



August 2024



Special Olympics Montana Local Program Development Guide

**Special
Olympics**
Montana



Local Program Development Guide

Section 1: Starting & Structuring Your Local Program

Special Olympics
Montana



The Local Program is the organizational structure that delivers the mission, programming, and related activities of Special Olympics, and operates as part of the larger Accredited Special Olympics (State / Provincial / National) Program.

Many Accredited Program organizational structures and models exist throughout our movement, requiring unique approaches and situations for Local Programs. It is not the goal of this guide to prescribe or promote a “one size fits all” approach to Local Program development and sustainability. Rather, this guide is offered so you, in collaboration with Special Olympics Montana (SOMT), have a greater understanding of successful Local Program operations and structures, and can apply these fundamentals to your Local Program as applicable and useful.

This guide is a resource for Local Program leadership, providing information and tools to successfully offer quality Special Olympics programming in local communities. Local Program leadership is critical to the success of Special Olympics. The grassroots level is the foundation of our worldwide movement and the starting point for each athlete and constituent’s experience.

This guide is divided into the following sections, which may be used in whole or part to enhance your Local Program:

- **Section 1:** Starting and Structuring Your Local Program
- **Section 2:** Athletes
- **Section 3:** Volunteers, Coaches, and Families
- **Section 4:** Sports Management
- **Section 5:** Communications
- **Section 6:** Fundraising
- **Section 7:** Finance and Risk Management
- **Section 8:** Paperwork

The Local Program Development Guide is a tool to both establish and engage new Local Programs and leaders, and to provide the next level of resources to grow and enhance an existing Local Program. The guide was developed in collaboration with a workgroup of Program leaders and Local Program participants from the following Programs: SO Canada, SO Jamaica, SO Louisiana, SO Maryland, SO North Carolina, SO Ohio, SO Ontario, SO Oregon, SO Southern California, and SO Wisconsin. Special Olympics offers it gratitude for their contributions.

Your Special Olympics Montana Staff (SOMT) are available to offer additional guidance and support as you work to engage constituents in local Special Olympics opportunities and make the promise of our movement a reality. **Thank you for your commitment to the mission of Special Olympics.**

Contents

This section of the Local Program Development Guide addresses the following topics and questions:

- What is a Local Program and what purpose does it serve? (Pages 2-4)
 - Special Olympics Montana Area Map (Page 4)
 - Area Management Team Structure/Position Descriptions (Pages 5-7)
 - Area Management Team Training Checklists (Pages 7-9)
 - Local Program Growth and Sustainability (Pages 9-11)
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What is a Local Program and what purpose does it serve?

The Local Program is the heartbeat of Special Olympics and brings our mission and vision to life. This mission is shared by all Special Olympics Programs, and remains consistent at all levels of the movement:

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.

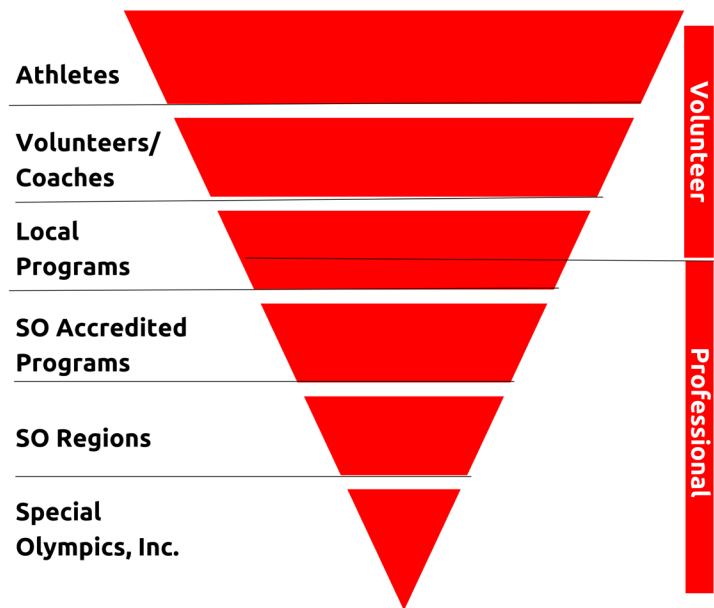
The **vision** of Special Olympics is an inclusive world for all, driven by the power of sport, through which people with intellectual disabilities live active, healthy, and fulfilling lives.

How do Local Programs fit into the overall structure of Special Olympics?

Each Local Program offers official Special Olympics sports training and competition opportunities for athletes (individuals with intellectual disabilities) and Special Olympics Unified Sports® Partners (individuals without intellectual disabilities). A Local Program may originate from a variety of places:

- Geographic areas – Communities, counties, or other land boundaries
- Independent community Special Olympics clubs or teams
- Schools – Public, private, or specialized schools, colleges or universities
- Sports-based organizations, such as Parks and Recreation Departments or YMCAs
- Organizations serving people with intellectual disabilities, such as independent living facilities or adult service providers.

Special Olympics' "inverted pyramid" approach illustrates the importance of Local Programs. The Local Program makes the first – and often, the strongest – impression about the Special Olympics movement. A strong Local Program is necessary to our success: you are the front door of Special Olympics.



What are the parts of the pyramid, and what is their role?

The pyramid begins with our athletes and includes many important people that support them, as well as the professional structure of Special Olympics that enables Local Program success.

Athletes

Individuals of all ages and ability levels are welcome to participate in Special Olympics. To be eligible to participate as a Special Olympics athlete, the individual must be identified as having an intellectual disability. Section 2 of the Local Program Development Guide further outlines athlete eligibility, and SOMT can provide additional details, including required documentation for participation.

It's important to note that athletes don't embark on their Special Olympics journey alone. They are often supported by the following individuals, among others, along the way:

- Special Olympics Unified Partners are individuals without an intellectual disability who participate in Special Olympics Unified Sports® as teammates.
- Families and caregivers are encouraged to participate at every level of Special Olympics and can be an essential component of a Local Program. All family members of Special Olympics athletes are encouraged to participate in Special Olympics as volunteers, coaches, and/or Unified Partners.

Volunteers

Volunteers are the lifeblood of Special Olympics and serve as the primary source of support for Local Programs. There are numerous volunteer opportunities such as serving as a coach, sports official, chaperone, committee member, fundraising volunteer, and more! Local Programs would not exist without the support and commitment provided by volunteers.

Special Olympics Professional Structure

The following levels of Special Olympics provide leadership and management for our movement and exist to support our Local Programs in delivering the mission of Special Olympics.

- **Special Olympics Montana (SOMT)** – is an Accredited Program and a registered charitable non-profit organization that exists to deliver and advance the mission of Special Olympics. It is accredited and authorized by Special Olympics, Inc. (SOI) and is responsible for following the policies, rules, and standards set forth by SOI in its delivery of services.
- **Special Olympics North America (SONA)** is one of SOI’s seven global regions and is responsible for implementing the policies and initiatives of SOI. SONA provides support and guidance to each of the Accredited Programs within North America (Canada, the United States, and the Caribbean).
- **Special Olympics, Inc. (SOI)** is responsible for the overall leadership and management of all Special Olympics Programs across the globe, which supports millions of athletes, coaches, and volunteers in more than 190 countries and territories.

Special Olympics Montana Area Map



How is the Area Management Team (AMT) structured, and what are the roles?

The Area Management Team provides leadership, administration, and oversight of the Local Program. At its core, the Area Management Team performs the necessary functions to allow sports training and competition and Special Olympics programming to exist at the local level.

In the beginning, there may only be a select few Area Management Team members based on your most essential priorities and needs. As you discuss each member's skills and areas of interest, defined roles will become clear and allow you to start functioning as a team.



What should I expect in each of these roles?

The following duties included are examples of what should be managed by each role. Consult additional Local Program resources as needed for each role or contact SOMT with additional training needs.

The following pages contain sample job descriptions for various Area Management Team roles, as well as training checklists you can consult and customize for your specific needs. Please confirm any adjustments needed to these resources with SOMT.

Area Management Team Position Descriptions

Area Director (AD)

The Area Director is responsible for providing strategic leadership and management. The AD plans, organizes, directs, and coordinates programming and services for constituents in their area in accordance with established policies to achieve the goals, objectives, standards, and mission of Special Olympics. This role also works to develop area leaders, manages risk for the area, and works to sustain area resources. The completion of responsibilities will be performed by the AD and AMT members who have been empowered to lead and complete the specific functions outlined below.

Finance Coordinator

The Finance Coordinator is responsible for all aspects of the financial administration for the area. This role also works with the fundraising coordinator to ensure that all fundraising follows SOMT guidelines.

Fundraising Coordinator

The Fundraising Coordinator oversees activities to raise the funds necessary to support the area through sponsorships/partnerships and the execution of fundraising programs and events. All efforts are managed according to guidelines established by SOMT.

Local Program Coordinator (LPC)

The Local Program Coordinator ensures that all Special Olympics paperwork, policies, and procedures are adhered to, primarily related to athlete, Unified Partner, and volunteer participation. The LPC also oversees all data provided to SOMT.

Sports and Competition Coordinator

The Sports & Competition Coordinator administers the planning and delivery of an area's quality fitness, training, and competition events for Special Olympics athletes and Unified Sports® Partners. Responsibilities include, but are not limited to:

- Coordinate sport-specific training and competition for sports offered
- Recruit qualified coaches, and ensure all are properly trained and certified

- Recruit athletes and Unified Partners, and work with management team to ensure all have proper forms on file
- Ensure safe, secure, and appropriate facilities and equipment
- As needed, secure lodging and transportation for competitions.

Communications Coordinator

The Communications Coordinator is responsible for ensuring proper use of the Special Olympics name and brand. The position also leads the external promotion of the area and its activities.

Volunteer Coordinator

The Volunteer Coordinator is responsible for recruiting, registering, and training area volunteers. They ensure adequate staffing of volunteer roles (that volunteers meet eligibility requirements mandated by their roles) and comply with all SOMT policies and procedures.

Athlete Leadership Coordinator

The Athlete Leadership Coordinator ensures that the area has meaningful representation by athlete leaders on its Area Management Team, and in overall operations. This role also ensures that the area offers and/or participates in athlete leadership programming and offerings of SOMT, such as Athlete Leadership Councils or workshops.

Area Management Team Training Checklist

The following is a sample checklist to train individuals for various roles, including requirements, responsibilities, and skills needed for each position.

Area Director / Assistant Area Director

- Become familiar with Local Program policies and procedures
 - Recruitment and registration of all participants (volunteers, athletes, etc.)
 - Procedures for effective financial management
 - Overall marketing and communications guidance (press releases, website and social media protocols, emergency / crisis communications)
 - Requesting and/or submitting insurance information for facilities / rental vehicles, including certificates of insurance
 - Risk management procedures, including Incident Report Forms
 - Process of approval of contracts and agreements between Special Olympics and external entities
- Maintain Local Program specific properties (storage, mail & phone information, etc.)
- Facilitate regular meetings of the Area Management Team

Sports

- Ensure athlete registration requirements are met
 - With LPC leadership, ensure all athletes have current medical forms before training. When needed, send renewal request letter and blank medical form to athletes requiring renewals for the upcoming season.
 - Maintain current medicals on file at all SOMT activities
 - With GMS Coordinator, become familiar with Games Management System as needed, and your role in working within GMS
- Review and comply with all sports rules and policies
 - Maintain acceptable athlete/coach ratios
 - Align with Accredited Program's procedures and deadlines for coach certification and education.
 - Meet all deadlines for athlete and games registration
 - Become familiar with sports rules that apply to your Local Program (SOMT, SOI, National Governing Body/ies) and advancement criteria
 - Meet all uniform and equipment requirements, and comply with any applicable distribution/return procedures
 - Ensure Athlete Code of Conduct has been reviewed and agreed upon by all athletes, Unified Sports® Partners, coaches, and families
- Review and follow logistical and risk management guidance as needed
 - Completion and submission of incident report forms
 - Maintaining and presenting insurance info for facilities and rental vehicles
 - Maintaining facility agreements and related documentation
 - Observe SOMT travel procedures, and fulfill the needs of your Local Program according to them
- Communicate with coaches and families within the overall Local Program communication structure/plan.

Volunteers

- Review volunteer classifications (Class A / Day of Volunteer) and the processes by which you recruit, register, and train volunteers accordingly
- New Season Checklist
 - Determine which volunteers need application renewals
 - Ensure all coaches and key Local Program volunteers have valid Class A registration
 - Ensure new volunteers complete the appropriate volunteer paperwork and all related procedures
- Process for new volunteers
 - Update and provide introductory information about volunteer opportunities with your Local Program

- Collect volunteer form, including background check info (for Class A volunteers), and submit to SOMT per its guidance
- Provide volunteers with access to Protective Behaviors, and Concussion Training, and maintain your Local Program’s records regarding completion (as needed).

Finance and Fundraising

- Review and observe Special Olympics and SOMT fundraising policies and procedures – including, but not limited to:
 - Any revenue sharing agreements that apply to Local Programs
 - Acknowledgement of individual and memorial donations
 - Documentation and reporting in-kind donations
 - Special event fundraising expectations for promotion and participation
 - Ensure timely thank you letters and receipts are issued
- Familiarize yourself with Local Program financial procedures, such as expense reporting and proper handling and processing of funds
- Enforce Class A and Day of Volunteer roles and requirements with respect to fundraising
- Review and align with all SOMT policies and procedures regarding insurance for facilities and rental vehicles (including requesting certificates of insurance), and contract approvals involving your Local Program.

Communications

- Familiar with all Local Program policies and procedures
- Review all guidance related to marketing and communications duties:
 - Working with local media
 - Preparation of newsletters and mailings
 - Managing social media accounts
 - Creating brand-compliant marketing materials
 - Reviewing and complying with logo usage / branding and language guidelines
 - Observing requirements for maintaining social media or web pages specific to your Local Program.

Local Program Growth and Sustainability

As a Local Program grows, it will have to evolve to best serve its participants. As more athletes join a Local Program, more sport opportunities may need to be added, practice facilities will need to be larger or grow in number, the budget will have to increase, and the coach and volunteer base will need to grow. It is wise to plan ahead for growth, so you are best prepared for your Local Program to reach its full potential.

Expand Programming to Schools or Communities

New participants in your Local Program can come from any age or setting. As your Local Program develops, aim to offer all possible entry points to Special Olympics:

- Partnering with local schools/districts can provide opportunities for new athletes, coaches, and volunteers. Increased access to funding and facilities might also be possible.
- Community-based teams offer opportunities for athletes to engage in Special Olympics beyond school age and can draw in new participants in all roles so that our mission can be delivered throughout the life of an athlete or volunteer.

Enhancing Existing Sports

Consider adding fitness training to the existing Local Program schedule. This approach can improve the fitness and conditioning of your participants and create healthy habits that extend beyond your sports season.

Additionally, when assessing your existing offerings, keep in mind the ages and developmental stages your Local Program currently offers. When possible, aim to expand these categories so that all ages and abilities can be served.

Adding Special Olympics Unified Sports® Options to Already Existing Sports

The Local Program can grow by giving volunteers the option of also becoming Unified Partners to train and compete alongside Special Olympics athletes.

Adding New Sports

Athletes, coaches, and families may have interest in new sports beyond what is currently offered. SOMT has protocols in place for considering new sports. Should your Local Program have the ability to introduce a new sport, consider the following in making an effective decision:

Interest

- Aside from surveying your Local Program, a sports clinic or demonstration would allow you to introduce basic skills for a new sport and determine the true interest.

Facilities

- Discuss training and competition options with local recreation centers, schools, and sports organizations to determine available facilities for your Local Program

Coaches

- Survey your coaches' interests and skills in a new sport and determine if there are additional volunteers or coaches in your community that are capable of a) effectively training in a new sport, and b) helping to avoid overloading your existing coaches and volunteers.
- If your Local Program includes schools, consider offering high school/college athletes the opportunity to coach. Additional interest in coaching may also exist elsewhere in the school community.

Budget

- Include information in your budget about how much revenue the Local Program will need to sustain and/or grow. Plan out how much fundraising will be required to grow, either through fundraising or donations
- Consult SOMT to confirm the Local Program's budget and that the Program is staying within the parameters of the organization.

With this information, you now understand the fundamental elements of a Local Program, and the kinds of leaders, roles, and responsibilities that will help you establish and sustain a quality Local Program. Congratulations on taking this important step, and thank you for investing your time and talent in Special Olympics!



Contents

This section of the Local Program Development Guide addresses the following topics and questions:

- Eligibility and Athlete Registration (Page 1)
- Athlete Recruitment (Pages 2-3)
- Athlete Code of Conduct (Pages 3)
- Misconduct Reporting/Behavior Management (Pages 3)
- Additional Programming for Athletes (Pages 4-5)

Special Olympics aims to create an inclusive environment for all athletes. But there are required steps to become a Special Olympics athlete. There are also recommended sources for recruiting athletes, and additional opportunities for athletes beyond the playing field.

Eligibility

Special Olympics training and competition is open to every person with intellectual disabilities who registers to participate in Special Olympics as required by the General Rules. For detailed information regarding eligibility consult Special Olympics Montana (SOMT).

Age Requirement

Individuals are eligible for training and competition at age 8, and there is no upper age limit for participation. Children ages 2-7 (under age 8) are eligible to participate in the Special Olympics Young Athletes program.

Identifying a Person with an Intellectual Disability

A person's eligibility in Special Olympics includes assessing the presence of an intellectual disability. Consult SOMT regarding current definitions and guidance on what determines the presence of an intellectual disability.

Special Olympics Unified Sports®

Unified Partners follow a similar registration process as athletes/volunteers. To become a Unified Partner, an individual must complete Volunteer/Unified Partner Registration, which includes a Special Olympics Release Form as well as the Communicable Disease Waiver. Unified partners under the age of 18 will need two non-family references.

Athlete Registration

Athletes must submit an Athlete Medical Form to Special Olympics. This health information form must be signed by a medical professional who holds one of these licenses (MA, DO, NP, or PA). Physicals completed by a chiropractor will not be accepted. Forms may be accessed through the SOMT website. Athletes must submit an athlete release form. Athletes under the age of 18, or who have guardians appointed to them, must have their parent or guardian sign the form. Athletes who are 18 years of age or older without a guardian may sign the Release Form themselves.

Athlete Recruitment

Special Olympics Local Programs are always growing. It's important to reach as many athletes as possible to help maintain growth. Below are several tips to assist with outreach to new and current athletes.

Create Relationships with Local Groups & Agencies Serving Individuals with Disabilities

- Partner with Parks and Recreation Departments for opportunities to include individuals with intellectual disabilities in their current Programs. Connect links between Special Olympics and Parks and Recreation websites for more information on how to get involved.
- Connect with all agencies and community services – such as group homes – to bring in older athletes or maintain current athlete base as they age out of school.

Advertise Locally & Utilize Social Media

- Create a Local Program website and social media account(s), according to the following SOMT guidance listed below. Use these outlets to promote your Local Program and recruit.
 - o **When creating your local website, it should be named after your program/team name. Do not put Special Olympics as part of your URL. Your website should only include your team/program name.**
 - o **If you create a social media page, please add Holly Netz, Director of Marketing and Communications as an admin on this page. This is necessary for marketing and branding purposes. She would alert your program if a change was necessary.**
- Advertise upcoming events and include information such as how to join, how to volunteer, and how to donate.
 - o **Due to gambling laws, you are not allowed to sell MTN Truck Raffle Tickets online. You CAN have a link to the Special Olympics Montana website for online raffle sales.**

Target Local Schools

With support from SOMT, introduce the Special Olympics Unified Champion Schools[®] strategy, which is a comprehensive model that combines Special Olympics Unified Sports[®], Inclusive Youth Leadership, and Whole School Engagement to create school and community climates of acceptance and inclusion. This can begin as early as pre-kindergarten with Young Athletes[™], and continue throughout elementary, middle, and high school with Unified Sports and/or related sports and leadership

opportunities. Students, regardless of ability, can serve as volunteers, coaches, and athletes/Unified Partners with their Unified Champion School® or in your Local Program.

- Work with local Head Start programs, independent school districts, Special Education Directors, and/or Athletic Directors.
- Many colleges also offer programs for students with IDD and can provide access to athletes and families that may otherwise not have been introduced to Special Olympics.
- Speak at parent meetings and/or teacher professional development days.
- Provide Special Olympics and Unified Sports information to students and their families through newsletters and brochures.

Target Young Athletes

- Target Head Start and inclusive preschools to share information as to how they can incorporate the program during the day and encourage teachers to become coaches.
- Offer a Young Athletes Expo at Area Games and invite the public.
- Incorporate Special Olympics Healthy Athletes® opportunities that begin with a screening.

Athlete Code of Conduct

All athletes, Unified Partners, and volunteers (including coaches) must sign a Code of Conduct as part of registration to ensure every participant knows what behaviors are encouraged and which are not permissible in Special Olympics. Please see Section 8 for a copy of the Athlete Code of Conduct.

Misconduct Reporting

- A Misconduct Report should be completed immediately for behavioral issues that:
 - Violate the SOMT codes of conduct, including Athlete, Coach and Volunteer Codes of Conduct.
 - Are detrimental to other participating athletes, volunteers, staff, or spectators.
 - Affects the image of Special Olympics Montana.

This report should be submitted to the Outreach Director no more than three days after the event. Please see Section 8 for a copy of the Misconduct Reporting Form.

Behavior Management

- Upon receipt of a Misconduct Report on an athlete the Outreach Director will communicate with the submitter to determine the level of consequences.
- The consequences should be progressive in nature unless the behavior was extreme.
- Consequences may include a written plan for success, probation, 1-1 Volunteer support, 1-1 behavior management support, etc.
- Consequences will be documented and sent to all parties involved for signature and to communicate the success plan moving forward.
- In all cases, documentation will be filed with the Athlete's GMS profile.

Additional Programming for Athletes

Once athletes have been recruited, registered, and engaged in your core programming, be mindful of additional opportunities for athletes to experience Special Olympics. Consult SOMT regarding how the following items are delivered, and expectations for your Local Program's role in offering to your athletes.

Athlete Leadership

Athlete Leadership empowers athletes to develop leadership skills and utilize their voices and abilities to undertake meaningful leadership roles, influence change in the Special Olympics movement, and create inclusive communities around the world. As athletes gain the confidence that comes with achievement on the field of competition, they feel empowered and ready to take on new challenges off the playing field as well, to make use of all their abilities.

There are numerous roles athletes might serve in the Local Program. Some roles require meeting certain criteria as well as going through a series of training courses. A support mentor can assist the athlete to become more successful and have a more meaningful experience.

Athletes can serve Special Olympics as an Athlete Leader in many roles such as: AMT Member, Athlete Input Council, Health Messenger, Development Messenger, Board of Directors Athlete Representative, coach or official, and more!

Consult SOMT about additional opportunities to advance your athlete leaders through their offerings.

Special Olympics Healthy Athletes®

Special Olympics Healthy Athletes is a Special Olympics program that provides free health screenings and health education in a fun, welcoming environment with a focus on removing the anxiety people with intellectual disabilities often experience when faced with a visit to a medical professional.

Healthy Athletes events are led by licensed medical professionals with the support of additional medical professionals and students going into those fields to give them hands on experience working with people with intellectual disabilities. Most of our Healthy Athletes events occur in conjunction with state-wide sporting events.

Current Healthy Athletes disciplines vary by program but could include any or all of the following: Fit Feet, FUNfitness (physical therapy), Healthy Hearing, Health Promotion, MedFest (offers a free physical exam), Opening Eyes, Special Smiles, and Strong Minds (mental and emotional support). Consult SOMT for detailed descriptions of each offering.

Healthy Communities

Healthy Communities is a model Special Olympics Health program addressing the severe health disparities faced by people with intellectual disabilities through immediate and long-term community-based solutions. Healthy Communities is working to increase access to quality health care and prevention programming to improve the health status of people with intellectual disabilities.

Fitness

Physical fitness is a key part of the Special Olympics mission. Fitness is a lifelong pursuit, requiring the establishment of healthy habits year-round. Members of the Special Olympics community are encouraged to seek optimal health and performance through adequate physical activity, nutrition, and hydration, at Fit 5 classes offered at local fitness centers.

Motor Activities Training Program (MATP)

The MATP is specially designed for athletes with significant intellectual and/or physical disabilities who require the greatest assistance and support. MATP is a training program that is individualized for each athlete's existing skill level, not a competition against others. It prepares athletes through sport-related activities appropriate for their abilities and age. Athletes will receive recognition for participation and personal bests with MATP ribbons or medals.

Individual Skills

Individual skill level is offered for athletes who have either not yet mastered the necessary skills, or sometimes are new, to playing competitively on the court or field of play in a particular sport. Athletes learn and master basic components of a sport during practice and achieve points assigned to each component. A player's final score is determined by adding together the scores in each component.

Special Olympics Young Athletes

Young Athletes is a unique sport and play program for children with and without intellectual disabilities between the ages of 2-7. It introduces children to fundamental movement and sports skills in an age and developmentally appropriate format, with a focus on fun and play activities. Young Athletes prepare children to enter Special Olympics sports training and competition when they reach the appropriate age and stage of development.

The benefits of the Young Athletes program are numerous and include (but are not limited to):

- Motor skill development
- Physical fitness
- Social, emotional, and learning skills
- Higher family expectations for the future
- Sports readiness
- Social inclusion and acceptance



Contents

This section of the Local Program Development Guide addresses the following topics:

- Volunteers (Pages 1-5)
- Coaches (Pages 5-7)
- Families and Caregivers (Pages 7-8)
- Codes of Conduct (Pages 8)
- Certification Cheat Sheet (Pages 8-9)

In order to run efficiently, all Local Programs rely on several functions for success. Volunteers, coaches, and families can all play an important role in the health and operations of your Local Program. In this section, you will find possible strategies for your Local Program; please discuss with your local level Area Management Team what will work best for your community.

Volunteers

Volunteers are the backbone of Special Olympics. Your Local Program will thrive as you recruit and meaningfully involve volunteers. This process includes identifying your volunteer needs, locating and recruiting volunteers in your service area, proper registration and training for volunteers, recognizing their contributions, and retaining them.

SOMT has staff supporting volunteer management and can be a helpful resource in growing and maintaining your volunteer base. Additionally, it is recommended to refer to Section 1 of the Local Program Handbook, for reference regarding Local Program structures and roles referred to below.

Determining Volunteer Needs

- Develop a list of volunteer roles needed by your Local Program in all categories (Area Management Team, sports, communications, fundraising, etc.). Be mindful of the skills and time required to do these roles effectively.
- Maintain or create job/position descriptions for volunteer roles, including training duties
- Set firm but reasonable expectations for your volunteers. A sample list of expectations might include:
 - o Complete the required volunteer registration forms and training
 - o Fulfill the responsibilities of your assignment
 - o Set a good example for all participants

- Model good sportsmanship and behavior
- Be continually vigilant and aware of the safety of all participants
- Fulfill your commitment to the role, and consider additional training and opportunities offered by Special Olympics that can increase your effectiveness and broaden your volunteerism in the movement.

Volunteer Recruitment, Engagement, & Retention

There are several steps Local Programs can take in order to increase its volunteer force. Below are suggestions that might enhance your recruitment efforts:

- If applicable, appoint a volunteer committee to assist with recruiting and training.
- Ensure that all recruitment efforts have a clear message, demonstrate need, and have a follow-up plan. Aim to answer the following questions for volunteers when recruiting them:
 - What is the time commitment?
 - What skills are required?
 - How does the volunteer get in touch if interested?
- Utilize your communication channels (website, social media, newsletters, speaking engagements, local news outlets) to share your needs with the community.
- Utilize your athlete leaders to recruit volunteers.
- Create and maintain a list or database with volunteers, both prospective and current.
- Meet with volunteers to better understand their interests, and to pair them with the best opportunity in your Local Program.
- Follow up promptly with inquiries and new volunteers, to provide outstanding customer service and to confirm their involvement.
- Upon arrival at a Local Program activity, provide training and mentorship to ensure the best possible experience.
- Ensure that thank you letters, and acknowledgement opportunities are part of your Local Program efforts, as part of existing activities or by creating a dedicated volunteer appreciation event or campaign.
- Gather feedback from volunteers about their experience, to keep a consistent focus on improvement.
- Nominate an outstanding volunteer for the SOMT Distinguished Service Award.
- Spotlight and recognize dedicated volunteers at practices, on social media sites, or at events in your area.

Recruiting volunteers can be done in a variety of ways and can target many groups in your community. Below is a sample list of target recruitment areas for volunteers:

- Local sports organizations and leagues
- Community service organization

- Sponsors and local businesses, paying special attention to those that offer volunteer hours to employees and/or donations to charities based on hours served by employees
- High schools / colleges (especially those that are Unified Champion Schools)
- Families of athletes
- Service groups

Volunteer Registration

In compliance with Special Olympics, Inc. policy, all U.S. Programs must register and classify volunteers. The registration procedure and forms are important tools for ensuring the safety and well-being of all athletes and volunteers. See Certification Cheat Sheet page 11-12 for requirements.

Class A Volunteers

An individual is a Class A volunteer and must complete a Class A Volunteer registration form if they meet any of the following criteria:

- Has regular close, physical contact with athletes
- Is in positions of authority, trust, or supervision with athletes
- Handles cash or other assets of the Local Program
- Chaperones athletes and may stay overnight or transport athletes

Confirm with SOMT that you have and are using the most current registration form, and that you know the registration process. See Certification Cheat Sheet page 11-12 for requirements.

All Volunteer Registration Forms must be submitted, and volunteers must be approved by SOMT prior to beginning any Class A Volunteer duties. All volunteers listed as coaches or chaperones, listed on a housing form for competition, or transporting athletes must have a current, approved Class A Volunteer form on file. All volunteers listed as LPC's must have certifications up to date to receive the monthly "Green List".

Special Olympics, Inc. requires that all Class A Volunteers complete Special Olympics' safeguarding training (Protective Behaviors) PRIOR to commencing any Local Program volunteer activities. If serving as a coach, Concussion Training must also be completed.

All Class A volunteers must undergo a criminal background check. A background check is completed by SOMT using a national vendor. Conditional approvals may be made based on the results of the background check or if an applicant answers "Yes" to any of the questions regarding suspension or revocation of a driver's license. **

**If under the age of 18, the volunteer does not have to complete a background check until their 18th birthday or complete Protective Behaviors.

SOMT may make a determination regarding the level of the volunteer's involvement based on the results of the aforementioned background check. SOMT will notify the volunteer and Local Program if they are unable to assist as a Class A Volunteer.

All volunteer registration forms and required training must be renewed every three years.

Day of Volunteers

Day of Volunteers include volunteers whose role begins and ends the day of an event. Day of Volunteers have more limited contact with athletes (not one-on-one), and do not have any contact with a Program's cash or assets.

While Day of Volunteers have limited contact with athletes, a strict registration protocol must still be followed, in accordance with your Accredited Program's procedure.

- Complete Day of Volunteer registration form (electronic) on site.
- Day of Volunteers must sign in and attest to the requirements to volunteer for the day.

Disqualifiers

In order to ensure the safety of Special Olympics athletes, Unified Sports partners, and other participants, Special Olympics is selective with its volunteers. While Special Olympics is committed to a culture of teamwork and inclusion for all, there are disqualifiers for potential volunteers.

Disqualifiers for Being a Volunteer Include, but are not limited to:

- A felony arrest / prosecution
- Child abuse, or any role in causing a child's death
- Kidnapping
- Sexual abuse or misconduct
- Neglect of a child or any other individual for whom the potential volunteer has held responsibility
- Arson
- Driving under the influence (DUI), or comparable offenses require a conditional approval limiting the transportation of athletes.

There are also potential disqualifiers that may be taken into consideration by SOMT, as part of determining volunteer eligibility.

Misconduct Reporting

- A Misconduct Report should be completed for behavioral issues that:
 - Violate the SOMT codes of conduct, including Athlete, Coach and Volunteer Codes of Conduct.

- Are detrimental to other participating athletes, volunteers, staff, or spectators.
- Affects the image of Special Olympics Montana.

The Misconduct Report Form can be found in Section 8. If a Misconduct Report is submitted on a volunteer the Outreach Director will communicate to all parties involved. Depending on the severity of the incident, volunteers may be subject to discipline and/or dismissal. In all cases, documentation will be filed with the Volunteer's GMS profile.

Coaches

Having a well-trained team of coaches is critical to the success of Special Olympics and Local Programs, as well as ensuring the happiness and development of athletes.

There are several sources for recruiting Special Olympics coaches:

- Sports organizations
- Sports leagues
- Colleges and universities – including athletic departments, sororities and fraternities, academic departments, and/or residential halls
- Service groups
- Local officials' associations
- Adaptive Physical Education and Physical Education teachers
- Special Education and General Education teachers
- Coaches (current or former) at the elementary or secondary school level
- College students in Special Education programs
- Current or former Unified Champion Schools or SO College Unified partners
- Special Olympics athlete leaders

Types of Special Olympics Volunteer Coach Roles

There are several roles for a volunteer who wishes to become involved as a certified Special Olympics Coach. While some coaches may choose to remain a team volunteer, other coaches may strive to increase their level of certification.

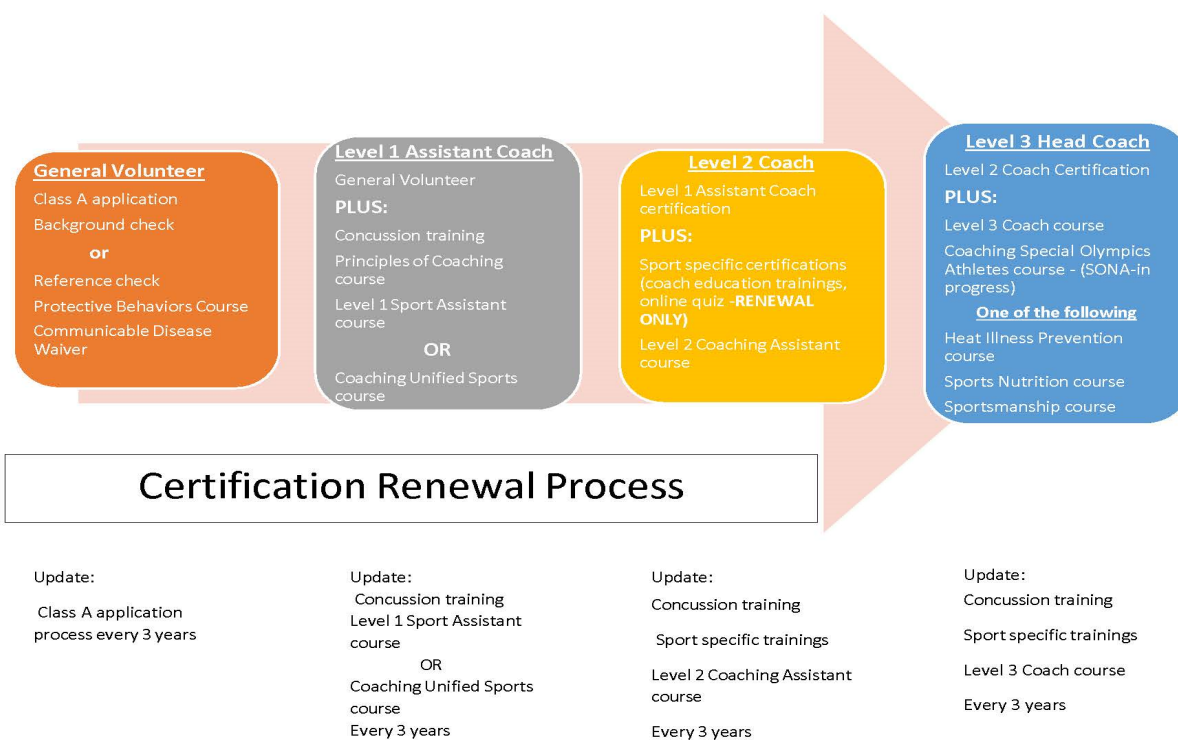
Special Olympics is continually evolving and enhancing its coach education system to meet the needs of volunteer coaches and the athletes they coach. Coach education is available at all levels of knowledge and experience, from entry-level to advanced coaches. SOMT can provide you with detailed information regarding coaching requirements and opportunities available to your Local Program.

Coach Education

SOMT has defined a coach education progression, and the graphic below lists the education required for each level.



Coach Education Progression



Continuing Education

To maintain certification, a coach must update certifications regularly. Additional coach education is encouraged and is available in a variety of locations. Here is a partial list of approved sources for training and continuing education:

- Special Olympics Resources Coach Tube: <https://coachtube.com>
- Special Olympics Resources: <https://resources.specialolympics.org/sports-essentials>
- Special Olympics Learning Portal: <https://learn.specialolympics.org/>
- National Federation of State High School Associations: <https://nfhslearn.com/>
- Other Special Olympics-approved courses for training and certification might be available. Consult SOMT on any additional third-party sources.

In order to protest at a state sports event, a level three certified coach must have completed that season's sport specific coaching course. This is offered at the beginning of every season by the SOMT Sports Director. All certifications must also be up to date. Refer to Coach Education Progression graphic on page 6 for specific details on Level 1, 2, or 3 coach certifications.

Retaining Coaches

Retaining coaches is critical for maintaining trust and relationships with athletes, Unified partners, volunteers, and families. There are several ways to retain coaches and build a stronger Special Olympics community.

- Provide an initial meeting to review coaching role.
- Empower the coach to be the leader of their team and enforce positive behavior.
- Ensure effective communication prior to and throughout the season.
- Offer opportunities for input, including the opportunity to debrief after the season in preparation for the next year.
- Encourage continued education and provide recognition at every new training and/or level of coach certification.
- Nominate an outstanding coach for the Distinguished Service Award.
- Promote advancement in the movement, such as selection to coach at a National, Regional, or World Games.
- Invite coaches to participate in other events throughout the year.

Families and Caregivers

Families and caregivers – parents, siblings, and others who play a key role in direct support for athletes – are a vital component of the Special Olympics movement. These individuals engage at various levels of activity and participation within the Local Program, but all can prove valuable to its success.

Communication with, and outreach to, families and caregivers is a key role within the Local Program. When possible, the Local Program should maintain a position on its Area Management Team *with specific goals of providing opportunities for family involvement. Duties of this role may include:*

- Keep regular contact with families directly, and coordinate with communications team for additional outreach through their channels. A family newsletter could be a consideration as part of the communications strategy.
- Create a welcome letter for new athletes and their families, which includes opportunities for families and caregivers to volunteer with the Local Program.
- Host meetings and events dedicated to families and caregivers, such as:
 - o A new family orientation session

- Hospitality events for family networking, and to gather contact information from participants
- Annual, quarterly, or sport-season gatherings highlighting upcoming and/or recently completed sports seasons
- Regular meetings to get feedback.

Engaging families in any of the diverse roles in Special Olympics will strengthen your Local Program. Visit the Special Olympics Resources page on families to explore ways to actively engage athletes' families and caregivers: <https://www.specialolympics.org/our-work/families>

Working with Agency/Provider Staff

Some athletes who participate in Special Olympics may live in group homes or other supported living environments and/or may be assisted by trained support staff. Local Programs need to establish the most effective means for communicating with direct care staff, articulating expectations and needs for their support. Some staff may have interest in joining your Local Program as a coach, volunteer, or Unified Sports partner which would mean the agency provider would be considered a Class A Volunteer with SOMT and paperwork would need to be completed and submitted. If the agency provider wanted to be a coach, please refer to the coach education section to see all paperwork/training that would need to be completed.

Codes of Conduct

All volunteers (including coaches) must sign a Code of Conduct as part of registration to ensure everyone knows what behaviors are encouraged and which are not permissible in Special Olympics. All family members are also encouraged to sign a Code of Conduct. All Codes of Conduct can be found in Section 8-Appendix.

Certification Cheat Sheet

All the forms needed are located on the SOMT website Participation Forms Page.

Athlete

- Athlete Registration Form – Renew every 3 years
- Athlete Medical Packet (Condensed OR Accessible) – Renew every 3 years
- Communicable Disease Waiver and Release of Liability – Renew every 3 years
- Athlete Code of Conduct – Renew every 3 years
- Athlete Release Form (version Oct. 2018) – One time document submitted to SOMT office

Unified Partner

- Volunteer/Unified Partner Application – Renew every 3 years
- Communicable Disease Waiver and Release of Liability – Renew every 3 years
- Protective Behaviors Test required for 18 years or older – Renew every 3 years
- Unified Partner Code of Conduct – Renew every 3 years
- Background Check if 18 or over
 - Must have Social Security #, Driver’s License number, and full legal name to run Criminal Background check.
- Reference Check if 17 and under
 - Must have two **non-family names** and phone numbers, one can be the LPC

Volunteer

- Volunteer/Unified Partner Application – Renew every 3 years
- Communicable Disease Waiver and Release of Liability – Renew every 3 years
- Protective Behaviors Test required for 18 years or older – Renew every 3 years
- Volunteer Code of Conduct-Renew every 3 years
- Background Check if 18 or over
 - Must have Social Security Number (SSN), Driver’s License number, and full legal name to run criminal background check
- Reference Check if 17 and under
 - Must have two **non-family names** and phone numbers, one can be the LPC

Certified Coach

All the above for Volunteers, plus:

- Coaches Code of Conduct – One time document submitted to SOMT office
- Concussion Training – Renew every 3 years
- Level 1, 2, or 3 certifications up to date (Refer to Coach Education graphic on page 6)
- Season sport specific training

Certified Local Program Coordinator

All the above for Volunteers, plus:

- First Time LPC
 - Initial LPC Training with Outreach Director
 - More if needed.
- Recertifying LPC
 - Passing the Recertification Exam (score of 85% or higher) – Renew every 3 years

In order to receive the monthly “Green List,” all certifications must be current.

Local Program Development Guide

Section 4: Sports Management

Special Olympics
Montana



Contents

This section of the Local Program Development Guide addresses the following topics:

- Structuring Local Program Sports Training (Pages 1-3)
- Competition Standards and Leading Practices (Pages 3-5)
- Additional Opportunities (Page 6)
- Sport Training Checklists (Pages 6-7)
- Sports Department @ SOMT: Brittani Bush, Bill Polk, Richie Whitney

Training and competition take place year-round at all levels. The primary goal of Special Olympics is to provide training and competition opportunities, which are directed by qualified coaches and volunteers. Individuals and teams compete in divisions according to age, gender, and ability.

As a Local Program Coordinator, it is important to understand the basics of sports training and competition. There are factors involved in getting athletes ready for competition and then taking them to competition, in a way that ensures quality, safety, and a positive experience.

Please note that prior to the beginning of training and attending competition, the following elements should be in place:

- Registration of the Local Program with SOMT
- Selection of sport(s) for competition
- Athlete medical forms and release forms completed and submitted
- Unified Partner and Class A Volunteer form registration forms completed and submitted
- Head and assistant coach(es) trained and certified
- Local Program budget created and turned in to the AMT and State Office

Foundational details regarding Special Olympics sports training and competition can be obtained from SOMT.

Structuring Local Program Sports Training

The following opportunities may be added based on your Local Program's capacity and specific needs, along with endorsement from SOMT Sports Department.

Sports Opportunities Offered

Special Olympics offers something for everyone, regardless of age or ability level. Fact sheets, rules, and coaching guides for each sport (official and recognized) are available from SOMT Sports

Department, or by visiting specialolympics.org. Most sports offer multiple levels of play, ranging from standard regulation play to individual or team skills offerings.

The Official Special Olympics Sports Rules govern all Special Olympics competitions. Special Olympics has developed these rules based upon International Federation and National Governing Body Rules for each sport.

Consult SOMT regarding sports currently offered to your Local Program, and the time of year recommended for each sport season.

Locally Popular Sports

Special Olympics may also allow athletes to engage in locally popular sports. SOMT can provide more details regarding its process for assessing and approving new sports. The following general guidance is offered for consideration in this area:

- Locally popular sports may require pre-approval from SOMT and SOI if they have been determined by SOI to be sports that might expose Special Olympics athletes to unreasonable risks to their health or safety.
- No Accredited Program may offer any training or competition in any sport which SOI has classified as a prohibited sport.
- Requests for permission to offer one of these sports must be accompanied by proposed rules and safety standards. SOI has classified the following sports as locally popular sports that require pre-approval:
 - o Combative sports
 - o Martial arts (other than Judo)
 - o Sledding sports
 - o Motor sports
 - o Aerial sports
 - o Shooting
 - o Archery

Special Olympics Unified Sports®

Special Olympics Unified Sports® is an inclusive sports program that includes Special Olympics athletes (individuals with intellectual disabilities) and Unified Partners (individuals without intellectual disabilities). Through shared sport training and competition, Unified Sports promotes inclusion for individuals with and without intellectual disabilities.

Unified Sports is identified in Article 1 of the Sports Rules as three inclusive models – Competitive, Player Development, and Recreational. Each of these models reflects a certain style of play and teammate composition, but all must be fully inclusive for participants.

Coaches should consult with SOMT regarding what Unified Sports models are offered and at which events.

Unified Sports Competitive Style

- All athletes and partners must have sport-specific skills and tactics to complete without modification of rules.
- Teams in this model may be eligible for advancement to Regional and World Games.
- Athletes and Unified Partners in team sports must be of similar age and ability.
- Athletes and Unified Partners in sports, such as golf, may have a greater variance in age and ability.

Unified Sports Player Development Style

- Athletes and Unified Partners are not required to be of similar abilities, but must be of similar ages.
- Teammates of greater abilities serve as mentors to assist teammates of lower abilities in developing sport-specific skills and tactics.
- In certain sports, such as bocce, more age variation is allowed.
- Competition is available at this level.

Unified Sports Recreation Style

- Consists of inclusive recreational sports opportunities for athletes and Unified Partners, or other organizations as introductory one-day events, exhibitions, or demonstrations.
- There is no prescribed training, competition, and/or team composition requirements.
- Opportunities may take place in partnership with schools, sports clubs, and/or community programs.
- Physical education class activities and intramural sports may also fall into this category.

Competition Standards and Leading Practices

The minimum standards for athletes desiring to compete in Special Olympics are based on Special Olympics Inc. Sports Rules. All athletes must be trained in the sport before competing. Part of this training may include nutrition education and physical conditioning. Eight consecutive weeks are mandatory.

In addition to training, your Local Program might also take part in organizing and delivering competitions within your service area. SOMT will provide guidance regarding your responsibilities in this area, and any expected standards or processes for doing so.

Levels of Competition

Athletes of all ability levels have an opportunity to advance to the next higher-level competition provided the sport and event are offered at the next level, from sub-Program Games to World Games.



Divisioning

The fundamental difference between Special Olympics competitions and those of other sports organizations is that athletes of all ability levels are encouraged to participate, and every athlete is recognized for his/her performance. Competitions are structured so that athletes compete with other athletes of similar ability in equitable divisions.

Divisioning is a multiple-stage process of matching athletes for competition based on their gender, age, and competitive ability level.

- Before each competition, a time, score, or skill assessment is submitted for each athlete or team. For events that are not timed or measured, such as basketball and soccer, there is a series of short games between athletes or teams or an assessment of each athlete or team's ability by a committee.
- The divisions are then set up based on the information on each athlete's skill level so that each set of competitors is closely matched. Divisions can then be modified at advanced levels based on the results of preceding competitions.

SOMT can provide more detail about divisioning, and how your Local Program can support a thorough, consistent divisioning process for its competitions.

Maximum Effort Rule

If an athlete's final performance at a state-level competition exceeds his or her submitted divisioning score by x% (See chart at end of document for exact percentages), the athlete will be subject to* the following restrictions (***coaches may submit new scores up to the final registration due date***). See Appendix for full documentation on Maximum Effort Rule.

Age Requirements

Individuals aged eight and above are eligible to participate in competition, with official results, and be awarded with medals and ribbons recognizing their place of finish.

There is no maximum age limitation for participation in Special Olympics.

Criteria for Advancement

SOMT can provide details regarding any criteria for advancing to higher levels of competition, including any quotas that might exist. Any such criteria and procedures apply to both individual and team sports, including Unified Sports[®], and should be made known to athletes, families, and volunteers.

Games Management System (GMS)

SOMT uses a Games Management System (GMS) to maintain data on all participants. This system is essential to athlete registration, and often to the divisioning process. SOMT staff is available to outline expected processes and procedures by Local Programs, and to provide any necessary training.

Sports and Competition Safety

Ensure the safety of your athletes, Unified Partners, coaches, volunteers, and fans by always promoting health and safety during sports training and competition.

During Practice Sessions and at Competitions

- Conduct a safety walkthrough of facilities before each training season or competition.
- Always have a basic first aid kit available at every practice and competition.
- Always have athletes' medicals available at practices and competition. Be sure to protect the privacy of this information and note where these forms go at the end of the season.
- Establish a simple protocol in case of an accident or other incident. Provide all coaches with the most up-to-date and accurate emergency contact information for athletes, Unified Partners, and volunteers.
- Follow SOMT crisis communication plan that includes who to contact and what to do.
- Ensure that there is at least a 4:1 ratio of athletes to coach to provide proper supervision (3:1 ratio for Winter Sports).

- Be sure to establish that a coach can contact the Local Program Coordinator in case of an incident.
- Provide coaches with the number and location of the nearest emergency services.

Additional Opportunities

In addition to traditional sports training and competition, Special Olympics provides a variety of related opportunities for athletes of all abilities. Section 2 of the Local Program Development Guide addresses additional methods your Local Program might deliver the mission to your athletes.

Sport Training Checklists

Logistics

- Facilities arranged and evaluated for safety and accessibility; submit insurance contracts and payment
- Equipment procured and prepared
- Length of practice
- Time of day for practice
- Availability of coaches and volunteers
- Communication of dates and times to athletes

Athletes

- Number involved
- Age level and maturity
- Skill level
- Adjusting for different skill levels
- Preparedness for potential injuries

Safety

- Practice conditions
- Water available
- Weather Conditions
- Hazard-free playing surface
- Equipment in proper condition
- Emergency procedures
- Medical forms on site
- Supervise athletes at drop off and pick up at practice and competition

Delivery of Instruction

- Key points
- Teaching methods
- Position of athletes: Not facing the sun, athlete needs such as hearing, vision, etc.
- Delegation of volunteers and assistant coaches
- Intervention for behavior or crisis
- Positive feedback and support
- Progression throughout the session:
 - Easy to difficult
 - Slow to fast

Organization of Practice

- Warm-ups (body and skills)
- Review previously taught skills
- Introduce new skills
- Game or event situation; competitive experience
- Cool down and team talk
- Cell phone numbers of chaperones and coaches
- Emergency contact information for chaperones and coaches

Other

- Communication with parents, coaches, and event staff
- Coordination of Special Events
- Communication with Special Olympics Montana and Area Management Team
- Attend monthly Area Management Team meetings in person or virtually
- Volunteers should be Concussion Certified
- Volunteers complete Protective Behaviors-mandatory reporter
- Fill out Misconduct Reporting Form when necessary



Contents

This section of the Local Program Development Guide addresses the following topics:

- Internal Communications (Pages 1-2)
- External Communications (Pages 3-5)
- Crisis Communications (Pages 5-6)
- Branding and Language Guidance (Pages 6-12)

For success to occur with all stakeholders, the Local Program needs to communicate often and in a variety of ways. This section of the Local Program Development Guide addresses recommendations for internal and external communication, as well as branding and language guidance commonly sought by Local Programs.

Internal Communications

Who is your internal audience?

- Local Program Area Management Team (AMT, head coach/coaches)
- Athletes / Unified Partners
- Families
- Coaches
- Volunteers

What do you need to communicate?

- Awareness of Special Olympics – Our mission, how to engage with us, news about Local Program activities
- Practice and meeting schedules
- Competition dates
- Fundraising activities
- Training opportunities for athletes and coaches
- Travel details
- Volunteer opportunities for athletes, Unified Partners, coaches, and other Local Program roles

When do you communicate?

It is important to communicate on a regular basis, even when something is not immediately upcoming. **Weekly communication is highly recommended.** For example: “We will start training for Winter Games in six weeks; look for the specific practice schedule to be out by ____.”

When there may not be upcoming events, consider communicating less frequently. Bi-weekly or monthly communication may be more appropriate at these times.

How do you communicate?

Consider that everyone has different preferences. Do not rely solely on one means of communication. Common communication approaches used by Local Programs include:

- Email
- Text messaging/Messaging Apps
- Newsletters (print and/or digital) or Mailers
- Private/moderated social media* groups with member/access control
- Website
- Phone calls

*Be mindful of the content posted on social media. Some information is only appropriate for an internal audience and not for the general public. Further guidance is included later in this guide regarding social media usage.

Reminders:

- Keep all lists current! Be sure to add new athletes, families, and volunteers when they join a Local Program. Delete those who are inactive.
- Keep your communication lively to encourage engagement. Remember your ABCs: Audience Based Communications! Put yourself in the shoes of the recipient of your communication – make it clear, easy to read and understand, include all necessary details, and avoid jargon or acronyms that aren’t widely/universally known.
- Always maintain a professional tone in your communications — remember that you are representing Special Olympics.
- All official Special Olympics communications between participants (example: coach and their athletes/team) conducted via email, text, or social media should always aspire to be “observable and interruptible.” In other words, communications should never be one-on-one, to help protect everyone involved. Examples:
 - Text exchanges should be group texts including the whole team, whole coaching staff, etc.
 - Respond to SO-related practice or event questions from athletes/Unified Partners on the team Facebook page, or in a group text.

External Communications

Who is your external audience?

- All internal audience members
- Partners
- Community leaders
- Prospective athletes, volunteers, and donors – your community!
- Family, Guardians, Providers

What do you need to communicate with followers and the general public?

- Awareness of Special Olympics – Our mission, how to engage with us, news about Local Program activities
- Program news, upcoming events/activities, and ways to engage
- Achievements, milestones, and good news
- Athlete, coach, volunteer, and family profiles
- Volunteer opportunities
- Ways to support the Local Program financially – including donations, special events, and fundraisers

How to communicate with fans, followers, and the general public?

- Social media
- Website
- Newsletters (print and/or digital)
- Emails
- Printed collateral – including fact sheets, brochures, posters, and flyers
- Town halls (in-person and/or virtual)

Who is doing the talking?

Each Local Program should select a spokesperson, usually the Area Director or Communications Coordinator, that are qualified and prepared to speak to the media or public about Special Olympics. Be sure to engage athlete leaders trained as public spokespeople.

All individuals speaking to the media or public should maintain clear, consistent messaging about the Local Program and are using current state facts and statistics.

What coverage to expect from local media about your program/area:

- Overall education/awareness about the Local Program, including its needs and activities
- Upcoming competitions
- Results from competitions
- Athletes and/or coach profiles

- Volunteer recruitment needs
- Assistance with fundraising activities

Using Special Olympics Letterhead

For communications on behalf of Special Olympics and/or the Local Program, such as letters to the community and/or donation requests, you may need to use Special Olympics letterhead. Contact SOMT or your local Area Director/Communications Coordinator for an approved template to be used by Local Programs.

Social Media

Social media can be a powerful and cost-effective way to reach a broad audience. At the same time, it is important to be mindful of how social media is used, and the effects that social media can have on your Local Program. If your local program has a Facebook page, please add SOMT's Marcomm Staff members as an administrator to the page.

Social Media Policy

It is important to have guidelines when using social media within the Local Program. Discuss this with SOMT to obtain our policy. Share this information with all Local Program athletes, coaches, families, and volunteers. Please see appendix for the full SOMT Social Media Policy.

Leading Practices for Managing Social Media on Behalf of Special Olympics

Verify SOMT policies/protocols regarding the ability (or not) for Local Programs to create social media accounts. This verification would also apply to creating websites/URLs.

You should only make a social media account in the name of a Special Olympics Local Program with prior approval and guidance from SOMT, following their social media, digital media, and website protocols.

- This includes policies and guidance pertaining to using the likeness of participants (photos, images, voice, etc.)
- Use the Special Olympics logo in accordance with branding guidelines set forth in the SOI Branding Standards online: <https://media.specialolympics.org/resources/brand-awareness-and-communication/branding/brand-guidelines/Brand-Identity-Guidelines-2018.pdf>
- Do not publish confidential or personally identifying information about Special Olympics athletes, staff, volunteers, families, community partners or sponsors.
- Be mindful of copyright and intellectual property rights of others and of Special Olympics. Individual bloggers and webmasters may be held accountable for the information that they publish on their sites if it is illegal, defamatory, copyrighted, etc.
- If someone asks you a question outside of your expertise, direct the person to the proper resource. Do not act as a spokesperson. Refer such requests and questions to SOMT Marketing and Communications Director, Holly Netz who can be reached at 406-315-4200 or hnetz@somt.org.

- At no point should Special Olympics accounts ever be used for the purpose of expressing personal or political beliefs or opinions. Keep your personal views separate.
- Do not use the Special Olympics name or logo to promote or endorse any product, religion, cause, political party, or candidate.
- Per the Special Olympics General Rules, do not allow the Special Olympics name or logo to be used in conjunction with alcohol, vaping, or cannabis-based product companies. Certain provisions also apply to firearms. Consult SOMT Development Department for guidance.
- Avoid arguments and confrontations online. If you see a comment that would warrant an official response from Special Olympics, contact SOMT.
- Each area will have a page on the SOMT website where they are able to update local area information and add events to the calendar.
- Teams are able to have their own website name but Special Olympics Montana or SOMT is not allowed to be used in the URL address.

General Social Media Guidelines

- While complete privacy does not exist in the world of social media, almost every social media platform has privacy settings that can help protect your privacy.
- Your personal and professional life could overlap when what is shared becomes part of the public domain and may reflect on the author personally and/or professionally. Remember, even after being deleted, comments and posts continue to live online in archival systems.
- Delete any profane or derogatory comments on your personal social media pages. Always report posts that you feel are threatening, harassing, or inappropriate. This could violate the Volunteer Code of Conduct.
- Respecting the privacy of others is incredibly important when using social media. Do not publish or tag photos of others without their permission. Avoid publishing someone's last name, school, or place of employment on social media if you do not have their permission. It is important to note that what you publish may be subject to public disclosure in legal proceedings.
- Avoid conflicts of interest and maintain a distinction between your personal identity and the identity you represent on behalf of Special Olympics.
- Do not comment anonymously, conceal, or misrepresent your identity in your online activities.
- When instances of misinformation occur in social media posts or comments, respond with facts and data.
- Monitor your social media accounts on a daily basis to look for inappropriate posts and to respond to questions and comments as needed – remember, social media is a dialogue, not a one-way communication.
- We often see Facebook groups, profiles or pages that represent themselves as Special Olympics and are not associated with the program. These pages try to friend athletes/volunteers/families and use scam tactics to “sell merchandise” or steal passwords and take control of accounts. If you see ANY account that is questionable, please report it to SOMT MarComm immediately. Holly Netz, hnetz@somt.org or Holly Netz on Facebook.

Crisis Communications

A crisis is a situation that demands immediate attention and response from Special Olympics. A crisis could be operational in nature, stemming from an issue or incident that causes harm to a participant, disrupts events, or causes damage to a physical location. A crisis can also put the reputation of Special Olympics at risk, causing people to perceive the organization poorly.

Local Programs are advised to be familiar with SOMT's Emergency Response Procedures for events. crisis communication plans issued by SOMT. In general, the following guidance is offered for crisis situations:

General Emergency Response Procedure

- Immediately contact emergency services in the event of a life-threatening incident.
 - SOMT local areas should make every effort to ensure emergency services are available at in-person events.
 - Call 911 if on-site emergency services are not immediately available.
 - Notify the Area Director or Local Program Coordinator immediately in case of an emergency.
 - Care for the athlete(s) and control the immediate area:
 - Keep the area around the athlete clear of non-family members or equipment to allow emergency services access and for privacy.
 - Calmly talk to the athlete and explain what is happening. Someone they know and trust should always remain with them.
 - Do not give liquids or food or move the athlete.
 - Follow emergency services instructions.
 - Contact the SOMT state office staff and complete an incident report. SOMT staff will provide crisis communication guidance if needed.
 - Vickie Donisthorpe, COO, 406-315-4215 vdonisthorpe@somt.org
 - Brittani Bush, VP Sports, 406-315-4216 bbush@somt.org
 - Rae Smith, VP Outreach, 406-315-4214 rsmith@somt.org
- For a crisis not requiring immediate attention from local authorities, begin by contacting SOMT's CEO and/or Crisis Communication lead (often the Marketing and Communications Director).

Branding & Language Guidance-

As our core visual identity, all Local and Accredited Programs must make every effort to ensure the Special Olympics logo and brand are used properly, internally, externally, and by third parties, like vendors, partners, and media. Any area volunteer making graphic/collateral or talking to the press needs to watch the "Marketing and Branding 101" video/quiz located in the Outreach Google Drive.

[SOMT Branding 101](#)

Special Olympics Montana has created an abridged version of SOI guidelines. You can view that document here:

[Marketing/Branding 101](#)

Key Logo Usage Guidance

The following information is important to keep top of mind when using the Special Olympics logo. If you have any questions about using the Special Olympics logo, please reach out to SOMT marketing department.

- The logo should not appear in colors other than red, black, white, or gray.
- The logo should be placed on a solid background that provides the maximum contrast possible, so the logo is clearly visible.
- Nothing should be added to, removed from, or adjusted in the logo.
- The symbol (globe symbol) cannot be used on its own and must always be used together with the text.
- The Area logo should be used in all cases for Area social media posts, flyers, and communications produced by the Area. The State logo should only be used for State-led programming. Please reach out to SOMT MarComm with any questions, or for official copies of State Games logos, etc. (hnetz@somt.org)

Using "Olympics" and Other IOC Elements

Through a Protocol of Agreement signed on February 15, 1988, the International Olympic Committee (the IOC) officially recognized SOI and agreed to cooperate with SOI as a representative of the interests of athletes with intellectual disabilities. The IOC's formal recognition of SOI carries with it a solemn duty and responsibility, which must be discharged by SOI and all of its Accredited Programs, to conduct Special Olympics training and competition in accordance with the highest ideals of the international Olympic movement, to guard and protect the use of the term "Special Olympics," and to protect the word "Olympics" from unauthorized use or exploitation. **The IOC's Protocol of Agreement with SOI prohibits SOI, Programs, and GOCs/LOCs from using the five ring Olympic logo, the Olympic anthem, or the Olympics motto.** Each Accredited Program agrees to fulfill these responsibilities by accepting accreditation from SOI, as provided in its Accreditation License and Article 6 of the General Rules.

If you come across other entities using the Special Olympics in any way and they are not affiliated with either SOI or the State program, please contact MarComm at the state office. hnetz@somt.org

Uniforms

Your Local Program may be responsible for ordering and creating uniforms. Consult SOMT regarding your specific responsibility in this area, and its specific procedures for uniforms and equipment. If you proceed in ordering uniforms for your Local Program, the following information may be useful. **Team name logos are prohibited from appearing on 'official' uniforms for competition. The team name IS allowed to appear on the uniform, but only in a logo format dictated by SOI. If you want to put your team name on your uniforms, please contact MarComm at the state office to obtain a SOI approved logo. Additionally, it may be helpful to print the brand guidelines and take those to the business creating your team uniforms.**

Commercial Messages on Athlete Uniforms and Competition Numbers

To avoid commercial exploitation of persons with intellectual disabilities – per the Special Olympics, Inc. General Rules – no uniforms, bibs, or other signs bearing competition numbers worn by Special Olympics athletes and Unified partners during any competition or during any Opening or Closing Ceremonies of any Games may be emblazoned with commercial names or commercial messages. The only commercial markings that may be displayed on athletes' uniforms during Games, competitions, and Opening and Closing Ceremonies are the normal commercial marking of the manufacturer.

In terms of Special Olympics uniforms, “normal commercial markings” are limited to:

- On larger clothing items – such as shirts, jackets, pants, jerseys, and sweatshirts – one logo or commercial name per clothing item is permitted if that name or display does not exceed an area of 6 square inches or about 39 square centimeters (such as a display measuring 2” x 3” or 5.08 cm X 7.62 cm).
 - o Please note that, in addition to commercial messages, each sport may have specific guidelines to the size and location of numbers and team names as indicated by each National Governing Body.
- On small clothing items – such as caps, socks, hats, gloves, and belts – one logo or commercial name per clothing item is permitted if that name or display does not exceed an area of 3 square inches or 19.35 square centimeters.
- On athletic shoes, no logos or commercial names are permitted except for the brand name and logo included by the shoe manufacturer when issued to the general public.
- Please consult pages 82-85 of the Special Olympics Branding Standards (<https://media.specialolympics.org/resources/brand-awareness-and-communication/branding/brand-guidelines/Brand-Identity-Guidelines-2018.pdf>) prior to ordering uniforms. **It is strongly recommended that you contact SOMT for guidance and/or to review artwork prior to ordering uniforms. If your uniforms do not meet branding standards, you may not be able use them in competition.**

Special Olympics sub-Program Visual Identity Guidelines

Proper representation of a sub-Program

B Team Representation

Examples of how to properly represent a team through their team lock-up mark.



SpecialOlympics.org Special Olympics Sub-Program Visual Identity Guidelines / December 2012

Branding for Team Uniforms and T-Shirts

Athlete T-shirts and/or uniforms should not carry any sponsorship branding. They can, however, be branded with the Special Olympics logo in accordance with branding standards.

Lockup for sub-Programs, Clubs, or Teams


When creating shirts for sub-Programs, clubs, or teams, a lockup can be used that gives priority to the actual team name. This acknowledges the importance of local teams within Special Olympics, Inc. and facilitates the creation of distinct team identities for games within a program. If you do not have an official team logo lockup, please contact MarComm at the state office to obtain one. (hnetz@somt.org)

Above and below are examples of the Special Olympics brand in action with examples of lockups for sub-Programs, clubs, or teams.



Branding for Volunteer Apparel

In addition to banners and signs, logos on volunteer t-shirts are an appropriate and approved way to recognize local sponsors. Sponsor logos could be placed on the sleeves and/or the back of the shirt. The Special Olympics brand should only appear on the front of the shirt.

Brand in action **T-shirts**
Lock-up for sub-programs, clubs or teams

 When creating shirts for sub-programs, clubs or teams, a lock-up can be used that gives primacy to the actual team name. This acknowledges the importance of local teams within Special Olympics and facilitates the creation of distinct team identities for games within a program.

- 1 The name of the team has primacy on the shirt ensuring team or club recognition between competing teams. The choice of typeface and design of this element is at the discretion of the program.
- 2 The name of the Accredited Program to which the sub-program, team or club is affiliated is set in all capitals Ubuntu Bold as illustrated here.
- 3 The Special Olympics symbol is centred beneath the program name.
- 4 The color, typestyle or motif created for each team reflects the local identity of the club or team while clearly identifying the club or team as being within the Special Olympics Accredited Program.



Language Guidelines

It is critical that appropriate terminology is used when speaking about a Local Program. This helps to educate the public while reinforcing the organization's brand. Below are documents that outline commonly used terms and acronyms in our movement, and recommended ways to refer to elements of Special Olympics and those we serve:

- [Special Olympics Language Guidelines](#)
- [Special Olympics Intellectual Disability Terminology Guidelines](#)

Glossary of Commonly Used Special Olympics Terms

- **Accreditation:** Method of assuring that every Program meets the essential core requirements of the Special Olympics mission, as well as certain management and financial requirements. Accreditation 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.
- **Area Games:** Preliminary competitions that take place before SOMT state events. These serve as additional competitive opportunities for athletes, as well as provide information that is used to ensure that athletes have an opportunity to compete at an appropriate level according to their ability.
- **Athlete:** A person who is identified as having an intellectual disability who is at least 8 years of age and registers to participate in accordance with the SOI General Rules. This individual trains in an Official Sport or Recognized Sport for a minimum of eight weeks or longer during the calendar year and competes in local, state, or Program Special Olympics competitions, or participates in a Motor Activities Training Program. Children under age eight can participate in Young Athletes.
- **Athlete Input Council:** A committee comprised of athletes whose purpose is to facilitate discussion among athletes and pass along their suggestions to improve their respective Program.
- **Athlete Medical Form:** Contains pertinent athlete information, including emergency contacts and medical conditions. This form must be completed by a medical examiner before participation in Special Olympics. This form is also known as the Participation Form and is due every three years unless otherwise stated by the Accredited Program.
- **Athlete Release Form:** Each athlete is required to submit a consent form to participate in Special Olympics.
- **Area Management Team:** Each area has a team of volunteers that assists with fundraising, events, public relations, education, training, competition, finance oversight, outreach, and engagement.
- **Class A Volunteer:** Any person who volunteers for a Special Olympics Accredited Program as a coach, chaperone, driver, overnight host, Unified Sports® partner, or otherwise in a manner that results in regular close contact with Special Olympics athletes. Class A Volunteers also include those who may assume administrative or financial duties such as Area Management Team members, Committee Members, Event Directors, or Board Members.
- **Day of Volunteer:** Any person who volunteers at a single event; one-day, or walk-on volunteers who do not have direct responsibility or close ongoing contact with athletes.
- **Coach:** Individual charged with training athletes in a specific sport.
- **Division:** The competitive grouping of three to eight athletes in a particular sport based on age, gender, and ability level.
- **Games Management System:** database used by Special Olympics Montana for athletes, coaches, and volunteers to keep track of paperwork, certifications, competitions, etc.

- **Games Management Team:** A group of volunteers who organize and run state level special events and competitions for Special Olympics.
- **Global Messenger:** Athlete ambassadors who foster awareness and advocacy for the Special Olympics movement internationally. Athletes must complete a training program in communications, speech writing, and presentations along with their local speech coach.
- **Special Olympics Healthy Athletes[®]:** Special Olympics Healthy Athletes[®], made possible by the Golisano Foundation, and in the United States in collaboration with the U.S. Centers for Disease Control and Prevention, is a program dedicated to providing health services and education to Special Olympics athletes, and changing the way health systems interact with people with intellectual disabilities.
- **Area/Local Program:** The Area/Local Program is the direct service unit for athletes and their family members within Special Olympics Montana. The Area/Local Program engages with the public to provide sports training, competition opportunities, and related activities while creating inclusive communities. An Area/Local Program is the grassroots level of the Special Olympics movement, and may originate out of existing independent Special Olympics clubs, public or specialized schools, colleges or universities, independent living facilities, Parks and Recreation Departments, adult service providers, professional sports clubs, geographic communities, counties, or other training groups that include registered Special Olympics athletes.
- **Local Program Coordinator:** Class A Volunteer who has been trained to be the coordinator of a local team. The LPC handles the team budget, schedules practice times and facilities, and organizes all events for this particular team.
- **Medical:** See “Athlete Medical Form”
- **SOI General Rules:** The Special Olympics, Inc. (SOI) General Rules provide the rules and guidelines for all activities and bind participants (including Local Coordinators) to the Special Olympics purpose, mission, and goals.
- **Staging:** The area where athletes convene as they prepare for competition and awards. This is used to ensure that athletes are placed into the correct competitive divisions.
- **Time Trials:** An event run at the same location as the competition for establishing scores to division athletes for final competition.
- **Special Olympics Unified Sports[®]:** An inclusive sports program that combines approximately equal numbers of teammates with and without intellectual disabilities on sports teams for training and competition.
- **Special Olympics Unified Champion Schools[®]:** Unified Champion Schools creates social inclusion in schools by building on Special Olympics’ values, principles, practices, and experiences. This programming strives to incorporate three components in schools: Unified Sports[®], inclusive student leadership, and whole school engagement.
- **Unified Partner:** A person without an intellectual disability who trains in a Special Olympics sport and who competes as a teammate.

Common Special Olympics Acronyms

- **AMT:** Area Management Team
- **BOD:** Board of Directors
- **DD:** Developmental Disability
- **GMS:** Games Management System
- **GMT:** Games Management Team
- **HOD:** Head of Delegation
- **ID:** Intellectual Disability
- **IYL:** Inclusive Youth Leadership
- **LETR®:** Law Enforcement Torch Run® for Special Olympics
- **AMT:** Area Management Team
- **LPC:** Local Program Committee
- **MATP:** Motor Activities Training Program
- **NGB:** National Governing Body
- **SMT:** Sports Management Team
- **SOI:** Special Olympics, Inc.
- **SONA:** Special Olympics North America
- **UCS:** Unified Champion Schools®
- **UP:** Unified Partner
- **YA:** Special Olympics Young Athletes

Local Program Development Guide

Section 6: Fundraising and Partnerships

Special Olympics
Montana



Contents

This section of the Local Program Development Guide addresses the following topics and questions:

- General Fundraising Guidance (Pages 1-2)
- Fundraising Event Guidance (Pages 2-3)
- Partnerships (Pages 3-6)

Fans and funds are the fuel that service the mission of Special Olympics, especially as Special Olympics is offered at no cost to the participant. How funds are raised and managed are important responsibilities of the Local Program and SOMT. A few examples of some of the established Special Olympics fundraising events that Local Programs could take part in are the Law Enforcement Torch Run®, Polar Plunge®, Plane Pull®, and consumer-facing campaigns by promoted partners of SOMT.

Local Programs fundraise to create sustainable programs and ensure quality growth. Prior to engaging in fundraising, contact SOMT fundraising/development staff. They will guide you through the fundraising policies and procedures, as well as provide ideas and strategies to ensure success.

There are many ways to raise funds. Deciding what is in the Local Program's best interest should be examined closely with SOMT. Some common ways to raise funds include:

- Sponsorships/Partnerships
- Grants
- Employee match programs
- Special events (e.g. raffles, auctions, concessions, dinners, galas, walk-a-thons, etc.)
- Participating in shared revenue opportunities conducted by SOMT.

General Fundraising Guidance

The following information applies to all forms of fundraising:

- All volunteers who handle large sums of money (\$500 or more) are required to register as Class A Volunteers.
- When selling MTN Chevy Truck Raffle Tickets you can accept cash or check. Venmo, Paypal and credit cards are not allowed.
- Be aware of fundraising restrictions. Collaborate with SOMT Development Director before soliciting, especially when seeking corporate support. Making multiple asks may aggravate or confuse donors, whether prospects or current donors.

- Fundraising is done to support Local Program teams. Fundraising for a particular athlete – unless approved by SOMT – is strictly prohibited.
- All contractual agreements that address liability require approval by SOMT for them to be considered binding.
- All funds raised by a Local Program must be deposited into the authorized SOMT program account within two (2-5) business days of the donation.
- Funds should be sent by check or money order. **Do not mail cash.** Cash may be hand-delivered to SOMT state office. Always request a receipt for cash.
- Gift-in-kind donations (water, food, facility, materials, etc.) should be documented. The Development Department requests an itemized list of donations, the value of that donation, and business name/information and will mail the receipt to the donor. If you prefer a form, contact the Development Department.
- Consider participating in fundraisers already established by SOMT. Leveraging established SOMT fundraisers tend to be more cost-effective and successful than conducting a new event.
- Fundraisers may serve several purposes. Identify the purpose and match the amount of effort that will go into it based on its purpose. For example:
 - o A car wash can bring in great awareness; however, the amount of money it raises may be limited.
 - o Likewise, make sure costs are considered. A common fundraising standard is that any fundraising effort return at least 4 times the investment – in other words, if you invest \$100 on a fundraiser, it should raise at least \$400.

Fundraising Event Guidance

When organizing a fundraising event, the following steps are advised:

- Fundraising events are not allowed to have any direct affiliation with tobacco, vaping, cannabis-based, or alcohol products. Consult SOMT staff for additional guidance.
 - o With exception, these types of fundraisers are permitted (pint nights,) *if* the event marketing has been approved by SOMT.
- **SOMT requires the completion of the Fundraising Form (link located on the SOMT Team Planning Webpage) prior to any event marketing including social media posts, poster design, etc.** This form will ask for basic information about the event and might require a simple expense and revenue budget.
- Build a fundraising event plan which includes identifying the overall fundraising objective – including setting a goal for how much you want to raise (gross and net after expenses) – and a timeline for tasks to be completed (what and when).
- Successful fundraising – particularly special event fundraisers – requires a group of volunteers assigned to specific tasks. Assign manageable duties to others, train as necessary, monitor progress frequently, make timely adjustments, and have fun!

- Detailed record keeping is crucial to your fundraising efforts. Make sure that all expenditures reconcile with bills and receipts, and that all revenue reconciles with items sold (such as auction items, raffle tickets, etc.) Use forms provided by SOMT to track expenses and revenue.
- Funds raised must be turned into the Finance Coordinator or Area Director.
- Following a fundraiser, be sure that all supporters and sponsors have been thanked for their contributions. Thank you letter templates and stationery may be available from SOMT. Certificates or plaques may be appropriate depending on the circumstances.
- Take time to conduct a post event evaluation as part of a successful fundraising event. In addition, maintain records that will be helpful for future events such as donor/participant contact info, items and amounts donated, and files that outline your previous tasks and communication.

Law Enforcement Torch Run (LETR) Event Fundraisers

The Law Enforcement Torch Run is the largest public awareness vehicle and grass roots fundraiser for Special Olympics worldwide. In Montana, LETR signature fundraisers include Polar Plunge, Tip-A-Cop, Torch Run Relay, and Plane Pull. The Montana Torch Run also hosts several other fundraisers throughout the year that include gun raffles, golf tournaments, shooting competitions, and more.

A fundraiser is considered an LETR event when it is predominately led by law enforcement officers. In efforts for the Torch Run to support SOMT athletes, the revenue for the following fundraisers qualifies for the 60/40 split (60% to the area/local program team and 40% to the state office).

- Polar Plunge
- Tip-A-Cop
- Montana Torch Run
- Plane Pull
- Other LETR Special Events

When the event is a state or LETR sponsored fundraiser, individual areas/teams are not permitted to raise funds in tandem with the event.

Partnerships

Local Programs should forge partnerships in their communities. The following information is provided to help you get started with creating your own partnerships with sponsors, volunteers, clubs and organizations, athletes, and others in your community.

Prospecting and Networking

A partner begins as a prospect – a person, school, business, or organization that you want to have a deeper relationship with your Local Program. There are many prospects in your community, and many

are closer at hand than you might think. These prospects become part of your Local Program’s network of community contacts, to share future opportunities and general communication.

Potential prospects

Prospects generally come from two tiers of contacts: those who are already aligned with your Local Program or with Special Olympics, and those who “should be”. In either case, here are a few suggestions of who to find, and where to find them.

- Start internally with your leadership, your athletes, and their families. Where do they work? What clubs, organizations, service clubs, or places of worship do they belong? Who are the most influential people they know?
- The Law Enforcement Torch Run (LETR) is a significant partnership within our movement. Consult with SOMT LETR Liaison regarding LETR agencies near you, any existing efforts led by LETR in your community, and how to best engage these agencies in your area.
- What are the most prominent companies in your community? Many focus on areas that align with Special Olympics, such as health and wellness, and supporters of youth and school sports. Others might be frequent community donors during special occasions such as festivals or holidays.
- Confirm if a prospect is the decision maker for their organization. Often you will encounter a “gatekeeper” that stands between you and the decision maker. Develop your relationship with the decision maker whenever possible!
- Use the Special Olympics Resource Toolkit to learn about research and facts that might also be helpful in finding and cultivating prospects:
<https://resources.specialolympics.org/research>

Before any action is taken to develop a relationship, check with the Development Department to ensure that there is no preexisting relationship.

Successful Approaches to Partner Development

Developing a partnership is all about relationship building. The following guidance can be helpful in overcoming barriers to building partnerships.

Starting a Strong Partnership

1. Always listen for opportunities. All interactions provide an opportunity to share the Special Olympics mission.
2. Learn about what matters most to the partner. You already know the partner is valuable to your efforts. If you can take the time to find out how you can also meet their needs, a true partnership can develop. Research, when possible, who they are and what they do, so you understand their priorities before you meet.

- a. If this is your first time meeting a potential partner, a common approach to the initial conversation is to talk 20% of the time and listen 80% of the time. Be alert to any information they share that aligns with your needs.
3. Be willing to start small. You may have a grand vision for a partnership, but it may take time to develop. A large partnership might start with a “no” or with a donation of time rather than their resources. Stay persistent, and keep the door open whenever possible!

Making the Ask

1. Get personal! After brief introductions, be willing to share why Special Olympics matters so much to you and support your “Special Olympics story” with facts about the movement. Passion can be contagious. Use that passion to help them understand why this ask or event is so important.
2. Take a unified leadership approach! Our athletes are our greatest success stories and can often make the most compelling and convincing asks for support. Take athletes with you to your meeting, encourage them to share their story, and include them in the process of making the ask.
3. Stay positive! Regardless of the outcome, you are representing Special Olympics and making them more aware of our work. Even if the answer is “no” initially, a positive impression will set a positive tone for your next interaction.
4. Be brave in the attempt! Not every ask will end in “yes”. Follow the example of our athletes and do your best and stay confident that a “no” will get you one step closer to the outcome you want.
5. Have options! Be prepared to pivot the conversation to any number of opportunities to support your Local Program, thinking of the various gifts they could provide:
 - a. Time – Can this partner become a volunteer, as a coach, Unified partner, committee member, or otherwise support with the gift of their time?
 - b. Talent – Does this person (or group) have skills that can help your Local Program? Can they help to make asks or introductions to others? Think about what makes this person successful, and how that could benefit your Local Program.
 - c. Treasure – In addition to their money, what else can they offer that is valuable? Products, gift cards, discounts, proceeds of sales, equipment, venues, etc. – there can be many options to contribute, and most will be very useful.

When you confirm a new supporter, be prepared to deliver (and when possible, over-deliver) on your end of the deal.

- A Letter of Agreement (LOA) can outline roles and responsibilities that are clear and easy to follow. Check with SOMT Development Department for a sample to ensure that our Program’s approval process is followed.
- Provide information about how, and to whom, they can easily send or submit their contribution.
- Thank the donor early and often. Consider sharing the impact of their gift (example: how much equipment your team can purchase from their support, or how many more athletes can now

compete at an event). Also, involve your athletes in the thank you strategy. They are your greatest ambassadors!

Maintaining the Relationship

Regardless of whether or not you get the support you are seeking, this meeting has now started a relationship. A true partnership goes beyond a single pledge or donation. Consider how you might keep them informed – and potentially more involved – in your Local Program for years to come.

1. Invite the donor to a team practice, an event, or other opportunity to see your athletes in action – and to see what their contribution has made (or could make) possible.
2. Include them in your regular communication with your Local Program, and (if applicable) invite them to follow your Program on social media. Keep your Program on their mind often!
 - a. Remember to brag about the most exciting news happening in your Local Program. Are you headed to a State/National Games? Has an athlete been trained in Athlete Leadership?
3. Beyond mass communication, set up a regular schedule for a meeting, coffee, lunch, or other one-on-one opportunity to connect with your new partner. If an athlete is available to join you, bring him or her along!
4. Think about your next invitation to support what you do. Is it a similar opportunity to donate or volunteer as they've done before, or are you ready to take the relationship to the next level?
5. Remember to talk about the impact that Special Olympics is having in your community, and what they have made possible. Your success will become their very own Special Olympics story, and might compel them to bring another partner to the table.

Every donation (financial, gifts in kind, employee matching, etc.) is important to SOMT and receives personalized gratitude. It is essential to communicate with the Development Department so all donors can be recognized and given a tax receipt for their donation.

Please don't hesitate to ask questions! The Development Department is here to help!



Contents

This section of the Local Program Development Guide addresses the following topics:

- Finance (Pages 1-3)
- Risk Management (Pages 3-5)
- Sample Guidance for Inclement Weather Resource (Pages 5-6)

Finance

Proper financial accounting within a Local Program serves many functions, both for the health of your Local Program, and in growing the movement in your service area. It can, among other factors:

- Demonstrate transparency and responsibility to the community about how donor dollars are used;
- Maintain the legal and ethical integrity of Special Olympics' brand, mission, and charitable status; and
- Grow partnerships and trust with our supporters, and directly impact the ability to grow our movement at the grassroots level.

All funds raised in the name of SOMT are the assets of SOMT, including those raised by Local Programs. The following guidance is intended to assist your efforts to manage Local Program finances, in strong partnership with SOMT.

Oversee & Manage Financial Resources

The following steps should be taken to ensure that the Local Program's financial resources are managed appropriately:

- *Identify a Local Program volunteer to manage finances. This position is called Finance Coordinator and they serve on the Area Management Team (AMT).*
Recruit someone who is capable of helping with budgeting, managing funds, and reporting finances as required. Notify SOMT who has been identified for this role.
Must be a Class A Volunteer and pass the background check when handling financials.
- *Educate your Local Program about financial procedures.*
Local Program leadership should be knowledgeable about financial practices and policies in place by SOMT and should make program participants and volunteers aware

of financial procedures that they must follow as part of the Local Program. **Each Area Management Team (AMT) has an Area Finance Guideline.** It is in the best interest of the Local Program Coordinator's (LPC's) to have a copy of this document to understand procedures for depositing and withdrawing team money. Local Program Coordinator's (LPC's) must participate in LPC Finance Training 1x per year (usually September).

Additional Financial Considerations

Your Local Program's financial lead should be familiar with the following items.

- Banking and accounting practices vary by Accredited Program. It is recommended to meet with SOMT's Chief Financial Officer/Finance Director (or other staff, if directed) to understand policies and expectations regarding:
 - Banking for Local Programs
 - Budgeting and financial reporting requirements
 - Expense reporting and/or reimbursement for Local Program expenses
 - Purchasing, inventory, and disposal of capital equipment, which is generally defined as non-disposable equipment or items valued above a certain threshold (likely \$1000 USD or more)
 - Reporting in-kind donations, whether as part of fundraising efforts or reporting volunteer hours, if applicable.
- While athletes are prohibited from being charged to participate in Special Olympics per the General Rules, SOMT may invoice Local Programs for pre-arranged services (such as lodging and registration at State Games). Generally, the SOMT office will invoice Local Programs for such fees or deduct the invoiced amount from Local Program funds, if applicable.
- When planning for State Basketball or State Summer Games, please use the hotels that are set up for direct billing and communicate to your area Finance Coordinator.
 - Local Finance Coordinator's set up direct billing for their teams and specify which area the direct bill is for. i.e. Five Valleys Special Olympics
 - Local Finance Coordinator's use their area credit card (or Area Director's) that is needed for to hold the direct billing; they also use the billing address for the area or Finance Coordinator (**do not use the SOMT state office address**)
 - LPC's call hotel and ask to be put under the Five Valleys Special Olympics
 - Hotels send the direct bill to the area Finance Coordinator, and they pay the invoice
- **If you choose a hotel that does not have direct billing, it is the LPC's responsibility to**
 - reserve the hotels under your own personal credit card
 - pay for the hotels using your own personal credit card or a check from your Finance Coordinator if you have made prior arrangements with the hotel and your Area Finance Coordinator

- turn in a receipt to your Area Finance Coordinator and get reimbursed using your team account
- Local Programs are not permitted to open credit cards, debit cards, additional bank savings or checking accounts, certificates of deposits (CDs), lines of credit, general investments or any other financial instrument, or establish endowments.
- Local Programs may not incorporate or establish any legal entities that include the Special Olympics name nor trademark. Local Programs also may not register anything that includes the name or marks of any of its associated brands (Examples: Law Enforcement Torch Run for Special Olympics or Polar Plunge).
- In addition to financial policies, Local Programs should be familiar with SOMT's fundraising policies and how they apply to you. Examples of such policies might include:
 - The timeframe in which deposits must be made upon receipt of funds (2-5 days).
 - The process in which thank you letters must be sent to all donors.
- Additional resources available from SOMT include:
 - IRS (or equivalent) letters and documentation, which may be needed for securing donations.
 - Tax exempt certificates for purchases, and any guidance on what does or does not qualify.
 - Proof of accreditation by Special Olympics.
 - General financial information from SOMT – such as annual reports or IRS Form 990 – can generally be found on the website, or upon request.

Risk Management

Conducting sports and other activities inherently involves exposure to a variety of risks to the participants, volunteers, and the organization. Some of these risks could negatively impact the people, assets, and/or reputation of Special Olympics and our partners. Effective risk management practices allow you to minimize the chance of risk to all participants so everyone can enjoy a safe and healthy environment when at Special Olympics. It can also help minimize or avoid incidents that could hinder your ability to operate or otherwise damage the organization.

General Risk Management Guidance

Local Programs are advised to be familiar with the following topics and documents and educate Local Program leadership and constituents on an ongoing basis, about the protocols, policies and resources that support effective risk management.

All Local Program leaders – which equates to Class A volunteer leadership – are required to take safeguarding training (i.e. Protective Behaviors or Operation Safeguard) PRIOR to beginning any Class A volunteer duties.

Incident Reporting

Incident Report Forms are available from SOMT (and on the SOMT website), as well as standard procedures for completion and submission. An Incident Report Form should be completed following all injuries or illnesses at Special Olympics activities.

The Incident Report Form is a factual account and should be free of speculation or hearsay. It is best to leave the determination of potential liability to our insurance claims professionals. Following an injury or illness, forms should be promptly sent to SOMT state office in a timely manner.

Other types of incidents may include property damage, abuse, theft, or incidents requiring law enforcement. Please immediately contact SOMT for guidance as these matters are not reported via the Incident Report form.

Insurance

SOMT can provide you with information regarding insurance coverage, and the process for requesting/providing insurance documentation and guidance.

Consult with SOMT staff when any of the following apply to your Local Program:

- Local Programs should fill out as much of the contract as possible for facility usage and **then submit the contract to SOMT for signature.**
- All insurance documentation must be signed by SOMT state office.
- Requesting and supplying Certificates of Insurance, to practice facilities or other vendors requiring proof of insurance.
- Rental of vehicles, such as buses or vans, for transportation of Local Program participants.
 - o Please note that 12 passenger vans are **not** permitted by SOMT.
 - o Please contact SOMT state office or your Outreach Director for rental procedures.

Automobile Liability Insurance

Automobile liability insurance provides protection to Special Olympics for liability claims arising as a direct result of the use of a non-owned or hired automobile. For coverage to be effective, the vehicle must be used for Special Olympics business with the permission of Special Olympics and driven by an employee or a registered volunteer of Special Olympics.

Restrictions include:

- Non-owned and hired auto liability coverage applies excess of any other valid and collectible insurance.
- Excess coverage is provided to registered Class A Volunteers of Special Olympics who are using their personal vehicles on behalf of, and with the permission of, Special Olympics, and have a valid driver's license and insurance with at least the state minimum requirements.

**Reach out to the Outreach Department with any questions regarding travel.*

Athlete Housing Policy

The SOMT Board of Directors has established a written Athlete Housing Policy. For guidance on this policy, please reference the SOMT website under Team Planning Resources or call the Outreach Department.

Recreational Swimming Policy

- SOI has a recreational swimming policy that limits registered athletes from swimming at hotels and other facilities while traveling for competitions. Details are available in the Safety Considerations section of the Swimming Sport Rules.
- All Special Olympics swimming training, recreational sessions, and competition events shall be conducted in accordance with SOI's rules and procedures to ensure the safety and well-being of all SOMT athletes, coaches, and volunteers.
- If the Safety Considerations detailed in SOI's Swimming Sport Rules are not met, then all swimming is prohibited from beginning until the end of each sports competition or event.

Medical Emergency Considerations

- Ideally, a physician, an athletic trainer, or a physical therapist knowledgeable in the triage and treatment of athletic injuries should cover practices and games.
- The primary coach for a team must maintain a copy of all athletes' medical forms during practices and games and make forms and any special instructions available to medical personnel if needed.
- The coaching staff should be educated and skilled in immediate management designed to contain the extent of the illness/injury until appropriate medical personnel are available, including but not limited to certification in cardiopulmonary resuscitation (CPR) and first aid.
- The primary coach responsible for a team is responsible for activating the emergency management plan or protocol. This plan can be adapted from an existing plan (for schools or agencies, for example) to fit your Local Program's needs, and should also align with the policies and procedures of SOMT.

Crisis Communication Plan

A crisis is a situation that demands immediate attention and response from Special Olympics. A crisis could be operational in nature, stemming from an issue or incident that causes harm to a participant, disrupts events, or causes damage to a physical location. A crisis can also put the reputation of Special Olympics at risk, causing people to perceive the organization poorly.

Local Programs are advised to be familiar with crisis communication plans issued by SOMT. In general, the following guidance is offered for crisis situations:

- For Medical, Fire, or Police Emergencies: call 911 first, then immediately call SOMT CEO & COO.
- For a crisis not requiring immediate attention from local authorities, begin by contacting SOMT CEO & COO.

Sample Guidance for Inclement Weather

Rain

Decisions on field closures are made as late as possible to give the best possible chance for the game to be played.

Winter Weather

SOMT uses the following chart to determine if sports should be played during cold weather.

A safety threat exists when the physically active cannot maintain heat. Cold exposure can be uncomfortable, impair performance, increase injury risk and may be life threatening. Cold weather is defined as any temperature that can negatively affect the body’s regulatory system. These do not have to be freezing temperatures.

The following guidelines have been established for practice participation.

Cold Weather Practice Recommendations	
Wind Chill Temperature ABOVE 36°	Normal Practice
33° - 35° with Precipitation	No more than 40 minutes outside per session. May return outside after 20 minutes indoors.
32° or Below with Precipitation	No Outside Practice
32° - 35° without Precipitation	No more than 1 hour outside per session. May return outside after 30 minutes indoors.
26° - 31° without Precipitation	No more than 30 minutes outside per session. May return outside after 15 minutes indoors.
25° or Below without Precipitation	No Outside Practice

Hot Weather

The risk of heat-related illness from vigorous sports activity increases with the temperature. The body generates heat, which cannot be dissipated readily when the ambient temperature exceeds 85°F/29°C, depending upon the humidity. Hot weather is considered at any point where the heat index reaches or exceeds 90°F/32°C. As a rule, proceeding with training or competition should be carefully considered if the heat index at the start of training is projected to be above 95°F/35°F. Coaches should exercise caution and provide additional water breaks.

Thunder & Lightning

If inclement weather is forecasted, an individual should be designated to monitor the weather forecast and radar during the competition. If the facility being used for competition has a lightning detection system, and a facilities policy in place that is more stringent than described below, the facilities policy will supersede the Special Olympics policy.

Example: If lightning is detected within five kilometers/eight miles of practice or competition, all coaches, players, referees, and spectators are to withdraw from the field and seek proper shelter. No place outside is safe near thunderstorms. The best shelter is a large, fully enclosed, substantially constructed building. A vehicle with a solid metal roof and metal sides is a reasonable second choice.

30-minute Rule: Wait at least 30 minutes after the last sound of thunder or the last lightning flash before giving the "all clear" signal and resuming normal activity. If thunder is heard or lightning is seen again within that 30-minute time frame, the event will continue to be postponed or officials may decide to cancel the event.



SPECIAL OLYMPICS ATHLETE CODE OF CONDUCT

Special Olympics is committed to the highest ideals of sport and expects all athletes to honor sports and Special Olympics. All Special Olympics athletes agree to the following code:

SPORTSMANSHIP

- I will practice good sportsmanship.
- I will act in ways that bring respect to me, my coaches, my team, and Special Olympics.
- I will not use bad language.
- I will not swear or insult other persons.
- I will not fight with other athletes, coaches, volunteers, or staff.

TRAINING AND COMPETITION

- I will train regularly.
- I will learn and follow the rules of my sport.
- I will listen to my coaches and the officials and ask questions when I do not understand.
- I will always try my best during training, divisioning, and competitions.
- I will not "hold back" in preliminary heats just to get into an easier final heat.

RESPONSIBILITY FOR MY ACTIONS

- I will not make inappropriate or unwanted physical, verbal, or sexual advances on others.
- I will not use alcohol, marijuana, tobacco products, illegal drugs or any other substance causing impairment while representing Special Olympics and/or participating at Special Olympics functions including training sessions, practices, and for the duration of Special Olympics Games travel, overnights, and/or competition.
- I will not take drugs for the purpose of improving my performance.
- I will obey all laws and Special Olympics rules.

By signing below, I understand that if I do not obey this Code of Conduct, I will be subject to a range of consequences by my local program, the State Office, or a Games Organizing Committee including not being allowed to participate in any Special Olympics events including the National and World Games.

Please sign, date and return to:

Special Olympics Montana
P.O. Box 3507
Great Falls, MT 59403-3507

Athlete Signature _____

Date _____

Athlete – Print Name _____

Witness _____



SPECIAL OLYMPICS VOLUNTEER/UNIFIED PARTNER CODE OF CONDUCT

Special Olympics is committed to the highest ideals of conduct and expects all Volunteers/Unified Partners to honor Special Olympics Montana rules and regulations. All Special Olympics Volunteers/Unified Partners agree to observe the following code of conduct:

RESPECT FOR OTHERS

- I will respect the rights, dignity and worth of athletes, coaches, other volunteers, friends, and spectators in Special Olympics.
- I will practice good sportsmanship: I will act in a way that brings respect to me, other volunteers, my team, and Special Olympics.
- I will treat everyone equally regardless of sex, ethnic origin, religion, or ability.
- I will be a positive role model for the athletes I encounter.

ENSURE A POSITIVE EXPERIENCE

- I will ensure that for each athlete the time spent with Special Olympics is positive.
- I will respect the talent, developmental stage, and goals of each athlete.
- I will be fair, considerate, and honest with athletes and communicate with athletes using simple, clear language.
- I will encourage each athlete to perform to the best of the athlete's ability in all that they do.

ACT PROFESSIONALLY AND TAKE RESPONSIBILITY FOR MY ACTIONS

- My language, manner, sportsmanship, punctuality, preparation, and presentation will demonstrate high standards.
- I will display control, respect, dignity, and professionalism to all involved. (athletes, coaches, opponents, officials, administrators, parents, spectators, media, etc.).
- I will encourage athletes to demonstrate the same qualities.
- I will not use alcohol, marijuana, tobacco products, illegal drugs or any other substance causing impairment while representing Special Olympics and/or participating at Special Olympics functions including training sessions, practices, and for the duration of Special Olympics Games travel, overnights, and/or competition.
- I will follow the team's established communication channels, refrain from posting negative or inappropriate comments on social media and communicate directly with SOMT staff and volunteers on all matters.
- I will refrain from any form of personal abuse towards athletes and others, including verbal,



physical and emotional abuse.

- I will be alert to any form of abuse from other sources directed towards athletes in my care.

QUALITY SERVICE TO THE ATHLETES

- I will seek ongoing training and information from other volunteers and my Local Program Coordinator to improve my knowledge/skills to best serve the athletes.
- I will be knowledgeable about SOMT rules and expectations to support athletes at the local program level.
- I will do my best to support the needs of our local program by getting to know the athletes in our program and make myself aware of any medical concerns with athletes in our program.
- I will look for opportunities and ways to support the Local Program Coordinator and other coaches and volunteers.

HEALTH AND SAFETY OF THE ATHLETES

- I will ensure that the equipment and facilities are safe to use.
- I will ensure that the equipment and the environment are appropriate for the age and ability of the athletes.
- I will not engage in any inappropriate contact or relationships with athletes, volunteers, or other participants in Special Olympics.
- I will not leave athletes unattended while at practice, events, or overnight stays.
- I will be aware of any medical limitations regarding an athlete’s participation.
- I will encourage athletes to seek medical advice when required.
- I will maintain the same interest and support towards sick and injured athletes.

By signing below, I understand that if I violate this Code of Conduct in any way, shape, or form, I will be subject to a range of consequences, up to and including being prohibited from volunteering in Special Olympics.

Please sign, date, and return to:

*Special Olympics Montana
P.O. Box 3507
Great Falls, MT 59403-3507*

Volunteer/Unified Partner Signature _____

Date _____

Volunteer/Unified Partner Signature – Print Name _____



SPECIAL OLYMPICS COACH CODE OF CONDUCT

Special Olympics is committed to the highest ideals of sport and expects all coaches to honor sports and Special Olympics. All Special Olympics Coaches agree to observe the following code of conduct:

RESPECT FOR OTHERS

- I will respect the rights, dignity and worth of athletes, coaches, other volunteers, friends, and spectators in Special Olympics.
- I will treat everyone equally regardless of sex, ethnic origin, religion, or ability.
- I will be a positive role model for the athletes I coach.

ENSURE A POSITIVE EXPERIENCE

- I will ensure that for each athlete I coach, the time spent with Special Olympics is positive.
- I will respect the talent, developmental stage, and goals of each athlete.
- I will ensure each athlete competes in events that challenge that athlete's potential and are appropriate to that athlete's ability.
- I will be fair, considerate, and honest with athletes and communicate with athletes using simple, clear language.
- I will ensure that accurate scores/ratings are provided for entry of an athlete or team into any event.
- I will instruct each athlete to perform to the best of the athlete's ability at all preliminary and final heats in accordance with the Official Special Olympics Sports Rules.

ACT PROFESSIONALLY AND TAKE RESPONSIBILITY FOR MY ACTIONS

- My language, manner, punctuality, preparation, and presentation will demonstrate high standards.
- I will display control, respect, dignity, and professionalism to all involved in the sport (athletes, coaches, opponents, officials, administrators, parents, spectators, media, etc.).
- I will encourage athletes to demonstrate the same qualities.
- I will not use alcohol, marijuana, tobacco products, or take illegal drugs or any other substance causing impairment while representing Special Olympics and/or participating at Special Olympics functions including training sessions, practices, and for the duration of Special Olympics Games travel, overnights, and/or competition.
- I will follow the team's established communication channels, refrain from posting negative or inappropriate comments on social media and communicate directly with SOMT staff and volunteers on all matters.



- I will refrain from any form of personal abuse towards athletes and others, including verbal, physical and emotional abuse.
- I will be alert to any form of abuse from other sources directed towards athletes in my care.

QUALITY SERVICE TO THE ATHLETES

- I will seek continual improvement through performance evaluations and ongoing coach education.
- I will be knowledgeable about the Sports Rules and skills of the sports(s) I coach.
- I will provide a planned training program, organized practice schedule, and practice plans.
- I will keep copies of the medical, training, and competition records for each athlete I coach. I will maintain the privacy of medical information for each athlete I coach.
- I will follow the Special Olympics and the National Governing Body rules for my sport(s).

HEALTH AND SAFETY OF THE ATHLETES

- I will ensure that the equipment and facilities are safe to use.
- I will ensure that the equipment, rules, training, and the environment are appropriate for the age and ability of the athletes.
- I will not engage in any inappropriate contact or relationships with athletes, volunteers, or other participants in Special Olympics.
- I will not leave athletes unattended while at practice, events, or overnight stays.
- I will review each athlete's medical form and be aware of any limitations on that athlete's participation noted on that form.
- I will encourage athletes to seek medical advice when required.
- I will maintain the same interest and support towards sick and injured athletes.
- I will allow further participation in training and competition only when appropriate.

By signing below, I understand that if I violate this Code of Conduct in any way, shape, or form, I will be subject to a range of consequences, up to and including being prohibited from coaching in Special Olympics.

Please sign, date and return to:

*Special Olympics Montana
PO. Box 3507
Great Falls, MT 59403-3507*

Coach Signature _____ Date _____

Coach – Print Name _____



For Office Use Only
SOMT Approval by: _____
Signature/Date: _____

Behavior Incident / Misconduct Report Form

This report should be completed to report a situation at any SOMT event where a participant creates a behavior problem that violates the code of conduct, is detrimental to participating athletes, or affects the positive image of Special Olympics participants. Participants include athlete, coach, volunteer, family member, spectator, staff or official at any SOMT event.

Person filing this report:

Print Name & Sign:	
Date Form was Completed:	
Address, City, State, Zip:	
Telephone and Email address:	

Person exhibiting problem behavior:	
Date of Incident:	
Event Where Incident Occurred:	
Role with SOMT:	

Please Describe the Incident:

Action Taken at the Time of Incident:

Witnesses to Incident:

Name & Role with SOMT	Signature

Comprehensive Action Plan for Incident: (one on one supervision, suspension, expulsion, etc.)

To be completed when final action plan is decided upon

Date	Action to be Taken



SPECIAL OLYMPICS
FIRST REPORT OF ACCIDENT/INCIDENT



U.S. Program/Area: [] Date of Incident: _____

Injured Person/Party Information Date of Birth: ___/___/___ Age: _____

Name: _____ (Last) (First) (MI)

Address: _____ (Street) (City) (State) (Zip)

Home Phone: (____)____ - _____ Work Phone: (____)____ - _____

Gender: [] Male [] Female Social Security Number: _____ - _____ - _____

TYPE OF INJURY/ACCIDENT:

- [] Bodily Injury
[] Property Damage
[] Automobile
[] Other: _____

INJURED PARTY:

- [] Athlete [] Spectator
[] Volunteer [] Unified Partner
[] Coach [] Property Owner
[] Employee
[] Other: _____

Description of Accident (If automobile accident occurred, please attach a copy of the police report). Describe how the accident occurred (attach a separate sheet if necessary): _____

Site/event where accident occurred: _____

ACCIDENT OCCURRED DURING:

- [] Training/Practice
[] Competition
[] Traveling to or from SO event
[] Other: _____

TYPE OF INJURY:

- [] Severe cut w/ bleeding
[] Less serious bruise or cut
[] Break/fracture
[] Concussion
[] Paralysis
[] Fatality
[] Other: _____

DISPOSITION:

- [] Released to parent
[] Refusal of care
[] Refer to doctor
[] Refer to hospital or clinic
[] Medical attention
[] EMS transport
[] Patient requested EMS transport
[] Released to personal vehicle
[] Police
[] Ambulance
[] Report only
[] Other: _____

BODY PART INJURED:

- [] Head
[] Neck
[] Torso
[] Back
[] Hand (L / R)
[] Finger (L / R)
[] Elbow (L / R)
[] Shoulder (L / R)
[] Leg (L / R)
[] Knee (L / R)
[] Thigh (L / R)
[] Shin (L / R)
[] Toe (L / R)
[] Other: _____

SPORT:

- [] Alpine Skiing
[] Aquatics
[] Athletics
[] Badminton
[] Baseball
[] Basketball
[] Bocce
[] Bowling
[] Cheerleading
[] Cross Country Ski
[] Cycling
[] Equestrian
[] Figure Skating
[] Floor Hockey
[] Golf
[] Gymnastics
[] Kickball

SPORT cont.

- [] Power Lifting
[] Relay Game
[] Roller Skating
[] Sailing
[] Snowboarding
[] Snowshoe
[] Soccer
[] Softball
[] Speed Skating
[] Swimming
[] Table Tennis
[] Team Handball
[] Tennis
[] Track & Field
[] Volleyball
[] Other: _____

Contact/Care Provider Information If an athlete or underage volunteer was injured, please identify care provider and/or responsible party (e.g. parent, legal guardian).

Relationship to the injured person: _____

Name: _____

Address: _____

Home Phone: (____)____ - _____

Employer Name: _____

Employer Address: _____

Work Phone: (____)____ - _____

Does the injured person have medical insurance? [] Yes [] No

If yes, insurance is provided by: [] Injured Person [] Care Provider/Responsible Party

Please provide name of Company and Policy Number: _____

Witness Information (Please provide names and phone numbers of any witnesses to the incident)

Witness #1 Name: _____

Daytime Phone: (____)____ - _____

Witness #2 Name: _____

Daytime Phone: (____)____ - _____

Special Olympics Official / Representative (other than claimant)

Name: _____

Daytime Phone: (____)____ - _____

Signature: _____

SUBMIT ACCIDENT MEDICAL CLAIMS TO:

HEALTH SPECIAL RISK, INC. (HSR)
HSR, 8400 Belleview Drive, Suite 150, Plano, TX 75024
Toll Free: 800.328.1114 | Fax: 972.512.5820
Email: claims@hsri.com

Special Olympics Policy Number: SR2014DC-P-050866

SUBMIT LIABILITY CLAIMS TO:

AMERICAN SPECIALTY INSURANCE
7609 W. Jefferson Blvd., Suite 150, Fort Wayne, IN 46804
Toll Free: 800.566.7941 | Fax: 260.969.4729
Email: claims@americanspecialty.com

IF INJURY WAS SERIOUS OR FATAL, IMMEDIATELY NOTIFY

AMERICAN SPECIALTY at 800.566.7941.
We provide 24/7 Emergency Claims Phone Coverage.

HOW TO FILE A CLAIM:**Excess Accident Medical Coverage**

Special Olympics Corporate Insurance Program; Excess Accident Medical Coverage

FIRST REPORT OF ACCIDENT/INCIDENT

1. The claim form should be fully completed and submitted within 90 days from the date of injury. Please also answer and complete the section regarding other medical insurance under “Contact/Care Provider Information” by marking either yes or no, and providing the Company and Policy Number. Incomplete claim forms are one of the most frequent reasons for claim payments being delayed.
2. The claim form must be signed by a Special Olympics representative.
3. Only one claim form for each accident needs to be submitted to **HSR**.
4. Once completed, we suggest keeping a copy for your records, and mailing the original to the address shown below.
5. If medical expenses are incurred as a result of an accidental injury at a Special Olympics event, it is recommended that providers are notified of this secondary insurance, including the policy number listed on the incident report form and the contact information for **HSR**.

YOUR BILLS

1. As outlined above, please advise all doctors/hospitals regarding this coverage so they may forward us their itemized bills.
2. If you have already been to the doctor/hospital and did not know about this coverage, then please send all the itemized bills to **HSR** at the address shown below.
3. The bills should include the name of the doctor/hospital, their complete mailing address, telephone number, the date you were seen by the doctor/hospital, what the doctor saw you for (diagnosis) and the specific itemized charges (description of treatment including the CPT/procedure code). Contact your medical provider for a UB04 or HCFA 1500 billing form.
 - **Please note that an itemized bill is defined as a bill/claim form from the provider via UBO4 or HICFA-1500 claim form. Submitting itemized bills in any other format will delay the claims process. Providers are familiar with this process, so please be sure to (1) contact the provider and share the details above and request that the provider submit outstanding balances directly to **HSR**; or (2) secure a copy of the UBO4 or HICFA 1500s provided to the primary insurer and submit a copy to **HSR** for consideration.**
4. Due to HIPAA Privacy laws **HSR** is unable to request this information from your medical provider. “Balance Due” or “Balance Forward” statements do not contain sufficient information to complete your claim. **HSR** cannot pay your bills using only the Primary Insurance Carrier’s EOB.

EXCESS ACCIDENT MEDICAL INSURANCE

1. If the policy provides coverage on a secondary/excess basis and you have any other primary insurance coverage you need to send the bills to your primary insurance first.
2. **HSR** will consider benefits after your primary insurance has processed the claim.
3. We will require a copy of your primary insurance Explanation of Benefits (EOB) which you should receive from your primary insurance letting you know what was paid or denied, and the reason(s) why. **HSR** will not be able to consider your claim without this information.

If you have any questions, please contact Customer Service at (866) 523-3199. They are available from 8:00 a.m. to 5:00 p.m. Central time, Monday – Friday. You may also forward any documents by fax to (972) 512-5820 or email to claims@hsri.com.

HOW TO FILE A CLAIM:

General Liability and Automobile Liability

Special Olympics Corporate Insurance Program; General Liability and Automobile Liability

FIRST REPORT OF ACCIDENT/INCIDENT

It is recommended that incidents that may give rise to a liability claim (for example, serious bodily injury to participant, spectator or volunteer, automobile accident, or property damage to a facility used for an event), or if you receive a legal summons or a letter from an attorney as a result of such an incident, please report this information to the American Specialty claims team as outlined below:

1. Complete the First Report of Accident Claim form.
2. Submit the First Report of Accident and/or the Summons/Letter from Attorney to:
American Specialty Insurance & Risk Services, Inc.
7690 W Jefferson Blvd, Suite 150
Fort Wayne, IN 46804
Customer Service: 800-566-7941
claims@americanspecialty.com
3. If Injury was serious or fatal, immediately notify American Specialty at 800-561-7941. We provide 24/7 Emergency Claims Phone Coverage.

If you have questions, please contact Customer Service at 800-566-7941. Representatives are available from 8:00 a.m. to 5:00 p.m. (EST) Monday – Friday. The customer service line includes information for contacting a representative after-hours, if needed. You may also forward any documents by email to: claims@americanspecialty.com.

Maximum Effort Rule

Updated 1.8.24

Special Olympics Montana recognizes a modified format of the SOI Maximum Effort Rule, which is described in Chapter 11 of the SOI Article 1 of Sports Rules. The Maximum Effort Rule allows SOMT competitions to be more accurately divisioned and provides better competition opportunities (the max effort rule will not apply to certain sports, as will be noted).

Per Special Olympics International Article 1 of Sports Rules—

- 11.2.2.1 - Percentage Rule - A percentage is established and published for each event in which the rule will be applied. Athletes and teams may not exceed this percentage of improvement from their divisioning score to their final score. If an athlete or team exceeds this performance percentage, disqualification may take place.

Max Effort Rule- If an athlete's final performance at a state-level competition exceeds his or her submitted divisioning score by x% (See chart at end of document for exact percentages), the athlete will be subject to* the following restrictions (**coaches may submit new scores up to the final registration due date**) —

1st time offense- LPC will receive an official warning on behalf of the athlete.

2nd time offense- LPC will be notified that the athlete will not be eligible to qualify for advancement to the next offered World and/or USA games. Example- If any athlete offends at SSG 2025, they would not be eligible for advancement to the USA Games or World Summer Games, whichever comes next.

3rd time offense- LPC will be notified that the athlete will receive a suspension from the state-level game in which the offense occurred for the following year.

4th+ time offense- The 3rd time offense will be utilized for all offenses after the 3rd time.

In addition, it is not SOMT's intent to discourage athlete participation from games, as that is in direct contradiction of the mission, however, it is also a contradiction to not provide meaningful competition. As a result, entire teams and delegations will be subject to the following sanctions in the event 25% of the team's athletes/unified partners exceed the max effort rule. The following rule and sanctions are explained—

LPC and Coach Honest Score Submission Rule- If 25% of a team's athletes/unified partners violate the max effort rule, the following restrictions will be enacted—

1st time offense- LPC will receive an official warning on behalf of the delegation.

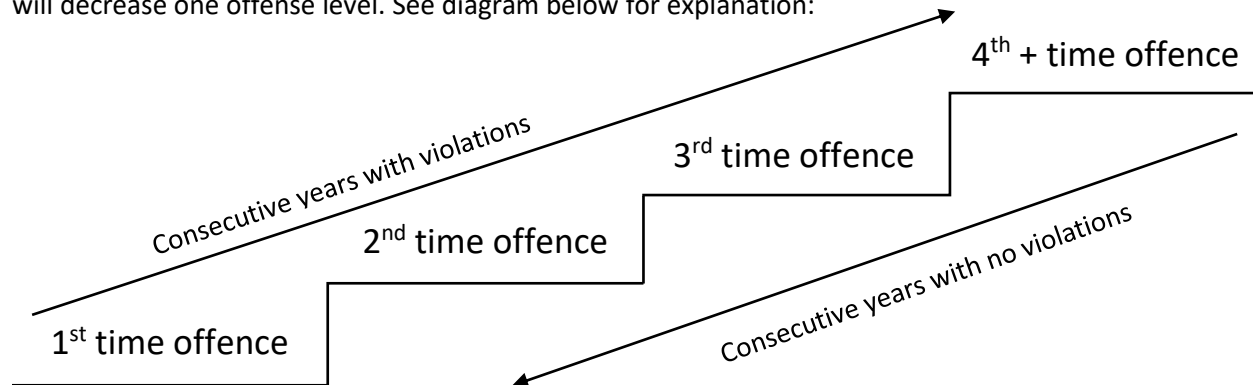
2nd time offense- LPC will be notified all athletes in delegation will not be eligible for advancement to the next offered World and/or USA games. Example- If the delegation offends at SSG 2025, the athletes of that delegation would not be eligible for advancement to the USA Games or World Summer Games, whichever comes next.

3rd time offense- LPC will be notified that the entire delegation will receive a suspension from the state-level game in which the offense occurred for the following year.

4th+ time offense- The 3rd time offense will be utilized for all offences after the 3rd time.

The tracking of violations game-to-game- Max Effort Rule violations will be reviewed and tracked for each individual games. For example- A violation at State Summer Games will not affect a separate games, such as Bowling Championships. Each will have its own violation tallies.

Decreasing of Restrictions- For each games a competitor does not commit a violation, their restrictions will decrease one offense level. See diagram below for explanation:



How team violation percentage is found- Team violation percentage is found using team's total competitor count. Formula: Competitors with violation / total team competitors.

**Following state level competitions, the proper process to determine violations will be—*

1. State Games scores will be entered at the State Office.
2. If scores are flagged as a violation, the occurrence will be noted.
3. The occurrence will be reviewed by SOMT Sports staff, and in certain cases, there will be an exception given to the x% rule at the Sports staffs' discretion.
 - a. For example, in the standing long jump, if an athlete's submitted score is 0.25 meters, and the athlete jumps 0.40 meters (60% difference), a violation would not be observed, as the percentage is high, but the real-life application of the difference is minimal in the competition.
4. If it is confirmed as a violation, it will be recorded by SOMT Sports staff.
5. SOMT Sports staff will notify the offending team's LPC by email and administer the appropriate restriction to the LPC.

Unique Score Submission Requirement

To assure that athletes are receiving meaningful practice time in preparation for State Games, all athletes/unified partners and teams will be required to have honest and accurate individual scores submitted to compete at a State Level event. If there is not a submitted score, the athlete or team involved will be scratched from the event. The Max Effort Rule will apply to the score submitted, and it is the LPC's responsibility to ensure all scores submitted are accurate.

Violation Percentages by Sport

Updated: 1/8/2024		
Sport	General % for violation	Notes
Basketball	n/a	Pools created based on submitted scores, cross pool play on day two with re-divisioning after day one play. Obvious cases of sandbagging by submitted score or during day one of play will be put into the max effort violation protocol.
Bowling	40, 50, 60	Sliding scale. 60 for 49 or less, 50 for 50-99, 40 for 100+
Alpine Skiing	40	Area Game Only. Will be reviewed in World Games qualifying years.
Snowboarding	40	Area Game Only. Will be reviewed in World Games qualifying years.
Cross-country skiing	40	Area Game Only. Will be reviewed in World Games qualifying years.
Snowshoeing	40	Area Game Only. Will be reviewed in World Games qualifying years.
Floor Hockey	n/a	Area Level Only. Will not receive review.
MATP	n/a	Adaptive sports
Golf	40	Would be a narrower percentage, but varied practice courses must allow for a wider gap.
Soccer	n/a	Pool play in morning, followed by redivisioning.
Bocce	n/a	Currently no metrics to accurately determine violation.
Gymnastics	n/a	Judged event based on levels. No scores submitted.
Swimming	40	Individual events only.
Cycling	40	
Powerlifting	40	Judgement will be based on double or triple combos.
Athletics	40	Individual events only.