



# The Way Forward

Special Olympics PA  
Reorganization Plan





# Background

*How did we get to this point?*

# Why Reorganize?



- **Listening to our volunteers, athletes and staff.**



- **Athlete numbers flat – potential growth is currently limited.**
- **Prior attempts to address the issues have not resolved them.**
- **SOPA needs a new approach to achieve improved results.**

# Team Formed December 2017



**A team of SOPA staff and volunteers from across the state was formed to review and seek options for possibilities of a better organizational structure .**

**Michelle Boone**, SOPA Staff-Sr. Sports Director

**Penny Coup**, SOPA Staff-Sr. Director of Local Program Development

**Eric Cushing\***, SOPA Staff-VP of Marketing & Development

**Nikki DelSandro\***, Erie City Volunteer

**Carol Erzen**, Allegheny County Volunteer

**Krista Gardner\***, York County Volunteer

**Tony Gillespie**, Board Member & Montgomery County Volunteer

**Lynn Lopez**, Lancaster County Volunteer

**Kraig Makohus**, SOPA Staff – Senior Director, Individual and Major Gifts

**Alice Moat**, Bethlehem Volunteer

**Shannon Pechart\***, Area M Staff-Sports Director

**Jordan Schubert**, Chester & Montco Athlete, SOPA Staff-Athlete Leadership Coordinator

**Clare Walsh Miller**, SOPA Staff-Sr. VP of Programming

**Susan Wyland**, SOPA Staff-VP of Finance & Administration

# Research and Analysis



- **Discovery Phase**
- **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

# More and Better



The team focus is to seek solutions to achieve:

## More and Better

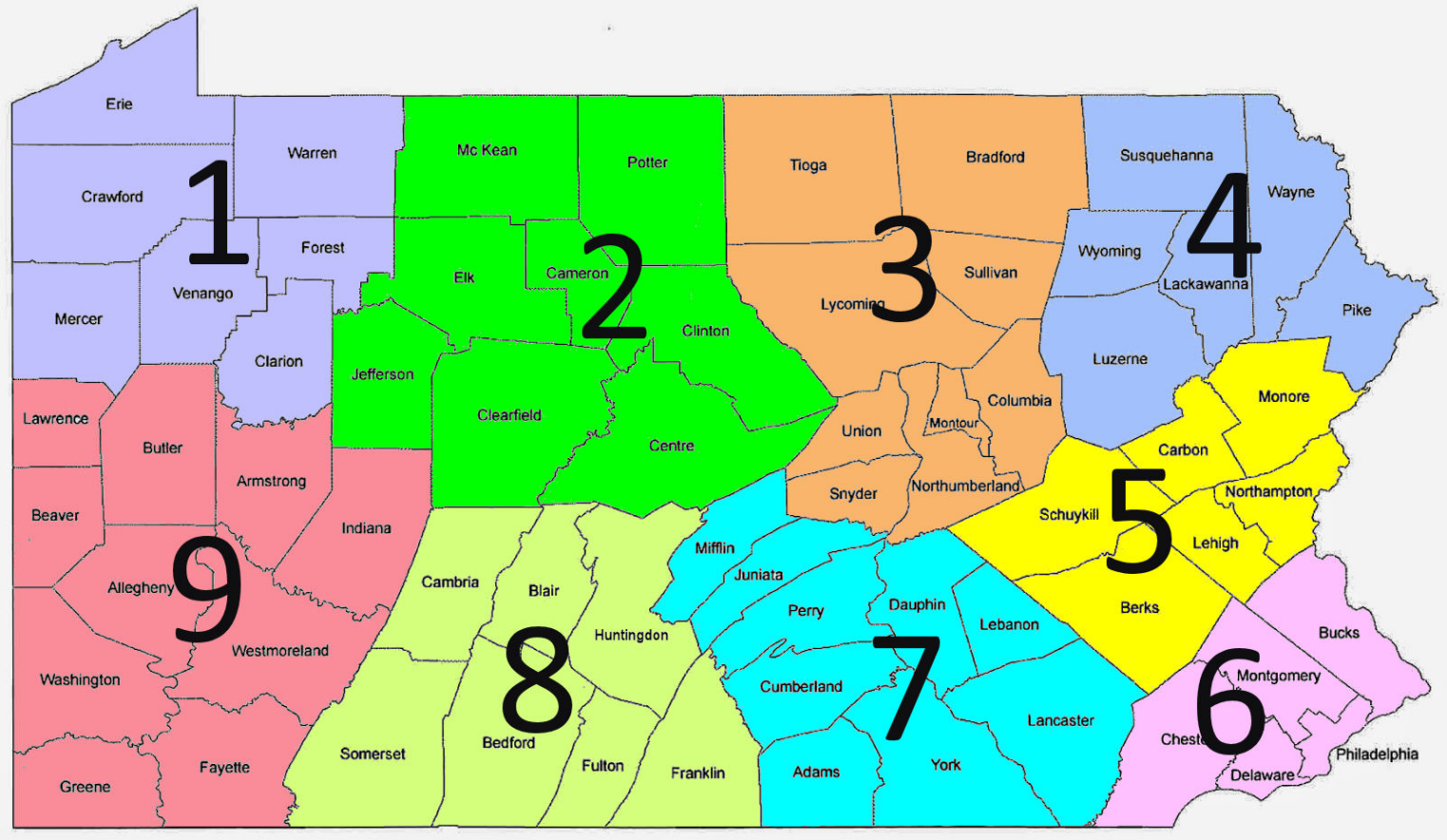
- Serve **more** athletes
- **Better** quality and experiences for all athletes and volunteers
- **Equity** of programs for all athletes and volunteers

# Guiding Principles



- 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
- Achieve to be **financially sustainable**
- Overall **funds will support all** Athletes

# Proposed Regional Structure





# Projected Phases of Reorganization



## **Phase 1 – Reorganization Committee - Aug 2017 to Leadership**

- 12 months of researching, analyzing and producing a recommendation

## **Phase 2 – Solving the Nuts and Bolts of Reorganization – Sept – Feb. 2019**

- Answering Key Questions about: Financial Model, Administration Structure, Competition Model, Program Growth
- Town Hall Meetings Jan 14-24, 2019
- SOPA Board Presentation and Approval Feb. 10th

## **Phase 3 –Transition Planning and Implementation of Pilot Program**





- **Task Force Committees**
  - **Developed to address questions** raised by Leadership attendees wanting more details on the proposed regional structure.
  - Sixty Task Force members represented **a cross-section of roles** including athletes, volunteers, and staff from **all regions of the state.**
  - **Four Task Forces:**
    - Administration
    - Program Growth
    - Fundraising & Finances
    - Sports & Competition

# Admin Topics Addressed



Definition of Program

Function of Program

Functions of Volunteers and Staff

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# Admin Task Force Members

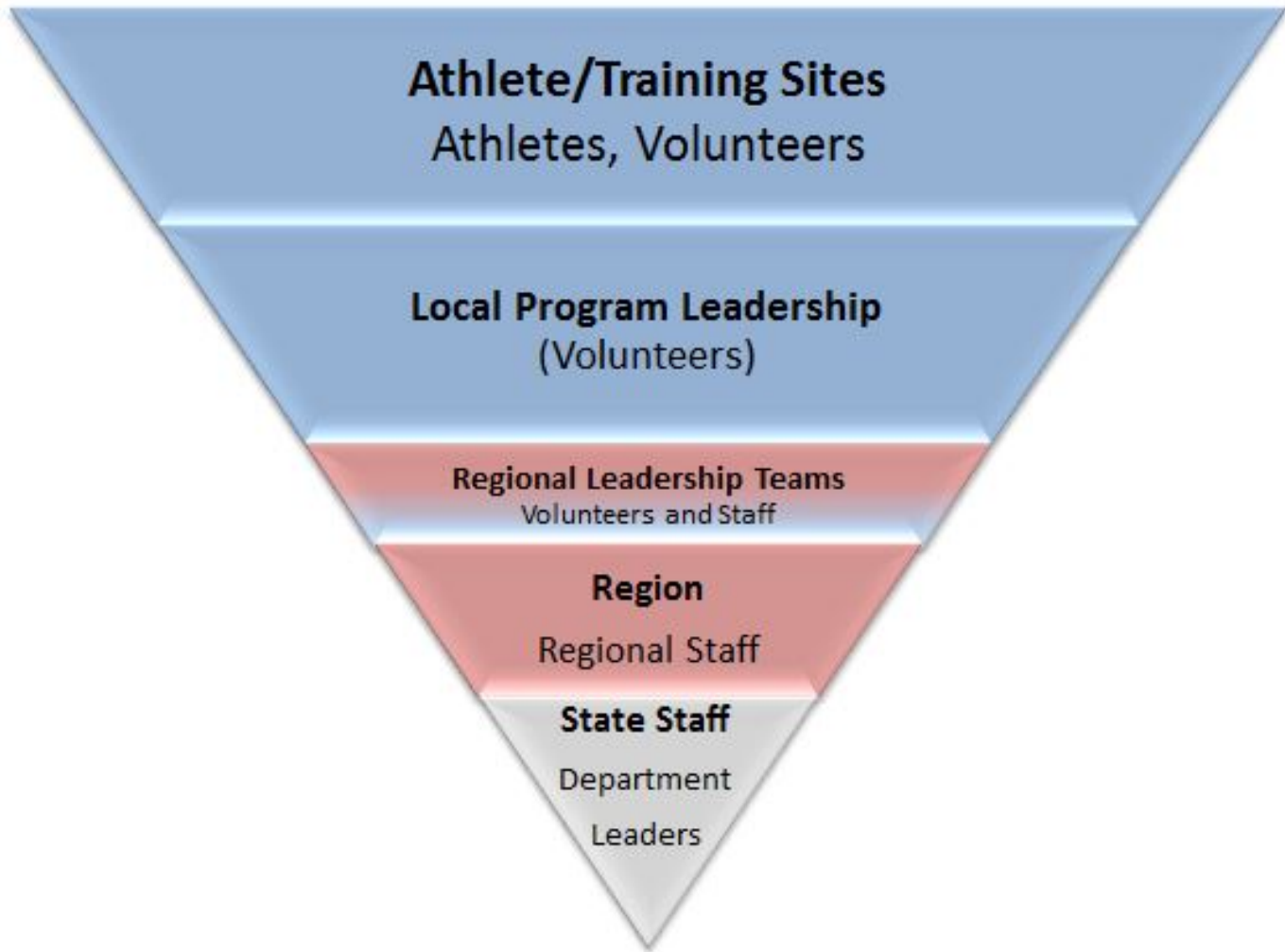


Barb Branda - Northumberland Snyder  
Bella Bregar - Centre  
Amara Geffen - Crawford  
Tom Hemphill - Delaware  
Faith Holton - Blair  
Nicole Jones - Staff  
John Klenzing - Franklin  
George Massimini - Bucks

Mike O'Hara - Area P  
Mary Pitzer - Butler  
Christine Rodrigues - Carbon  
Tracy Rooker - Lycoming  
Zach Williams - Fayette  
Jim Binz - Staff  
Kathy Guy - Staff  
Lynn Lopez – Reorg Team/Lancaster  
Clare Walsh Miller – Reorg Team/Staff



# Regional Structure Overview





## ***Q: Can a local program keep its identity?***

Yes, and it will be defined by geographic borders as defined today.

## ***Q: What is the function of a **program**?***

- provide sports training and competition opportunities to athletes;
- **secure volunteers** for local events;
- provide community outreach;
- facilitate athlete leadership;
- program fundraising;
- program coordination including contracts and insurance certificates

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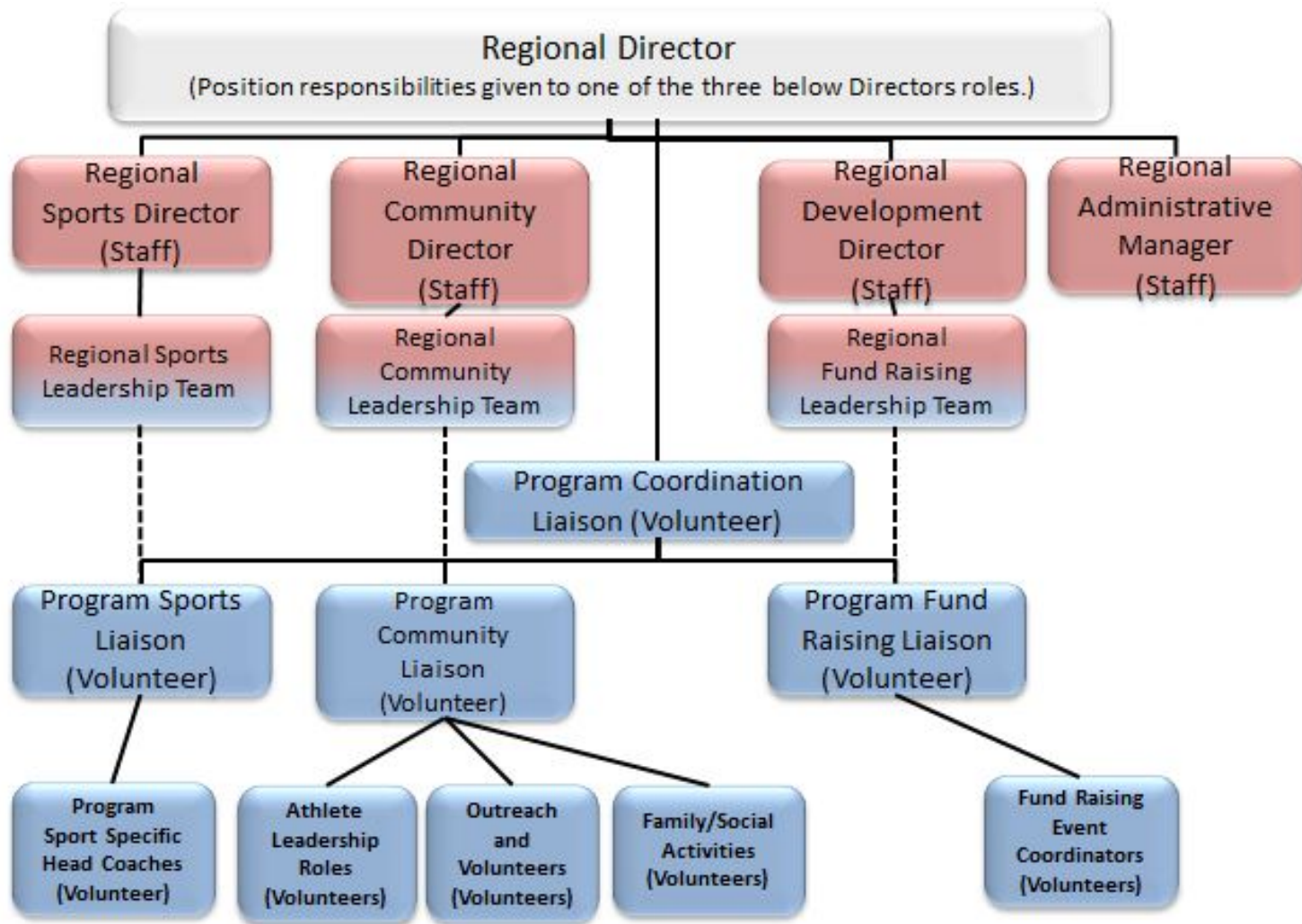
# Proposed Regional Function Chart

**Staff Responsibility**

**Regional Leadership Functions  
Staff & Volunteer**

**Volunteer Responsibility**

**Local Volunteers Responsibility**



# Sports

Staff  
Responsibility

Regional  
Leadership  
Functions  
Staff & Volunteer

Volunteer  
Responsibility

Local Volunteers  
Responsibility





# Community

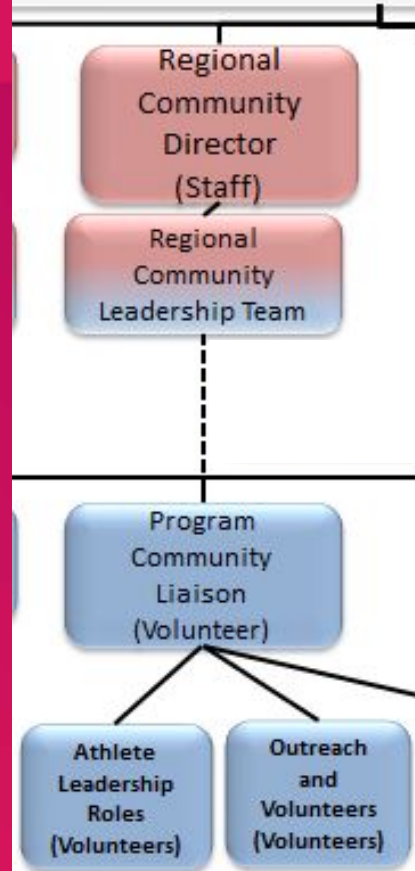
Staff  
Responsibility

Regional  
Leadership  
Functions  
Staff & Volunteer

Volunteer  
Responsibility

Local Volunteers  
Responsibility

Regional Director  
(on responsibilities given to one of the three below Directors roles.)



## Regional Community Director:

- Growth of athletes and volunteers
- Community partnerships
- Athlete Leadership oversight
- Supervision of Program Community Liaison

## Regional Community Leadership Team:

- Connecting regional staff to program volunteers
- Generate and guide goals of the region

## Program Community Liaison:

- Athlete Leadership
- Community outreach
- Day-of volunteer recruitment
- Social activities

# Development

Staff  
Responsibility

Regional  
Leadership  
Functions  
Staff & Volunteer

Volunteer  
Responsibility

Local Volunteers  
Responsibility

## Regional Development Director:

- Cultivate the greater communities' sponsorship and donor opportunities
- Oversight of Program Fundraising Liaisons

## Regional Fundraising Leadership Team:

- Connecting regional staff to program volunteers
- Generate and guide goals of the region

## Fundraising Liaison:

- Local fundraising activities

## Fund Raising Activities Teams:

- Program fundraising

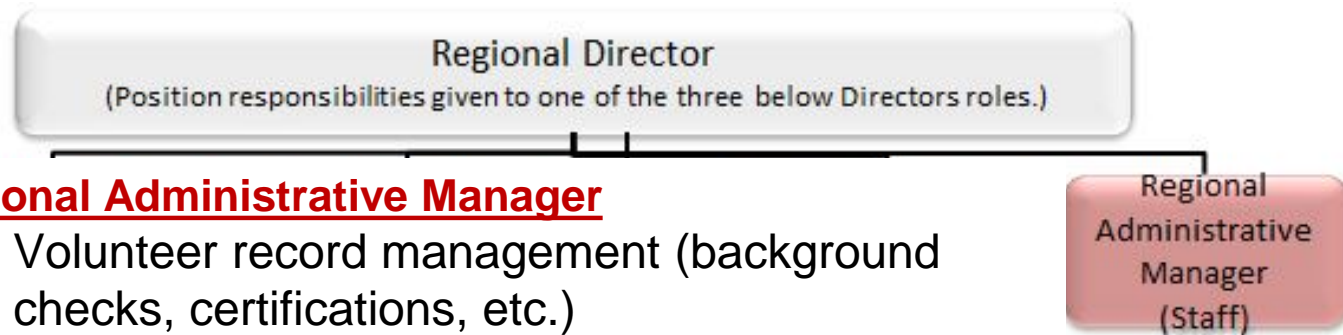


# Admin

Staff  
Responsibility

## Regional Administrative Manager

- Volunteer record management (background checks, certifications, etc.)
- Athlete record management (retention and growth support)
- Regional communication centralization



# A place for all volunteers



| CURRENT Volunteers                       | PROPOSED Regional Model   |
|--|---|
| Program Management Team Members          | Program Sports Liaison, Program Community Liaison, Program Fundraising Liaison and Program Coordination Liaison |
| Athlete Leadership Positions             | Athlete Representatives & Mentors, Global Messengers, Health & Fitness Coordinators, Athletes as Coaches        |
| Coaches                                  | Acquired at the <b>Program level</b> and supported by the <b>Regional Sports Leadership Team</b>                |
| Sport Directors & Sport Management Teams | Members of the <b>Regional Sports Leadership Team</b>   |

# Program Growth

## Topics Addressed



- Volunteer Management
- Athlete Recruitment and Retention
- Define Quality Experience for Athletes & Volunteers
- Athlete Leadership

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# Program Growth Task Force



Dean Huya - Warren

Johanna Schoeneck - Lycoming

Dawn Bressler - Columbia-Montour

Jean Sandburg - Area P

Pam Youngkin - Northampton

Linda Lechner - Northampton

Dana Lindsey - Bethlehem

Dan Gemmill - Montgomery

Bob Lopez - Lancaster

Jane Burget - Blair

Tim Spence - Butler

Anne Phillips - Lancaster

Quimber Usites – Washington

Carolyn Kushner - SOPA Staff

Alice Moat – Reorg Team/Bethlehem

Jordan Schubert – Reorg Team/Staff

Penny Coup – Reorg Team/Staff





## Q. How will Volunteer Management Recruitment Work?

- Targeted recruitment to meet specific needs
- Recruitment for regional volunteer roles
- Existing online volunteer registration process
- Training and Recognition
- Retention and Quality of Volunteer experience





***Q. How will athlete outreach/recruitment be accomplished to attain a healthy, sustainable increase?***

- Target school aged athletes through the establishment of strong school partnerships
- Target adult athletes through the establishment of strong partnerships with service providers
- Regional Awareness Campaign to better define who we are, what we do and who we service.







## ***Q. What is the definition of quality of experience for athletes and volunteers?***

- Athletes – A quality experience for athletes is when they have multiple sports training and competition opportunities which are well-executed with proper and sufficient equipment to accommodate all athletes
- Volunteers – A quality experience for volunteers is when the experience is focused on direct support, interaction and success of the athletes and volunteers are doing what they signed up for and want to do.



# Program Growth - Athlete Leadership



## *Q: How will reorganization impact other athlete leadership roles?*

- We expect additional **Global Messenger** opportunity by the increase in Regional activities.
- We also want to expand **Athlete Representative** opportunities by broadening the collection of input from athletes within each sport.
- Additionally, we are looking to add activities related to fitness thereby recruiting athletes to assume the **Health and Fitness Coordinator** roles.
- **Mentorship** - Will recruit volunteers specifically for this role.

Global Messenger



# Program Growth - Athlete Leadership



***Q: How can we assure more athlete voices are heard across the region?***

- Each Region will host an **Athlete Leadership Team (ALT)**.
  - Each program will be encouraged to recruit athletes to gather input from a broad range of fellow athletes by sport or other such segments. They in turn will bring insights and opinions to the Regional ALT who will provide to their RIC representative.
- The **Regional Input Council (RIC – state level)** will have one Input Council member per region who will serve as Athlete Leadership Team Chair for the region. Regional Input Council will expand from six to nine members.



## ***Q: How can more athlete representatives be a part of Athlete Congress?***

- When fully developed, each region may send one Athlete Representative; dependent on size and sports offered, additional Athlete Representative(s) may be able to attend. Final development will be a part of the Regional rollout.

# Fundraising and Finance

## Topics Addressed



- Review of State / Local Finances
- Cost per Athlete Ratio
- Regional Budgeting
- Regional Financial Operations
- Fundraising Events

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# Fundraising/Finance Task Force



John Kersey - Warren  
Marc Folmer - Lycoming  
Doug Jacobs - Area P  
Tony Gillespie- Montgomery/BOD  
Amanda Sechrist - Northampton  
Scott Otterbein - Montgomery  
Anthony Watts - Lancaster

Grace Myers - Adams  
Sara Long - Huntingdon  
MaryAnn Ritchey - Blair  
Pamela Clayton - Allegheny  
Eric Cushing – Staff  
Kraig Makohus - Staff  
Susan Wyland- Staff



# Financial Health



## Special Olympics PA Financial Health of SOPA 31-Dec-17

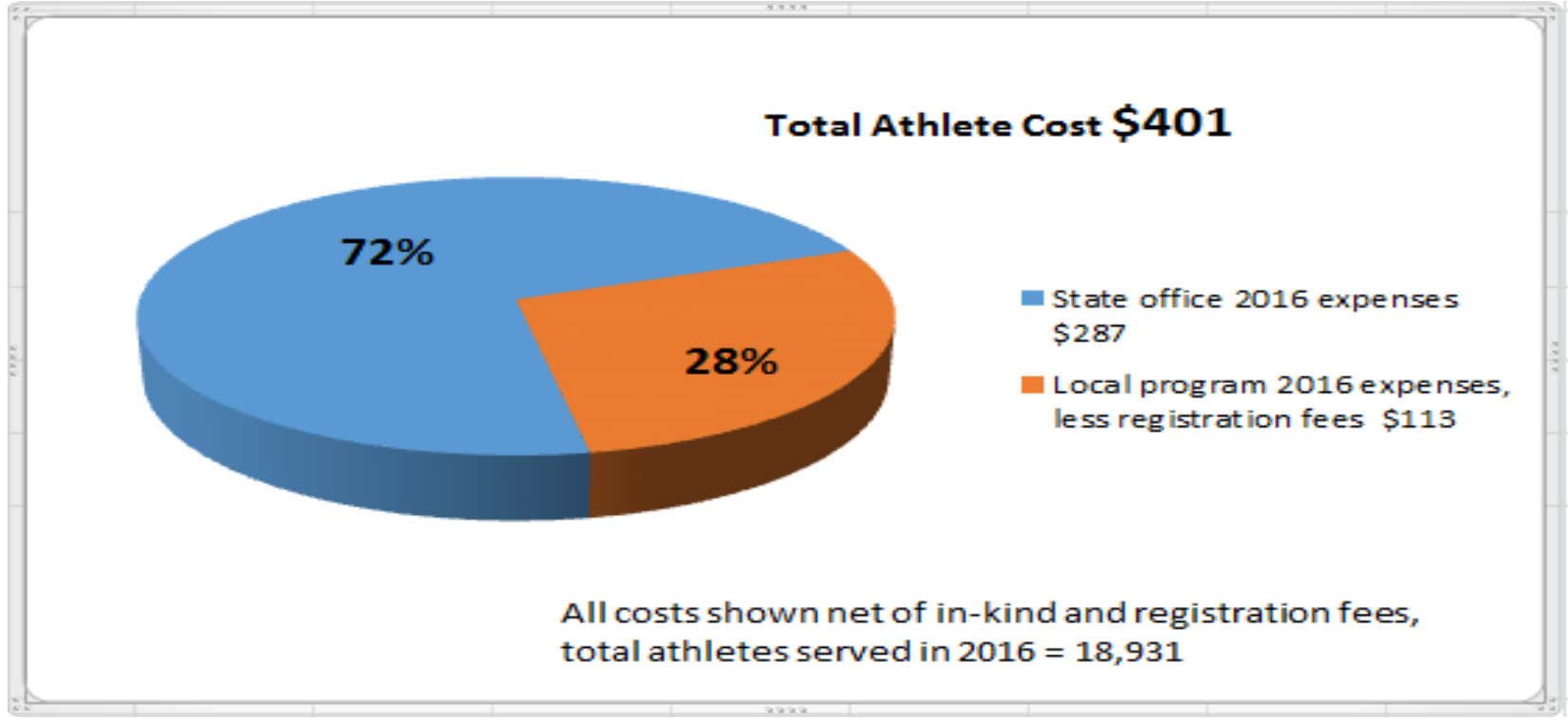
|              | State               | %           | Local               | %           | Total               | %           |
|--------------|---------------------|-------------|---------------------|-------------|---------------------|-------------|
| Cash         | \$ 584,278          | 18%         | \$ 3,732,489        | 66%         | \$ 4,316,767        | 49%         |
| CD's         | 60,000              | 2%          | 1,368,937           | 24%         | 1,428,937           | 16%         |
| Securities   | 2,593,730           | 80%         | 560,556             | 10%         | 3,154,287           | 35%         |
| <b>Total</b> | <b>\$ 3,238,008</b> | <b>100%</b> | <b>\$ 5,661,982</b> | <b>100%</b> | <b>\$ 8,899,991</b> | <b>100%</b> |

|                       |            |  |            |  |            |
|-----------------------|------------|--|------------|--|------------|
| Actual Earnings       | \$ 277,198 |  | \$ 61,049  |  | \$ 338,247 |
| Actual Rate of Return | 9%         |  | 1%         |  | 4%         |
| Earnings at 9%        | \$ 277,198 |  | \$ 509,578 |  | \$ 786,776 |

**Missed Opportunity in 2017 \$ 448,529**

|            | State        | % | Local        | % | Total        | % |
|------------|--------------|---|--------------|---|--------------|---|
| Revenue    | \$ 6,478,491 |   | \$ 2,346,156 |   | \$ 8,824,647 |   |
| Expenses   | 6,463,967    |   | 2,137,751    |   | 8,601,718    |   |
| Net Income | \$ 14,524    |   | \$ 208,405   |   | \$ 222,929   | - |

# Total Cost per Athlete





# Fundraising and Finance



***Q: Will funds raised locally stay local or become a part of a regional budget or go into “One Big Pot”?***

Local identity of funds – including reserves, income and expenses will be maintained within the Regional structure.

- We continue our current centralized accounting system
- Budgets will be created Regionally and be made up as a sum of the finances of each program





***Q: What is the most efficient and effective way to handle budgeting and financial operations? Question restated: What will happen to local reserves?***

- Current reserve balances will remain earmarked for the program that generated them.
- Reserves will be tracked via current Centralized Accounting system.
- By law, responsibility for investments of all reserves belongs with the SOPA board.
- Honor donor intent when specified (e.g.: a bequest specifically written for XYZ county).



# Fundraising and Finance



***Q: How will program fundraising events and state office fundraising events co-exist?***

- Money raised locally can stay local.
  - Local fundraising events should continue.
- Cost per athlete ratio based on program needs.
- Each program will be part of a larger region, with the expectation that a regional budget will be developed to support individual program needs.





***Q: Given the proposed increased staffing, how can we ensure the sustainability of the regional model?***

- 10-year forecast shows long-term sustainability with short-term need for state reserve support (*pending board review/approval*)
  - Increased capacity for fund-raising with paid staff.
  - Programs within a region working together in support of larger events.
  - Review and evaluate local fundraising efforts to ensure best use of time and resources.
  - Investment earnings from program and state reserves will support the whole.

# Training and Competition Topics Addressed



- Training site locations
- Opportunities in Regional Structure
- Coach Trainings and Certifications
- Coach support

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# Training and Competition Task Force



Becky Fischer - Centre  
Jo Schoeneck - Lycoming  
Elizabeth Porter - Bradford/Sullivan  
Sue Ann Jacobs - Area P  
Christopher Wolfel - Northampton  
Lisa Barbour - Philadelphia  
Jim Malcolm - Montgomery  
Jim Miele - York  
Maryellen Brown - Area M  
Adam Burget - Blair

Dennis Dewey - Franklin  
Charles Jones - Lawrence  
Andrew Knight - Washington  
Mike Ermer - Staff  
Kristen Lenig - Staff  
Michelle Cordell - Staff  
Michelle Boone - Reorg Team/Staff  
Carol Erzen – Reorg Team/Allegheny



# Training and Competition



***Q: Where will training sites be located? How do we insure equitable/consistent programming? How will new training sites be formed?***

- Current training site locations will remain intact, add or subtract based on assessment and need
- Training Site Assessment - consistent experiences, meet regional needs, efficient use of resources (financial and personnel)

## Next Steps:

- Committee to create Training Site Assessment tool
- Data collection: location of current training sites, number of athletes served per region in each sport; use this information to add training sites as needed to fill gaps

# Training and Competition



## *Q: What competition opportunities will exist in the new structure?*

- Competitions: local/Invitationals, Sectionals and States and **add** Regional competition to provide more opportunities.
- Offerings per region will vary, depending on participation
- Advancement to all higher level competitions should be selected based on place of finish at the previous level of competition (as dictated in SOI, Article 1)
- **Allocations** to Sectional/State events will be provided per region and will be dispersed based on predetermined qualifying local/regional competitions.
- **Regional competitions** could serve as qualifiers or culminating events
- **Multi-regional events** should be considered when quality competition is not available within a region



# Training and Competition



***Q: How will coach trainings and certifications be managed to make the process more efficient?***

- Make coach trainings/education opportunities **accessible and convenient**
- Manage training schools/coach education per region with **Regional Sport Expert Teams**
- Establish **consistent timeline** for trainings per sport per year
- Increase **advanced coach trainings** offered: sport-specific, advanced strategies, practice planning, etc. for current coaches
- Offer a **balance** of in-person and online education courses



# Training and Competition



***Q: How will coach support requirements be handled to ensure that coaches can focus on athletes?***

- Clearly outline **expectations of coaches**: responsible for paperwork that directly relates to their team - practice plans, rosters, training attendance, competition entry forms to include assessment scores or current time/distances
- Areas to be managed by program leadership members/regional staff include: securing facilities, transportation, volunteer clearances, athlete medicals, recruitment, equipment/uniform ordering, competition opportunities, etc.
- Create more opportunity for **coach to coach interaction/communication**: mentoring, best practice sharing, competition planning, etc.

Next Steps:

- Developing resources/tools that are easily accessible and mobile friendly





# Where to go from here?

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# Next Steps for Reorganization Plan



- **Regional Town Hall Meetings, January 14-24**
- **SO North America presentation,  
– January 31**
- **Pilot Region Review / Selection  
by early February**
- **SOPA Board Meeting,  
February 10<sup>th</sup>, final approval**
- **Pilot Region Implementation**





## Criteria for Selection

- **Representative of SOPA**
  - Geography: urban and rural
  - Status of current program needs
- **Build on strengths within the region**
- **Open to new ideas focused on improvement**
- **Athlete-centered mindset**

# Phase 3: Implementation



**Rest of 2019** - Transitional planning

**Early 2020** – Pilot 1 Region

\*\* Review and assess the process

**Jan. 2021** – 2-3 additional Regions

\*\* Review and assess the process

**Jan. 2022** – 3 additional Regions

\*\* Review and assess the process

**Jan. 2023** – Final Regions on board; Re-Org Transition Complete

\*\* Ongoing Review and improvements

# Benefits for all



# Benefits of new organizational structure:



## Athletes:

- More opportunities to compete (scrimmages, regional competitions, more athletes/teams/challenges)
- Greater access to training sites
- Consistency of opportunities regardless of geography
- Equality of sports and programs across the state
- A better overall experience from beginning to end



# Benefits of new organizational structure:



## Volunteers:

- Manageable roles focused strengths
- More opportunities with athletes,
- Reduction of administrative duties
- More staff support in all areas of the program

***Resulting in an improved overall experience***

# Benefits of new organizational structure:



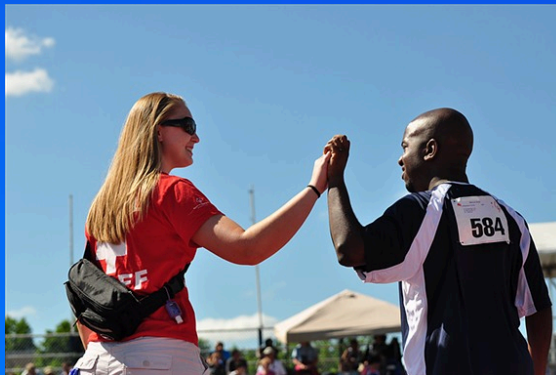
## Organization as a whole:

- More efficient and effective implementation
- Better resource allocation.
- Sustainable structure that can promote program growth, serve more athletes
- Athlete and volunteer experience that forges a path to the next 50 Years

# Q&A



# OPPORTUNITY FOR QUESTIONS



# What will the next 50 years bring?



**“Don’t be afraid to give up the good for the GREAT!”**

*- John D. Rockefeller*

**“If you do what you have always done, you will get what you have always gotten.”**

*- attributed to Henry Ford*

