



Special Olympics Unified Champion Schools® UCS Partnership Planning Resource

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UCS Partnership Planning Resource

This resource was created for Special Olympics Unified Champion Schools® (UCS) Program staff in the Special Olympics North America (SONA) Region to support their efforts to establish formal partnerships. It is intended to provide practical steps and tools to assist with the partnership development process with a variety of organizations such as: school districts, individual schools, city governments, associations and other community-based organizations.

Although this document provides tips and examples, none of the information contained within should be considered legal advice. Any legal considerations should be reviewed by your own legal counsel prior to entering into an agreement of any sort. This resource is comprised of two sections:

1. SECTION 1: The Why & How of Partnerships

- a. General overview of partnering philosophy
- b. Goal setting, accountability & measurement

2. SECTION 2: Considerations for Planning & Documentation

- a. Document creation process
- b. Document types
- c. Document examples and resources

SECTION 1

Partnerships with school districts, government agencies, non-profit organizations and other community-based groups can improve outcomes for Unified Champion Schools, your Program, our movement, and the partnering organization. Strong partnerships can magnify efforts to expand social inclusion within Unified Champion Schools and their communities, from Unified Sports and Youth Summits to community-based programming and local competitions.

Key to those outcomes is considering why and how you will go about forming any partnership.

PARTNERSHIP PLANNING & DOCUMENTATION

Why

The answer to the question, “why partner?” is simple: **collective impact**. The underlying premise of collective impact is that outcomes (such as creating a more inclusive school community) will occur more rapidly, be better received, and have more sustainable impact when multiple organizations pool their unique expertise, relationships and resources to achieve shared goals.

This approach makes it possible to reach targets (or reach them faster) than we would otherwise be able to, on our own. Moreover, each organization involved broadens their scope of influence and deepens their connection to one another and to the communities they serve.

Engaging in a partnership through the lens of collective impact provides participating groups with the opportunity to share tasks and responsibilities, and ultimately, the rewards of their combined focus and energy.

How

Set Goals: Any partnership, regardless of what each entity brings to the collaboration, must be rooted in shared, well-defined goals. Both must agree to contribute and commit to action.

Sample Partnership Goals:

- Collaboratively host three “awareness raising” events by (date)
- Establish Unified Leadership Teams at each site by (date)

Clarify Tasks, Owners and Outcomes: Much like our Special Olympics Unified Sports model, when each partner builds on the other’s strengths, the pair successfully works toward a shared goal, and can celebrate success together. Partners should set roles and define responsibilities, together. If well-defined and clear to everyone involved, powerful progress can occur.

Sample Task List for Partners

- SOXX will design trainings for teachers in 5 new, UCS “target schools”; Partner A will provide space and materials and communicate a month in advance to teachers in target schools.

Conduct Risk and Brand Assessment: Partners must clearly identify issues of liability related to each other’s brands, if/and how funds will be involved, how communications will be managed and any potential legal and/or insurance considerations. This is particularly important prior to entering into a formal contract of any kind. **These factors should be discussed in depth and reviewed by appropriate decision-makers before any agreement is signed.**

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Sample “Conditions” Statements:

- Special OlympicsXX grants to Partner A a non-exclusive and non-transferable authorization to use the Special Olympics name and logo (collectively, the “Special Olympics Marks”) for the Unified Champion Schools project. Any use of the Special Olympics Marks will be subject to Special Olympics’ prior approval as to usage, style, and content.
- Partner A will provide funding for all transportation related to Unified Sports events.

Generate “Measures of Success”: Here, partners identify targets, list the objectives and goals under each target, set milestones to monitor progress, and document demonstrable, quantifiable outcomes/impacts. Building in timelines - including opportunities for progress monitoring and recognition of achievements - will help partners stay abreast of successes, challenges and opportunities for recalibration.

Sample Measures of Success:

- X percentage of Partner A staff members trained in Special Olympics Unified Sports implementation
- X percent annual increase in numbers of community members participating in awareness and outreach events

Defining goals, clarifying roles and responsibilities, considering issues of liability and identifying measures of success will help your Program determine the type of partnership to form and serve as a template for meetings and conversations leading to the agreement itself.

SECTION 2

Once you have established a strong relationship and both parties are ready to formalize an agreement to work together, the next step is to create the appropriate document to define and articulate the work you will do together.

Steps to consider in the partnering process:

- Identify the points that need to be addressed in a partnership document, such as the purpose, goals, milestones, payments, accountability measures and deliverables.
- Determine term of partnership agreement, partnership renewal or close-out. (e.g. 1 or more years and subject to renewal/extension; or no timeframe articulated and either party may exit partnership, at any time, if deemed necessary or appropriate)

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- Determine the type of document that will be created. See below.
- Create document in collaboration with partner (possibly start with a template)
- Review and sign-off by organization's appropriate leadership and legal entities
- Determine announcement and marketing plan
- Monitor and track partnership progress

Questions to consider during the partnership documentation process:

- Will money, goods, or services be exchanged between organizations?
- Are there staffing responsibilities or services being provided to support the partnership?
- Will branding marks/logos be used by the partner? What is the review process?
- What risk management, insurance or liability issues need to be addressed? Might the partnership engender unnecessary risk, liability, insurance coverage costs?
- Is there a specific start and end date needed?

Topic Considerations:

Below is a list of the types of topics that may be included in partnership documents. Given that each partnering scenario is different, every partnership document will differ in what is included. This list should be viewed as a "menu" of potential options to consider during the process.

- Purpose, vision, goals for partnership and duration that the document is in effect
- How goals and impact will be measured, and each party held accountable
- Expected contributions from each party; funding & sponsorship policies/protocols
- Risk management, liability & insurance responsibilities of each party
- Use of logos/marks/name, including any co-branding
- Organizational policies that will be in effect
- Staffing structure & responsibilities
- Applicable health and safety protocols or measures to be followed
- Facility usage & transportation
- Process of support and communication with schools/stakeholders
- Growth and Sustainability plans
- Applicable indemnification, hold harmless, and/or dissolution language
- Signatory (who from each party will sign)

PARTNERSHIP PLANNING & DOCUMENTATION

Document Types

It is up to the partnering entities to determine the most appropriate type of document to use in each situation. Documents range from informal agreements to formal contracts and there are important legal differences among these documents with regard to stringency, enforceability and liability, the most notable being whether or not the document is legally binding. Some of the most common partnership document types include:

- Letter of support, proclamation, roadmap, Letter of agreement/intent, Memorandum of agreement (MOA), Memorandum of understanding (MOU) and Formal Contract *

Note: some organizations or school systems may already have a standard agreement or MOU template in place that can be used as a starting point.

School Agreement Examples

Program examples of partnership documentation with schools and districts:

School agreement Examples

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