SOI Global HQ	SOI Regions	Programs
<ul style="list-style-type: none"> • Develop understanding of current recognition activities • Establish parameters, processes, and procedures for global recognition system • Conduct global surveys and nomination processes to identify achievement • Present recognition awards • Tie investment and support activities to recognition of achievements and best practices 	<ul style="list-style-type: none"> • Rigorously scout for evidence of achievements, successes, and innovations • Enforce selection criteria and recognition mechanisms within the framework of the global system • Develop and promote supplemental customized Region-specific recognition elements 	<ul style="list-style-type: none"> • Document and present achievements in the framework of the global recognition system • Be willing to collaborate with other Programs and SOI to establish centers of excellence; review opportunities for sharing successes and information across the Movement

Strategic Initiative #4: Ensure Understanding and Application of Special Olympics General Rules

Description:	The Special Olympics General Rules and Accreditation Standards include an overarching set of tools for promoting unity of the global Movement around the mission and global standards in the areas of sports, competitions, governance, risk management, and quality. This five-year window will be a time to use this set of tools to define, encourage, and enable the improvement of Program quality and sustainability.
Targets & Measures:	<ul style="list-style-type: none"> • New edition of Special Olympics General Rules adopted by SOI Board in support of 2011-2015 Strategic Plan • 90% of Accreditation Applications are submitted, reviewed, and approved within the regular Accreditation cycle
Actions & Tactics:	<ul style="list-style-type: none"> • Develop and approve a revised set of Special Olympics General Rules • Upgrade the Accreditation Standards to incorporate key aspects of the 2011-15 Strategic Plan and to reflect increasing maturity of Accredited Programs • Build competency in General Rules knowledge and Accreditation Standards among leadership, staff, and other stakeholders through establishment and ongoing development of General Rules and Accreditation Standards training programs for athletes, SOI staff, Programs, GOCs, and other constituents in multiple delivery formats (document-based, web-based, and others) • Reinvigorate global commitment to proactive risk management • Nurture commitment from stakeholders by documenting benefits of the General Rules and Accreditation Standards for the Movement
Issues to Address:	<ul style="list-style-type: none"> • Complexity of the current body of standards and requirements currently enshrined in Special Olympics General Rules • Lack of a universally accepted approach to the design of the new General Rules: streamlined document with a range of clarifying charters or a rearranged all-encompassing document similar to the current version? • Low levels of General Rules awareness among key constituents and decision-makers • Incoherent monitoring systems designed and deployed to track compliance with Special Olympics Accreditation Standards

Business Model: Roles of SOI Global HQ, Regions, and Programs in Executing the Plan

SOI Global HQ	SOI Regions	Programs
<ul style="list-style-type: none"> • Review proposed General Rules changes identified to date, solicit additional feedback, and lead General Rules redevelopment • Ensure broad-based support and acceptance for revised Accreditation Standards • Develop and deploy Accreditation Standards compliance mechanisms • Serve as a repository of compliance updates and data • Design and promote a uniform General Rules training curriculum 	<ul style="list-style-type: none"> • Ensure active engagement of Regional Advisory Councils and Program leaders to recommend General Rules changes • Lead implementation and offer training related to new General Rules and Accreditation Standards • Deploy Accreditation Standards monitoring mechanisms and ensure regular updates and compliance with the requirements 	<ul style="list-style-type: none"> • Propose General Rules changes • Fully follow the enhanced General Rules and Accreditation Standards requirements • Share updates and background information with Special Olympics Regional offices Accreditation Standards in a timely manner

ESTABLISH SUSTAINABLE CAPABILITIES

Vision 2015

Special Olympics has the supportive culture, core systems and infrastructure, and established processes to best support our growth, make fact-based decisions, and deliver measurable impact over time. It is critical that Special Olympics focuses on not just what we do, but how we get it done. We have a world-class means of measuring our impact at multiple levels. We will significantly increase our professional effectiveness, 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. We will communicate effectively internally in order to enhance our alignment and leverage technology to achieve best practices in stakeholder management.

Growth Goal	<ul style="list-style-type: none"> Reduce administrative costs by 25% from 2009 levels for SOI and provide cost savings for participating Programs
Quality Goal	<ul style="list-style-type: none"> Create an integrated eCRM

Situation Assessment

We operate largely independent Programs that provide key services for our athletes and their surrounding communities. As we have moved into new markets and launched new programs, the complexity of our organization has increased. Decentralized management and service delivery has often kept us from realizing opportunities for truly global knowledge management and economies of scale.

We have made some progress in building external research partnerships to support the Movement. We have developed relationships with the University of Massachusetts Boston and the University of Illinois at Chicago, and have begun to explore a relationship with the University of Ulster. Results from these initial relationships have been encouraging as commissioned research has proven valuable and cost effective.

We have made several steps forward in developing tools for communication and knowledge management. KMS, now known as resources.specialolympics.org, provides us with a tool for posting information, such as coaching guides. Unfortunately, this tool is dated. It is time to review new systems that are more relevant and user-friendly for our organization.

MySOI is our most recent attempt at creating a knowledge management tool. But this tool has been underutilized as different departments and divisions have their own programs and systems for storing and processing information. This highly partitioned system does not promote an active exchange of information, and it contains redundancies and inconsistencies that lead to confusion and unnecessary spending.

We have done little to realize economies of scale throughout our Movement. Many of our Programs share a “cooperative” or “collaborative” business model. That model requires negotiation and agreement rather than the acceptance of new initiatives typical in more hierarchical organizations. Shared services permit relatively small, geographically dispersed business units to take advantage of cost savings from rationalizing vendors, negotiating contracts collectively, or through other collaborative activities with third parties.

Strategic Initiative #1: Leverage Global Research Partnerships

Description:	Research and evaluation activities help us to identify the needs of our constituents, evaluate the impact and quality of Special Olympics programs, and investigate and implement new interventions to support our athletes and the Movement. To achieve our goals, we must reach beyond our organization to work with partners who will improve our access to best practices and ideas that support our Movement. In particular, we must work with partners throughout the world to diversify and expand our research agenda and research resources. Additionally, research and evaluation activities should be expanded to more fully incorporate work in the area of positive psychology to create a strengths-based assessment of our work and its impact.
Targets & Measures:	<ul style="list-style-type: none"> • Establish Regional research user groups (including athletes), extending incrementally from two Regions in 2011 to five Regions in 2015 • Establish one Center of Excellence, or university research partnership, for the Mission-Driving Pillars (Advance Quality Sports & Competition, Build Communities, and Fans & Funds)
Actions & Tactics:	<ul style="list-style-type: none"> • Diversify and expand research project resources and develop a global, diverse research agenda • Develop a plan for disseminating research throughout the Movement • Build relationships necessary for supporting Centers of Excellence • Create social and economic measures to quantify the impact of Games • Integrate positive psychology approaches into future research and evaluation activities • Update the research plan and priority initiatives on an annual basis
Issues to Address:	<ul style="list-style-type: none"> • Challenge in developing relationships • Challenge in identifying appropriate partners in all Regions • Ability to disseminate and make use of data and research

Business Model: Roles of SOI Global HQ, Regions, and Programs in Executing the Plan

SOI Global HQ	SOI Regions	Programs
<ul style="list-style-type: none"> • Build global research agenda • Partner with leaders to build Regional research user groups • Lead dissemination to a range of internal and external audiences 	<ul style="list-style-type: none"> • Advise HQ on data needs • Support HQ in building Regional Research user groups 	<ul style="list-style-type: none"> • Build university partnerships • Participate in research and evaluation studies to obtain locally relevant data • Advise Regional office on data needs • Communicate research findings

Strategic Initiative #2: Collaborate in Shared Services Initiatives

Description:	Special Olympics is not only a Movement but also a global organization, operating as more than 200 independent organizations. We must build the capacity to work collaboratively to take advantage of the economies of scale that we can create together. By identifying opportunities to leverage our size, skills, and information on all levels, we will be able to reduce costs and generate greater efficiencies. Potential shared services could include travel services, online suppliers, and global courier services. SOI will also identify other Finance and IT areas for exploration.
Targets & Measures:	<ul style="list-style-type: none"> • Reduce administrative costs by 25% from 2009 levels for SOI and provide cost savings for participating Programs • At least 25% of Programs will take advantage of one or more shared service offerings
Actions & Tactics:	<ul style="list-style-type: none"> • Launch at least four global shared services projects • Develop an internal body of knowledge about allocation accounting, procurement, and contracts • Conduct an evaluation to determine potential shared-services opportunities and develop detailed business cases and cost analyses for the top 10 options for consideration by an ad hoc working team comprised of SOI, Regional staff, and Program staff • Develop work plans and contracts to implement at least four shared-services options • Develop and implement a plan for using services to achieve cost savings at Games
Issues to Address:	<ul style="list-style-type: none"> • Ensure that shared-services agreements do not jeopardize local or national partnerships • Allow for the varying needs of different Programs and allow Programs to opt in or out according to their best interest

Business Model: Roles of SOI Global HQ, Regions, and Programs in Executing the Plan

SOI Global HQ	SOI Regions	Programs
<ul style="list-style-type: none"> • Develop an internal capacity and knowledge around allocation accounting, procurement, and contracts • Assess potential shared-services opportunities and develop business cases with cost analyses for the top 10 options • Participate in the ad hoc work group to evaluate the business cases and identify which four shared-services opportunities should be pursued • Lead at least four shared-services initiatives 	<ul style="list-style-type: none"> • Participate in the ad hoc work group to evaluate the business cases and identify which four shared-services opportunities should be pursued • Educate Programs about the shared-services opportunities and help evaluate which services would benefit which Programs 	<ul style="list-style-type: none"> • Participate in the ad hoc work group to evaluate the business cases and identify which four shared-services opportunities should be pursued • Participate in the shared-services opportunities that provide benefit to the Program

Strategic Initiative #3: Enhance Knowledge Management and Internal Communication

Description:	There is a tremendous amount of information about good news, pilot projects, best practices, and important events that needs to be shared across our Movement -- with our Regions, Programs, athletes, coaches, and fans. We do not have an effective method for capturing and disseminating this information. We seek to find both new and traditional mediums to effectively share our important Movement-wide resources, athletes' stories, key messages, and news from around the world. We seek to create a "best-in-class" knowledge management that will accelerate the idea generation and adoption curve of Programs.
Targets & Measures:	<ul style="list-style-type: none"> • Create a knowledge management system that is regularly used by at least 75% of the Programs
Actions & Tactics:	<ul style="list-style-type: none"> • Conduct a needs assessment to identify the types of information and systems that would be helpful to Programs and identify the best solutions to meet those needs • Create a knowledge management system that provides real value for users (including staff, volunteers, coaches, families, Game organizers, and other key stakeholders) and supports our Strategic Plan work • Create dedicated risk management resources for Programs • Disseminate monthly Movement-wide communications that share best-practice ideas, key management messages, and Movement successes in multiple languages • Create a library of resources for Programs, updating existing resources as needed • Develop training Programs to demonstrate how the system can be used • Conduct a comprehensive review of all current internal communications messages, themes, and channels. The review will seek to identify key users, stakeholders, and potential gaps • Develop both new and traditional medium outreach strategies • Develop a system for surveying Programs' internal communications effectiveness • Develop Centers of Excellence to help SO develop expertise and provide knowledge sharing
Issues to Address:	<ul style="list-style-type: none"> • Cost of implementation and leadership training and capacity • Difficulty and cost of translations in multiple languages

Business Model: Roles of SOI Global HQ, Regions, and Programs in Executing the Plan

SOI Global HQ	SOI Regions	Programs
<ul style="list-style-type: none"> • Develop a process to capture global best practices • Review existing information and best practices to identify gaps • Develop training programs to illustrate the use of KMS system • Manage communication systems • Develop new and traditional medium for dissemination • Evaluate reach/effectiveness of the communications 	<ul style="list-style-type: none"> • Contribute best practices • Coordinate translations • Host training programs to demonstrate the uses of KMS • Ensure that communications reach Programs, and facilitate dialogue to improve communications • Share information from the Region and Programs • Identify key messages, events, and press releases to be shared 	<ul style="list-style-type: none"> • Contribute to the library of global best practices • Participate in the training programs to learn to use KMS • Use internal communications products and protocols • Provide feedback on the products to identify areas for improvement • Develop local methods of delivery to ensure the messages flow from Global HQ to Programs

Strategic Initiative #4: Develop and Leverage eCRM (Customer Relationships Management) Platform

Description:	The core of the Special Olympics Movement is its staff, volunteers, donors, athletes, and other members, but we currently have no easy way for capturing and accessing information about these people and their activities. Instead, we use multiple, narrowly focused systems to collect information about people in particular roles without identifying how they participate in and impact the Movement as a whole. For example, we may identify someone as a coach but fail to recognize this same person as a large donor. We need an integrated system to enable us to effectively engage the people who drive the work that we do.
Targets & Measures:	<ul style="list-style-type: none"> • Create an integrated eCRM
Actions & Tactics:	<ul style="list-style-type: none"> • Conduct a needs assessment to identify the appropriate providers for an eCRM system and select most effective option • Develop an implementation and communication plan • Migrate from existing databases to new eCRM platform • Develop training programs to demonstrate how the system can be used
Issues to Address:	<ul style="list-style-type: none"> • Cost of implementation and acceptance by SOI and Programs

Business Model: Roles of SOI Global HQ, Regions, and Programs in Executing the Plan

SOI Global HQ	SOI Regions	Programs
<ul style="list-style-type: none"> • Lead system selection • Identify existing donor, marketing, and volunteer databases as candidates for migration to eCRM • Develop, obtain buy-in for, and communicate an implementation plan • Lead implementation 	<ul style="list-style-type: none"> • Train Programs on eCRM use and best practices • Use eCRM in Regional operations 	<ul style="list-style-type: none"> • Use eCRM in Program operations

STRATEGIC CHOICES & FINANCIAL SUMMARY

We have an ambitious and bold Strategic Plan. Unfortunately, our capacity and resource constraints prohibit us from immediately pursuing every exciting idea that surfaced during our planning process. The following section lays out how we thought about prioritizing and sequencing our strategic activities.

We approached the all-important set of investment questions and strategic choices with a set of guiding principles.

- **Assess the financial implications.** We operate in a world with limited resources. We must evaluate ways to raise revenue and decrease costs.
- **Balance impact for SOI and Programs.** We must be thoughtful about how our funding and prioritization decisions impact both SOI and Programs.
- **Sequence.** We must think about what needs to be started now and what can be deferred to later years.
- **Think long- and short-term.** We must think about which investments must be made today to position ourselves for the future.
- **Be realistic.** We can't set goals that we can't achieve or ask for resource allocations that are beyond what we need. We have to be cognizant not only of financial resources but also of management and leadership capacity and ability to focus.
- **Balance work across Pillars.** The Movement has validated our 5-Pillar (Advance Quality Sports & Competitions, Build Communities, Connect Fans & Funds, Develop Movement Leadership, and Establish Sustainable Capabilities) approach. We agree that a well-rounded strategic approach will require us to invest across Pillars.

SOI Strategic Choices & Investment Priorities

In applying these principles, we have been mindful of Movement-wide considerations. We recognize that each Region, Program, and sub-Program has to make its own decisions and strategic choices. We thought it would be helpful to articulate how Special Olympics International has internalized this plan and determined initial budgetary requirements. We evaluated five investment scenarios and, encouragingly, reached quick consensus on one of them. In summary, this scenario immediately funds all existing fundraising capacity plans to hit our goal of doubling revenue and then funds many of the remaining resource requests across the five Strategic Pillars. In practical terms, this implies that we will:

- Fully fund plans to grow our existing revenue channels – donor development, corporate partnerships, strategic gifts, planned giving.
- Defer start-up investments for new revenue sources until late 2012 or early 2013. We believe these are critical, but we want to shore up new capacity for existing revenue channels first.
- Defer indirect investments for Movement training and capability to 2012 or early 2013 – for example, the Fundraising College or Grants Resource Center.
- Fund at 50% strategic work across the Pillars according to each Pillar's priorities and plans. This gives us substantial new capacity and resources to appropriately launch the Strategic Plan.

Sequencing

In collaboration with the Working Group Chairs and teams, we developed implementation plans for each strategic initiative. The full details are too voluminous to share here, but we will make the documents available on a collaborative website for use and reference.

IMPLEMENTATION SUPPORT

Cascading the Plan Globally

Over the next five years, the strategic success of Special Olympics as a global Movement will hinge on the Plan's traction at the Program and sub-Program level. Regional leaders are already working with Programs to provide guidance on how SOI's objectives can be incorporated into Program plans and reinforced at the Program level. Many Programs have initiated their own strategic planning processes in response to SOI's call to action. In the first quarter of 2011, headquarters will begin to work more closely with the Regions to facilitate best practice sharing, provide strategic planning tools, and deliver hands-on support for Programs. Examples of these cascading tools to be released with the Strategic Plan include:

- One-Page Plan Summary: This is the ultimate executive summary "placemat" of our Strategic Plan for easy reference.
- Program Guidance: A leadership guide for SO Program Staff and Boards to help understand SOI investments and Program-level targets.
- Frequently Asked Questions (FAQs): We have been collecting a set of common questions we have been asked about the Plan and how to interpret it.

Strategic Messaging and Communication

We also acknowledge the importance of clear and consistent communication about the Plan at numerous levels. We will need to communicate from SOI Headquarters to SOI Regions and Accredited Programs. We will also need mechanisms to channel and respond to feedback from Programs. We know that we have a number of critical stakeholders and constituents who have both an interest in and need for a different level of communication than a detailed 50-page SOI plan. We also recognize a need to sharpen our "elevator speech" about the Plan in order to clearly share our message with donors and other friends of the Movement. We are committed to developing and sharing several communication tools by early 2011.

Monitoring and Evaluation

We must continuously monitor our progress over the planning horizon. It is important that we carefully track our progress against key strategic goals and share updates with each other on a regular basis. The Strategic Plan will be a "living and breathing" document. We will make periodic modifications and changes, and we will share them with all. We will put the following mechanisms in place to facilitate this dialogue:

- Census Baseline & System Enhancements: We will make some modifications to the census data requirements for 2010 to ensure that we have a sufficient baseline of data from which to measure our progress from year to year. Going forward, we will develop and deploy more robust systems aimed at capturing detailed progress data from Programs and sub-Programs and building trusted sources of information about our shared Movement-wide successes.
- Strategic Scorecard: We will implement a balanced scorecard to quickly communicate our success in achieving Pillar-level objectives. We will also collect data and track our progress in accomplishing individual strategic initiatives.
- Annual Strategy Review: We will conduct a formal annual review of our strategic progress in consultation with the SOI Board of Directors.
- Strategic Updates: We will share formal updates to the SO Movement on progress with Plan implementation, learnings, and success stories.

GLOSSARY

Accredited Programs: refers to entities that formally applied and received from Special Olympics International either full or provisional accreditation for a specified period of time, giving them the legal right to use the Special Olympics name and logo. Accredited Programs represent a subset of the body of **Programs** – entities that either offer or aspire to offer Special Olympics opportunities, including Founding Committees, those with suspended Accreditations, and those in the process of renewing or reestablishing Accreditation with Special Olympics International

Athlete: a person with intellectual disability who participates in a minimum of 10 weeks of training per sport and has the opportunity to compete in Special Olympics Games and competitions at any level (local, provincial/state, national, Regional, or world) at least once every four months

Athlete Sports Development Model: provides the optimal training development plan for athletes of all ages and skill levels to excel in training and competition and to meet their level of aspiration in each stage of their athletic career

Athlete fundraising program: broad-based effort by athletes to raise funds for Special Olympics. Two primary channels exist for this type of fundraising: product sales and sponsorship of an activity

Athlete Input Council: forum for athletes to report to other athletes and Program leaders about what is happening in their areas, voice their opinions about important issues, and gain leadership training and experience

Athlete Leadership Program (ALPs): initiatives that encourage and support athletes as they seek to join volunteer and other leadership roles in the movement

Biannual review of programmatic activities: comprehensive visits that will provide opportunities for Special Olympics staff (representing headquarters and Regional offices) as well as fellow Program leaders to work in-depth with Programs on specific areas identified in advance by the Program and Region. These visits in particular will be designed to assist Programs in completing their self-assessments, setting priorities and developing action plans for the upcoming year

“Call to action” campaign: coordinated communication effort designed to ask supporters to take a specific action or actions including advocacy, volunteering, pledging or donating

Centers of Excellence: concept in decentralized organizations with multiple operating units of selecting one or more units with demonstrated expertise in a particular function to lead the organization’s activities in that function

Coaches: a person who selects, assesses, and provides Special Olympics athletes with comprehensive sports training and preparation for competitions, knowing, understanding and abiding by the rules of the sport being coached, Special Olympics General Rules and Official Sports Rules

Community builders (families): proactive family members who build lasting relationships with government, community members, religious leaders, other family members, and organizations to further the opportunities and resources afforded to persons with intellectual disabilities at a local or sub-Program level

Competition: athletic contest between individuals or groups of people for the purpose of defining the best performance

Current sources of revenue: sources vary by Program. For many Programs within the SO Movement, current sources of revenue includes government funding, events, direct response, foundations, corporate partnerships and major gifts

Diversified funding: funding that comes from multiple revenue streams – rather than being overly reliant on any single revenue stream – to protect against future revenue disruption. Best practices suggest that no more than 30% of revenue come a single stream

eCRM (Customer Relationship Management): software tool, pioneered by sophisticated for-profit companies with complex sales and customer support activities, that enables users to view customers (constituents) from multiple perspectives and allows users to access all known information about a particular customer or group of customers from a single source

Event: the occurrence of a single or multi-sport competition. Training scrimmages, athletes being timed or judged against other athletes, or athletes in league play are not required to have ceremonies or awards

Financial sustainability: ability of a Special Olympics Program to generate financial and in-kind support to offer services continuously in an uninterrupted fashion and with minimal changes to the conditions of services or increasing numbers of athletes and other constituents

Fundraising College: a central support service that provides training and counsel on best fundraising practices that could be deployed by SO Programs

Games: a multisport competition inclusive of awards presentation, Olympic-like pageantry, entertainment, and educational programs

Global Athlete Councils (GACs): same as an Input council but on the Global Level

Global Messengers: athletes who have completed at least one course in public speaking and how to deliver the Special Olympics message. Each Program should have Global Messengers. SOI selects 12 athletes every four years to serve as Sargent Shriver International Global Messengers

Global talent review: a periodic activity initiated by Special Olympics International every 24-36 months to assess the state of Movement leadership, develop insights into available capabilities and skills gaps, identify succession plans for key roles and agree on overall talent management plans for geographic areas and levels of the global organizational structure

Global training curriculum: a group of interrelated courses in the field of leadership development and capabilities that will be created and offered by Special Olympics in collaboration with third-party experts, as needed, to ensure uniform understanding, application, and development of leadership concepts by Special Olympics leaders around the world

Global volunteer management program: a software program designed to register and track volunteers, their activity, and the training they have completed. This system will allow communication of data on training and service between Programs and levels of the Movement

Global Youth Summit: gathering of young people ages 12-20 at World Games to discuss youth involvement in Special Olympics and the SO role in a better world

Grant resource center: a central service designed to assist Programs in the acquisition of grants from foundations, multilaterals, and government agencies

Healthy Athletes program: Special Olympics' global program for providing free health screenings, preventive, educational, some corrective (e.g., eyeglasses, hearing aids), and referral services to Special Olympics athletes, usually in conjunction with sports competitions

Health disparities: the gaps (deficits) in health status, functioning, and access to health care services that people with intellectual disability and other underserved populations experience in comparison with the general population. These generally arise as a combination of greater core needs, but are made worse by a lack of social support programs and the discrimination or indifference of society

Health protocols: formally defined approaches to address access to health services (diagnostic, preventive, treatment, referral) across a variety of local situations globally that can improve individual and population health and enhance functioning in daily life activities

Indirect versus direct fundraising: direct fundraising is under the control of SOI. Indirect fundraising is under the control of Programs. SOI may have a role in supporting indirect fundraising

Influential leaders and organizations: individuals or bodies that both attract significant media and public attention and possess the ability to sway public opinion towards a cause or vision

Integrated campaign for major gifts: a fundraising effort centered on a small number of shared funding needs. Traditional campaigns have an overall revenue target and timeline as well as a case for funding for each identified need

Integrated sports: any sports training or competition where Special Olympics athletes are practicing the activity under the rules of Special Olympics with persons without intellectual disabilities. The activity can be organized by Special Olympics or other sports organizations

Internal communications: encompass all communication (formal and informal) that the Movement undertakes with its closest stakeholders. Internal communications cross departments, divisions, Regions, and Programs. Stakeholders can include SOI employees, Program leaders, Board members, etc. Internal communications are used to communicate with these stakeholders to inform them of change, keep them up to date with Movement news and developments, or help achieve movement wide goals

Knowledge management: the ability to gather, catalog, and disseminate information useful to many organizational units in one software-supported system, usually with internet-based access, to permit sharing the information broadly across the entire organization

Law Enforcement Torch Run (LETR): a strategic partnership with law enforcement personnel that raises funds for Special Olympics programs from a number of fundraising events

Meaningful athlete leadership roles: roles that need to be filled in order to advance the Movement and its goals. These might be as simple as volunteering at Games to set up or clean up after events, or as complex as serving on a Board of Directors or starting an Athlete Input Council. They do NOT include jobs that are "invented" to make athletes feel involved

Operating revenue: revenue available to fund core operations, whether restricted or unrestricted

Operational effectiveness: the extent to which the stated project purpose was attained. The analysis of effectiveness focuses on whether the planned benefits have been delivered and received, as perceived by all key stakeholders; to what extent the changed organizational arrangements produced the planned improvements; whether the balance of responsibilities between the various stakeholders was appropriate; how unplanned results may have affected the benefits received

Operational plans: a set of one-year goals, objectives and activities (and corresponding performance measures) to be completed by Special Olympics entities in a given year. Usually operational plans are presented in conjunction with annual budgets – statements of proposed income and expenses for a single fiscal year

Organization-wide brand standard: a shared approach to describing Special Olympics from the perspective of “who we are, what we do, and why it matters.” The brand standard includes common language as well as graphics

Performance scorecard: a management approach aimed at aligning business activities with the vision and strategy of the organization, and monitoring performance against strategic goals. It adds nonfinancial performance measures to traditional financial metrics to give Special Olympics leaders a more balanced view of organizational performance

Personal Sports and Skills Development Program: an interactive tool that empowers athletes to take ownership of their training and performance and incentivizes coaches to help athletes achieve their personal best

Program Development System: a web-based management tool aimed at facilitating self-assessment of Special Olympics Programs by gathering numeric (for example, numbers of athletes, coaches, and volunteers) and descriptive (for example, Board composition) information, proposing assessment and development criteria and framework, and consolidating data for analysis at the level of individual Programs, Regions, and the global organization

Regional Advisory Councils: elected and/or appointed groups of Special Olympics leaders established by each of the Regions to represent Special Olympics Accredited Programs and advise Special Olympics International on issues of overarching concern and importance to the organization at large

Regional research user groups: a group of experts and stakeholders established by an SOI Region in order to develop priority research questions and to reach out at the direction of the RMD to create research projects and partnerships in support of the Mission

Season: a minimum eight-week period of sport-specific training with at least one competition

Shared services: an approach to aggregating support functions common to multiple organizational units and negotiating favorable contracts with suppliers based on volume and common needs to reduce administrative costs

Single sport: an event in which only one sport is being practiced

Special Olympics Accreditation Standards: Accreditation Standards set forth the core requirements that an organization must meet in order to be considered a Special Olympics Accredited Program. An organization must satisfy Special Olympics Accreditation Standards before it is granted the legal right to operate as a Special Olympics Program and use the Special Olympics name and logo

Special Olympics General Rules: the document that provides current and consolidated guidance to all Special Olympics Accredited Programs, as amended from time to time by Special Olympics International

Special Olympics (Movement) leadership: the totality of individuals at all levels of the Special Olympics global structure, including but not limited to Special Olympics International Board, headquarters, Regional offices, Program Boards and staff members, local coordinators, and club managers, who set direction for Special Olympics development and influence people to follow that direction. These individuals strive to build relationships that involve mobilizing, influencing, and guiding others toward Special Olympics goals articulated in the Mission Statement, Special Olympics General Rules and the current Strategic Plan

Sport Administrators: people responsible for competition management, event scheduling, athlete registration, and coach recruitment

Sport Experience: an introductory Special Olympics sports activity providing a experiential learning experience for participants (athletes, guests, and supporters) lacking familiarity with Special Olympics

Sport resource team: appointed volunteer teams of sports experts recruited from Special Olympics Programs and other sports organizations that will assist to develop a sport-specific development plan, develop coaching guides and other support material, provide guidance on sport-specific questions, and review suggested Special Olympics sport-specific rule changes or additions

Strategic Plan: a three- to five-year plan or blueprint of broad goals and objectives used to enable an organization to meet the challenges of the future, drive direction, and focus; it reflects and embodies a process in which the organization defines, implements, evaluates, and updates its vision, goals, and objectives (means for achieving goals) on a continual basis. The multi-year plan is typically reviewed on an annual/semi-annual basis to inform annual operational plans

Training session: A coach-coordinated, but not necessarily coach-led, time period in which athletes focus on sport skills and conditioning to improve performance in a sport

Unified Sports®: a Special Olympics program that combines Special Olympics athletes and athletes without an intellectual disability (partners) on sport teams for training and competition. This definition is to be revised for the 2011-2015 Strategic Plan

Young Athletes program: early intervention play program for athletes 2 to 7 years of age