

## 2021 ACCREDITATION GUIDE

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**\* If there are inconsistencies among translations of this document, the English version governs.**

## PURPOSE AND BENEFITS OF ACCREDITATION

**Purpose.** Special Olympics Inc. (“SOI”) accredits Programs to ensure the worldwide quality, and ultimately the growth, of the Special Olympics movement. Accreditation is a method of assuring that every Program meets the essential core requirements of the Special Olympics mission and also certain minimum management and financial requirements. The accreditation requirements are designed to enable Programs to demonstrate compliance by completing a short accreditation application with information that is easily verifiable by SOI regional and legal staff.

**Rights and Benefits.** When a Program satisfies the accreditation requirements, SOI signs that Program’s Accreditation License Agreement, which grants the Program the legal right to use the Special Olympics name, logo and other trademarks within its jurisdiction, to conduct Special Olympics sports and related activities, and to raise funds under the Special Olympics name. In addition, Programs gain access to numerous benefits of accreditation, including:

- Shared strategy and vision
- International and regional leadership
- General Rules, Program Quality Standards, Sports Rules, other resources
- International competitions and summits
- Key initiative support: Unified Sports, Young Athletes, Unified School Programs, Health Programs, etc.
- Research in sports, health, and disability
- Global brand marketing
- Athlete leadership opportunities
- Regional leadership conferences and leadership development opportunities
- Technical assistance in sports training, health, games management, software, legal, governance, fundraising and marketing
- Access to financial resources through grants, partnerships with international corporations and organizations, revenue sharing, and major fundraising initiatives
- Risk management guidance and support

### SUBMISSION DEADLINE: 16 NOVEMBER 2020

Special Olympics Programs are accredited in two-year cycles. All Programs must submit their accreditation materials by 16 November 2020.

Programs are advised to remember that proposed revisions to the General Rules may affect future accreditation requirements. SOI shall provide sufficient and significant notice to allow Programs to comply with any changes to future requirements.

### Materials Due from Programs Applying for 2021-2022 Accreditation

Programs that were accredited for calendar years 2019-2020 will have their accreditation expire on 31 December 2020. Each of these Programs should submit an application for 2021-2022 accreditation through the online accreditation system by 16 November 2020. Please note that accreditation applications will not be approved until properly completed, including submission of accompanying documents and fees through 2020. Pursuant to the General Rules, accreditation automatically expires if not renewed by the expiration date. Programs without active accreditation, conditional accreditation, or founding committee status are not eligible to receive grants from SOI.

### **Materials Due from Programs Accredited for 2020-2021**

Programs that are accredited for calendar years 2020-2021 are required to submit the following by 16 November 2020. Documents and contact information should be submitted on the Mid-Cycle Update Page accessible through the “2021” tab of the Program’s 2020-2021 application in the online accreditation system.

- 2019 Audited Financial Statements
- 2019 Adjusted Gross Revenue Form (Non-U.S. Programs) **or** 2019 Form 990 (U.S. Programs)
- 2021 Budget (if not yet complete/approved, note on the application when it will be submitted)
- 2021 Operational Plan (if not yet complete/approved, note on the application when it will be submitted)
- Accreditation fees through 2020 (2021 fees based on 2019 AGR forms are not due until invoiced in 2021)
- Updated contact information for the Program’s office, Board Chair, Executive/National Director, and Sports Director

### **ONLINE ACCREDITATION SYSTEM INSTRUCTIONS**

All Programs are expected to use the online accreditation system for submission of applications and other materials. The online system has been updated to improve user experience, and training sessions will be provided. If you have difficulty with the system, please contact your regional Organizational Development representative and/or Luke Barcy and Will Case in SOI’s Legal Department at [accreditation@specialolympics.org](mailto:accreditation@specialolympics.org).

**Logging In.** Log in at <http://services.specialolympics.org/Login>. If you are already registered in the system, your user name is your email address. If you have forgotten your password, you can reset it by clicking on the “Reset Password” tab on the login screen. If you would like to be registered, please contact your regional Organizational Development representative, who can create a new profile for you.

**Submitting Applications and Materials.** Once you log in, you will see links to current and past applications for your Program.

- Click to view the current application.
  - If you are applying for 2021-2022 accreditation, follow the instructions and complete all questions on the “2021” tab.
  - If you are accredited for 2020-2021, click on the “2021” tab at the top of the application and follow the instructions on the “2021” tab.
- If you are unable to answer “yes” to any of the required application questions, please make an explanatory note in the comment box below the question and follow up with your regional Organizational Development representative if needed.
- Each question response is saved when answered, allowing you to leave and return if not completing the application in a single session. When you have answered all questions and inserted documents and notes where requested, please click the “submit” button. By clicking the “submit” button, you will notify SOI that your application is ready to be reviewed. You will receive an email notification when your application is approved or if

further information is needed. You will continue to have access to your application in the event you need to update your information.

## **APPLICATION REVIEW AND APPROVAL**

If a Program's application is complete by 16 November 2020, SOI will be able to review the application before the Program's accreditation expires on 31 December 2020. If the Program is unable to answer "yes" to all required application questions, or if the materials are otherwise incomplete, SOI may request further information to complete the application. Based on the review, SOI will take one or more of the following actions:

### **Full Accreditation**

Full accreditation is granted if the Program meets all accreditation requirements or meets all but certain requirements and receives a waiver from SOI for those requirements.

### **Conditional Accreditation**

SOI may provide conditional accreditation to a Program that cannot, for good cause, satisfy certain accreditation requirements and submits a plan, approved by SOI, that details how, and by what date, the Program will comply with the unmet requirements. To request conditional accreditation, a Program should include an explanation and plan in the comment box under each required application question to which the Program is unable to answer "yes." The plan should include a date by which compliance will be completed. SOI grants conditional accreditation on a case-by-case basis. SOI regional staff will work with the Program to develop and complete the compliance plan by the specified date. Conditional accreditation provides the same benefits as full accreditation, but typically comes with a shorter term.

### **Compliance Waiver**

If it is impossible for a Program to comply with an accreditation requirement, SOI may grant a compliance waiver under General Rules Section 6.22 if SOI determines that such a waiver is clearly in the best interest of Special Olympics athletes and the movement. SOI grants waivers on a case-by-case basis and may specify time limits and other parameters for the waiver. In order to request a waiver, the Program should select "waiver" for the relevant application question and include an explanation and any supporting documentation. A Program requesting a waiver must show that the accreditation requirement:

- Violates specific national laws applicable to the Program;
- Causes significant hardship for the Program; or
- Cannot be strictly met, but the Program is in compliance with the requirement's intent.

### **Denial of Accreditation**

A Program that does not submit properly completed accreditation documents demonstrating compliance with the accreditation requirements, and that has not received a waiver or conditional accreditation, may be denied accreditation.

## **ONGOING COMPLIANCE**

Accreditation is conditioned on the Program's continued compliance with all accreditation requirements, the Accreditation License Agreement and the General Rules. If SOI becomes aware

of a Program's noncompliance, SOI regional Organizational Development staff will work with the Program to help it comply with the relevant accreditation or General Rules requirements. In the event of a Program's material mismanagement or non-compliance with the accreditation requirements or the General Rules, SOI reserves the right to take corrective measures. This may include, without limitation, denying eligibility for grant funding, adjusting the Program to founding committee or conditional accreditation status, adjusting allocation of Games quotas, approving management and personnel decisions, and/or revoking accreditation.

## RECENT CHANGES

In a process beginning in December 2014, a task force of representatives from each Region and headquarters considered and ultimately recommended updates to the accreditation requirements and application. In the process, the task force considered feedback from the Global Leadership Team and each of the Regional Leadership Councils. The following changes were approved by the Global Leadership Team and the SOI Board of Directors in the fall of 2015.

Since 2016, the following substantive changes are included in the requirements. Programs had one year to implement the Unified Sports and Finance/Business Expert requirements, and those requirements are now in effect.

- **Finance or Business Expert.** Programs are required to have a finance or business expert on their Boards of Directors. Corresponding with this requirement, the minimum number of Board members is increased from six to seven.
- **Unified Sports.** Programs are required to provide opportunities for Unified Sports activities. This requirement is satisfied by Unified Sports activities at any level.
- **Software.** Programs are required to use Special Olympics software for accreditation, athlete, volunteer, and competition information management as provided and instructed by SOI. This requirement will apply to current census and accreditation software and to new software replacing GMS as it is rolled out in coming years. Expectations under this requirement will take into consideration local circumstances, including technical capability, software readiness and technical support access. Guidance will be provided by SOI on what specifically is required during each accreditation cycle. Programs applying for 2020-2021 accreditation during the fall of 2019 should answer "yes" to the software question on the accreditation application if your Program uses (1) the online census system and (2) the online accreditation system. In future years, additional software will be added to this list as it is developed and rolled out to Programs.

## CORONAVIRUS RELIEF ACCREDITATION FEE DISCOUNT

- **June 30, 2021 (30% Discount).** Programs are eligible to receive a 30% discount on their 2021 accreditation fees for payment made prior to 30 June 2021. This discount replaces and supersedes the extraordinary discounts provided during 2020.

## ACCREDITATION REQUIREMENTS

1. **Special Olympics Mission.** The Program's bylaws/governing documents include the Special Olympics Mission Statement in accordance with General Rules Section 1.01.
2. **Governing Board.**
  - **Board Composition.** The Program has a Board of Directors with management oversight and financial responsibility for the Program and at least seven members including an expert in intellectual disabilities, a sports expert, a finance or business expert, and a close family relation of a Special Olympics athlete in accordance with General Rules Section 5.02(c).
  - **Athlete Leadership.** The Board of Directors includes at least one Special Olympics athlete in accordance with General Rules Section 5.02(c).
  - **Board Rotation.** The Program's Board of Directors is subject to rotation of its members in accordance with General Rules Section 5.02(d).
  - **Meetings.** The Board of Directors meets at least twice each calendar year.
3. **Executive/National Director and Sports Director.** The Program has an Executive/National Director and a Sports Director in accordance with General Rules Section 5.02(e), who may be part-time or full-time, volunteer or paid, but who are not the same person and neither of whom is the Chair of the Board of Directors.
4. **Special Olympics Sports.** The Program provides quality training and competition in two or more Special Olympics Sports in accordance with General Rules Sections 3.04 and 3.05. The Program provides Unified Sports opportunities in accordance with General Rules Section 3.11.
5. **Registered Athletes.** The Program registers Special Olympics athletes in accordance with General Rules Section 2.02 and submits athlete census data to SOI as required in accordance with General Rules Section 2.06.
6. **Software.** The Program uses Special Olympics software for accreditation, athlete, volunteer, and competition information management as provided and instructed by SOI.
7. **Name and Logo.** The Program's name is "Special Olympics [name of jurisdiction]" and the Program's logo is the Special Olympics logo plus name of jurisdiction in accordance with General Rules Sections 5.03 and 5.07.
8. **Finances and Planning.**
  - **Budget and Financial Statements.** The Program has an annual budget and annual financial statements in accordance with General Rules Sections 8.03 through 8.05 and has provided a financial report (either an IRS Form 990 if the Program is a U.S. Program or an Adjusted Gross Revenue Form if the Program is outside of the United States) for the year prior to the year in which the application is due.
  - **Operational Plan.** The Program has developed a multi-year plan aligned with SOI's strategic plan and priorities and prepared a written operational plan in accordance with General Rules Section 8.03(a).
9. **Accreditation Fees.** The Program pays its accreditation fees when due or makes other arrangements agreed to by SOI in accordance with General Rules Section 8.08.
10. **License Agreement.** The Program has executed a current Special Olympics Accreditation License Agreement in accordance with General Rules Section 6.09.

## 2021-2022 ACCREDITATION APPLICATION

**[Note: Programs are expected to complete applications through the online accreditation system. To assist Programs reading translations of this guide in different languages, this application is the same as it appears online for Programs outside the United States.]**

Welcome to your Special Olympics accreditation application. This application page is due 16 November 2020. Please complete all of the following questions, attaching documents and inserting notes where requested. Each question response is saved when answered, allowing you to leave and return if you are not completing the application in a single session. If you have questions or comments for SOI, please insert a note or contact your SOI regional Organizational Development representative. For the current Accreditation Guide, license agreement, forms, and other accreditation materials, click [here](#).

Thank you!

- 1. Special Olympics Mission.** Do the Program's bylaws/governing documents include the SO Mission Statement? Please attach the document or note when it was previously submitted.
- 2. Governing Board.**
  - 2.1. Does the Program have 7 or more members on the Board of Directors? Please attach a list of the Program's Board members, including the years of service for each member.
  - 2.2. Does the Board include an expert in intellectual disabilities? Please type his/her name.
  - 2.3. Does the Board include a sports expert? Please type his/her name.
  - 2.4. Does the Board include a finance or business expert? Please type his/her name.
  - 2.5. Does the Board include a close family relation of an athlete? Please type his/her name.
  - 2.6. Does the Board include a Special Olympics athlete? Please type his/her name.
  - 2.7. Do the Program's bylaws/governing documents limit the terms of the members of the Board to a maximum of 9 consecutive years?
  - 2.8. Does the Program's Board meet at least twice each calendar year? Please attach minutes from 1 meeting during 2019 and minutes from 1 meeting during 2020.
- 3. Executive/National Director and Sports Director.** Are the positions of (1) Board Chair, (2) Executive/National Director, and (3) Sports Director held by different people?
- 4. Special Olympics Sports.**
  - 4.1. Does the Program provide quality training and competition in 2 or more Special Olympics Sports? Please list 2 sports.
  - 4.2. Does the Program provide Unified Sports opportunities?



**5. Registered Athletes.**

5.1. Does the Program certify that it registers athletes? Please attach sample athlete registration forms or note when they were previously submitted. Click [here](#) for form templates.

5.2. Did the Program submit its 2019 census data?

**6. Software.** \*\*Does the Program use Special Olympics software for accreditation, athlete, volunteer, and competition information management as provided and instructed by SOI? \*\* Answer yes to this question if your Program uses (1) the Online Census System and (2) the Online Accreditation System. Additional software will be added to this requirement in future years as it is developed and rolled out.

**7. Name and Logo.** Does the Program use the Special Olympics name and logo correctly? Please attach samples of the Program's current letterhead and business cards or note when they were previously submitted.

**8. Finances and Planning.**

8.1. Is the Program submitting its 2019 annual financial statements? Please attach the document. Financial statements for Programs with more than US\$100,000 in annual revenue must be audited by an independent auditor. If requesting a waiver from the audit requirement, please attach your request here with the unaudited financial statements.

8.2. Is the Program submitting its 2019 Adjusted Gross Revenue Form? Please attach the document.

8.3. Is the Program submitting its 2021 budget? Please attach the document or, if not yet complete/approved, note when it will be submitted.

8.4. Is the Program submitting its 2021 operational plan? Please attach the document or, if not yet complete/approved, note when it will be submitted.

**9. Accreditation Fees.** Has the Program paid all accreditation fees currently due? If the answer is "no," please contact SOI to arrange payment or discuss a payment plan. If a payment plan is currently in place, please include a note here.

**10. License Agreement.** Is the Program submitting its signed Accreditation License Agreement with this application? Please attach the completed and signed document.

**11. Contact Information.** Has the Program provided updated contact information for its office, Board Chair, Executive/National Director, and Sports Director on the Program Profile Page? Please click [here](#) to update contact information.

**12. Voluntary Questions.** The following questions are voluntary, and your answer will not impact the approval of your application.

**12.1. Program Quality Standards.** Has the Program conducted a self-assessment and identified areas for improvement using the Program Quality Standards?



- 12.2. **Board Training.** During the last 2 years, have the Board Chair and the majority of Board members undergone training relevant to their governance roles?

When you have answered all questions and inserted documents and notes where requested, please click the “submit” button. By clicking the “submit” button, you will notify SOI that your application is ready to be reviewed. You will receive an email notification when your application is approved or if further information is needed. You will continue to have access to your application if you need to update your information.

Thank you for your leadership in the Special Olympics movement!

## 2021 MID-CYCLE UPDATE PAGE FOR PROGRAMS ACCREDITED FOR 2020-2021

**[Note: Programs are expected to submit materials through the online accreditation system. To assist Programs reading translations of this guide in different languages, this page is the same as the “2021” tab online for Programs outside the United States accredited for 2020-2021.]**

### 2021

Welcome to your Special Olympics accreditation mid-cycle update page.

Please complete all of the following questions, attaching documents and inserting notes where requested. Each question response is saved when answered, allowing you to leave and return if not completing the application in a single session. If you have questions or comments for SOI, please insert a note or contact your SOI regional Organizational Development representative.

Thank you!

#### 1. Finance and Planning.

- 1.1. Is the Program submitting its 2019 annual financial statements? Please attach the document. Financial statements for Programs with more than US\$100,000 in annual revenue must be audited by an independent auditor. If requesting a waiver from the audit requirement, please attach your request here with the unaudited financial statements.
- 1.2. Is the Program submitting its 2019 Adjusted Gross Revenue Form? Please attach the document.
- 1.3. Is the Program submitting its 2021 budget? Please attach the document or, if not yet complete/approved, note when it will be submitted.
- 1.4. Is the Program submitting its 2021 operational plan? Please attach the document or, if not yet complete/approved, note when it will be submitted.

- 2. Contact Information.** Has the Program provided updated contact information for its office, Board Chair, Executive/National Director, and Sports Director on the Program Profile Page? Please click [here](#) to update contact information.

When you have answered all questions and inserted documents and notes where requested, please click the “submit” button. By clicking the “submit” button, you will notify SOI that your

mid-cycle update is ready to be reviewed. You will receive an email notification if further information is needed. You will continue to have access to your application and mid-cycle update page if you need to update your information.

Thank you for your leadership in the Special Olympics movement!

## GUIDE TO ACCREDITATION REQUIREMENTS

### **Requirement 1: Special Olympics Mission**

**Requirement.** The Program's bylaws/governing documents include the Special Olympics Mission Statement in accordance with General Rules Section 1.01.

**Purpose.** A Program's governing documents establish the Program's legal existence, describe its legal powers and set forth its operating procedures. Depending on the Program's legal form and national laws, its governing documents could consist of one or more of the following: Articles of Incorporation, Articles of Association, Constitution, and Trust Deed, Bylaws or a similar document that outlines the legal structure, purpose and governance of the Program. The inclusion of the Special Olympics Mission Statement in the governing documents ensures that the Program will be legally obligated to dedicate its assets and operations to Special Olympics activities.

**Mission Statement.** As set forth in General Rules Section 1.01: The mission of Special Olympics is 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 and friendship with their families, other Special Olympics athletes and the community.

**Compliance.** Each Program must attach to its accreditation application a copy of its current governing document(s) containing the Mission Statement in the same or substantially the same wording, or note when it was previously submitted.

The wording of a Program's governing documents is considered "**substantially the same**" as the Special Olympics Mission Statement if (1) the Mission Statement is accurately translated into a language other than English or (2) there are minor wording changes that do not materially change the meaning of the Mission Statement.

Programs that wish to use alternative terminology to the term "**intellectual disability**" due to legal requirements must address their request to SOI's Legal Department.

### **Requirement 2: Governing Board**

#### **Requirements.**

- **Board Composition.** The Program has a Board of Directors with management oversight and financial responsibility for the Program and at least seven members including an expert in intellectual disabilities, a sports expert, a finance or business expert, and a close family relation of a Special Olympics athlete in accordance with General Rules Section 5.02(c).
- **Athlete Leadership.** The Board of Directors includes at least one Special Olympics athlete in accordance with General Rules Section 5.02(c).
- **Board Rotation.** The Program's Board of Directors is subject to rotation of its members in accordance with General Rules Section 5.02(d).
- **Meetings.** The Board of Directors meets at least twice each calendar year.

**Purpose.** To be successful, a Special Olympics Program needs a strong Board of Directors with effective leadership, meeting frequently enough to exercise meaningful management and

including appropriate expertise and a range of perspectives for quality decisions. Regular rotation of Board membership facilitates fresh energy and ideas, supports fundraising through connections of new Board members, and signals openness and transparency.

**Board of Directors.** The accreditation requirements refer to the governing body with ultimate decision making authority for each Program as the “Board of Directors.” Governing bodies under different names, such as “Boards of Trustees,” “Boards of Governors,” and “Program Committees” (as defined by General Rules Section 10.01) also satisfy General Rules and accreditation requirements related to board governance. Board composition requirements are not met by Special Olympics athletes, experts, and family relations being members of Board or Program committees when they are not full voting members of the governing body with ultimate decision making authority for the Program.

**Expert in Intellectual Disabilities.** An expert in intellectual disabilities should have an advanced degree or substantial professional experience in a field related to intellectual disabilities, such as special education or developmental psychology.

**Sports Expert.** A sports expert should have an advanced degree or substantial professional experience in a field related to sports.

**Finance or Business Expert.** A finance or business expert should have an advanced degree, certification, or substantial professional experience in a field related to financial or business management.

**Close Family Relation.** A close family relation includes a parent, sibling, grandparent, or child of a current or former Special Olympics athlete.

**Athlete Leadership.** Each Board of Directors must include at least one current or former Special Olympics athlete. The Board should use the same criteria for choosing an athlete member as it would for choosing any other member, seeking candidates with motivation, commitment, skills and ability to contribute meaningfully, with appropriate support and training. Athlete members must have the same rights and privileges as other voting Board members, including full voting rights and the same terms as other members. Athletes should play a meaningful and integral role and should not be chosen only to satisfy this accreditation requirement. Programs are encouraged to make use of materials provided through the Special Olympics Athlete Leadership Program to make the most of athlete leadership. If a national law prohibits Board membership by a person with intellectual disabilities, the Program may request a compliance waiver. In such situations, the Program must find another way, with SOI’s approval, to comply with the intent of the requirement.

**Staff Members on the Board of Directors.** The accreditation requirements and General Rules do not prohibit Program staff from serving as voting members on the Program’s Board of Directors. As a best practice, however, Programs are encouraged to have Board and staff roles filled by different people. Having staff and board roles filled by different people decreases the likelihood and appearance of conflicts of interest. It also spreads opportunities, improves diversity, and decreases turnover risk if the roles are held by different people. For Programs that wish to have people in dual roles, it is good to have guidelines to clarify expectations. For example, Board members should abstain from being involved in decisions that would impact them personally as staff members, such as impacting their salary, benefits, or oversight. It should

also be clarified that Board and staff roles currently held by one person may be held by two people when the current person leaves one or both roles.

**Board Rotation.** Pursuant to General Rules Section 5.02(d), the governing documents of each Program are required to limit the terms of Board members to a maximum of 9 consecutive years. Following is an example of such a provision: "Term of Office. Directors who are elected by the Board shall serve three-year terms or until their earlier resignation, removal, or death. A director shall serve no more than nine consecutive years." For verification, SOI will review the Program's bylaws or governing documents attached under the first application question to ensure a Board rotation provision is included.

**Board Rotation Waiver.** Pursuant to General Rules Section 5.02(d), Programs requesting an exception to the nine-year limitation should submit a written request to their Regional President/Managing Director that includes (1) the name and years of service of the member(s) for whom the exception is requested, (2) the justification for the extension, and (3) the length of the requested extension. Please note that Section 5.02(d) prohibits waivers that would extend service beyond eighteen consecutive years or result in exceptions for more than 20 percent of the Board of Directors. Waivers to the Board rotation requirement must be recommended by the Regional President/Managing Director and approved by SOI's Chief Executive Officer. Regional Presidents are responsible for evaluating the merit of waiver requests in relation to the long-term success and growth of the requesting Program. Before seeking a Board rotation waiver, Programs are encouraged to consider having exemplary long-term Board members support the Program in other ways or step off the Board for a one-year period before returning to the Board.

**Board Meetings and Minutes.** A Program's Board of Directors is required to meet twice each year, but the application only requests minutes from one meeting during the current year and one meeting during the previous year.

### **Requirement 3: Executive/National Director and Sports Director**

**Requirement.** The Program has an Executive/National Director and a Sports Director in accordance with General Rules Section 5.02(e), who may be part-time or full-time, volunteer or paid, but who are not the same person and neither of whom is the Chair of the Board of Directors.

**Purpose.** Division of the roles of Executive/National Director, Sports Director, and Board Chair among three different people (1) promotes accountability, (2) prevents overburdening one person, and (3) leads to a wider breadth of experience, skills and ideas in the Program's leadership. This in turn leads to more effective governance and growth.

**Executive/National Director.** The Executive/National Director reports to the Board of Directors and is responsible for the Program's day-to-day operations and executes daily functions, such as: planning and executing Program goals, managing the Program's budget, hiring and supervising support staff, planning administrative functions, developing relationships with affiliated sports organizations, and ensuring that all goals are met.

**Sports Director.** The Sports Director reports to the Executive/National Director and plans and runs the Program's sports program, including creating and implementing the Program's sports

training plan, developing new sports initiatives, managing and coordinating the Program's regional and world teams, and planning the Program's Summer and/or Winter Games.

#### **Requirement 4: Special Olympics Sports**

**Requirement.** The Program provides quality training and competition in two or more Special Olympics Sports in accordance with General Rules Sections 3.04 and 3.05. The Program provides Unified Sports opportunities in accordance with General Rules Section 3.11.

**Purpose.** Special Olympics sports are at the heart of our mission. Programs should provide training and competitions consistent with the requirements of the General Rules that are designed to create meaningful and robust sports opportunities for Special Olympics athletes.

**Official Special Olympics Sports.** See General Rules Section 3.04(b) for lists of Official Special Olympics Sports.

**Unified Sports.** Unified Sports is a program that combines Special Olympics athletes and athletes without intellectual disabilities (partners) on sports teams for training and competition. The Unified Sports accreditation requirement is satisfied by a Program providing Unified Sports opportunities at any level in at least one sport.

#### **Requirement 5: Registered Athletes**

**Requirement.** The Program registers Special Olympics athletes in accordance with General Rules Section 2.02 and submits athlete census data to SOI as required in accordance with General Rules Section 2.06.

**Purpose.** Athlete registration is necessary for health, legal and data collection purposes. Census information is important for program evaluation, planning, and marketing.

**Forms.** As part of registration, Programs are required to collect forms for each athlete pursuant to General Rules Section 2.02. For accreditation, Programs are required to attach their current registration forms or note when they were submitted with a previous accreditation application. If any revisions to the forms have been made since previously submitted, the current forms must be attached. Instructions are available at <https://resources.specialolympics.org/Athlete-Registration-Forms.aspx>.

#### **Requirement 6: Software**

**Requirement.** The Program uses Special Olympics software for accreditation, athlete, volunteer, and competition information management as provided and instructed by SOI.

**Implementation Period.** Programs should answer this application question based on their current circumstances, and accreditation will not be withheld as a result of answering "no" during the implementation period.

**Software.** Programs applying for 2021-2022 accreditation during the fall of 2020 should answer "yes" to the software question on the accreditation application if they use (1) the online census

system and (2) the online accreditation system. In future years, additional software will be added to this list as it is developed and rolled out to Programs. Expectations under this requirement take into consideration local circumstances, including technical capability, software readiness and technical support access.

### **Requirement 7: Name and Logo**

**Requirement.** The Program’s name is “Special Olympics [name of jurisdiction]” and the Program’s logo is the Special Olympics logo plus name of jurisdiction in accordance with General Rules Sections 5.03 and 5.07.

**Purpose.** Uniformity in Program names and logo usage consistent with the Special Olympics Brand Guidelines is important for public awareness.

**Name.** A Program may translate the Special Olympics name into its national language for use within its jurisdiction. Outside of that jurisdiction, the Program name shall be stated in English.

**Logo.** A Program may use the Special Olympics logo only when it is displayed in conjunction with or juxtaposed with the name of the Program. Programs and Sub-Programs may not:

- Modify or add to the official logo,
- Use any logo not authorized by SOI, or
- Register any Special Olympics names or trademarks.

**Letterhead and Business Cards.** Programs are required to attach their current letterheads and business cards or note when they were submitted with a previous application. If any revisions have been made since previously submitted, the current materials must be attached. If a Program does not use business cards, it is not required to create them solely for the accreditation application. If your Program needs assistance creating or updating branded materials, please contact your regional Organizational Development representative.

### **Requirement 8: Finances and Planning**

#### **Requirements.**

- **Budget and Financial Statements.** The Program has an annual budget and annual financial statements in accordance with General Rules Sections 8.03 through 8.05 and has provided a financial report (either an IRS Form 990 if the Program is a U.S. Program or an Adjusted Gross Revenue Form if the Program is outside of the United States) for the year prior to the year in which the application is due.
- **Operational Plan.** The Program has developed a multi-year plan aligned with SOI’s strategic plan and priorities and prepared a written operational plan in accordance with General Rules Section 8.03(a).

**Purpose.** Proper financial controls are essential for every Special Olympics Program to assure that Program assets are used solely to support the Special Olympics mission.

**Financial Statements.** Annual financial statements should include:

- Statement of all revenue from the most recently completed fiscal year,
- Statement of all expenses from the most recently completed fiscal year, and



- Balance Sheet showing the Program's assets and liabilities as of the last day of the most recently completed fiscal year.

**Financial Audit.** Pursuant to General Rules Section 8.05(a), each Accredited Program's annual financial statement shall be audited by an independent certified public accountant, or by an independent accounting professional in the Program's jurisdiction with recognition in the profession. Please see the Accreditation Fees Policy for guidelines and instructions regarding waivers from the audit requirement.

**Fiscal Year.** Pursuant to General Rules Section 8.02, the fiscal year recognized by all Accredited Programs and Sub-Programs shall be the calendar year, unless otherwise approved in advance by SOI. If your Program has a different fiscal year that affects the submission of budgets and financial statements, please contact your regional Organizational Development representative to determine an appropriate plan for submission.

**IRS Form 990.** Programs in the United States are required annually to submit a copy of their filed IRS Form 990. The 2019 Form 990 is due to SOI 16 November 2020 and will be used to calculate the Program's 2021 accreditation fee.

**Adjusted Gross Revenue Form.** Programs outside the United States are required to submit an AGR Form annually. The 2019 AGR Form will be used to calculate the Program's 2021 accreditation fee.

**Financial Records.** Programs should maintain records supporting all financial information submitted to SOI. Upon request, SOI may inspect the Program's financial records or request an independent audit to confirm the information reported.

**Annual Budget.** An annual budget is a statement of planned revenue and expenses for an entire fiscal year and is a planning tool that every Program must have in order to effectively manage its finances and assets. If needed, please contact your regional Organizational Development representative for a budget template. If your Program's budget is not yet complete or approved at the time you submit your accreditation application, please note when it will be submitted. Approval of your application will not be delayed as a result of the budget if all other items are timely submitted and provided it is submitted by 31 December of the year prior to which the budget applies. This is in accordance with General Rules Section 8.03(b), which requires that the Program's budget be approved by the Program's Board of Directors and submitted to SOI before the start of the year for which it was developed.

**Operational Plan.** In accordance with General Rules Section 8.03(a), Programs are required to develop a written operational plan for each fiscal year, setting forth comprehensive goals for the Program's sports, programmatic, administrative and fundraising goals, and its plans for growth. If needed, please contact your regional Organizational Development representative for an operational plan template. If your Program's operational plan is not yet complete or approved at the time you submit your accreditation application, please note when it will be submitted. Approval of your application will not be delayed as a result of the operational plan if all other items are timely submitted and provided it is submitted by 31 December of the year prior to which the plan applies. This is in accordance with General Rules Section 8.03(b) which requires

that the Program's operational plan be approved by the Program's Board of Directors and submitted to SOI before the start of the year for which it was developed.

### **Requirement 9: Accreditation Fees**

**Requirement.** The Program pays its accreditation fees when due or makes other arrangements agreed to by SOI in accordance with General Rules Section 8.08.

**Policy.** Please see the Accreditation Fees Policy, which includes fee formulas, the invoicing and payment schedule, payment instructions, and other details.

### **Requirement 10: License Agreement**

**Requirement.** The Program has executed a current Special Olympics Accreditation License Agreement in accordance with General Rules Section 6.09.

**Purpose.** The Special Olympics Accreditation License Agreement gives a Program the legal authority to operate as a Special Olympics Program and to use the Special Olympics name and logo for specified purposes, all of which is conditioned on the Program's compliance with the accreditation requirements and General Rules.

### **Voluntary Questions**

**Questions.** The following questions are voluntary, and your answer will not impact the approval of your application.

- 12.1 **Program Quality Standards.** Has the Program conducted a self-assessment and identified areas for improvement using the Program Quality Standards?
- 12.2 **Board Training.** During the last 2 years, have the Board Chair and the majority of Board members undergone training relevant to their governance roles?

**Purpose.** The voluntary questions are included in order to collect information and emphasize importance of certain non-required opportunities.

**Program Quality Standards.** Answer "yes" to this question if the Program's Board of Directors and/or staff has done a self-assessment and identified areas for improvement using the Program Quality Standards. For more information on how to do an assessment, please contact your regional Organizational Development representative.

**Board Training.** Board training opportunities will continue to be offered by SOI, and Programs may also seek other training opportunities locally. To answer "yes" to this question, training can be done as a group or separately with trainings tailored to specific members' training needs (for example, finance training for the Board's treasurer, athlete leadership training for athletes on the Board). For assistance in identifying Board training opportunities and resources, please contact your regional Organizational Development representative.

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