



# Special Olympics

## 2011-2015 Strategic Plan

*Version 2.0*

*May 2010*

# Table of Contents

- Welcome Letter..... 3**
- Planning Process Overview ..... 4**
- Strategic Assessment..... 7**
- Strategic Framework ..... 15**
  - Special Olympics Foundation ..... 17**
  - Advance Sports & Competitions ..... 18**
  - Build Communities ..... 22**
  - Connect Fans & Funds ..... 26**
  - Define Movement Leadership..... 34**
  - Establish Sustainable Capabilities ..... 37**
- Next Steps..... 40**

## WELCOME LETTER

---

Dear Fellow Special Olympics Leaders:

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

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

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

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

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

Very Sincerely,



Timothy P. Shriver  
Chairman & CEO  
Special Olympics International



J. Brady Lum  
President & COO  
Special Olympics International

## PLANNING PROCESS OVERVIEW

---

### What are we trying to achieve?

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

- ***We are drafting a Special Olympics Movement-wide strategic plan, not an SOI plan.***  
It is important to stress upfront that we are developing a shared strategy for the global organization. To focus solely on SOI-specific goals represents a common misperception that is so important to correct whenever we hear it. This entire process has been designed to fundamentally change not only the way we share input and insights with each other but also the way in which we work together to implement our Mission. To do so, we can't just talk; we have to get serious about mutual goals, aspirations, visions, and strategies.
- ***We need to see ourselves as creators, not simply editors.***  
The easiest thing to do is to take someone else's work and comment on it. The much more difficult task in any endeavor is creating something from scratch, being vulnerable to having others tear it apart, and owning the outcome. That is our challenge now – to create together. We firmly believe that when we approach a task as creators, we bring our whole selves into the conversation. We want the best ideas, the best thinking.
- ***The June Global Congress is not the "finish line" for the plan.***  
Morocco is a turning point, not the end. There will be many subsequent steps that will involve Board review and the creation of Regional and Program level plans. We will know we have been successful when Program level plans have embedded many of the concepts and strategies introduced. And we will really know success when they are executed in ways that engage and support our athletes, families, and volunteers at a local level. All that notwithstanding, the Global Congress remains a critical milestone. The outcomes for the Congress are outlined separately and real strategic choices will be made.
- ***We all have unique and mutually supportive roles in this planning process***  
SOI Staff, Program Leaders, Key Constituents and Partners have separate but mutually connected roles in the plan and in the execution. We respect all in the process.

## Where are we in the strategic planning process?

### ***Phase I: Input and Assessment – {Completed}***

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

### ***Phase II: Emerging Strategic Framework -- {Completed}***

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

### ***Phase III: Content Drafts – {Completed}***

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

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

### ***Phase IV: Global Alignment***

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

### ***Phase V: Regional & Program Plans***

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

***Phase VI: Plan Approval and Communication***

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

**How we are organized to get the work done?**

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

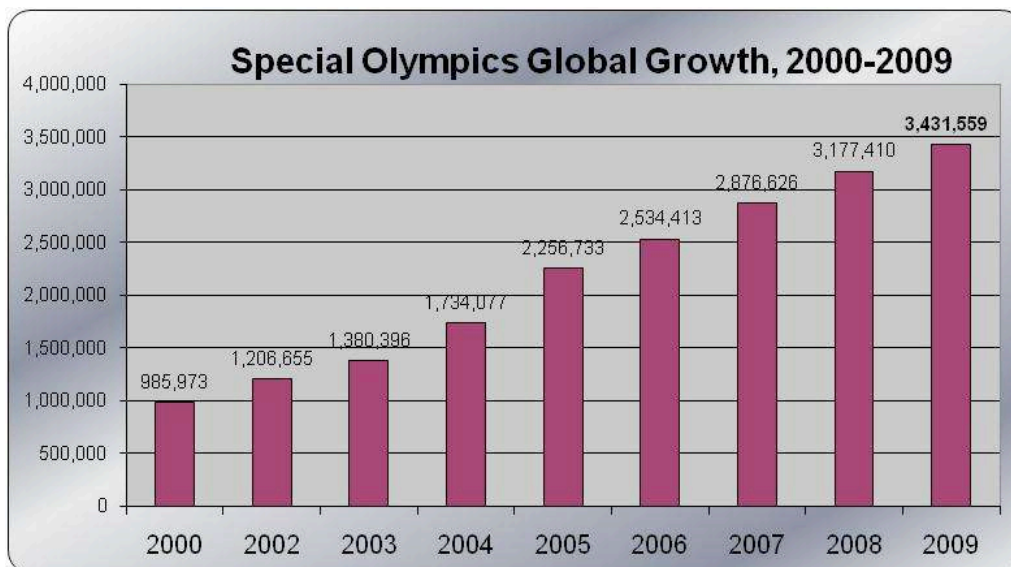
- **SOI Board:** This SOI International Board is the ultimate governing body for our Movement. We have involved many Board members in the process and have geared our process for final Board ratification and approval November 2010.
- **Strategic Planning Steering Committee:** This group was established to help steward and guide the creation of the strategic plan. It consists of a diverse group of representatives from across the Movement.
- **Strategic Planning Working Groups:** We established five working groups to date to lead the plan development for each pillar of our emerging strategic framework. Each of these working groups is chaired by a Program leader and then staffed by a SOI liaison.
- **Regional Advisory Groups and Leadership Teams:** We have encouraged each of the Advisory Councils and other leadership teams to become actively involved in the process. We see these groups as critical teams for discussion and debate. We also see these groups as critical links to truly operationalize the plans.

## STRATEGIC ASSESSMENT

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

**Make no mistake: the Special Olympics Movement remains strong!**

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



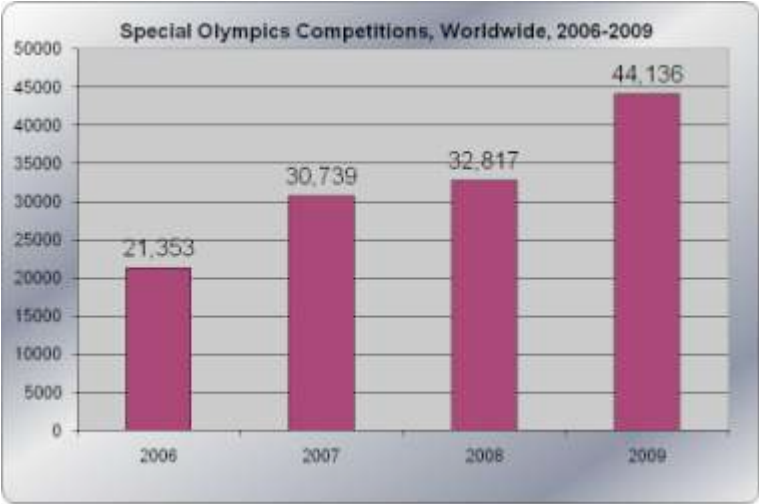
We further solidified our global reach, rapidly expanding in high growth areas such as Asia Pacific (18% growth) and East Asia (10% growth). However, we also saw very solid growth in places like North America (8% growth).

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

- The ratio of male to female athletes has decreased to 1.6-to-1 signaling a trend toward greater engagement of female athletes.
- The number of children ages 2-7, who train according to Special Olympics rules more than doubled in 2009 (to nearly 57,000 individuals) following a 50% jump in the previous year.

We continue to sharpen our focus on delivering year-round competition opportunities. In 2009, Special Olympics offered athletes 12,000 more competitions than the previous year and

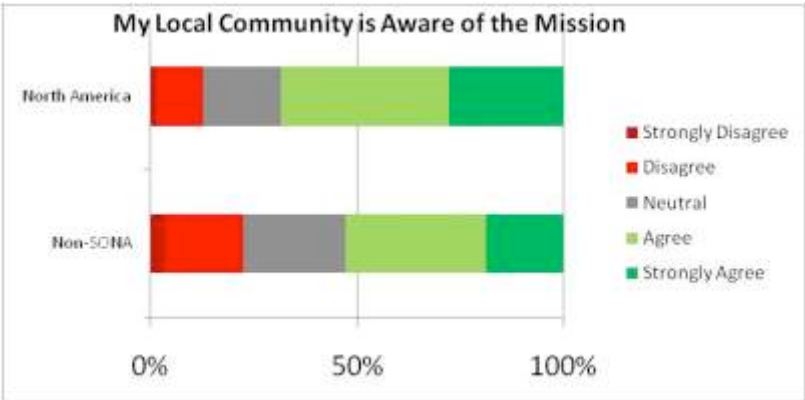
increased the overall number of competitions to 44,136 – equal to 121 competitions on average being staged every day around the world.



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

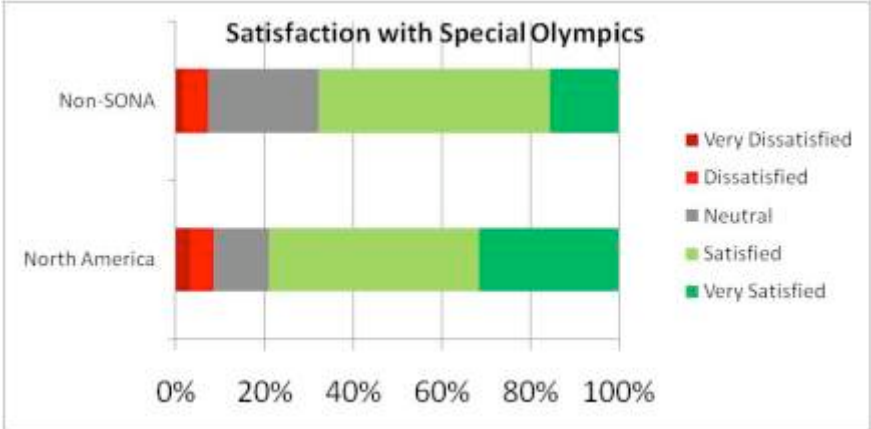
The Special Olympics Healthy Athletes program thrives in more than 100 countries, led by more than 1,250 volunteer clinical directors. Each year more than 165,000 athletes receive free health screenings, including eye glasses, hearing aids, clinical tests/exams, education, preventive supplies and referrals.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

Our global Mission Effectiveness Survey reminded us that we’ve made great progress in building awareness of our mission around the globe. However, the level of that awareness varies greatly from region to region.



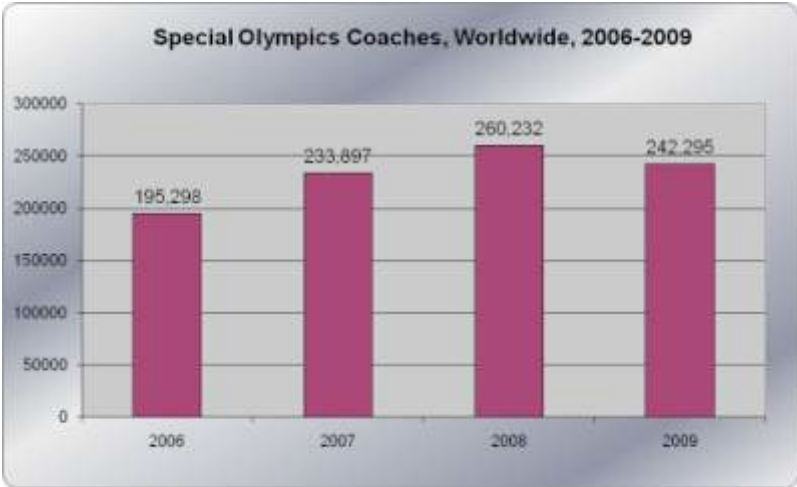


Members of the Special Olympics community are highly satisfied with the Movement itself and are extremely excited about the future. Over 70% of respondents to our worldwide survey are highly satisfied with their local Program, which means we’re doing a good job at the grass-roots level. And while we obviously strive for 100% satisfaction, we are encouraged that so many people’s lives are being positively impacted by the Special Olympics Movement. We also see significant energy aligned behind the Movement going forward as survey respondents almost unanimously believe that Special Olympics can and should continue to grow.



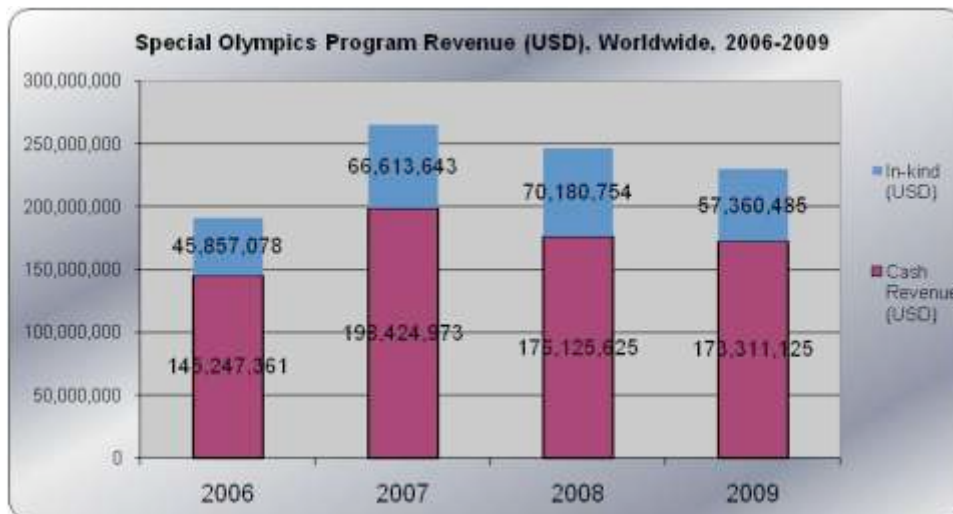
However, our Movement has room to improve

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



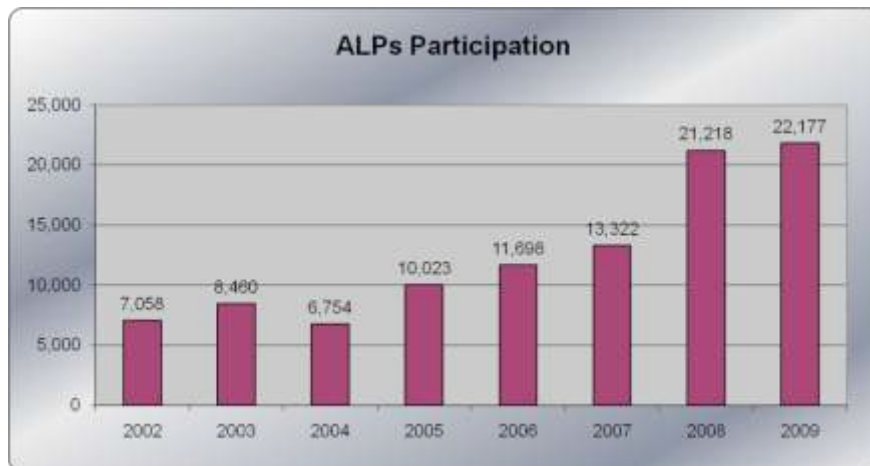
At the end of 2009, Movement-wide revenue raised by accredited Programs amounted to more than 173 million USD in cash donations and more than 57 million USD in in-kind donations. U.S.-

based Programs continued to generate the vast majority of the Movement’s cash revenue, contributing over 80 percent of the total. Overall cash and in-kind donations have not grown in proportion to the growth of new Athletes.



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

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



Our Mission Effectiveness Survey revealed some additional insights and opportunities:

- There is a desire for clearer guidance regarding what activities we're going to focus on going forward, and their relationship to our Mission.
- Quality is top of mind for our leaders around the world, but there is no common agreement on what quality means and how it should be measured.
- There is a need to create additional leadership opportunities for our Athletes; only half of the survey respondents believe athletes have sufficient leadership opportunities.
- Finally, we were reminded that the World Games require a significant amount of effort from people across the Movement, and that as leaders of the organization we need to do a better job of providing education and support around our Games core value proposition.

#### The Special Olympics Movement has a number of strategic imperatives

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

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

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

What will be different for our Movement going forward is our focus on quality. We hope that this shift in emphasis comes as no surprise to people across the Movement, and we believe it won't; quality was universally cited as a key issue for Special Olympics in our worldwide survey and is clearly an issue we need to address. We believe the Movement is aligned around the quality idea and is very much ready to embrace it. The hard work will be figuring out exactly how we should measure quality. We need to create a common definition of quality, identify the right set of metrics to track it, and determine how, if at all, that definition should vary across programs around the world.

- **Sustainability:** We must focus on generating revenue. As noted above, we will need to increase funding by almost 70% in the coming years to maintain baseline per athlete levels. We must fund our work with a revenue model that is sustainable for both accredited programs and the Movement overall. A Movement united in operating revenue will be a sustainable Movement.
- **Worldwide Awareness:** The Special Olympics Movement remains little known in many parts of the world and misunderstood in many others. Our survey reminded us that the power of the Special Olympics name varies around the world, and that the Movement could benefit from better visibility. We must brand (or rebrand) our Movement to communicate our powerful value propositions and attract millions of new fans.
- **Leadership:** We are dangerously dependent on a small number of dedicated and charismatic leaders around the world -- athlete leaders, family leaders, volunteer leaders, and Program leaders. Only half of our survey respondents believe athletes have sufficient leadership opportunities. Our Program leaders are being taxed beyond any reasonable measure. Clearly, we must find a way to recruit, retain, and develop a significantly expanded team of the highest quality leadership to champion our Movement in the future.
- **Flexibility:** We have not yet fully succeeded in adapting our business model to the realities of the developing world. We must ensure all programs are given the opportunity to succeed, and create policies and procedures to support this opportunity.
- **Organizational Unity:** Our organizational culture, while boasting a world class unity around our Mission, is often a source of fragmentation and misunderstanding. We must become one team with a common vision and a common set of goals.

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

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

- Athlete experience related questions
  - What are the best measures of growth? How can we develop state of the art standards for achieving growth? What are the underlying elements of this growth?
  - What are the best measures of quality? How do we define standards of excellence in competitions and sports training? Frequency of competition? Fairness and dignity of games?

- Should our Athlete counts continue to grow? At what pace? Should there be a numeric and/or growth rate target? By Region? By Program?
- What new models can we implement to ensure Special Olympics leadership in sports, coaching excellence and athlete satisfaction? How do we ensure that we are taken “seriously” in sports?
- Community-building related questions
  - How important is attitude change and action at the community level, as defined geographically and socially?
  - What are the measures of growth and quality in our core community programs – ALPS, families, volunteers, youth engagement, and health screenings?
  - How does advocacy fit within the mission? What should be the boundaries for Special Olympics advocacy activities? What is the right balance of our policy and advocacy work and efforts, both in the US and internationally?
  - How can we continue to enhance the reach and impact of our work in health and fitness and strengthen our partnerships? How does this work intersect with our sports programs?
- Fundraising and Marketing related questions
  - How can we create a more “barrier-free” fundraising system? What holds us back from stronger revenue growth? What types of campaigns should we collaborate on as a Movement?
  - How do we define fundraising success – globally, regionally, Program level?
  - How should Special Olympics globally, regionally and at Program level diversify its funding sources to ensure long-term viability?
  - How can we ensure that our 44,000 events are conducted in ways that strengthen our marketing messages and fundraising appeal?
- Special Olympics leadership related questions
  - How do we define overall success within the Movement? What does a balanced scorecard look like for our Movement?
  - How can these measures serve as the foundation for establishing a defined recognition and accreditation standards for SO Program excellence?
  - How can we use General Rules and Accreditation Standards to define and drive Program Quality and Sustainability via a new set of Accreditation Standards of Excellence? What changes to our General Rules are recommended?
  - How do we ensure that SO recruits, trains and retains the best talent in the world while creating clear centers of knowledge? How do we ensure training, succession, and tools, to foster stronger leadership and sustainability across our Programs?
- Organizational capabilities related questions

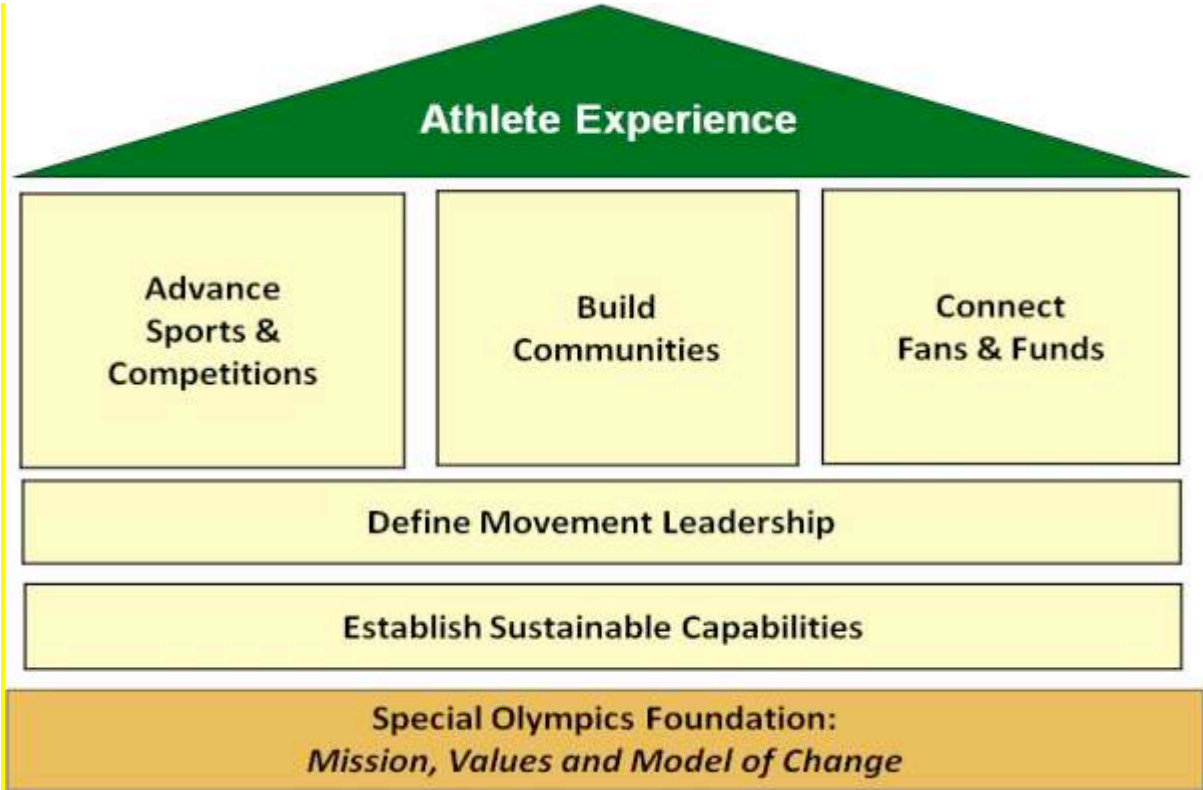
- What are the defining elements of our culture and corresponding values needed to achieve the vision and objectives of our new plan?
- What processes, people and systems do we need across our Movement to ensure better effectiveness and efficiencies?
- How should our business model change to support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

Many of these questions are addressed in the plan that follows. Others require continued analysis and discussion.

## SPECIAL OLYMPICS STRATEGIC FRAMEWORK

---

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



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

- Athlete Experience: We celebrate now and always that our Athletes are at the center of our work and the heart of our Movement.
- Special Olympics Foundation: We also celebrate and reaffirm the enduring and guiding nature of our current Mission while acknowledging the need to better articulate our unique model of change, value proposition, and scope of involvement.

At the core of this framework are five “pillars” of work that ultimately link together to provide a holistic, consistent and quality experience for Special Olympics athletes.

There are three Mission-Driving Pillars.

- **Advance Sports and Competitions:** Our Athletes are the center of our work. Special Olympics should be recognized as a global leader in sports, providing excellence in coaching, training, and competition management at all levels, offering each athlete the opportunity to develop to their personal best through the activation of sport and athlete development models.
- **Build Communities:** The transformative power of Special Olympics comes when we build powerful communities of change around our Athletes, creating demonstrable impact at multiple levels of society. Healthy Athletes, Families Program, ALPs, and schools and youth initiatives continue to position our Movement as being a change agent for whole communities – for all of us – not just as a service delivery program for a small population.
- **Connect Fans & Funds:** Special Olympics must become a more effective, sustainable and innovative marketing and fundraising organization. We must facilitate thoughtful, committed and diversified engagements with individuals, corporations, foundations, civic and service organizations, and government agencies from the local to the global levels aiming to increase operational funding and support for Special Olympics Movement-wide. We have an opportunity to translate communications into strategic storytelling, passive spectating into fan engagement, and community support into real collaborative and breakthrough fundraising.

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

- **Define Movement Leadership:** We must understand what makes us successful, work together to execute a common agenda, leverage the unique skills and gifts of each accredited Program, set standards of excellence, and develop leaders, effective systems and tools to “raise the bar” at all levels of the Movement. This is the definition of alignment.
- **Establish Sustainable Capabilities:** Special Olympics must have the core systems, infrastructure and processes to best support the growth and expansion of the global Movement and deliver measurable impact over time. It is critical that Special Olympics focus is not just what we do, but how we get it done. We have to acknowledge that rapid growth must be matched by quality in service and support.

What follows is an explanation of each of the parts of our Framework.



## SPECIAL OLYMPICS FOUNDATION

---

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

### Our origins

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

### Our mission

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

### Where the mission leads

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

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

We are working to establish a new paradigm and reposition ourselves and our work from:

- Once to Daily
- Sports to Sports Community
- Event to Movement
- Them to Us
- Nice to Important
- Service culture to Empowering culture
- Giving to Transforming
- Pity to Acceptance

This section will be outlined further at the Global Congress and in the subsequent Plan drafts.

## ADVANCE 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, offering each athlete the opportunity to develop to their personal best through the activation of an enhanced athlete and coach model.

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

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

### ***Current Situation Assessment***

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

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

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

### ***Strategies and Targets***

#### Strategy #1: Quality training

It is crucial that athletes are provided with the right types of quality training at the applicable stage in an athlete's development and performance objectives. Training will differ at all stages of an athlete's sport development and the technical expertise that is needed based on the priorities required for each stage especially for those athletes advancing to higher levels.

- Every athlete is offered a minimum of two training opportunities per week with every training opportunity being at least 1 – 1 ½ hours in duration for a minimum of 12 weeks per sport (with consideration for parameters of each sport i.e. for winter sports with shorter cycles).
- At least 80% of Special Olympics athletes train and compete in venues that are equal in quality to facilities applicable to their level of training (i.e. offered to the secondary school students; by sport governing bodies; etc.).
- Increase, by 20%, the number of Special Olympics athletes whose performance and progress is tracked by;
  - Participating in a standardized fitness test 2 – 3 times in a program year to establish a benchmark to assess the quality of training.
  - Utilizing sport specific measurement tools.
- Grow, by a minimum of 8-10% annually on average, the number of Special Olympics athletes registered in Programs worldwide.

#### Strategy #2: Quality competition

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

- Every athlete has an opportunity to participate in several Special Olympics competitions per sport per season.
- Selection of athletes at the Program level and above is a transparent, documented process that is justifiable to athletes based on athletic performance at a sanctioned qualifying event.
- Athletes competing at Program level and above have been educated in the rules and have been trained to a level of competency to compete in their sport at that appropriate level.
- Competitions at Program level and above be conducted to Sport Governing Bodies standards (Program, Regional, National or International) and that minimum standard for sport specific competition volunteers (i.e. table officials in swimming) be developed for Special Olympics competitions and these sport specific competition volunteers be trained to that minimum standard (Program, Regional, National, or World level).

Strategy #3: Coaching excellence

Excellence forms the cornerstone of a coach's philosophy and Special Olympics will continue to develop resources to be a leader in coach education by partnering with applicable agencies to provide the highest level and most current technical knowledge.

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

Strategy #4: Athlete Development Model

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

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

- Provide materials and tools to help coaches select the best and most appropriate sport for each athlete.

Strategy #5: Unified Sports

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

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

## BUILD COMMUNITIES

---

### ***Vision 2015***

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

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

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

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

### ***Current Situation Assessment***

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

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

Special Olympics family members represent a diverse group whose interest in and support of the Movement ranges from very enthusiastic to non-existent. Currently, family leadership opportunities are executed and delivered sporadically because of varying conditions at the Program and sub-Program levels, and family services and support mechanisms exist at the local

level without a comprehensive global system. We do not offer a clear range of family engagement opportunities and support, which further compounds the problem.

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

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

### ***Strategies and Targets***

#### **Strategy #1: Enable Athlete leadership**

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

- Ensure that 10% of all Special Olympics athletes are provided Athlete Leadership opportunities that will directly improve their employability and daily living skills.

- Guarantee that in every national Program, every Board of Directors includes at least one athlete as a permanent Board member, and that every office include at least one Athlete employee.
- Develop global standards for participation of athletes on governance structures and ensure at least 90% compliance with those standards.
- Grow the reach of the Young Athletes Program by 100% by 2015.

### Strategy #2: Empower Families

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

- 1,000 family members will be recruited and trained as active community builders
- Develop global standards for participation of family members on governance structures and ensure at least 90% compliance with those standards.
- Develop a framework for family engagement which is replicable at a Program level and includes incentives for active participation and leadership.

### Strategy #3: Unify Schools and Communities

Provide consistent opportunities for young people with and without intellectual disabilities to engage in Unified Sports Young Athletes, cheer teams, volunteerism, and leadership development activities worldwide.

- Special Olympics will increase the number of youth aged 8-22 serving as Unified partners, volunteers, advocates and fans to match that of athletes within this age group by 2015
- All Boards of Directors will include a pair of young leaders to champion the involvement of youth in the Program and in the Movement
- SO will retain at least 50% of youth registered as volunteers or participants in projects, events and/or volunteer work at all levels of the organization.
- Social media and popular culture campaigns will register 1 million youth fans by 2015.



Strategy #4: Improve Athlete health and well-being

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

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

## CONNECT FANS AND FUNDS

---

### ***Vision 2015***

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

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

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

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

### ***Current Situation Assessment***

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

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

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

## ***Strategies and Targets***

### **Strategy #1: Build new sources of revenue**

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

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

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

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

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

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

While it is not the intention to make the campaign only US-focused, the reality of deploying a call to action campaign in 170 countries is daunting given language, cultural, legal and organizational issues. For this reason, we should develop marketing assets within the call to action campaign that can be deployed strategically and adapted to different circumstances around the world. For example, in many countries, brand

awareness for Special Olympics could be the most important measurable goal of the campaign and elements of the call to action campaign could be used for that objective. Success in this campaign should be measured in both fundraising and in building a new class of on-line donors that we can continue to engage for support across many dimensions.

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

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

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

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

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

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

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

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

With the cultural diversity of our Movement, the specific form, content, and delivery of the training will need to be customized, based on the unique needs of each region and Program. The infrastructure for this fundraising training, tools, and resources will be

developed by headquarters and it will rely not only on expertise of external resources but on the best practices of our current Programs and leaders.

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

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

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

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

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

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

- *Increase major gifts from individuals by 500% annually by the end of 2015 through the deployment of an integrated campaign.*

**2.3 Establish revenue diversification standards and goals and provide programs with shared knowledge and best practices as they seek to broaden their revenue sources.**

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

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

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

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

- *Increase utilization of the Torch Run outside North America to the level that it contributes at least 50% of the funding level raised inside the United States.*

## **2.5 Strengthen the funding model for World and Regional games to deliver more revenue for program growth.**

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

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

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

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

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

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

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

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

We can build a web and mobile phone community that brings SO fans and athletes together 365 days a year to share their photos and videos, their stories, challenges and accomplishments. With this site, everyone around the globe can upload their stories,

pictures, videos to one place. They can be shared with everyone to tell our story...the day to day images and videos of people participating in SO at 38,000 events a year.

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

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

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

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

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

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

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

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

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

Special Olympics represents a highly decentralized, grassroots organization that shares a common brand. In fact, the primary linkage between our diverse programs is a shared mission and the expression of that mission in the brand works and images we all use in



common. Understanding what binds us together is vital to maintaining a successful brand and even more important to grow our resources and relevance in the communities in which we work.

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

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

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

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

## DEFINE MOVEMENT LEADERSHIP

---

### ***Vision 2015***

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

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

### ***Strategies and Targets***

#### Strategy #1: Develop leadership strength and depth

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

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

#### Strategy #2: Build a Pathway to Program Excellence

Programs require direction and specific assistance if they are to develop rapidly and contribute to meeting the Movement’s strategic goals. Special Olympics will develop and implement a defined pathway of Program development that will guide Programs at all levels in their

evolution. Performance management will evolve over time to include a larger variety and depth of parameters. We will encourage comparison of Program performance to promote high levels of achievement, Movement alignment, partnerships, and learning. When we compare performance we will take into account Program-specific resources, challenges, and opportunities, but also recognize that even those Programs with the least resources and greatest challenges can be the best in the world in aspects of our work.

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

### Strategy #3: Recognize and Reward excellence

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

Recognition programs already exist in many Programs. We want to continue to leverage, and where appropriate, scale and spread those good ideas. We also see a gap in opportunities for better and more coordinated regional and global recognition efforts.

- Programs: Capture evidence of recognition programs at all levels of the Movement for the purpose of sharing them later.
- Global: Establish a global recognition program.
- Evaluate opportunities and criteria to channel grant monies towards Programs that demonstrate progress and excellence.

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

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

- Upgrade the Accreditation Standards to incorporate key aspects of the 2011-15 Strategic Plan and to reflect increasing Program maturity.
- Create and maintain document-based, web-based, and digital based General Rules and Accreditation Standards training programs for athletes, SOI staff, for Programs, and for GOCs.
- Consider specific, periodic General Rules and Accreditation training and certification requirements for athletes and for SOI, Program, and GOC staffs.
- Include General Rules training certification as an Accreditation Standard.
- Generate commitment from stakeholders on the benefits of the General Rules and Accreditation Standards for the Movement.
- Coordinate training opportunities to coincide with existing meetings and events (including Regional business meetings, orientation events, and the circulation of electronic newsletters).
- Build competency in General Rules knowledge and Accreditation Standards among leadership, staff and other stakeholders.

## ESTABLISH SUSTAINABLE CAPABILITIES

---

### **Vision 2015**

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

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

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

### **Strategies and Targets**

#### Strategy #1: Establish a Global Set of Organizational Values that Define our Culture

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

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

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

- **People Empowerment:** Positioning and empowering athletes to be contributing and respected members of Special Olympics and society, and supporting the Special Olympics Community (athletes, families, staff, volunteers, and advocates) to achieve the mission through experiences, relationships, training, and encouragement.

- **Inclusion and Respect** : Welcoming and including all; valuing talents, views and unique cultural perspectives of the Special Olympics Community and providing respectful environments and personal and organizational models for everyone in the Movement, whether on the playing field, in offices, or on-line.
- **Excellence**: Recognizing and reinforcing the intrinsic rewards of sport and related achievements by all members of the Special Olympics Community and pursuing excellence on an individual and organizational level.
- **Valuing Contributions and Innovation**: Demonstrating that people and their contributions are the most critical resources in achieving the Special Olympics mission and encouraging bold actions to achieve the improbable.
- **Unity and Integrity**: Striving for unity throughout the Movement that incorporates integrity of action as a hallmark of good business and ethical corporate citizenship.
- **Sportsmanship with Joy**: Living of the “Athlete Oath” by all in the spirit of genuine, friendly and fair competition.

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

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

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

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

- Ensure global, uniform compliance with the accreditation and program development requirements to generate consistent multi-year parameters for analysis and evaluation of Movement-wide development.

- Develop quality, growth and effectiveness criteria for all levels of the organization and base our investments and global decision-making on these parameters.
- Ensure Movement-wide value of the Research & Evaluation efforts through geographic diversity of study sites/investigators and communicating them via an increased range of channels and mechanisms.

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

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

- Explore actively opportunities for scale and synergy through **targeted shared services** applications.
- Establish a regional and/or Program-level **enter of excellence** for each strategic pillar and build a global network for knowledge sharing and idea generation.
- Create a best-in-class **knowledge management system** that will accelerate the idea generation and adoption curve for Programs.
- Create a robust **internal communications process** and protocol to share information and actions as a Movement.

## NEXT STEPS

---

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

- **Pre-Congress (May-early June):** We finalize the Input and Development phase of the Plan. The current draft of the Strategic Plan will guide our discussions in Marrakech and feedback is welcome in advance of the event and during the Congress around goals, objectives, targets, rationales and descriptions for each of the “pillars” of work. Multiple opportunities for engagement, including discussion logs and email, remain of relevance. We continue to share all information with Chairs and members of the corresponding Strategic Planning Working Groups as they prepare for presentations and debates in Morocco.
- **At the Global Congress (June):** Our Global Congress in Morocco will serve as the key milestone for sharing key plan inputs and, in many instances, reaching decisions on key strategic recommendations regarding our global Movement. We anticipate that as a result of deliberations at the Congress we will be able to formulate positions and recommendations that will be shared back to the SOI Board of Directors.
- **Post-Congress (July-November):** Our priority here is building operational details and plans across Regions and Programs to help make the plans real. Special Olympics is investing in developing sufficient capabilities to work with all Regional offices and Programs around the world to translate the language of the Movement-wide Strategic Plan into actionable Regional priorities and Program-specific plans that will collectively constitute our five-year roadmap.
  - Official summary of the Global Congress deliberations and decisions will be available within 30 days of the end of the Congress.
  - Leaders from around the world will be able to provide additional comments and recommendation with respect to strategies and targets via on-line forums and finalize the feedback process by August 2010.
  - Regional components of the Strategic Plan will have to be developed and available for discussion by early October.
- **November 2010 Board Meeting**  
The November Board meeting will be a clear decision making meeting to adopt and delineate our strategic direction; role of the Board in that strategy; composition of the Board and its Committees in support of that strategy; and relationships of the Board to the Accredited Programs (Alignment) and Staff Succession (Talent).

Again, many thanks to all for your incredible commitment!