



The Way Forward

20,000 Athletes, 30,000 Volunteers, ONE Special Olympics Pennsylvania

The Special Olympics Pennsylvania Reorganization Team presents for review the proposed reorganization proposal. The document is divided into 3 parts:

- **Why Reorganization**
- **The Process**
- **Executive Summary of Recommendations**

Why Reorganize?

For nearly 50 years, Special Olympics Pennsylvania has been empowering, advocating, and promoting the “A”bilities of individuals with intellectual disabilities. Together, thousands of volunteers have given countless hours to the movement. Now, as we prepare for the next 50 years, we need to better position Special Olympics Pennsylvania to face the challenges of today and anticipate the future challenges for individuals with intellectual disabilities. No private sector company or nonprofit can rest completely on their past efforts. We are grateful for the efforts of thousands who have shaped Special Olympics Pennsylvania into one of the leaders in the movement worldwide.

Over the last couple of years, as we discussed ongoing needs, concerns, and opportunities with our stakeholders (volunteers, athletes, partners, staff, and board), one consistent theme emerged. We can do **“more and better”** but to do that, change would need to occur.

Some of the themes that came from the information gathering phase were:

- **SOPA has a mission obligation to serve more people with ID throughout the state. We are currently not doing this as athlete numbers have remained the same for many years.**
- **Volunteers are the heart of SOPA and they are not satisfied with their current volunteer experiences. We must provide solutions.**
- **Inefficiencies and inequity of the athlete experience need to be addressed**
- **We are not employing our collective financial resources optimally to ensure long-term growth and sustainability**
- **The current organization structure does not foster collaboration**
- **Volunteers are stressed for time and resources, limiting the ability to embrace and support growth or new initiatives**

We need to do more “More and Better” for the athletes by creating a “ONE SOPA” organization.

The Process--Research, Analysis and Recommendation

Our work was organized into **3 Phases** that focused on Input and Engagement

PHASE 1 – Team formation to Leadership Conference
<ul style="list-style-type: none"> • December 2017 - Reorganization Team Formed • Early June 2018 - SOPA Board presentation review progress • June 2019 – The Way Forward Letter to Management Teams • August 2018 SOPA Leadership Conference presentations: General session, Athlete Congress, SOPA Board
PHASE 2 – Task Forces and Town Halls
<ul style="list-style-type: none"> • Sept – Dec. 2018: Task Formed • January 2019 – Town Hall Meetings in each region • January 2019 – SONA Presentation • Feb. 2019 – SOPA Board Meeting / Approval
PHASE 3 – Pilot Region – Transition to 2020
February 2019 – Communications with pilot “finalists”
2019-20 Pilot program selection, transition, implementation and assessment

Phase 1

SOPA hired experts to gather input from our stakeholders and to gain further insights into ongoing issues. Through this work, we came to a collective understanding that our current organizational structure would not permit us to achieve our strategic objectives in the future. These issues need to be faced head on and addressed in a major, organization wide approach.

As a result, the SOPA Board directed the creation of a Re-Org Team to study and report back with findings and recommendations. To keep us focused and to provide guidance, an independent consultant was brought in to facilitate the process. In December 2017, a team of 14 SOPA volunteers, staff, and an athlete and a Board member was formed to begin the hard work ahead. The Re-Org Team first embarked on a **Research and Analysis phase** to gather the baseline information needed.

- **Discovery Phase**
 - SWOT Analysis of SOPA
 - Meetings and reviewing information from other Special Olympics state programs
- **Analysis** of Options
- **Conclusion:** a regional model with additional staff support is the best solution
- **Foundation** for a way forward was presented at SOPA Leadership Conference in August 2018

Developed during those early months was the Re-Org Team’s theme of “**More and Better**”

- Serve **more** athletes
- **Better** quality and experiences for all athletes and volunteers
- **Equity** of programs for all athletes and volunteers

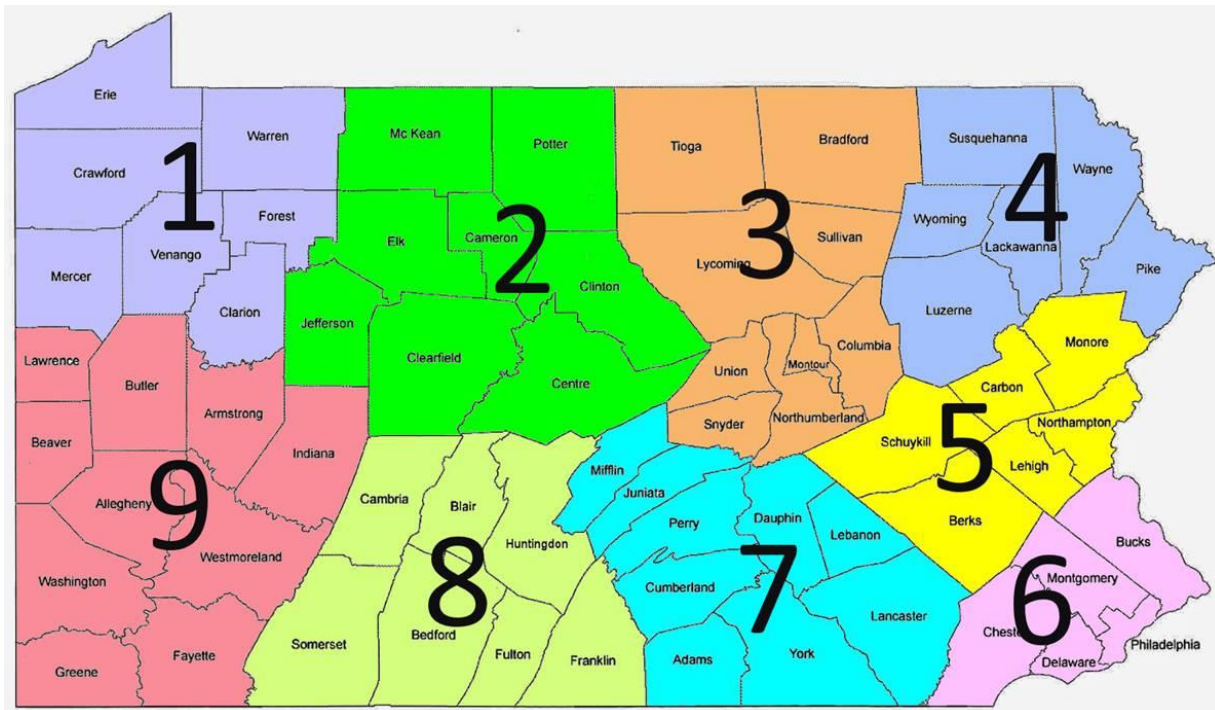
And the **Guiding Principles** of:

- Athletes can **participate anywhere**
- Training sites and competition within **reasonable distance** for all
- Solution should **increase** number of **opportunities** for athletes (scrimmages, etc.)
- **Benefits from Community Resources:** Universities, Businesses, Schools, Major Media Markets
- Any solution must be **financially sustainable**
- Optimize use of **funds to support all** Athletes

Based upon the defined Guiding Principles, the Re-Org Team created a proposed “regional” structure for Pennsylvania. Factors considered when creating the proposed regions:

- **“Urban” and “rural” components**
- **Natural geographic and cultural relationships/boundaries**
- **Common media markets/corporate partnerships and/or prospects**
- **Access to schools and universities**
- **Athlete growth potential**
- **Availability of fundraising and financial resources / Mix of Financial Resources including fundraising**

The Proposed 9 Region Structure



Phase 2

Phase 2 began with an open invitation to staff and volunteers to join task forces addressing **four functional areas: Administration, Program Growth, Fundraising & Finances, and Sports & Competition**. The resulting Task Force Committees were made up of over 60 individuals representing athletes, volunteers, and staff from all regions in the state, and bringing experience from multiple roles and having the primary goal of providing recommendations to accomplish theme of “More and Better”.

Over the course of the fall months of 2018, the Task Force Committees met to address questions assigned to each group. In early December, each Task Force submitted their recommendations to the Re-Org Team for consolidation. In early January, the Re-Org Team came together to pull all of the recommendations together into a cohesive proposal.

Communication Efforts of Solutions Team—Sharing The Vision

Throughout our work, our goal was complete transparency and open communication with our stakeholders and staff. To support this, we wanted to present our work to the “heartbeat of the movement”: the athletes, families, volunteers, and supporters and built into our communication plan a state-wide “road show” of Town Hall style meetings in January 2019 in each of the proposed regions in Pennsylvania. These meetings were open to any key stakeholder of Special Olympics Pennsylvania.

Overall Communication Plan Included:

- 2018 Leadership Conference
- SOPA Website: Materials and General Updates
- 9 Town Halls (one in each proposed region)
- Email: Over 16,000 sent to our stakeholders with links to information and invitation to attend a Town Hall near them
- Video: Recordings of Town Hall presentations were recorded and a link to them put on the SOPA website.
- Presentation to SONA leadership for additional feedback and recommendations
- SOPA Board webinars
- SOPA Board presentation

Phase 3

Phase 3 will commence in January 2020 with the initial Pilot Region. The Reorg Team is discussing the merits of several regions at this time and will choose the pilot region in February 2019. In selecting a pilot region, the Team is focused on several criteria with a big consideration given to majority program “buy-in”. Additional criteria for Pilot Region consideration include:

- Representative of SOPA, geographically (rural and urban)
- Build on strengths within the region – currently in relatively good heard
- Engaged leadership
- Open to new ideas focused on improvement for all
- Ability to sustain Regional model
- Athlete-centered mindset

Executive Summary of Recommendations—The Way Forward

Recommendations

1. Create a Regional Structure

- Meld current local programs (55) into 9 regions
- Volunteers and staff in each region work collaboratively together under the management of full time paid staff (regional directors)

2. Implementation of Reorganization (Phase 3):

- Four-year rollout of the regional structure across Pennsylvania
- Implement first pilot region in Q1 of 2020
- Create a Standing Oversight Committee to lead during the transition process. This committee will be kept in place to evaluate progress and make recommendations for necessary adjustments and shape and determine what success looks like.

3. Regional Staffing

- Each region will have full time paid staff and volunteer leaders who are responsible for the following areas:
 - **Sports:** Focus on competition management: Regional and Invitational support to volunteers, build UCS/School relationships, increase coach education/training schools with focus on success metrics that improve quality of programs, athlete experience, and equity of opportunities.
 - **Athlete Growth/Program Management:** Focus on growth of athletes and volunteers, community partnerships, and delivery of programs including UCS, Healthy Athletes, and Athlete Leadership. Key measures of success will include athlete and volunteer numbers and program metrics.
 - **Fundraising:** Focus on cultivating the greater communities' sponsorship and donor opportunities, ensuring that each region is leveraging regional opportunities to secure and raise more together than they were able to do separately
 - **Administrative:** Focus on volunteer record management (background checks, certifications, etc.), athlete record management (retention and growth support), regional communication
- Regional staff will be held accountable for achieving financial and programmatic goals in support of SOPA's overall strategic goals

4. Financing

- One SOPA equals all funds in Pennsylvania used for "More and Better" services for our current and future athletes
- Pull together and invest all local and state office reserves to maximize earning potential
- Use investment earnings to help support the restructure and ongoing operations

Benefits of the new model:

- Improved quality.
 - Regionalizing allows us to improve coaches' education, increase/improve training sites, and provide more competitions opportunities.
 - Use the best and most qualified volunteers, no matter where they live, to carry out responsibilities where they have expertise
 - More effective communication done on a regional level to athletes and families, volunteers and coaches
 - Equity is gained through the sharing of resources and opportunities in region model
- Athlete Growth. We will be able to more effectively and efficiently recruit more athletes via outreach strategies targeted at schools and service provider agencies who are connected regionally and culturally.
- Fundraising. We will increase our effectiveness by working together in approaching foundations, corporations, etc. as a region rather than separately