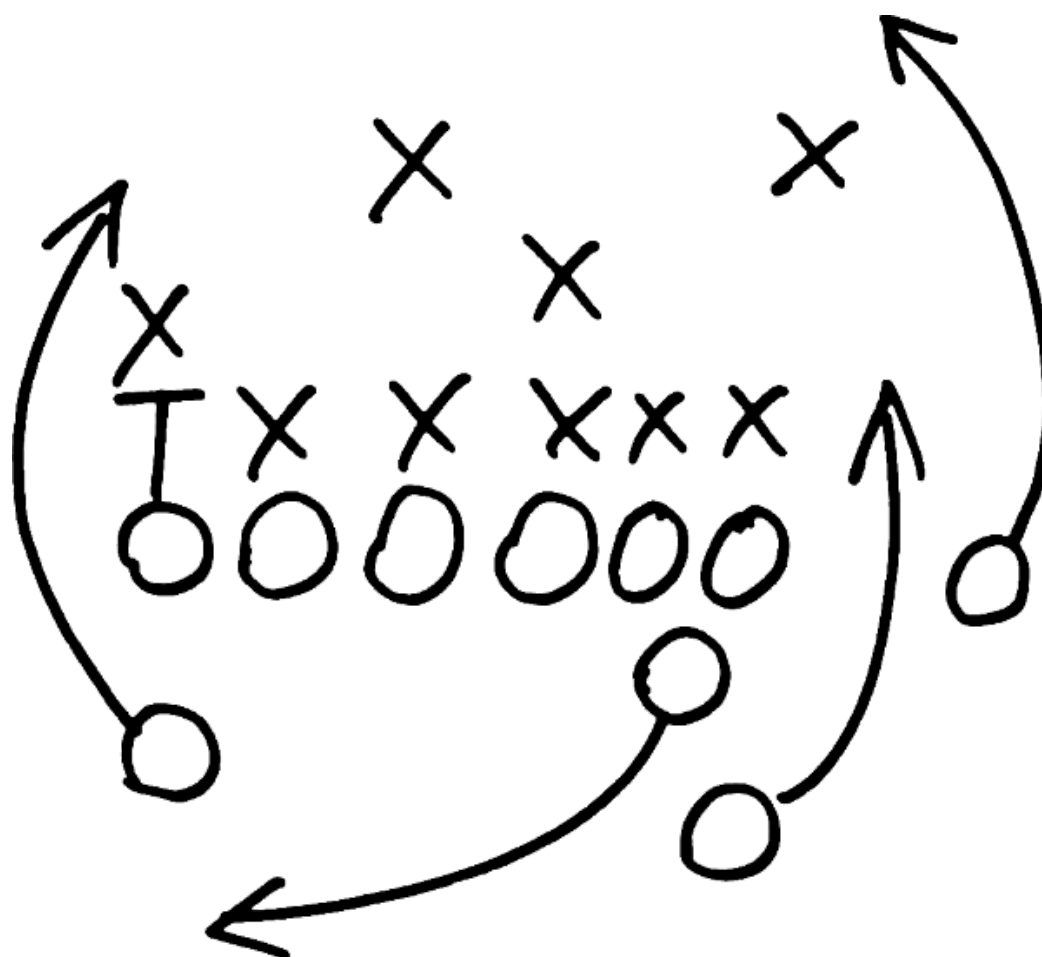




# REGIONAL PLAYBOOK



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### **FINANCE COORDINATOR (optional position)**

#### **FINANCE**

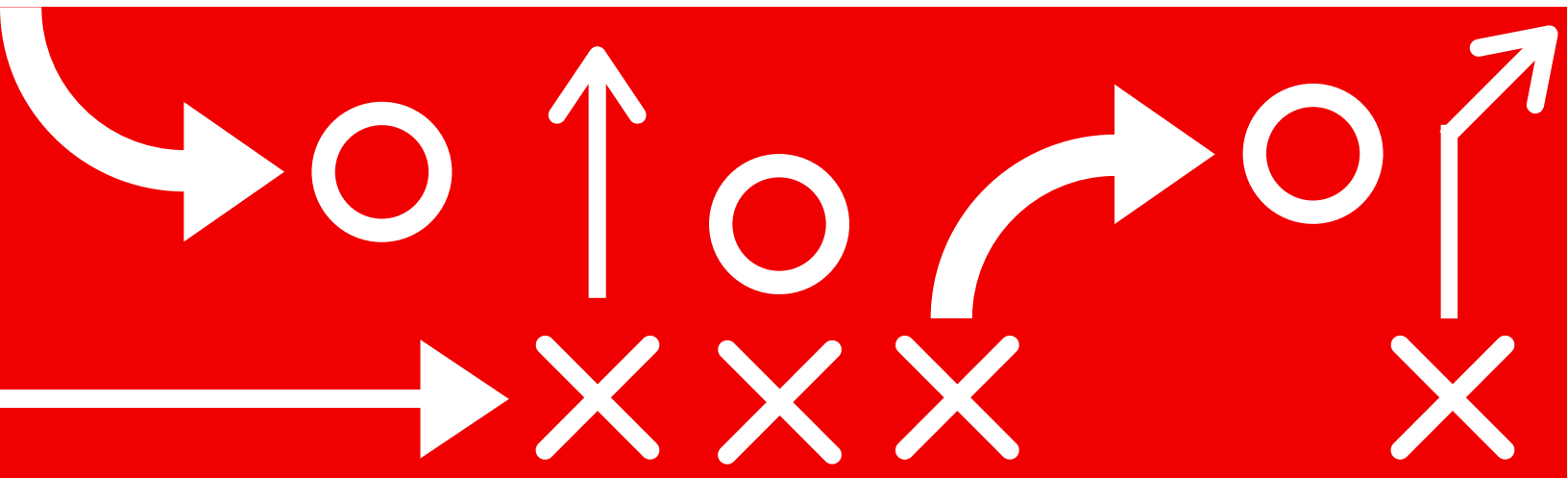
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# SPORTS



# SPORTS

## Athletes

### New Athletes

#### New Athlete Recruitment

**New athlete recruitment will be led by the Regional Executive Director with the support of the Regional staff and coordinated with Local Teams.** In an effort to assure Region-wide coordination, broader recruitment efforts will be coordinated and shared with Local Team leadership.

#### Procedure

Regional Executive Director will develop, lead and implement a Regional recruitment strategy for new athlete recruitment, working closely with Regional staff, Local Team Community Leaders and coaches.

- Local Teams will:
  - Promote athlete opportunities within their community
  - Connect the Regional staff to organizations within their community that are potential sources of athletes. In turn, the Local Team and the Region will collaborate to work with agencies and organizations serving potential athletes for Region-wide recruitment partnerships
  - Forward interested athlete contact information to the Regional Office for processing of new athletes as outlined in the Registration guidelines
- Regional staff will;
  - Create a comprehensive athlete recruitment plan to support athlete recruitment in all communities and across the Region
  - Promote athlete opportunities throughout the Region with targeted Regional marketing
  - Collaboratively strengthen existing community partnerships and work to create new ones via annual plan
  - Work with the Local Teams to identify needs to support new athlete recruits (i.e., new coaching volunteers, training facilities, etc.)
  - Work with Regional Leadership Team to meet athlete recruitment goals
  - Ultimate determination on goals will reside with the Regional Executive Director
  - Work with State staff to identify all new UCS schools. Partnerships will be collaborative with the ultimate goal of encouraging participation in community-based sports training and of retaining all students for participation after graduation.

#### Additional Resources (links)

[Athlete referrals/recruitment, social media resources](#) (Under Marketing Toolkit)

#### Registration – Medicals

*Coming Soon!*

## Current Athletes

### Medical Renewal

**Athletes currently registered** with Special Olympics Pennsylvania (SOPA) are to **submit their updated Application for Participation or “medical” form directly to their Regional office.**

#### Procedure

- **Athletes** (or their family, support team or SOPA coach or Local Team representative on their behalf) **will**;
  - Submit completed Application for Participation (AKA Medical Form) directly to their Regional office for processing and management
  - Submissions can be done by mail or email scanned version
- **Regional Staff will**;
  - Assume responsibility for inputting any new or updated information into the VSys database system.
  - In the event a Team receives a Medical Form, it should be forwarded to the Regional Office for processing.

**NOTE:** SOI, Inc. will be transitioning (required of all teams) to an online Athlete and Unified Partner Application for Participation (AKA Medical Form). Greater Lehigh Valley Pocono Region (GLVPR) will be SOPA's first rollout Region to test this new system when all VSys integration is complete. Once state staff has completed all testing, they will work with GLVPR staff and team leaders to develop a deployment plan.

#### Additional Resources (Links)

[Application for Participation](#)

## Training Site Registration

All Training Site information will be collected in SOPA's database system, VSys. Training Sites will be entered as Events in VSys. This will allow for pre-season volunteer and athlete registration.

New and previously established training sites will need to identify; sport, location, needs, dates, etc. Support will be provided to Teams by Sports Team Leader, Regional Administrative Manager and Regional Sports Director. Ideally this coordination should be **COMPLETED at least 4 weeks prior to the beginning of the training season** so training opportunities can be promoted and athletes, families and volunteers can make informed decisions and register accordingly using VSys.

#### Procedure

- New and existing Training Site Events will be entered into VSys by the Regional Administrative Manager or Regional Sports Director.
- The timeline is as follows:
  - VSys Set Up: (Example Fall 2020 - Fall Fest date Nov. 6-8)
    - 14 weeks prior to State Level Games - Event Registration Set Up (July 31, 2020)
    - 12 weeks prior to State Level Games - Event Registration Details Finalized (August 14, 2020)



- 10 weeks prior to State Level Games - Event Registration Closes (August 28, 2020)

*As a guideline, typical training seasons are:*

- Fall: Aug - Nov
- Winter: Nov - Mar
- Summer: Jan - June

Training seasons may operate outside of this schedule. Training sites should be set up at least 4 weeks prior to the start of your training season....(Ex: Bowling starting in Sept.)

- **Sports Team Leader will;**
  - Work with existing training sites and coaches to coordinate availability and will confirm days/times to report out at monthly Sports Team Leader meetings.
  - Collect all training site details to be shared with Regional Sports Director to coordinate the creation of the event in VSys
  - Will work with the Regional Sports Director to identify new training sites within their team as needed.
- **Regional Staff will;**
  - Use details collected by local Sports Team Leader to create an Event in VSys for each training site
  - Assess Regional training sites and needs and make recommendations based on sports offered, volunteer and site availability and expressed athlete interest.

Once all training site information is collected, a Regional “sport offerings list” will be created and promoted to encourage registration. This promotional material should include: sport, training start date, practice days, practice times, age served if appropriate and ability served (introductory/low vs advanced/high) as well as volunteer opportunities. Training sites will be listed by sport on the Regional website.

**VSys database “Events” for training sites will be created in VSys by the Regional staff by Local Team** for pre-season rosters to track athletes and coaches who are training during the season.

This will allow;

- Easier access to confirm which athletes need medicals PRIOR to state competition.
- Easier access to confirm which volunteers need training/background checks PRIOR to state competition.
- Tracking of athletes and volunteers who do not attend competition.
- Identify athletes and volunteers who participate in multiple sports throughout the year.

## **Procedures**

- **Local Team Leadership will (GMS);**
  - Participate in GMS registration
  - Participate in GMS training
- **Regional Staff will (VSys);**
  - Create “event” for training sites, fundraising activities, etc.

## Additional Resources (links)

[Database User Guide](#)

### Coach Packets

In advance of the first training session, coaches will create or be provided a “Coach Packet” that will include the following:

- Registered athlete medical forms
- Registered Unified Partner medical forms
- Training Site athlete roster
- Training site coach roster

**A copy of an Athlete’s or Unified Partner’s “medical” form is to be available to all Head Coaches** for a better understanding of needs, medical concerns, communications lines, etc.

### Procedure

- **Head Coach will;**
  - Have a copy of “medical” form for all rostered athletes in advance of the first training session.
- **Regional Staff will;**
  - Create and make available the coach packet for each training site

## Athlete Sport Training Requirements/Recommendations

**Eight (8) consecutive weeks is the minimum athlete sport training requirement.** A minimum of at least 10 weeks is required, so all participants can attend the policy-mandated 8 weeks of trainings. Alternative training methods should be made if circumstances do not allow for 8 weeks of sports specific training (i.e alpine skiing/weather/dry land training)

### Procedures

- **Head Coach will;**
  - Create Training Plan (10+ weeks)
  - Submit related costs for full training activities to Sports Team Leader for inclusion into the annual budget
  - Notify your Sports Team Leader who will notify the Regional Administrative Manager, if your training schedule is different than previously scheduled
- **Sports Team Leader will;**
  - Notify Regional Administrative Manager of any changes in training schedule to adjust the “event” in VSys

## Additional Resources

[SOI General Rules](#)

## Current Unified Partner

### Training Site Registration

**All Training Site information will be collected in SOPA's database system, VSys.** Training Sites will be entered as Events in VSys. This will allow for pre-season volunteer and athlete registration.

**New and previously established training sites will need to identify; sport, location, needs, dates, etc.** Support will be provided to Teams by Local Sports Team Leader, Regional Administrative Manager and Regional Sports Director. Ideally this coordination should be **COMPLETED at least 4 weeks prior to the beginning of the training season** so training opportunities can be promoted and athletes, families and volunteers can make informed decisions and register accordingly using VSys.

#### Procedure

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- **Sports Team Leader will;**
  - Work with existing training sites and coaches to coordinate availability and will confirm days/times to report out at monthly Sports Team Leader meetings.
  - Collect all training site details to be shared with Regional Administrative Manager to be entered into VSys as an Event
  - Work with the Regional Sport Director to identify new training sites within their Team as needed.
- **Regional Staff will;**
  - Use details collected by Sports Team Leaders to create an Event in VSys for each training site
  - Assess Regional training sites and needs and make recommendations based on sports offered, volunteer and site availability and expressed athlete interest.

Once all training site information is collected, a Regional "sport offerings list" will be created and promoted to encourage registration. This promotional material should include: sport, training start date, practice days, practice

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## Coach Packets

In advance of the first training session, coaches will create or be provided a “Coach Packet” that will include the following:

- Registered athlete medical forms
- Registered Unified Partner medical forms
- Training Site athlete roster
- Training site coach roster

**A copy of an Athlete’s or Unified Partner’s “medical” form is to be available to all Head Coaches** for a better understanding of needs, medical concerns, communications lines, etc.

### Procedure

- **Head Coach will;**
  - Have a copy of “medical” form for all rostered athletes in advance of the first training session.
- **Regional Staff will;**
  - Create and make available the coach packet for each training site

## Uniforms/Equipment

### Ordering of Equipment/Uniforms

**The Regional Sports Director will be responsible for the coordinating, ordering and storage (locally) of uniforms and equipment.**

Each Regional/local leadership team will create a system for ordering, inventory, disbursement and storage of sport equipment and uniforms. It is recommended that all equipment is inventoried at the conclusion of each season. Equipment must be checked to insure safety (proper certifications), new equipment will be ordered as necessary. Equipment will be stored within each local area.

### Procedures

- **Sports Team Leader will:**
  - Ensure proper care/inventory of equipment
  - Submit uniform/coach needs by deadline
  - Provide budget to Local Team Leader
- **Regional Staff will:**
  - Coordinate Regional purchases
  - Assist with sharing of resources
  - Remain current of Local Team inventory and needs
  - Collect and inventory returning equipment and uniforms each post season and as appropriate, remove all unsafe items and assure as needed, replacement costs are reflected in future budget

# Training

## Athlete Sport Training Requirements/Recommendations

**Eight (8) consecutive weeks is the minimum athlete sport training requirement.** A minimum of at least 10 weeks is required, so all participants can attend the policy-mandated 8 weeks of trainings. Alternative training methods should be made if circumstances do not allow for 8 weeks of sports specific training (i.e alpine skiing/weather/dry land training)

### Procedures

- **Head Coach will;**
  - Create Training Plan (10+ weeks)
  - Submit related costs for full training activities to Sports Team Leader for inclusion into the annual budget
  - Notify your Sports Team Leader who will notify the Regional Administrative Manager, if your training schedule is different than previously scheduled
- **Sports Team Leader will;**
  - Notify Regional Administrative Manager of any changes in training schedule to adjust the “event” in VSys

### Additional Resources

[SOI General Rules](#)

## Athletes Training: More than One Sport per Season

**Athletes can cross-train.** Athletes may train in multiple sports or train in one sport at more than one training site; if doing this the athlete must commit or declare (by telling the Head Coach or indicating primary sport on training site registration form), prior to the season, to one sport or one training site for advancement to State-level events. Priority will be given to athletes who have declared this as their primary training site.

### Procedure

- **Regional Staff will;**
  - Ensure all training sites have been registered (VSys events)
  - Rosters from all registered training sites should be merged and purged showing athletes training in more than one sport and notifying each coach requesting the athlete “declare” their sport advancement intent.

## Non-Competing Athletes: Training But Not Competing

It is allowable for an athlete to participate in a sport as a non-competitor. For athletes training in multiple sports, they may participate as non-competitors as long as they declare, prior to the season, the sport in which they intend to advance to state-level events. Availability for training at secondary sites will be based on space and

budget implications. Additionally, athletes may not be able to advance to competition for multiple reasons (too demanding, does not tolerate strange environments, etc.) and are encouraged to participate in training.

## Procedures

- **Head Coach will;**
  - Direct athletes to register pre-season

## Training Outside Special Olympics

We encourage all athletes to train and be physically active whenever possible. **An athlete may train outside of Special Olympics, however, that training will not count** towards the required 8 weeks of Special Olympics training.

All athletes must train under a Special Olympics certified coach at an approved training site. Special Olympics does not cover the cost of private lessons for athletes.

## Behavior

### Behavior Expectations

SOPA expects all athletes and volunteers to display appropriate behavior at all times. Athletes and volunteers are expected to sign the SOPA Code of Conduct, thereby acknowledging their commitment to adhere to these expectations. SOPA Code of Conduct should be signed no less than annually. As will sometimes happen, participants – athletes or volunteers, may become disruptive during SOPA activities. In order to ensure consistent management of such issues, we ask that all coaches or other leaders to handle these issues using the following guidelines.

### Procedure

- **Athletes, Volunteers and Unified Partners will;**
  - Annually review and sign the SOPA Code of Conduct, agreeing to follow and abide by code
- **Local Team level;**
  - A misconduct report should always be completed when there has been a violation of the SOPA Code of Conduct. These reports are kept on record, so we are able to track an individual's behavior. After a report is filed it should be discussed with all involved individuals separately and together if necessary
  - Local Team Leaders will address all misconduct, behavior or unsportsmanlike issues that occur within their Local Team, pulling in Regional staff as needed.
- **Regional office level;**
  - Issue consequences, if deemed necessary. These must be written, available to everyone and should be reviewed with all volunteers and athletes on a yearly basis.
  - Will support local leaders as needed

- **State office level;**
  - If suspensions or removal from the Local Team are deemed necessary it must be reviewed and approved by SOPA's Chief Program Officer.
  - If an issue arises at a Sectional or State Game it will be addressed by SOPA Staff

#### **Additional Resources Links Required –**

[Behavior Report](#)

[Code of Conduct](#)

## **Competition**

### **Advancement to Higher Levels of Competition (formal – does not include scrimmages, etc.)**

**As directed by Special Olympics, Inc. General Rules, athletes will follow the Advancement to Higher Levels of Competition rules.** Within SOPA, some sports are qualifiers from Sectionals to State events. All sports are qualifiers from State to National events, or World events as applicable. For individual sports (which are qualifiers) participation is required at Sectionals to advance. For team sports an individual must be listed on a roster (or as an alternate) in order to be eligible for advancement. Only two alternates per team are allowed on the roster.

Sport qualifiers:

Fall - Bocce, Long Distance Running/Walking, Powerlifting, Soccer, Volleyball

Winter – Bowling

Spring – Basketball, Golf, Tennis

In order to be eligible to advance;

- An athlete must have a valid athlete medical and be registered with the training site by the assigned deadline to be eligible for State competitions.
- Athletes must be active participants in training sessions (attending no less than 8 weeks, ideally 10 weeks of training prior to State events) AND be able to advance ("able" meaning – stay overnight, endure several days, increased activities, etc.).
- There must be predetermined events declared by the Region that will serve as qualifiers for advancement to state level events, this can include: local, Invitational, Regional competition. If competitions are not available in that sport a process for random draw will be determined (may be the case in less popular sports where competition opportunities are not readily available). There should also be a random draw process developed in the case that a previously scheduled competition is cancelled.

#### **Additional Resources (links)**

[Advancement to Higher Levels of Competition Policy](#)



## Out of Region Competition Opportunities

Competitions across Regions are recommended and encouraged! These are typically referred to as invitationals, where one Region/Local Team is inviting others to participate.

- **Sports Team Leaders will;**
  - Include planned participation in competitions in budget. If not included in approved budget, Sports Team Leader must get approval from Regional Executive Director in advance of registration.
  - Share anticipated event participation calendar with Regional Sport Director prior to each season.

## Out of State Sports Opportunities

Whether in-state, cross Local Team, Region or state boundaries, SOPA encourages additional competition and sports opportunities. Advance planning (financially and schedule) is absolutely necessary. For less popular sports, out of state competitions may be especially important.

- **Head Coach will;**
  - Contact Sports Team Leader to assure the event/opportunity is a part of the annual plan and Budget.
  - If not included in the annual budget, you may request approval via Sports Team Leader.
  - This inclusion will be considered the pre-registration approval process.
- **Sports Team Leader will;**
  - Confirm all SOPA policies are adhered to; including but not limited to registration, volunteer background checks, valid athlete/unified partner medicals, coach to athlete ratio, transportation and housing policies. If proposed participation is not included in annual budget, Sports Team Leader may request approval from Regional Executive Director.
- **Regional Sports Director will;**
  - Confirm the opportunities are sanctioned Special Olympics events or suitable for Special Olympic athlete participation.
  - Contact SOPA's VP of Sports for final approval.

## Coordination of Intra-Local Team or Intra Regional Play

We encourage training sites to provide greater opportunities for your athletes during the course of a training season. Such opportunities might include scrimmaging or having competitions (of a small scale) with other training sites in and outside your Local Team. If you are interested in finding or coordinating these activities, contact your Sports Team Leader who will support the coordination. One potential outcome is "league play" type coordination among Local Teams within a Region.

## Procedure

- **Head Coach will;**
  - Contact Sports Team Leader who will explore opportunities and work with the Regional Sports Director for coordination across the Region.
- **Sports Team Leader will;**
  - Contact Regional Sports Director for coordination across the Local Team with potential “league play” schedule.
- **Regional Sports Director will;**
  - Coordinate activities for inter-Region scrimmages or league play.

## Training Sites

### Expectations

It is Special Olympics Pennsylvania’s goal to provide a quality experience for all our athletes, and their minimum of 10 weeks of consecutive training in advance of competition is a major component of their participation. As such, all **training sites must have well maintained facilities and proper equipment** appropriate to training in the specific sport.

### Procedures

- **Sports Team Leaders will;**
  - Be responsible for meeting minimum Quality Standards of each training site
  - Identify facilities for trainings, and as needed, process contracts
  - Submit budget for equipment, uniform, facility needs
- **Regional Staff will:**
  - Take an inventory or assessment of all training sites and their needs
  - Ensure all training sites are meeting minimum quality standards consistently across the Region and “approve” (ensuring number of volunteers, certified coaches, equipment, etc.).
  - Identify locations where training sites are needed and look to establish
  - Set calendar for year that will provide guidance for training sites

### Additional Resources (links)

[Training Site Quality Standards Assessment Checklist](#)

### Training Site Event Creation

Regional Administrative Manager will create “events” in VSys which will allow athletes to register pre-season for participation. Those registration links (into VSys) will be a part of **the Region’s website so athletes can see where ALL activities are happening and for training**, be able to register (regardless of their location).

## Procedures

- **Head Coaches will;**
  - Develop a Training Plan and share information with the Regional Sports Director to create “event” in VSys to register this activity.
  - Direct athletes and volunteers to register for the training pre-season.
- **Regional Staff will;**
  - Create “event” in VSys to register the activity.
  - Provide the “event” link in the list of all trainings being offered Region-wide.
  - Maintain activity listing on Region’s website and provide information in all Region-wide communication avenues

**VSys database “Events” for training sites will be created in VSys by the Regional staff by Local Team** for pre-season rosters to track athletes and coaches who are training during the season.

This will allow;

- Easier access to confirm which athletes need medicals PRIOR to state competition.
- Easier access to confirm which volunteers need training/background checks PRIOR to state competition.
- Tracking of athletes and volunteers who do not attend competition.
- Identify athletes and volunteers who participate in multiple sports throughout the year.

## Procedures

- **Local Team Leadership will (GMS);**
  - Participate in GMS registration
  - Participate in GMS training
- **Regional Staff will (VSys);**
  - Create “event” for training sites, fundraising activities, etc.

## Additional Resources (links)

[Database User Guide](#)

## Current Athlete Registration

**Athletes currently registered** with Special Olympics Pennsylvania (SOPA) are to **submit their updated Application for Participation or “medical” form directly to their Regional office.**

## Procedure

- **Athletes** (or their family, support team or SOPA coach or Local Team representative on their behalf) **will;**
  - Submit completed Application for Participation (AKA Medical Form) directly to their Regional office for processing and management
  - Submissions can be done by mail or email scanned version

- **Regional Staff will;**
  - Assume responsibility for inputting any new or updated information into the VSys database system.
  - In the event a Team receives a Medical Form, it should be forwarded to the Regional Office for processing.

**NOTE:** SOI, Inc. will be transitioning (required of all teams) to an online Athlete and Unified Partner Application for Participation (AKA Medical Form). Greater Lehigh Valley Pocono Region (GLVPR) will be SOPA's first rollout Region to test this new system when all VSys integration is complete. Once state staff has completed all testing, they will work with GLVPR staff and team leaders to develop a deployment plan.

### **Additional Resources (Links)**

[Application for Participation](#)

## **Current Unified Partner Registration**

**Unified Partners currently registered** with Special Olympics Pennsylvania (SOPA) are to **submit their updated Application for Participation or "medical" form directly to their Regional office.**

### **Procedure**

- **Unified Partners will;**
  - Submit completed Application for Participation (AKA Medical Form) directly to their Regional office for processing and management
  - Submissions can be done by mail or email scanned version
- **Regional Staff will;**
  - Assume responsibility for inputting any new or updated information into the VSys database system.
  - In the event a Team receives a Medical Form, it should be forwarded to the Regional Office for processing.

Team Leaders will have the ability to update email, phone, etc. records for their Local Teams. VSys viewing "rights" of records will be expanded to all Team Leadership positions AND appropriate coaches to ensure volunteers under their supervision have met all background and training requirements.

**NOTE:** Unified Partners are both players and volunteers and therefore require the Application for Participation (AKA Medical Form), Volunteer Background Check reports and required SO trainings. The background checks are addressed in another section.

**NOTE:** SO, Inc. will be transitioning (required of all teams) to an online electronic Athlete and Unified Partner Application for Participation (AKA Medical Form). Greater Lehigh Valley Pocono Region (GLVPR) will be SOPA's first rollout Region to test this new system when all VSys integration is complete. Once state staff has completed all testing, they will work with GLVPR staff and Local Team leaders to develop a plan to deploy. "Viewing" rights will be given to team leaders to ensure volunteers under their supervision have met all background and training requirements.

## **Additional Resources (links)**

[Application for Participation](#)

[Background Check](#)

# **Competitions**

A competition must provide a safe, fair opportunity for all participants. All competitions will be included in the Regional Sports Plan and overall Regional budget by way of Local Team submissions. All competitions will be posted on the Regional website.

## **New Competitions**

Requests to host competitions should be made annually and included in the Regional budget. Requests for unforeseen competition opportunities not included in the budget will be considered on a case by case basis.

- **Head Coaches will;**
  - Contact your Local Team Sports Team Leader who will contact the Regional Sports Director to assure Region-wide coordination.
  - Include this activity in your Local Team's submitted budget.
  - Notify Regional Sports Director (who will notify SOPA's VP of Sports) of any non-SO or competition opportunities outside of Pennsylvania for approval granted by VP of Sports AND Regional Executive Director who will confirm budget availability.
- **Regional Staff will;**
  - Notify SOPA's VP of Sports of any non-SO or competition opportunities outside of Pennsylvania for approval granted by VP Sports AND Regional Executive Director who will confirm budget availability.

**Additional Resources (Links) Required** - Resources on hosting competitions, listed above

[Competition Resources](#)

[Hosting a Competition recording](#)

[Hosting a Competition PPT](#)

[SOPA Opening Ceremonies Guidelines](#)

[SOPA Award Guidelines \(Medals, Ribbons etc.\)](#)

[Invitational Resource Guide](#)

## Out-of-Region Competitions

Competitions across Regions are recommended and encouraged! These are typically referred to as invitationals, where one Region/Local Team is inviting others to participate.

- **Sports Team Leaders will;**
  - Include planned participation in competitions in budget. If not included in approved budget, Sports Team Leader must get approval from Regional Executive Director in advance of registration.
  - Share anticipated event participation calendar with Regional Sport Director prior to each season.

## Out-of-State Opportunities

Whether in-state, cross Local Team, Region or state boundaries, SOPA encourages additional competition and sports opportunities. Advance planning (financially and schedule) is absolutely necessary. For less popular sports, out of state competitions may be especially important.

- **Head Coach will;**
  - Contact Sports Team Leader to assure the event/opportunity is a part of the annual plan and Budget.
  - If not included in the annual budget, you may request approval via Sports Team Leader.
  - This inclusion will be considered the pre-registration approval process.
- **Sports Team Leader will;**
  - Confirm all SOPA policies are adhered to; including but not limited to registration, volunteer background checks, valid athlete/unified partner medicals, coach to athlete ratio, transportation and housing policies. If proposed participation is not included in annual budget, Sports Team Leader may request approval from Regional Executive Director.
- **Regional Sports Director will;**
  - Confirm the opportunities are sanctioned Special Olympics events or suitable for Special Olympic athlete participation.
  - Contact SOPA's VP of Sports for final approval.

## Intra-Regional Play

### Coordination of Intra-Local Team or Intra Regional Play

We encourage training sites to provide greater opportunities for your athletes during the course of a training season. Such opportunities might include scrimmaging or having competitions (of a small scale) with other training sites in and outside your Local Team. If you are interested in finding or coordinating these activities,

contact your Sports Team Leader who will support the coordination. One potential outcome is “league play” type coordination among Local Teams within a Region.

## **Procedure**

- **Head Coach will;**
  - Contact Sports Team Leader who will explore opportunities and work with the Regional Sports Director for coordination across the Region.
- **Sports Team Leader will;**
  - Contact Regional Sports Director for coordination across the Local Team with potential “league play” schedule.
- **Regional Sports Director will;**
  - Coordinate activities for inter-Region scrimmages or league play.

## **Advancement**

### **Advancement to Higher Levels of Competition (formal – does not include scrimmages, etc.)**

**As directed by Special Olympics, Inc. General Rules, athletes will follow the Advancement to Higher Levels of Competition rules.** Within SOPA, some sports are qualifiers from Sectionals to State events. All sports are qualifiers from State to National events, or World events as applicable. For individual sports (which are qualifiers) participation is required at Sectionals to advance. For team sports an individual must be listed on a roster (or as an alternate) in order to be eligible for advancement. Only two alternates per team are allowed on the roster.

Sport qualifiers:

Fall - Bocce, Long Distance Running/Walking, Powerlifting, Soccer, Volleyball

Winter – Bowling

Spring – Basketball, Golf, Tennis

In order to be eligible to advance;

- An athlete must have a valid athlete medical and be registered with the training site by the assigned deadline to be eligible for State competitions.
- Athletes must be active participants in training sessions (attending no less than 8 weeks, ideally 10 weeks of training prior to State events) AND be able to advance (“able” meaning – stay overnight, endure several days, increased activities, etc.).
- There must be predetermined events declared by the Region that will serve as qualifiers for advancement to state level events, this can include: local, Invitational, Regional competition. If competitions are not available in that sport a process for random draw will be determined (may be the case in less popular sports where competition opportunities are not readily available). There should also be a random draw process developed in the case that a previously scheduled competition is cancelled.

## **Additional Resources (links)**

[Advancement to Higher Levels of Competition Policy](#)

## **Allocations**

### **Competition Allocations for State Level Event**

Allocations will be awarded to Regions based on training numbers from each Local Team in the previous year. In Regions where the number of athletes interested is greater than allocations awarded, a Region is encouraged to hold qualifier events (a Regional event can serve as a qualifier for Sectionals or State Games). In these cases athletes will advance based on place of finish. It is recommended that local/Regional level qualifiers are set up whenever possible, so athletes are able to earn their spot to State events.

#### **Procedure for sports with non-qualifying local/Regional events:**

- **Sports Team Leader will;**
  - Local Teams send their allocation request to the Region
  - If there is more interest than allocations, all interested parties will be submitted into a random draw.
    - Register alternates who may receive returned allocations
    - Obligation to fill requested slots
- **Regional Sports Director will;**
  - Compile allocation request and submit LOI to State office
  - Disperse final allocations to Local Teams which will be based on LOI
  - If more requests than available, disbursement based on percentage of athletes at training sites.
    - Establish Regional waiting list for returned allocations
- **State Staff will;**
  - Will assign initial allocation to Region
  - Collect LOI from Region
  - Reallocate final allocation to Regions

**Note:** There can be multiple qualifying events. Region will specify at the beginning of the season what events will serve as qualifiers; these will be announced at pre-season coach meetings and on the Regional website.

## **Additional Resources (Links)**

[Allocation Lunch and Learn Video](#)

[State Allocation Process](#)



## Stand-in Coach

Giving athletes opportunities, whether training or competition, is a key tenet of SOPA – “More and Better”. On occasion, an opportunity will present and the “home” coach may not be available to attend. **As such, while not “ideal”, a neighboring Local Team’s coach (within a Region) may assume the “coach” role.** It will be managed on a case by case basis, and should not be a normal practice. If this situation arises it will need to be approved by your Local Team’s Local Team Leader and Regional Executive Director. As always, safety is the top priority. An athletes’ coach knows them best and will be best suited to manage any situations that arise.

### Procedure

- **Home Coach will;**
  - Notify Local Team Leader
  - Once approval is complete, the Home Coach will arrange for advance meeting and preparation with the “stand-in” coach assuring the athlete and their family or support persons are introduced.
- **Local Team Leader will;**
  - Review the situation with the Regional Executive Director for a final approval. The final outcome will be reported back to the Home Coach for appropriate follow-up.
- **Regional Executive Director will;**
  - Work with the Local Team Leader to determine the best outcome for the safety and wellbeing of the athlete.

**Note:** Costs associated for the “stand-in” coach will be the responsibility of the Region and attributed to the athlete’s home Local Team.

## Transportation

Local Teams will work with Regional staff to identify annual transportation needs to secure best pricing. This will be managed through the budget process.

### Additional Resources

[15 Passenger Vans FAQ](#)

**Note:** All individuals (who are not relatives) transporting athletes to Special Olympics events must be Class A volunteers. 15 passenger vans are not allowed to be used for Special Olympics travel.

## Accident/Incident Reports

Accident/Incident reports must be completed for all injuries occurring at training or competition. A copy should be kept on file with the Regional Administrative Manager who will submit to the SOPA Chief Program Officer and SOI Insurance Company. At Sectional or State Events, the form will be completed by the medical staff/HOD and submitted to the appropriate SOPA Competition Director who will submit it to the Insurance Company.

SOPA will not cover the cost for individual CPR/First Aid or Lifeguard Certification. Volunteers can obtain these certifications on their own and can be used as SOPA Continuing Education every (9) years. We encourage SOPA Regions partners with a local agency or third party to offer a group CPR/First Aid training to their coaches/volunteers, which may be free to the participant depending on the partnership agreement.

### Procedures

- **Head Coach/Coach will;**
  - Complete the Accident/Incident Report and submit to Regional Administrative Manager
- **Sports Team Leader will;**
  - Assure all Head Coaches have multiple copies of Accident/Incident Report form and direct them where to find online
- **Regional Staff will;**
  - Collect all Accident/Incident Reports
  - Assure Regional Executive Director is aware of all submissions
  - Send copy to SOPA Chief Program Officer and American Specialty Insurance and copy Local Team Leader
  - Follow-up with individual as appropriate
  - Responsible for consistent use of Accident/Incident form, including continuing education at Local Team level

### Additional Resources (Links)

Insurance Brochure – *You can request a copy by reaching out to Region staff*

[Accident/Incident Report](#)

## Sports Camp

Sports Camp is a seven (7) day overnight intensified sports training camp located in Bolivar, PA for athletes ages 12 through adult. The Antiochian Village contains about 400 acres of land, part of which is used for the camp as well as the Heritage Learning and Retreat Center.

- Primary Trainings Offered: athletics, basketball, bowling, flag football, flag football, soccer, softball, swimming, tennis & volleyball.
- Trained Clinicians and Certified Coaches for each sport.

- Region/Local Teams must send athletes/coaches in a 4:1 ratio by gender, as they will be housed together in cabins.
- Athletes must be able to withstand and fully participate in four hours of sports training per day along with scheduled evening activities. If they are not able to withstand this level of participation, consideration should be given to whether this camp provides the best experience for this athlete.
- Athletes must be able to be away from family/guardian support for the duration of camp and independently dress and be able to care for themselves.
- Athletes will be running in hot sun for a minimum of three hours each day.
- Additional recreational sports and camp activities offered.
- Mini competitions by ability group and Unified Sports® competition with coaches on Friday.

Athlete and volunteer camp requirement link below

Sports Camp selection will start at the Local Team level and be approved and processed through the Regional Office.

- **Sports Team Leader will;**
  - Complete a Letter of Intent (LOI), requesting the number of athletes and coaches they want to send to Camp and submit to the Regional Office.
- **Regional Staff will;**
  - Ensure the Region's attendees meet the 4:1 ratio
  - Ensure submitted names, both athletes and volunteers, are suited for the Camp experience
  - Submit all requests to the State office
  - Coordinate send-off and transportation for the Region "delegation"
- **State Staff will;**
  - After all requests are made, final allocations are provided with any unfilled requests placed on a waiting list. Once applications are completed and reviewed, athletes are either approved or denied based on application and/or past history. Athletes may be scratched for lack of Class A volunteers. Sport Camp follows the 1:4 coach/athlete ratio.

### Additional Resources Links

[Sports Camp](#)

## Coaches

### Coaches Training and Progression Plan

Special Olympics Pennsylvania introduced a "Coaches Training and Progression Plan" which tracks the certifications and experience of each registered coach. Coach education has a direct positive effect on our athletes' experience. As such, we want to recognize our volunteer's efforts for improving their sports and coaching education.

We encourage coaches to become a Gold level certified coach by working through the progression.

- **Certified** - The journey begins with the basics in the Certified Coach Level. In this level coaches complete three basic trainings, Protective Behaviors, General Orientation, and Concussion Training followed by completing the skills training of their chosen sport.
- **Bronze** - The Bronze Level provides the next level of training. This includes the course Coaching Special Olympics Athletes and implementing Fit 5 during athlete training sessions.
- **Silver**- The Silver Level will build upon the Bronze level and include the Principles of Coaching and Coaching Unified Sports® courses as well as athlete goal setting and year round training.
- **Gold** - The Gold Level will build upon the Silver level and the coach will learn advanced tactics for their sport of choice and work with their athletes on tracking and achieving their personal best performance goals.

### Additional Resources (Links)

[Coach Recognition Levels](#)

[SOPA Website - Coach Training and Progression Plan](#)

## Coach Requirements

**All coaches (and anyone within a 1 volunteer to 4 athlete ratio) must be Class A volunteers.** Class A volunteer status is obtained by completing a SOPA background check, General Orientation, Protective Behaviors and Concussion Training. In order to start the process, visit the SOPA website and complete the [Volunteer Application](#).

**All Head Coaches must be certified in their specific sport.** In order to become certified, a volunteer must attend an in-person sport specific training or submit an Experienced Coach application (insert link). All Class A coaches are encouraged to become sports specific certified to enhance the athlete experience.

### Procedures

- **Coaches (with or without athlete oversight in 4:1 ratio) will;**
  - Complete all required Class A background checks
  - Complete all required trainings

### Additional Resources (Links)

[Coach Job Descriptions for Training and Competition](#)

### Head Coach/Coaches Required Documentation

Complete and accurate documentation and paperwork is required for all Training Sites. Paperwork can be completed by Head Coach, Assistant Coach or designee.

### Documentation includes:

- Attendance at each practice
- Completion of all sport appropriate paperwork
  - Assessments/skill performance

- Competition registration
- Budget/needs for training site
- Document and report any incident or misconduct for training site
- Training Site Quality Standards Assessment Checklist

### Procedures Required

- **Head Coach will;**
  - Assure completion of all required paperwork
  - Submit to Sports Team Leader by assigned deadline
- **Regional Sports Director will;**
  - Compile all required paperwork for the Region and submit to State Office by assigned deadline

### Additional Resources (Links)

[Training Schools](#)

[Attendance Tracker](#) – SOPA Resources, under Training

[State and Sectional Paperwork](#) - SOPA website

[Assessment/Skill Performance](#) – found on Sports Offered page of SOPA website

[Misconduct Report](#) - SOPA Resources, under Program Administration

[Incident Form](#) - SOPA Resources, under Program Administration

[Training Site Quality Standards Assessment Checklist](#)

## Coach Sports Certifications

SOPA encourages all interested individuals to become certified coaches in specific sports. This education will greatly enhance our athletes' quality experience. No specific skills are required to become a coach; we are looking for passionate and committed individuals that are willing to be advocates for our athletes. If you have vast playing, coaching or officiating experience in a sport you can apply to become a coach through the Track 2 - Experienced Coach Track.

### **Steps to Becoming and Staying A SOPA Certified Coach:**

**Step 1: Courses for all Coaches (assistant and head coaches)** - Whether you are a new or seasoned coach, the following three trainings must be up to date in your volunteer record:

- **Complete** a SOPA [Volunteer Application](#) and [Class A Background Checks](#) (for 18 and over. Valid for five years).
- **General Orientation** – [Click here](#) for Online Training. This is a general introduction to Special Olympics and any new volunteer or coach should take this training prior to working with athletes. This training only needs to be completed once.

- **Protective Behavior Training** – Online Training that must now be completed **every three years**. Available by [clicking here](#), this training **must** be completed by all new and existing Class A volunteers (16 years of age and older) prior to working with Special Olympics athletes.
- **Concussion Training** - Online Training that must now be completed **every three years**. Available by [clicking here](#), this training **must** be completed by all new and existing Coaches prior to working with Special Olympics athletes
- **Athletes as Coaches at Athlete Leadership University** - (Optional) This training is highly encouraged for athletes who are interested in coaching. It trains athletes that currently are, or want to become, certified coaches make the transition from a competitor to a coach. [Click here](#) for Athletes as Coaches Frequently Asked Questions.

**Step 2: Becoming a Certified Coach** – Within a year of working with a Local Team a volunteer coach should consider becoming certified in one of two ways:

- **New Coach (skills)** – Work with your Sports Team Leader or Regional Sports Director to register for an upcoming Training School. A Training School content includes:
  - o Rules updates
  - o Organizing an eight week training plan
  - o Best practices in coaching Special Olympics Athletes
  - o Sport Skills materials are provided to each participant
  - o Coaches will need to complete at least ten (10) additional hours of training with the athletes in order to complete the certification
- **Experienced Coaches** – New Coaches with Sport Experience are encouraged to complete the Experienced Coach (Track 2) Application in VSys by logging on through the SOPA Online Portal (link?).
  - o Once your application is approved by the SOPA Training department, you will be directed to take the basic course – Coaching Special Olympics Athletes and to complete 10 hours of practicum.
  - o The Coaching Special Olympics Athletes course is an overview of four components: athlete, coach, training and competition.

## Coach Training Schools

Coach Training Schools are specific trainings for SOPA coaches. The SOPA Coach Training and Progression Plan will guide coaches through the SOPA education system and provide an opportunity for additional education and new skills. All training schools will be managed by the State office in conjunction with the Regional Sports Director. The Regional Staff will assess the needs of sports certifications within the Region and assure Coach Training Schools are established or as appropriate, available to volunteers in need.

Coach Training School dates and locations will be listed on the SOPA and Regional websites and in the VSys calendar, accessed by logging in through the SOPA Online Portal.

**To register for a Coach Training School**

- **New Volunteers will;**
  - Complete the new volunteer application, create a log in and password for the SOPA Online Portal.
  - Then follow steps under Existing Volunteer.
- **Existing Volunteers will;**
  - Log in to the VSys via the SOPA Online Portal. Click on the Training Schools, Webinars and More tab, select Sport Skills Training Sign Up.
  - Once in the Sign-up screen under subject select the Sport and click search.
  - Choose the best training date and location for you, click sign-up. Review the specific details of the training school and click the blue Sign-Up button. Once doing this you will receive a message across top of the screen that says “Thank you for Signing-up”
  - Once registered, a confirmation email will be sent containing details (date, time, location address). One week prior to the training you will receive a follow-up email indicating what to bring/wear, when to arrive, directions and contact information for the day-of training.

### **To request a Coach Training School**

Volunteers wishing to request a Coach Training School in their area should log in via the SOPA Online Portal.

- Complete and submit a Skills Interest Form found under “Training Schools, Webinars and More”
- The Regional Sports Director will use this information to assess the training needs of the Region

### **Finalizing Certification after Training School**

- A minimum of 10 hours working with Special Olympics Athletes in the sport listed above is required to complete your Level 2 Certification.
- Up to five hours of coaching, with a certified coach during the training season that is taking place prior to the course. (ex. if you have 5 training sessions before you take your sport training, you may use 5 hours from this time as long as you were coaching under a certified coach)
- No more than three hours may be used from coaching during a competition (no matter how many days).

### **Steps to submit practicum hours via Sports Training Application Select Sports Trainings Application Coaching Hours**

- Log in to the SOPA Online Portal
- From the available options please select the following;
  - Sport in the “job” drop down
  - Location
  - Date of training
  - Start time of training
  - Duration of training (3 hour maximum)
- Select **Save** to submit the hours for review.
- Hours may be submitted individually or at completion of all 10, but must be submitted for each training session.

#### · **Reviewing your submission:**

- o Go to the tab **My Information**
- o Select **Sports Trainings Application – Submitted Hours**
- o From the available listing review hours submitted
- o If hours were submitted incorrectly, select **Delete** to remove those hours from pending.
- o Hours with no status are considered approved

#### **Additional Resources (Links)**

[SOPA Online Portal](#)

[Steps That Need to be Completed to Become a Coach](#)

Coach Job Descriptions – [Head Coach Job description](#), [Assistant Coach Job description](#)

## **Sports Clinicians**

Special Olympics Pennsylvania encourages **experienced sports volunteers to explore becoming a clinician** to help support our goal of providing a quality experience for our athletes through educated coaches. Clinicians will be expected to provide sport education and training to coaches within their Region, under guidance of the SOPA Sport Director. Clinician position description, requirements and application are available on the [SOPA website](#).

#### **How to Apply**

- Submit Clinician application to [sportstraining@specialolympicspa.org](mailto:sportstraining@specialolympicspa.org)
- Attend a Train the Trainer session with the SOPA Training Director or a certified clinician
- Attend annual statewide Clinician webinar to review all updated rules and regulations

Complete SOPA Class A requirements and maintain sport certification. Applications are reviewed by the SOPA Sports Director and SOPA Training Director. The final decision (approved or not approved with rationale) will be shared with each individual and Regional Sports Director.

#### **Additional Resources Links**

[Clinician Application](#)

[SOPA Online Portal](#)

## **Continuing Coach Education**

To reach our goal of providing a quality experience to our athletes, SOPA requires coaches to continue their education throughout their coaching experience. Every three years a certified coach must take Continuing Education courses to maintain their sport certification.



By completing one of the [Continuing Education Course Options](#) and submitting a Continuing Education Form (insert link) along with proof of completion (certificate from course or congratulations email) to [Sportstraining@specialolympicspa.org](mailto:Sportstraining@specialolympicspa.org) each **current** certification will be renewed for three additional years. (Ex. Coaching Unified Sports)

Completion of courses that are sport specific will renew **current** certifications in that sport only for three additional years (ex. Coaching Softball will renew a softball certification, but not other sports the individual may have).

## Procedure

- **Certified Coaches will;**
  - Submit the Continuing Education with evidence (certificate from course of congratulations email) of “completing” SOPA recognized Continuing Education courses.
- **State Staff will;**
  - Review submitted Continuing Education Form and update VSys record as applicable. If the request is denied, the individual will be notified.
  - Offer Sport Specific Clinics at State Competitions. Please check the Coaches Handbooks for the date and time of these clinics. Continuing Education Form is not required after taking a clinic. The coach simply signs-in for the clinic to receive credit.

**NOTE:** SOPA offers two Act 48 eligible courses: Coaching Special Olympics Athletes (3.5 hours/must be the SOPA offered in-person or webinar course) and A Coach’s Playbook – An introduction to Autism. SOPA’s website provides guidance to manage this verification.

## Additional Resources (links)

[Continuing Education Course Options](#)

[Continuing Education Form](#)

## Stand-in Coach

Giving athletes opportunities, whether training or competition, is a key tenet of SOPA – “More and Better”. On occasion, an opportunity will present and the “home” coach may not be available to attend. **As such, while not “ideal”, a neighboring Local Team’s coach (within a Region) may assume the “coach” role.** It will be managed on a case by case basis, and should not be a normal practice. If this situation arises it will need to be approved by your Local Team’s Local Team Leader and Regional Executive Director. As always, safety is the top priority. An athletes’ coach knows them best and will be best suited to manage any situations that arise.

## Procedure

- **Home Coach will;**
  - Notify Local Team Leader
  - Once approval is complete, the Home Coach will arrange for advance meeting and preparation with the “stand-in” coach assuring the athlete and their family or support persons are introduced.

- **Local Team Leader will;**
  - Review the situation with the Regional Executive Director for a final approval.  
The final outcome will be reported back to the Home Coach for appropriate follow-up.
- **Regional Executive Director will;**
  - Work with the Local Team Leader to determine the best outcome for the safety and wellbeing of the athlete.

**Note:** Costs associated for the “stand-in” coach will be the responsibility of the Region and attributed to the athlete’s home Local Team.

## Training Sites

### Training Sites Expectations

It is Special Olympics Pennsylvania’s goal to provide a quality experience for all our athletes, and their minimum of 10 weeks of consecutive training in advance of competition is a major component of their participation. As such, all **training sites must have well maintained facilities and proper equipment** appropriate to training in the specific sport.

#### Procedures

- **Sports Team Leaders will;**
  - Be responsible for meeting minimum Quality Standards of each training site
  - Identify facilities for trainings, and as needed, process contracts
  - Submit budget for equipment, uniform, facility needs
- **Regional Staff will:**
  - Take an inventory or assessment of all training sites and their needs
  - Ensure all training sites are meeting minimum quality standards consistently across the Region and “approve” (ensuring number of volunteers, certified coaches, equipment, etc.).
  - Identify locations where training sites are needed and look to establish
  - Set calendar for year that will provide guidance for training sites

#### Additional Resources (links)

[Training Site Quality Standards Assessment Checklist](#)

### New Training Site or New Sport

**SOPA encourages the establishment of new training sites as needed to geographically serve additional athletes or to add a new sport.** In order to assure quality standards are met in advance of starting, volunteers are to contact the Local Team’s Sports Team Leader to discuss the need.

## Procedures

- **Head Coaches or Volunteer Leaders will:**
  - For new Training Sites, contact the Sports Team Leader to discuss interest. Together it is important to ensure you have interested athletes, coaches to meet the need, a facility appropriate to the sport and proper equipment.
  - For new sports, work with the Sports Team Leader. It is important to ensure this will be a long-term sustainable sport.
  - Assure required funding will need to be included in the budget.
- **Sports Team Leader will;**
  - Assess Local Team needs for new training sites or sports.
  - Review all proposed new training sites to assure the need and sustainability
  - Review all proposed new sports to assure the interest for sustainability
- **Local Team will:**
  - Work with Athlete Representative to identify new sports requested by athletes

### **Regional Staff will:**

- Work with Sports Team Leader to establish new training sites
- Approve all new training sites.
- Approve all new sports.

## **Additional Resources (links)**

[Sample Athlete Survey of Sport Interest](#)

## Training Site Event Creation

Regional Administrative Manager will create “events” in VSys which will allow athletes to register pre-season for participation. Those registration links (into VSys) will be a part of **the Region’s website so athletes can see where ALL activities are happening and for training**, be able to register (regardless of their location).

## Procedures

- **Head Coaches will;**
  - Develop a Training Plan and share information with the Regional Sports Director to create “event” in VSys to register this activity.
  - Direct athletes and volunteers to register for the training pre-season.
- **Regional Staff will;**
  - Create “event” in VSys to register the activity.
  - Provide the “event” link in the list of all trainings being offered Region-wide.

- Maintain activity listing on Region's website and provide information in all Region-wide communication avenues

**VSys database "Events" for training sites will be created in VSys by the Regional staff by Local Team** for pre-season rosters to track athletes and coaches who are training during the season.

This will allow;

- Easier access to confirm which athletes need medicals PRIOR to state competition.
- Easier access to confirm which volunteers need training/background checks PRIOR to state competition.
- Tracking of athletes and volunteers who do not attend competition.
- Identify athletes and volunteers who participate in multiple sports throughout the year.

### Procedures

- **Local Team Leadership will (GMS);**
  - Participate in GMS registration
  - Participate in GMS training
- **Regional Staff will (VSys);**
  - Create "event" for training sites, fundraising activities, etc.

### Additional Resources (links)

[Database User Guide](#)

## Current Athlete Registration

**Athletes currently registered** with Special Olympics Pennsylvania (SOPA) are to **submit their updated Application for Participation or "medical" form directly to their Regional office.**

### Procedure

- **Athletes** (or their family, support team or SOPA coach or Local Team representative on their behalf) **will;**
  - Submit completed Application for Participation (AKA Medical Form) directly to their Regional office for processing and management
  - Submissions can be done by mail or email scanned version
- **Regional Staff will;**
  - Assume responsibility for inputting any new or updated information into the VSys database system.
  - In the event a Team receives a Medical Form, it should be forwarded to the Regional Office for processing.

**NOTE:** SOI, Inc. will be transitioning (required of all teams) to an online Athlete and Unified Partner Application for Participation (AKA Medical Form). Greater Lehigh Valley Pocono Region (GLVPR) will be SOPA's first rollout Region

to test this new system when all VSys integration is complete. Once state staff has completed all testing, they will work with GLVPR staff and team leaders to develop a deployment plan.

### **Additional Resources (Links)**

[Application for Participation](#)

## **Current Unified Partner Registration**

**Unified Partners currently registered** with Special Olympics Pennsylvania (SOPA) are to **submit their updated Application for Participation or “medical” form directly to their Regional office.**

### **Procedure**

- **Unified Partners will;**
  - Submit completed Application for Participation (AKA Medical Form) directly to their Regional office for processing and management
  - Submissions can be done by mail or email scanned version
- **Regional Staff will;**
  - Assume responsibility for inputting any new or updated information into the VSys database system.
  - In the event a Team receives a Medical Form, it should be forwarded to the Regional Office for processing.

Team Leaders will have the ability to update email, phone, etc. records for their Local Teams. VSys viewing “rights” of records will be expanded to all Team Leadership positions AND appropriate coaches to ensure volunteers under their supervision have met all background and training requirements.

**NOTE:** Unified Partners are both players and volunteers and therefore require the Application for Participation (AKA Medical Form), Volunteer Background Check reports and required SO trainings. The background checks are addressed in another section.

**NOTE:** SO, Inc. will be transitioning (required of all teams) to an online electronic Athlete and Unified Partner Application for Participation (AKA Medical Form). Greater Lehigh Valley Pocono Region (GLVPR) will be SOPA’s first rollout Region to test this new system when all VSys integration is complete. Once state staff has completed all testing, they will work with GLVPR staff and Local Team leaders to develop a plan to deploy. “Viewing” rights will be given to team leaders to ensure volunteers under their supervision have met all background and training requirements.

### **Additional Resources (links)**

[Application for Participation](#)

[Background Check](#)

## **Uniforms/Equipment**

### **Ordering of Equipment/Uniforms**

**The Regional Sports Director will be responsible for the coordinating, ordering and storage (locally) of uniforms and equipment.**

Each Regional/local leadership team will create a system for ordering, inventory, disbursement and storage of sport equipment and uniforms. It is recommended that all equipment is inventoried at the conclusion of each season. Equipment must be checked to insure safety (proper certifications), new equipment will be ordered as necessary. Equipment will be stored within each local area.

### **Procedures**

- **Sports Team Leader will:**
  - Ensure proper care/inventory of equipment
  - Submit uniform/coach needs by deadline
  - Provide budget to Local Team Leader
- **Regional Staff will:**
  - Coordinate Regional purchases
  - Assist with sharing of resources
  - Remain current of Local Team inventory and needs
  - Collect and inventory returning equipment and uniforms each post season and as appropriate, remove all unsafe items and assure as needed, replacement costs are reflected in future budget

## **Records**

### **Training Site Records Needs**

All athletes and Unified Partners must have a valid medical within their VSys record. **Head coaches must have a copy of each participant's medical or medical hot sheet** in their possession at all trainings and competitions.

- **Head Coaches will;**
  - Provide pre-season registration support to athletes or others as needed
  - Have a copy of athlete and Unified partner medicals or medical hot sheet at all trainings and competitions.
- **Regional Staff will;**
  - Assure each head coach accessed the medical form or medical hot sheet for each athlete or Unified Partner registered at their training site.
  - Create the Training Site "event" for pre-season registration of athletes, Unified Partners, and volunteers in VSys.
  - Assure all medicals AND volunteer certifications to include background checks are current and valid.

## **Requirements**

### **Volunteer Requirements Management**

**Volunteer records in VSys will list all completed (current or expired) trainings and requirements.** This information is accessible to the individual, Regional staff, appropriate team leaders and head coaches.

## Procedures

- **Regional Staff will;**
  - Access all training site volunteer records to assure they are;
    - Background checked
    - Completed required Class A volunteer trainings
    - Have additional trainings (as appropriate) such as sport certifications, etc.

Provide information to Sports Team Leaders on status of volunteer records.

- **VSys will;**
  - Automatically notify volunteers of expiring certifications (background checks, required Class A volunteer trainings, sports certifications, etc.) with instructions to update

## Additional Resources (Links)

[Class A Trainings](#) and [Certified Coach Requirements](#).

## Coach Requirements

**All coaches (and anyone within a 1 volunteer to 4 athlete ratio) must be Class A volunteers.** Class A volunteer status is obtained by completing a SOPA background check, General Orientation, Protective Behaviors and Concussion Training. In order to start the process, visit the SOPA website and complete the [Volunteer Application](#).

**All Head Coaches must be certified in their specific sport.** In order to become certified, a volunteer must attend an in-person sport specific training or submit an Experienced Coach application (insert link). All Class A coaches are encouraged to become sports specific certified to enhance the athlete experience.

## Procedures

- **Coaches (with or without athlete oversight in 4:1 ratio) will;**
  - Complete all required Class A background checks
  - Complete all required trainings

## Additional Resources (Links)

[Coach Job Descriptions for Training and Competition](#)

## Head Coach/Coaches Required Documentation

Complete and accurate documentation and paperwork is required for all Training Sites. Paperwork can be completed by Head Coach, Assistant Coach or designee.

**Documentation includes:**

- Attendance at each practice
- Completion of all sport appropriate paperwork
  - Assessments/skill performance
  - Competition registration
- Budget/needs for training site
- Document and report any incident or misconduct for training site
- Training Site Quality Standards Assessment Checklist

## Procedures Required

### Head Coach will;

- Assure completion of all required paperwork
- Submit to Sports Team Leader by assigned deadline

- **Regional Sports Director will;**

- Compile all required paperwork for the Region and submit to State Office by assigned deadline

## Additional Resources (Links)

[Training Schools](#)

[Attendance Tracker](#) – SOPA Resources, under Training

[State and Sectional Paperwork](#) - SOPA website

[Assessment/Skill Performance](#) – found on Sports Offered page of SOPA website

[Misconduct Report](#) - SOPA Resources, under Program Administration

[Incident Form](#) - SOPA Resources, under Program Administration

[Training Site Quality Standards Assessment Checklist](#)

## Athlete Sport Training Requirements/Recommendations

**Eight (8) consecutive weeks is the minimum athlete sport training requirement.** A minimum of at least 10 weeks is required, so all participants can attend the policy-mandated 8 weeks of trainings. Alternative training methods should be made if circumstances do not allow for 8 weeks of sports specific training (i.e alpine skiing/weather/dry land training)

## Procedures

- **Head Coach will;**

- Create Training Plan (10+ weeks)
- Submit related costs for full training activities to Sports Team Leader for inclusion into the annual budget
- Notify your Sports Team Leader who will notify the Regional Administrative Manager, if your training schedule is different than previously scheduled



- **Sports Team Leader will;**
  - Notify Regional Administrative Manager of any changes in training schedule to adjust the “event” in VSys

## **Additional Resources**

[SOI General Rules](#)

## **Accident/Incident Reports**

Accident/Incident reports must be completed for all injuries occurring at training or competition. A copy should be kept on file with the Regional Administrative Manager who will submit to the SOPA Chief Program Officer and SOI Insurance Company. At Sectional or State Events, the form will be completed by the medical staff/HOD and submitted to the appropriate SOPA Competition Director who will submit it to the Insurance Company.

SOPA will not cover the cost for individual CPR/First Aid or Lifeguard Certification. Volunteers can obtain these certifications on their own and can be used as SOPA Continuing Education every (9) years. We encourage SOPA Regions partners with a local agency or third party to offer a group CPR/First Aid training to their coaches/volunteers, which may be free to the participant depending on the partnership agreement.

## **Procedures**

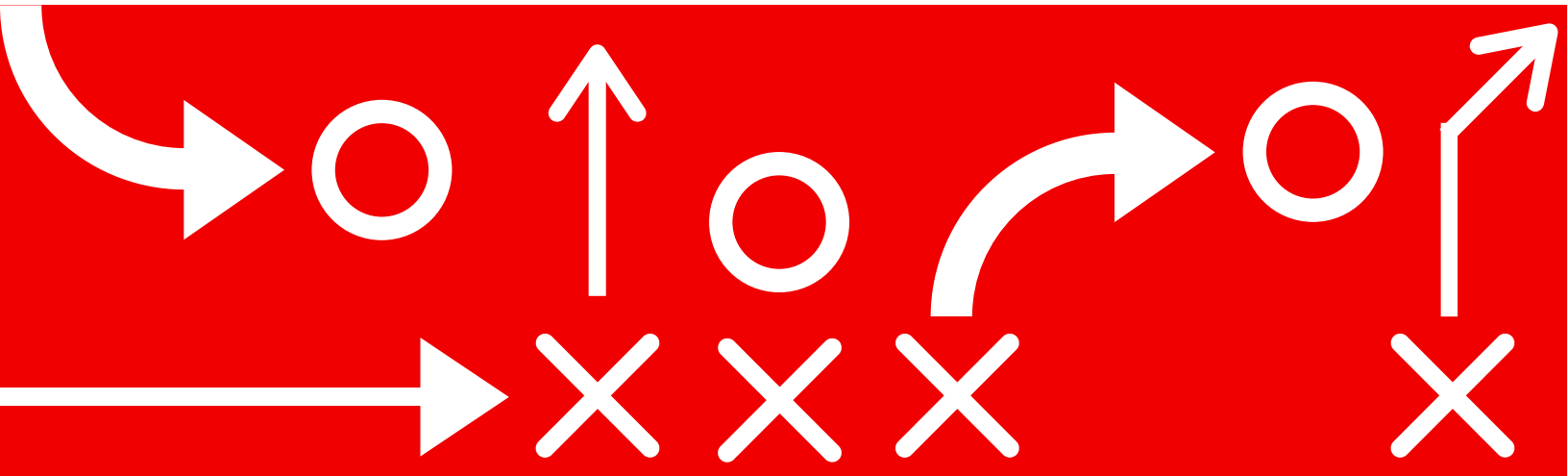
- **Head Coach/Coach will;**
  - Complete the Accident/Incident Report and submit to Regional Administrative Manager
- **Sports Team Leader will;**
  - Assure all Head Coaches have multiple copies of Accident/Incident Report form and direct them where to find online
- **Regional Staff will;**
  - Collect all Accident/Incident Reports
  - Assure Regional Executive Director is aware of all submissions
  - Send copy to SOPA Chief Program Officer and American Specialty Insurance and copy Local Team Leader
  - Follow-up with individual as appropriate
  - Responsible for consistent use of Accident/Incident form, including continuing education at Local Team level

## **Additional Resources (Links)**

Insurance Brochure – *You can request a copy by reaching out to Region staff*

[Accident/Incident Report](#)

# OUTREACH



# OUTREACH

## Athletes

### New Athletes

#### New Athlete Recruitment

**New athlete recruitment will be led by the Regional Executive Director with the support of the Regional staff and coordinated with Local Teams.** In an effort to assure Region-wide coordination, broader recruitment efforts will be coordinated and shared with Local Team leadership.

#### Procedure

Regional Executive Director will develop, lead and implement a Regional recruitment strategy for new athlete recruitment, working closely with Regional staff, Local Team Community Leaders and coaches.

- Local Teams will:
  - Promote athlete opportunities within their community
  - Connect the Regional staff to organizations within their community that are potential sources of athletes. In turn, the Local Team and the Region will collaborate to work with agencies and organizations serving potential athletes for Region-wide recruitment partnerships
  - Forward interested athlete contact information to the Regional Office for processing of new athletes as outlined in the Registration guidelines
- Regional staff will;
  - Create a comprehensive athlete recruitment plan to support athlete recruitment in all communities and across the Region
  - Promote athlete opportunities throughout the Region with targeted Regional marketing
  - Collaboratively strengthen existing community partnerships and work to create new ones via annual plan
  - Work with the Local Teams to identify needs to support new athlete recruits (i.e., new coaching volunteers, training facilities, etc.)
  - Work with Regional Leadership Team to meet athlete recruitment goals
  - Ultimate determination on goals will reside with the Regional Executive Director
  - Work with State staff to identify all new UCS schools. Partnerships will be collaborative with the ultimate goal of encouraging participation in community-based sports training and of retaining all students for participation after graduation.

#### Additional Resources (links)

[Athlete referrals/recruitment, social media resources](#) (Under Marketing Toolkit)

#### Registration – Medicals

*Coming Soon!*

## Current Athletes

### Medical Renewal

**Athletes currently registered** with Special Olympics Pennsylvania (SOPA) are to **submit their updated Application for Participation or “medical” form directly to their Regional office.**

#### Procedure

- **Athletes** (or their family, support team or SOPA coach or Local Team representative on their behalf) **will**;
  - Submit completed Application for Participation (AKA Medical Form) directly to their Regional office for processing and management
  - Submissions can be done by mail or email scanned version
- **Regional Staff will**;
  - Assume responsibility for inputting any new or updated information into the VSys database system.
  - In the event a Team receives a Medical Form, it should be forwarded to the Regional Office for processing.

**NOTE:** SOI, Inc. will be transitioning (required of all teams) to an online Athlete and Unified Partner Application for Participation (AKA Medical Form). Greater Lehigh Valley Pocono Region (GLVPR) will be SOPA's first rollout Region to test this new system when all VSys integration is complete. Once state staff has completed all testing, they will work with GLVPR staff and team leaders to develop a deployment plan.

#### Additional Resources (Links)

[Application for Participation](#)

## Training Site Registration

All Training Site information will be collected in SOPA's database system, VSys. Training Sites will be entered as Events in VSys. This will allow for pre-season volunteer and athlete registration.

New and previously established training sites will need to identify; sport, location, needs, dates, etc. Support will be provided to Teams by Sports Team Leader, Regional Administrative Manager and Regional Sports Director. Ideally this coordination should be **COMPLETED at least 4 weeks prior to the beginning of the training season** so training opportunities can be promoted and athletes, families and volunteers can make informed decisions and register accordingly using VSys.

#### Procedure

- New and existing Training Site Events will be entered into VSys by the Regional Administrative Manager or Regional Sports Director.
- The timeline is as follows:
  - VSys Set Up: (Example Fall 2020 - Fall Fest date Nov. 6-8)
    - 14 weeks prior to State Level Games - Event Registration Set Up (July 31, 2020)
    - 12 weeks prior to State Level Games - Event Registration Details Finalized (August 14, 2020)

- 10 weeks prior to State Level Games - Event Registration Closes (August 28, 2020)

*As a guideline, typical training seasons are:*

- Fall: Aug - Nov
- Winter: Nov - Mar
- Summer: Jan - June

Training seasons may operate outside of this schedule. Training sites should be set up at least 4 weeks prior to the start of your training season....(Ex: Bowling starting in Sept.)

- **Sports Team Leader will;**
  - Work with existing training sites and coaches to coordinate availability and will confirm days/times to report out at monthly Sports Team Leader meetings.
  - Collect all training site details to be shared with Regional Sports Director to coordinate the creation of the event in VSys
  - Will work with the Regional Sports Director to identify new training sites within their team as needed.
- **Regional Staff will;**
  - Use details collected by local Sports Team Leader to create an Event in VSys for each training site
  - Assess Regional training sites and needs and make recommendations based on sports offered, volunteer and site availability and expressed athlete interest.

Once all training site information is collected, a Regional “sport offerings list” will be created and promoted to encourage registration. This promotional material should include: sport, training start date, practice days, practice times, age served if appropriate and ability served (introductory/low vs advanced/high) as well as volunteer opportunities. Training sites will be listed by sport on the Regional website.

**VSys database “Events” for training sites will be created in VSys by the Regional staff by Local Team** for pre-season rosters to track athletes and coaches who are training during the season.

This will allow;

- Easier access to confirm which athletes need medicals PRIOR to state competition.
- Easier access to confirm which volunteers need training/background checks PRIOR to state competition.
- Tracking of athletes and volunteers who do not attend competition.
- Identify athletes and volunteers who participate in multiple sports throughout the year.

## **Procedures**

- **Local Team Leadership will (GMS);**
  - Participate in GMS registration
  - Participate in GMS training
- **Regional Staff will (VSys);**
  - Create “event” for training sites, fundraising activities, etc.

## Additional Resources (links)

[Database User Guide](#)

### Coach Packets

In advance of the first training session, coaches will create or be provided a “Coach Packet” that will include the following:

- Registered athlete medical forms
- Registered Unified Partner medical forms
- Training Site athlete roster
- Training site coach roster

**A copy of an Athlete’s or Unified Partner’s “medical” form is to be available to all Head Coaches** for a better understanding of needs, medical concerns, communications lines, etc.

### Procedure

- **Head Coach will;**
  - Have a copy of “medical” form for all rostered athletes in advance of the first training session.
- **Regional Staff will;**
  - Create and make available the coach packet for each training site

## Athlete Sport Training Requirements/Recommendations

**Eight (8) consecutive weeks is the minimum athlete sport training requirement.** A minimum of at least 10 weeks is required, so all participants can attend the policy-mandated 8 weeks of trainings. Alternative training methods should be made if circumstances do not allow for 8 weeks of sports specific training (i.e alpine skiing/weather/dry land training)

### Procedures

- **Head Coach will;**
  - Create Training Plan (10+ weeks)
  - Submit related costs for full training activities to Sports Team Leader for inclusion into the annual budget
  - Notify your Sports Team Leader who will notify the Regional Administrative Manager, if your training schedule is different than previously scheduled
- **Sports Team Leader will;**
  - Notify Regional Administrative Manager of any changes in training schedule to adjust the “event” in VSys

## Additional Resources

[SOI General Rules](#)

## Current Unified Partner

### Training Site Registration

All Training Site information will be collected in SOPA's database system, VSys. Training Sites will be entered as Events in VSys. This will allow for pre-season volunteer and athlete registration.

New and previously established training sites will need to identify; sport, location, needs, dates, etc. Support will be provided to Teams by Sports Team Leader, Regional Administrative Manager and Regional Sports Director. Ideally this coordination should be **COMPLETED at least 4 weeks prior to the beginning of the training season** so training opportunities can be promoted and athletes, families and volunteers can make informed decisions and register accordingly using VSys.

#### Procedure

- New and existing Training Site Events will be entered into VSys by the Regional Administrative Manager or Regional Sports Director.
- The timeline is as follows:
  - VSys Set Up: (Example Fall 2020 - Fall Fest date Nov. 6-8)
    - 14 weeks prior to State Level Games - Event Registration Set Up (July 31, 2020)
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- Summer: Jan - June

Training seasons may operate outside of this schedule. Training sites should be set up at least 4 weeks prior to the start of your training season....(Ex: Bowling starting in Sept.)

- **Sports Team Leader will;**
  - Work with existing training sites and coaches to coordinate availability and will confirm days/times to report out at monthly Sports Team Leader meetings.
  - Collect all training site details to be shared with Regional Sports Director to coordinate the creation of the event in VSys
  - Will work with the Regional Sports Director to identify new training sites within their team as needed.
- **Regional Staff will;**
  - Use details collected by local Sports Team Leader to create an Event in VSys for each training site
  - Assess Regional training sites and needs and make recommendations based on sports offered, volunteer and site availability and expressed athlete interest.

Once all training site information is collected, a Regional “sport offerings list” will be created and promoted to encourage registration. This promotional material should include: sport, training start date, practice days, practice times, age served if appropriate and ability served (introductory/low vs advanced/high) as well as volunteer opportunities. Training sites will be listed by sport on the Regional website.

### **Coach Packets**

In advance of the first training session, coaches will create or be provided a “Coach Packet” that will include the following:

- Registered athlete medical forms
- Registered Unified Partner medical forms
- Training Site athlete roster
- Training site coach roster

**A copy of an Athlete’s or Unified Partner’s “medical” form is to be available to all Head Coaches** for a better understanding of needs, medical concerns, communications lines, etc.

### **Procedure**

- **Head Coach will;**
  - Have a copy of “medical” form for all rostered athletes in advance of the first training session.
- **Regional Staff will;**
  - Create and make available the coach packet for each training site

## **Volunteers**

### **New Volunteers**

#### **Recruitment**

**Recruiting new season/year-round (Class A) and event (Class B) volunteers** will be led by the Regional Executive Director, collaborating with Regional staff and Local Team volunteers. Regional staff will develop a volunteer recruitment strategy and share that strategy with local Community Team Leaders. As noted in the “Registration” portion of this Playbook (insert link). Regional Administrative Manager will create an “Event” (known as Project) in SOPA’s database system VSys allowing both Class A and Class B volunteers to register for an event. Event details will be provided by the Local Team. The VSys system will allow for pre-registration of one-day volunteers and registration for volunteer training to include event roles, coaches’ education, etc.

#### **Procedures**

**Class A Volunteers:** *A Class A volunteer is someone who is or may be in immediate contact with athletes, and those who hold certain leadership positions.. Class A volunteers are required to have background checks completed before assuming their role. Class A volunteers will also be required to complete training.*

- **Local Teams will;**
  - Promote volunteer opportunities within their community
  - Connect the Regional Staff to organizations within their community that are potential sources of volunteers
  - Forward interested volunteer contact information to the Regional Office for processing and onboarding of new volunteers



- **Regional staff will;**
  - Develop a comprehensive volunteer recruitment plan to meet the needs of the Local Team and the Region
  - Promote volunteer opportunities throughout the Region with targeted marketing
  - Strengthen existing community partnerships and work to create new ones to generate a larger potential pool of volunteers
  - Process new volunteer applications, track volunteer requirement completion, onboard new volunteers and assist in placing new volunteers into needed roles
  - Regional Leadership Team will create and share Regional and Local Team volunteer recruitment goals and will work with the Local Team to meet those recruitment goals. Ultimate determination on goals will reside with the Regional Executive Director
  - Create “Events” in VSys for all events that require volunteers allowing for registration for volunteer training to include volunteer roles, and coaches’ education, etc.

*Class B: Event Volunteer: Class B volunteer is someone with casual or limited contact with athletes, such as Event Volunteers. Class B volunteers are not required to complete a background check.*

- **Local Teams;**
  - Share details of planned events requiring volunteers with Regional Administrative Manager, who will create an event in VSys
  - Share upcoming volunteers needs
- **Regional staff will;**
  - Take the lead on collaboratively promoting and recruiting for these opportunities
  - Create recruitment efforts to address the needs as expressed by the Local Teams and overarching Regional needs. Needs assessments will be conducted Region-wide.
  - Regional Administrative Manager will create Events in SOPA’s database system called VSys with direction from the Local Teams with regard to event details and volunteer needs. The VSys system will allow for pre-registration of one-day volunteers and registration for volunteer training to include event roles,, etc.

### **Additional Resources (links)**

[One Day Volunteer Expectation Brochure](#)

[Volunteer Expectation One Sheet](#)

[Class A Volunteer PDF of “How to Become a Class A Volunteer” Instruction Sheet](#)

## **Coordination of Volunteer Recruitment Efforts**

To ensure Regional coordination, monthly meetings will be held with Community Team Leaders from all of the Regional Teams and the Regional Community Director to ensure coordinated recruitment efforts, progress within the Local Teams and between the Local Teams, and the Regional Office.

These meetings will include Recruitment Goal Reviews as well as Team and Regional updates as it relates to recruitment efforts.

## **Procedures**

- **Local Teams will;**
  - Share recruitment initiatives and ideas, local resources
  - Share successes
  - Share needs:
    - Athlete: Looking to fill specific sport, Looking for younger athletes, Looking for Unified Partners
    - Volunteer: Anticipated coach needs, other Team volunteer needs
  - Identify where support is needed
- **Regional Staff will;**
  - Provide update on progress of athlete & volunteer recruitment goals
  - Share progress on current Regional initiatives for athlete and volunteer recruitment
  - Share plans for upcoming Regional initiatives for athlete and volunteer recruitment
  - Share any NEW Marketing Resources: Flyers, Presentations, Social Media Tool Kits that the Teams can use
  - Create and maintain a tracking tool that identifies Team needs for volunteers
  - Identify new volunteers and as needed and appropriate, assign according to interest, Team needs, and volunteer location

## **Additional Resources (links)**

Tracking tool to identify volunteer needs – *Coming Soon!*

## **Registration**

### **Volunteer Registration**

All new volunteers will register by completing SOPA's online Volunteer Application via the Online Portal and follow directions to designated roles; Class A or Class B, that are specified here:

<https://specialolympicspa.org/become-a-volunteer>. If online registration is not an option, a new volunteer may visit or call the Regional office and our Regional Administrative Manager will assist with the process.

- Class B registered volunteers will have the opportunity to register for event specific opportunities in SOPA's database system called VSys immediately following completion of the online <https://specialolympicspa.org/become-a-volunteer>. Volunteer Application
- Class A registered volunteers may register for specific activities within the VSys system or by contacting the Regional Office to review available opportunities (i.e., coaching, leadership, etc.), and begin their required Background Checks and applicable trainings.

## **Additional Resources**

[Become a Volunteer](#)

## Background Checks

The Regional office will assure Class A volunteer background checks are completed.

### Procedures

- **Local Team leader(s) will;**
  - Share “eligible” list of Class A volunteers with Head Coaches and other team volunteers as applicable.
- **Regional (or State) Staff will;**
  - Manage record(s) as needed (i.e., uploading of Disclosure Statement, etc.)
  - Follow-up for any missing requirement
  - Provide list of “eligible” Class A volunteers in advance of each season
  - If record remains incomplete, mark as “inactive”
  - Communicate with Class A volunteers providing any necessary support to complete all required steps
- **State will;**
  - Manage all background activity

## Required Trainings

The Regional office will assure all Class A volunteer required trainings are completed.

### New Volunteer required trainings:

- Complete a SOPA [Volunteer Application](#) and [Class A Background Checks](#) (for 18 and over).
- **General Orientation** – This training is available online via the Online Portal and must be completed by all new and existing Class A volunteers (16 years of age and older) prior to working with Special Olympics athletes. This is a general introduction to Special Olympics and any new volunteer or coach should take this training prior to working with athletes
- **Protective Behavior Training** – This training is available online via the Online Portal and must be completed by all new and existing Class A volunteers (16 years of age and older) prior to working with Special Olympics athletes. This training must be renewed every three years.
- **Concussion Training** - This training is available online via the Online Portal and must be completed by all new and existing Class A volunteers (16 years of age and older) prior to working with Special Olympics athletes. This training must be renewed every three years.
- **Athletes as Coaches at Athlete Leadership University** - This training is optional but highly encouraged for athletes who are interested in coaching. It trains athletes that currently are, or want to become, certified coaches make the transition from a competitor to a coach. [Click here](#) for Athletes as Coaches Frequently Asked Questions.

### Procedures

- **Local Team leader(s) will;**
  - Share list of “eligible” Class A volunteers in advance of each season

- **Regional Staff will;**
  - Manage record(s) as needed
  - Follow-up on any missing required training
  - Provide Sports Team Leaders Team Leaders with list of “eligible” Class A volunteers

## New Volunteer Assignments

Using a “Regional Volunteer Needs Tracking Tool,” initial volunteer applications will come into the Regional Office as outlined in the volunteer registration guidelines, and be assigned as needed.

### Procedures

- **Local Teams will;**
  - Collect and submit Team volunteer needs by way of the “Regional Volunteer Needs” tracking tool (insert link) or through the development of an “Event” in VSys
  - Email Regional Administrative Manager the name and proposed role for a specific volunteer that has been recruited by the Team. This will ensure the volunteer is not assigned to another role within the Region.
- **Regional Staff will;**
  - Maintain a list of Local Team and Regional needs based on monthly Community Team Leader Meetings. This list will be categorized: Coaches, Support, Leadership, etc.
  - Provide a standardized orientation which will be scheduled to “onboard” volunteers by the Regional Office
    - During Orientation NEW volunteers will learn about SOPA and the different volunteer opportunities that are available
    - The Regional Office will virtually connect NEW volunteers to the Local Team where they will be placed. Regional Office will notify the Community Team Leader that XX volunteer has completed the volunteer requirements and onboarding and is ready to begin volunteering in XX role. The submitted “interest” and need will be matched to the best of the Region’s ability.

### Additional Resources (Links)

Regional Volunteer Needs assessment tool – *Coming Soon!*

## Current Volunteers

### Volunteer Opportunities

*Coming Soon!*

## Records Management

**All athlete, volunteer and event/activity records are entered and managed in the SOPA database called VSys. All VSys records will be managed at the Regional level.** Athletes and volunteers will have the ability to cross

boundaries without having to change their geographic assignment in the database. Access to records will be given to Local Team leaders.

**VSys records need to be maintained to ensure current information is available for all constituents.**

## **Procedures**

### **Athletes and/or Unified Partners**

- **Regional Staff will;**
  - Enter a new and updated Application for Participation (Medical Form) into the VSys system.
  - Regional Administrative Manager will provide support as needed.
  - Manage “reminders” of expiring records and collect any missing information needed.
- **Athlete or Unified Partner will;**
  - Have the ability to access to their individual record in VSys via the Online Portal
  - Receive email correspondence regarding required renewals and be expected to follow up with requests

## **Background Checks**

**The Regional office will assure Class A volunteer background checks are completed.**

## **Procedures**

- **Local Team leader(s) will;**
  - Share “eligible” list of Class A volunteers with Head Coaches and other team volunteers as applicable.
- **Regional (or State) Staff will;**
  - Manage record(s) as needed (i.e., uploading of Disclosure Statement, etc.)
  - Follow-up for any missing requirement
  - Provide list of “eligible” Class A volunteers in advance of each season
  - If record remains incomplete, mark as “inactive”
  - Communicate with Class A volunteers providing any necessary support to complete all required steps
- **State will;**
  - Manage all background activity

## **Partnerships**

### **School Partners**

#### **School Partner Recruitment**

**Community Engagement will be led by the Regional staff in collaboration with Team volunteers to include partnership development of Schools and Intermediate Units (IU's).** Both entities will communicate and

coordinate recruitment efforts to maximize community partnerships by way of monthly Community Team Leader meetings or by a direct call to the Regional Community Director.

## Procedures

- **Local Teams will;**
  - Identify existing personal contacts and partnerships with the Regional Office so the Regional Office can expand those opportunities.
  - Help to identify potential partners within their local community that they have not yet built relationships with.
- **Regional staff will;**
  - Connect with local school districts and IU's to share Special Olympics opportunities available for students within their district's geographic area
  - Create presentations for outreach to schools showcasing partnership opportunities and will work to establish Regional relationships that will benefit multiple teams within the Region. Existing relationships are critically important to these meetings. Teams are encouraged to participate in these meetings whenever possible. Based on the strength of the relationship (employee in the district), it may be beneficial for the Team to co-lead these meetings with Regional staff. Regional staff will lead this process with the support and assistance of local volunteers as applicable.

## Records Management

### Access

**All athlete, volunteer and event/activity records are entered and managed in the SOPA database called VSys.**

**All VSys records will be managed at the Regional level.** Athletes and volunteers will have the ability to cross boundaries without having to change their geographic assignment in the database. Access to records will be given to Local Team leaders.

**VSys records need to be maintained to ensure current information is available for all constituents.**

## Procedures

### Athletes and/or Unified Partners

- **Regional Staff will;**
  - Enter a new and updated Application for Participation (Medical Form) into the VSys system.
  - Regional Administrative Manager will provide support as needed.
  - Manage "reminders" of expiring records and collect any missing information needed.
- **Athlete or Unified Partner will;**
  - Have the ability to access to their individual record in VSys via the Online Portal
  - Receive email correspondence regarding required renewals and be expected to follow up with requests

## Background Checks

The Regional office will assure Class A volunteer background checks are completed.

## Procedures

- **Local Team leader(s) will;**
  - Share “eligible” list of Class A volunteers with Head Coaches and other team volunteers as applicable.
- **Regional (or State) Staff will;**
  - Manage record(s) as needed (i.e., uploading of Disclosure Statement, etc.)
  - Follow-up for any missing requirement
  - Provide list of “eligible” Class A volunteers in advance of each season
  - If record remains incomplete, mark as “inactive”
  - Communicate with Class A volunteers providing any necessary support to complete all required steps
- **State will;**
  - Manage all background activity

## Required Trainings

The Regional office will assure all Class A volunteer required trainings are completed.

### New Volunteer required trainings:

- Complete a SOPA [Volunteer Application](#) and [Class A Background Checks](#) (for 18 and over).
- **General Orientation** – This training is available online via the Online Portal and must be completed by all new and existing Class A volunteers (16 years of age and older) prior to working with Special Olympics athletes. This is a general introduction to Special Olympics and any new volunteer or coach should take this training prior to working with athletes
- **Protective Behavior Training** – This training is available online via the Online Portal and must be completed by all new and existing Class A volunteers (16 years of age and older) prior to working with Special Olympics athletes. This training must be renewed every three years.
- **Concussion Training** - This training is available online via the Online Portal and must be completed by all new and existing Class A volunteers (16 years of age and older) prior to working with Special Olympics athletes. This training must be renewed every three years.
- **Athletes as Coaches at Athlete Leadership University** - This training is optional but highly encouraged for athletes who are interested in coaching. It trains athletes that currently are, or want to become, certified coaches make the transition from a competitor to a coach. [Click here](#) for Athletes as Coaches Frequently Asked Questions.

## Procedures

- **Local Team leader(s) will;**
  - Share list of “eligible” Class A volunteers in advance of each season
- **Regional Staff will;**

- Manage record(s) as needed
- Follow-up on any missing required training
- Provide Sports Team Leaders Team Leaders with list of “eligible” Class A volunteers

## Event Registration

### Local Team Events/Activities

**All event/activity records are entered and managed in the SOPA database called VSys.**

Local and Regional Events/Activities will be entered into the VSys system. This will allow athletes and volunteers, both Class A and B, to pre-register for activities. In turn, this will improve communications to all involved on updates, assignments, etc. Events include, but are not limited to;

- [Competitions](#)
- [Training Sites](#)
- [Fundraising events](#)

**Regional Administrative Manager will create all “Events” in VSys.**

#### Procedures

- **Local Teams will;**
  - Collect all event details to be shared with Regional Administrative Manager to be entered into VSys as an Event
  - Details will include specific volunteer needs
- **Regional Staff will;**
  - Use event details provided by teams to create specific Event in VSys
  - Event will include required volunteer needs.
  - Create and post a link to the Events in VSys allowing athletes and volunteers to “register” in VSys
  - Create templates available for the various activities (i.e. trainings, track + field events, etc.) to be completed for each event.

## Training Site Registration

All Training Site information will be collected in SOPA’s database system, VSys. Training Sites will be entered as Events in VSys. This will allow for pre-season volunteer and athlete registration.

New and previously established training sites will need to identify; sport, location, needs, dates, etc. Support will be provided to Teams by Sports Team Leader, Regional Administrative Manager and Regional Sports Director. Ideally this coordination should be **COMPLETED at least 4 weeks prior to the beginning of the training season** so training opportunities can be promoted and athletes, families and volunteers can make informed decisions and register accordingly using VSys.

#### Procedure

- New and existing Training Site Events will be entered into VSys by the Regional Administrative Manager or Regional Sports Director.



- The timeline is as follows:
  - VSys Set Up: (Example Fall 2020 - Fall Fest date Nov. 6-8)
    - 14 weeks prior to State Level Games - Event Registration Set Up (July 31, 2020)
    - 12 weeks prior to State Level Games - Event Registration Details Finalized (August 14, 2020)
    - 10 weeks prior to State Level Games - Event Registration Closes (August 28, 2020)

*As a guideline, typical training seasons are:*

- Fall: Aug - Nov
- Winter: Nov - Mar
- Summer: Jan - June

Training seasons may operate outside of this schedule. Training sites should be set up at least 4 weeks prior to the start of your training season....(Ex: Bowling starting in Sept.)

- **Sports Team Leader will;**
  - Work with existing training sites and coaches to coordinate availability and will confirm days/times to report out at monthly Sports Team Leader meetings.
  - Collect all training site details to be shared with Regional Sports Director to coordinate the creation of the event in VSys
  - Will work with the Regional Sports Director to identify new training sites within their team as needed.
- **Regional Staff will;**
  - Use details collected by local Sports Team Leader to create an Event in VSys for each training site
  - Assess Regional training sites and needs and make recommendations based on sports offered, volunteer and site availability and expressed athlete interest.

Once all training site information is collected, a Regional “sport offerings list” will be created and promoted to encourage registration. This promotional material should include: sport, training start date, practice days, practice times, age served if appropriate and ability served (introductory/low vs advanced/high) as well as volunteer opportunities. Training sites will be listed by sport on the Regional website.

**VSys database “Events” for training sites will be created in VSys by the Regional staff by Local Team** for pre-season rosters to track athletes and coaches who are training during the season.

This will allow;

- Easier access to confirm which athletes need medicals PRIOR to state competition.
- Easier access to confirm which volunteers need training/background checks PRIOR to state competition.
- Tracking of athletes and volunteers who do not attend competition.
- Identify athletes and volunteers who participate in multiple sports throughout the year.

## Procedures

- **Local Team Leadership will (GMS);**

- Participate in GMS registration
- Participate in GMS training
- **Regional Staff will (VSys);**
  - Create “event” for training sites, fundraising activities, etc.

### **Additional Resources (links)**

[Database User Guide](#)

### **Coach Packets**

In advance of the first training session, coaches will create or be provided a “Coach Packet” that will include the following:

- Registered athlete medical forms
- Registered Unified Partner medical forms
- Training Site athlete roster
- Training site coach roster

**A copy of an Athlete’s or Unified Partner’s “medical” form is to be available to all Head Coaches** for a better understanding of needs, medical concerns, communications lines, etc.

### **Procedure**

- **Head Coach will;**
  - Have a copy of “medical” form for all rostered athletes in advance of the first training session.
- **Regional Staff will;**
  - Create and make available the coach packet for each training site

## **Fundraising Event**

### **Regional and Local Fundraising Events**

Local and Regional fundraising events can include: Gala dinners, auctions, basket raffles, golf tournaments, bowl-a-thons, walk/runs, Plunges, online fundraisers, etc.

### **Procedures**

#### **Local Fundraising Team Leaders will;**

- Notify the Regional Development Director prior to all new, reoccurring or proposed fundraising events, including third-party events, by completing an online form available at [Fundraising Event Form](#)
- The form will capture the following event details: Proposed timeline, budget (revenue/expense), sponsorship, location, and opportunity for engagement with athletes, volunteers, community partners, or law enforcement partners
- Notify Regional staff in advance of an event to ensure that all required insurance documentation can be gathered and passed on to the requestor. All local and Regional events fall under SOPA’s general liability insurance.

- All third party contracts must be sent to the Regional Development Director for review and approval by SOPA CEO before moving forward with an event.
- Request hands-on support from Regional staff when preparing for a fundraising event, which may include creating an online fundraising page, providing proof of liability insurance, or reviewing and signing third party contracts. It is essential that Fundraising Team Leaders provide the Regional Development Director with prior notification of any fundraising event to ensure that these resources can be coordinated by Regional staff and offered in a timely manner.

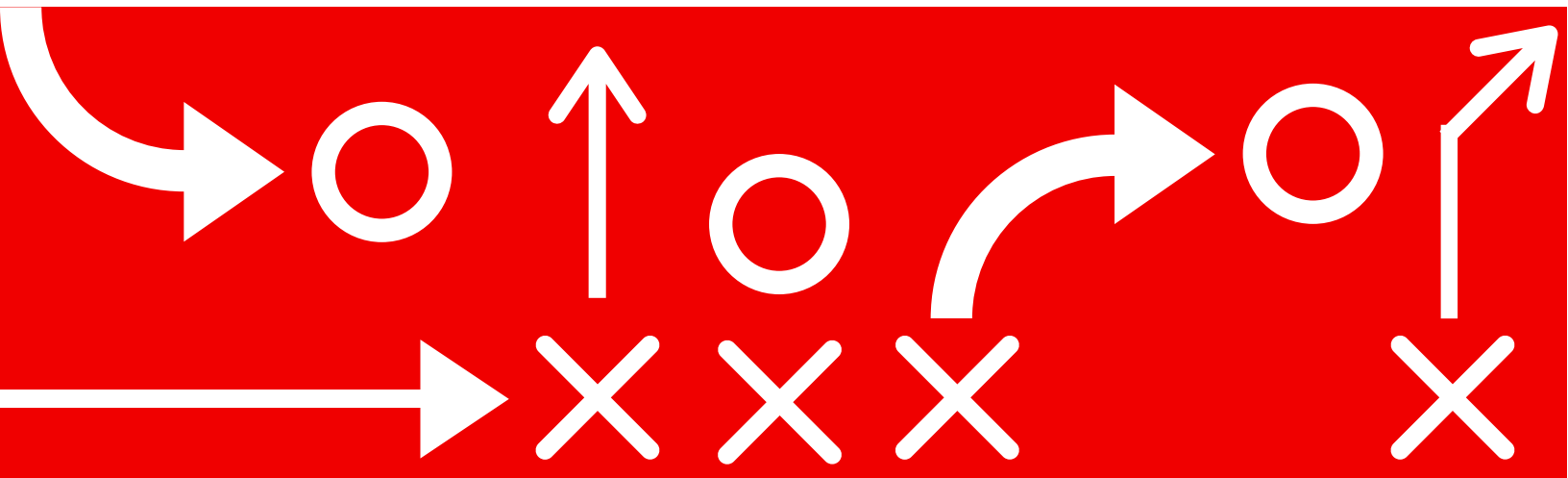
**Regional Development Director will;**

- Review the completed form and contact the Fundraising Team Leader via email or phone within 48 hours to discuss the proposed fundraising event and/or to begin the event planning process.
- Ensure that all proposed events are coordinated with local, Regional, and statewide fundraising.
- Communicate planned Regional fundraising activity to applicable state staff—Eastern PA Director of Development (Regions 3, 4, 5, 6, 7) or the VP of Development (Regions 1, 2, 8, 9)
- Notify Fundraising Team Leaders in advance of Regional participation in fundraising events coordinated by the state office
- Provide updates on local and Regional participation in state events during Fundraising Team Meetings
- Be responsible for the Regional LV Polar Plunge, working closely with Local Teams
- Set up an online fundraising page for any local or Regional event that requires online registration and/or payment. The Regional Development Director will work in conjunction with Fundraising Team Leaders to develop the structure and content for the online fundraising page.
- Facilitate third party event contract approval by SOPA CEO
- Using the information from the online form, work with the Regional Administrative Manager to create an event in Vsys
- Coordinate with the Regional Administrative Manager to engage and recruit local volunteers if needed

**Social Event**

*Coming Soon!*

# FUNDRAISING



# FUNDRAISING

All Regional fundraising will benefit activities and athletes within the Region. It is the expectation that Local Teams will continue their existing fundraising at the local level and will strive to grow their fundraising overall. Fundraising Team Leaders will work in partnership with the Regional Development Director to coordinate local and Regional fundraising. The Regional Development Director will coordinate and support local efforts and identify and pursue funding sources across the Region.

## Raising Funds

It is everyone's responsibility to raise funds in support of the Region, its athletes and activities. Local Fundraising Team Leaders will work in partnership with the Regional Development Director to coordinate local and Regional fundraising.

- Local Teams can conduct fundraising activities within their geographic service area
- Local Teams will be encouraged to combine fundraising efforts across program boundaries within the Region.
- The Regional Development Director will connect Local Teams that are undertaking similar fundraising activities within the Region and will facilitate cross-program fundraising, where possible.
- Fundraising activities cannot cross Regional boundaries without the prior knowledge and consent of the respective Regional Executive Directors. Fundraising Team Leaders must notify the Regional Development Director of any existing, new, or proposed fundraising that crosses Regional boundaries.

## Events

### Regional and Local Fundraising Events

Local and Regional fundraising events can include: Gala dinners, auctions, basket raffles, golf tournaments, bowl-a-thons, walk/runs, Plunges, online fundraisers, etc.

## Procedures

### Local Fundraising Team Leaders will;

- Notify the Regional Development Director prior to all new, reoccurring or proposed fundraising events, including third-party events, by completing an online form available at [Fundraising Event Form](#)
- The form will capture the following event details: Proposed timeline, budget (revenue/expense), sponsorship, location, and opportunity for engagement with athletes, volunteers, community partners, or law enforcement partners
- Notify Regional staff in advance of an event to ensure that all required insurance documentation can be gathered and passed on to the requestor. All local and Regional events fall under SOPA's general liability insurance.
- All third party contracts must be sent to the Regional Development Director for review and approval by SOPA CEO before moving forward with an event.
- Request hands-on support from Regional staff when preparing for a fundraising event, which may include creating an online fundraising page, providing proof of liability insurance, or reviewing and signing third party contracts. It is essential that Fundraising Team Leaders provide the Regional Development Director with prior notification of any fundraising event to ensure that these resources can be coordinated by Regional staff and offered in a timely manner.

**Regional Development Director will;**

- Review the completed form and contact the Fundraising Team Leader via email or phone within 48 hours to discuss the proposed fundraising event and/or to begin the event planning process.
- Ensure that all proposed events are coordinated with local, Regional, and statewide fundraising.
- Communicate planned Regional fundraising activity to applicable state staff—Eastern PA Director of Development (Regions 3, 4, 5, 6, 7) or the VP of Development (Regions 1, 2, 8, 9)
- Notify Fundraising Team Leaders in advance of Regional participation in fundraising events coordinated by the state office
- Provide updates on local and Regional participation in state events during Fundraising Team Meetings
- Be responsible for the Regional LV Polar Plunge, working closely with Local Teams
- Set up an online fundraising page for any local or Regional event that requires online registration and/or payment. The Regional Development Director will work in conjunction with Fundraising Team Leaders to develop the structure and content for the online fundraising page.
- Facilitate third party event contract approval by SOPA CEO
- Using the information from the online form, work with the Regional Administrative Manager to create an event in Vsys
- Coordinate with the Regional Administrative Manager to engage and recruit local volunteers if needed

## Cross-Region Fundraising Events

Fundraising events can only cross Regional boundaries with the prior knowledge and consent of the respective Regional Executive Directors.

**Procedures****Local Team will;**

- Notify the Regional Development Director prior to all new, reoccurring or proposed fundraising events that would cross Regions by completing an online form available at <https://forms.gle/jvePGNX3S4MFFpYw7>

**Regional Office will;**

- Approve and coordinate all cross-Region fundraising events with respective Regional Executive Directors

## Engaging Law Enforcement Partners

All law enforcement partnerships are managed at the state-level by the Director of State LETR Events & Engagement.

**Procedures****Local Team will;**

- Notify the Regional Development Director prior to all LETR new, reoccurring or proposed fundraising events by completing an online form available at [Fundraising Plans](#)

**Regional Office will;**

Share new, reoccurring and proposed LETR events with the Director of State LETR Events & Engagement, to coordinate the development of a strategy to engage with law enforcement partners in the Region.

**Additional Resources (links)**

[Fundraising Plans](#)

## Cash Management at Events

Regional staff and/or local Fundraising Team Leaders will be responsible for cash management at local and Regional events.

**Procedures****Local Team will;**

- Designate a minimum of two volunteers (or one volunteer and a Regional staff member) to accept cash or checks at events.
- Designate a volunteer to complete the Cash/Check Log by filling in the cash and checks received
- Designate a second person (can be a second designated volunteer or Regional staff member) to review and confirm the Cash/Check Log amounts are correct.
- Have both parties sign off on the Cash/Check Log.
- Ensure any single gift of \$250 or more collected at an event will be reported on a separate line on the Cash/Check Log, with complete donor information to include
  - Full name
  - Street Address
  - Email
- After the event, report funds raised in FADS system.
- Deposit via FADS all cash, checks, and credit card slips collected at an event - no later than 48 hours following an event. Per financial procedures, it is preferable if deposits are made within 24 hours following an event.

**Regional Staff will;**

- Set up an online fundraising page for any local event that will accept online credit card payments
- Oversee all incoming event transactions through the online fundraising page and provide Fundraising Team Leaders with progress reports
- Review and prepare online event donations for the Director of Development Administration to upload into SOPA's statewide donor database for recordkeeping and acknowledgement
- Utilize a team of (4) people (including 1 Regional Staff member) to receive cash and checks at large-scale Regional events (such as Polar Plunge)
- Enter cash and checks on a spreadsheet and reconcile at the end of the event
- Use payment process appropriate to the size and scale for smaller Regional events
- Coordinate Regional participation in State fundraising events

### **State office will;**

- Upload online donations into SOPA's statewide donor database for recordkeeping and acknowledgment
- Manage cash and check process for all State events (such as Beaver Stadium Run, UNCathalon)

## **State Fundraising Events**

All Regions will participate in fundraising events coordinated by the state office; therefore, Local Teams will be expected to participate, as well. State fundraising events include: Non-Region Polar Plunges, Beaver Stadium Run, Leprechaun Run, and UNCathalon. Polar Plunges and Beaver Stadium Run are LETR events. Regional participation in all state fundraising events will be coordinated by the Regional Development Director. State office model for Regional revenue share is under review.

## **Event Registration**

**All event/activity records are entered and managed in the SOPA database called VSys.**

Local and Regional Events/Activities will be entered into the VSys system. This will allow athletes and volunteers, both Class A and B, to pre-register for activities. In turn, this will improve communications to all involved on updates, assignments, etc. Events include, but are not limited to;

- [Competitions](#)
- [Training Sites](#)
- [Fundraising events](#)

**Regional Administrative Manager will create all "Events" in VSys.**

### **Procedures**

- **Local Teams will;**
  - Collect all event details to be shared with Regional Administrative Manager to be entered into VSys as an Event
  - Details will include specific volunteer needs
- **Regional Staff will;**
  - Use event details provided by teams to create specific Event in VSys
  - Event will include required volunteer needs.
  - Create and post a link to the Events in VSys allowing athletes and volunteers to "register" in VSys
  - Create templates available for the various activities (i.e. trainings, track + field events, etc.) to be completed for each event.

## **Donations**

All donations must be reported to the state office to ensure they are tracked in the statewide donor database (Raiser's Edge). Donations recorded through an online fundraising page for an event or through the finance depositing software will be uploaded into the statewide database.



When appropriate, the Regional Development Director will set up an online fundraising page for any local event that will accept online credit card payments. Regional staff will oversee all income event transactions through the online fundraising page and will coordinate with the Director of Development Administration to upload online donations into the statewide donor database for recordkeeping.

The current local process of using three depository banks will continue within a Region.

### **Procedures**

#### **Local Team will;**

- Deposit cash and/or checks at the local level within 48 hours of receiving cash or checks
- Record deposit information in FADS by the Finance Coordinator or Team Leader with appropriate cash logs, general ledger coding and donor information
- Report any single gift of \$250 or more collected at an event or as a donation as a separate line on the cash/check log, or in the deposit software, with complete donor information.

#### **Regional Office will;**

- Be responsible for depositing checks and/or cash received at the Regional office
- Process any cash or check donations forwarded from Local Teams
- Process all payments and donations for Regional fundraising events such as LV Polar Plunge
- Coordinate updated Raiser's Edge records with State Office
- Facilitate Raiser's Edge updating for fundraising events conducted using online software

#### **State Office will;**

- Reconcile depository bank statements using appropriate coding

## **Designated Donations**

Donor designated funds will be honored per donor's intent. This could include for example grant funds from a local community foundation with a geographic funding limitation or similar guidelines.

### **Procedures**

#### **Local Team will;**

- Deposit funds into the FADS system and code with the appropriate event and Team codes.

#### **Regional Office will;**

- Deposit funds into the FADS system and code with the appropriate event and Team codes, if applicable, for funds received at the Regional Office
- Coordinate updated Raiser's Edge records with State Office

#### **State Office will;**

Manage donation record in Raiser's Edge

## In-Kind Donations

An in-kind donation is a non-cash gift made to a nonprofit organization, including goods and services. Individuals, corporations, and businesses can all make in-kind donations.

Non-monetary gifts may be solicited within these guidelines:

- Requests should only be of entities within the local or Regional boundaries of the project
- Statewide Sponsors and/or Prospects requests should be coordinated through the Regional Development Director
- No national or international sponsors of SONA or SOI may be solicited

### Procedures

#### Local Team will;

- Report all in-kind donations to the Regional Development Director using the [in-kind receipt form](#), which gathers essential gift information for tax reporting purposes
- Requests to Statewide Sponsors must be reviewed with Regional Development Director prior to contacting any Statewide Sponsors

#### Regional Office will;

- Notify applicable state staff of interest in an in-kind donation from Statewide Sponsor to coordinate approach and seek approval or denial of request —Eastern PA Director of Development (Regions 3, 4, 5, 6, 7) or the VP of Development (Regions 1, 2, 8, 9)
- Report all in-kind donations to state staff using the in-kind receipt form, which gathers essential gift information for tax reporting purposes

### Additional Resources (links)

[In-Kind Receipt Form](#)

## Planned and Estate Giving

A planned gift is any major gift, made in lifetime or at death as part of a donor's overall financial and/or estate planning. These include gifts of equity, life insurance, real estate, personal property, or cash.

The state coordinates with the national Special Olympics office to handle all Planned and Estate giving across Pennsylvania.

### Procedures

#### Local Team will;

- Forward any notifications, documentation or checks received for these types of donations to the Regional Development Director

#### Regional Office will;

- Forward notifications, documentation or checks received for these types of donations to the state office for processing

**State Office will;**

- Process planned gifts according to donor intent, tracking and designating accordingly

## **Matching Gifts**

Matching gifts are a type of corporate giving program that essentially double (or in some cases can be more) an employee's initial donation to an eligible nonprofit organization. Confirmation of any gift to be matched by a company or foundation must be provided to those entities through the state office, which handles all matching gift tracking and confirmations.

**Procedures****Local Team will;**

- Forward any notifications, documentation or checks received for these types of donations to the Regional Development Director

**Regional Office will;**

- Forward notifications, documentation or checks received for these types of donations to the state office for processing

**State Office will;**

- Track matching funds ensure they are designated appropriately.

## **Third Party and Workplace Giving (Donor Advised Funds, SOI, Workplace Giving, etc.)**

Regions may receive funds from third parties, including Donor Advised funds, United Way workplace giving campaigns, Benevity, etc.

**Procedures****Local Team will;**

- Forward any notifications, documentation or checks received for these types of donations to the Regional Development Director

**Regional Office will;**

- Forward notifications, documentation or checks received for these types of donations to the state office for processing

**State Office will;**

- Process all third party giving and credit 100% of funds received to the designated Region (less any third party fees)

United Way workplace giving donor choice numbers are handled through the state office, and those numbers can be found here (insert link). If your area is not listed, please contact your Regional Development Director, who will ensure the state office creates an account.

## Donors

### Donor Information

Donated funds will be recorded and deposited at the local and Regional level.

#### **Local Team Leader or Finance Coordinator will;**

- Enter donations into the FADS system, including donor information, coded with the appropriate event or program codes

#### **Regional Office will;**

- Enter donations received at the Regional Office into the FADS system, including donor information, coded with the appropriate event or program codes

#### **State Office will;**

- Enter and manage donation records in Raiser's Edge and managed by state office
- Reconcile donation with the Finance Department

### Tracking Donors

#### **Tracking Donated Funds**

All gifts must be reported to ensure they are tracked, recorded and acknowledged in a correct and timely manner. Donations recorded through an online fundraising page for an event or through the finance depositing software will be uploaded into the Raiser's Edge statewide database.

#### **Procedures**

#### **Local Team Leader or Finance Coordinator will;**

- Deposit checks into the finance deposit software (FADS) and complete appropriate cash logs, complete with General Ledger coding, and donor information.
- Report any single donation of \$250 or more collected at an event as a separate line on the cash/check log, or in the deposit software, with complete donor information.
- Forward to the Regional Development Director any cash or check donations not entered into FADS system

#### **Regional Office will;**

- Set up an online fundraising page for any local event that will accept online credit card payments.
- Oversee all income event transactions through the online fundraising page and will coordinate with the Director of Development Administration to upload online donations into the statewide donor database for recordkeeping
- Process any cash or check donations forwarded from Local Team

**State Office will;**

- Enter and manage donation records in Raiser's Edge and managed by state office
- Reconcile donation with the Finance Department

## Thanking Donors

Regional and Local Teams are encouraged to thank their donors in a meaningful way. Official gift acknowledgements for tax purposes will be managed in Raiser's Edge by state office Development staff.

Donor lists and sample thank you letters are available upon request from your Regional Development Director

**Local Team will;**

- Thank donors in a meaningful way this can include a special note from an athlete, coach or Team Leader

**Regional Office will;**

- Coordinate with Local Team donor acknowledgements above and beyond thank you note as appropriate based on the donation
- Send additional, personalized thank you notes or other donation acknowledge as appropriate
- Provide donor lists and sample thank you letters on request

**State Office will;**

- Handle all official donation acknowledgments for tax purposes
- Within a week of receiving donation information (through either the online fundraising page for an event or deposit software), donations will be processed and acknowledged to the donor

## Grants

Local Teams may seek community, foundation, corporate, and United Way grant funding provided that there is no conflict with a Nationwide or Statewide Sponsor or Prospect (link). All grant proposals must be coordinated with the Regional office. Regional office will assist local grant writing and pursue grant funding across the Region.

**Procedures****Fundraising Team Leader will;**

- Register their intent to apply for a grant with the Regional Development Director, who will review and coordinate
- Email the Regional Development Director the following information a minimum of six weeks before the grant deadline:
  - Link or attachment to the grant application
  - Summary of the Local Team's application for funding
  - Requested amount

**Regional Office will;**

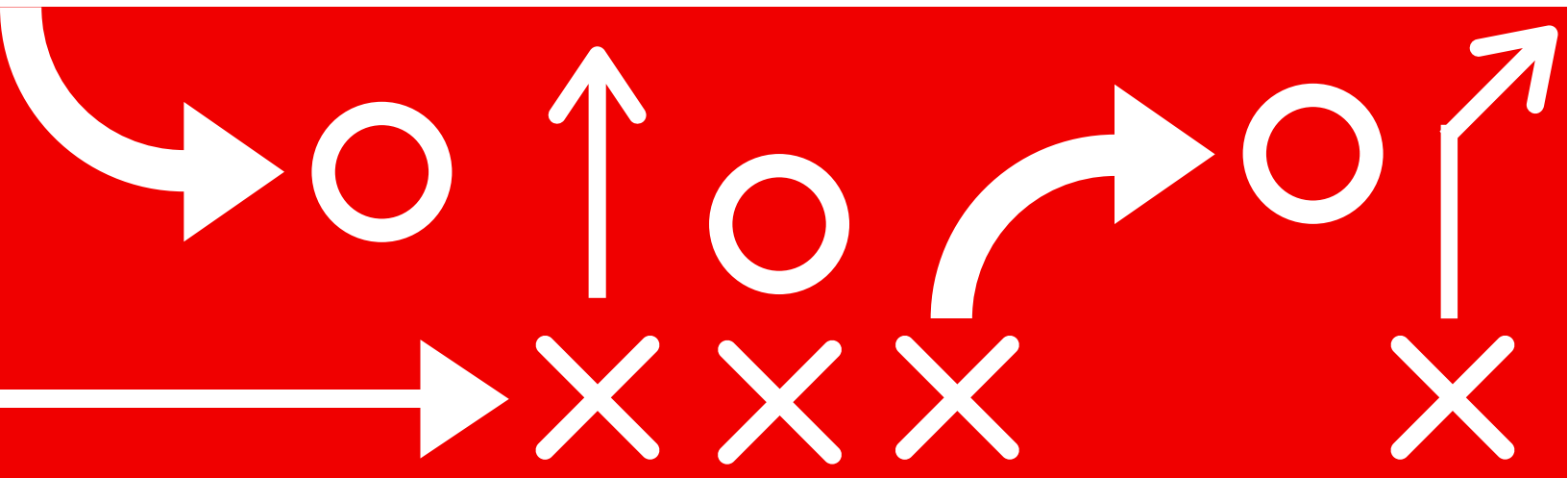
- Prepare and submit grant applications in partnership with the Fundraising Team Leaders
- Assist Fundraising Team Leaders with grant applications as needed
- Prepare and submit grant applications to support activities across the Region

- Forward all grant applications over \$10,000 to the SOPA Manager of Government, Foundation, and Corporate Grants for review

**State will;**

- Review all grant proposals over \$10,000
- Provide state budget or other financial information as needed

# COMMUNICATIONS



# COMMUNICATION

## Protocol for Emergencies

SOPA has established Crisis Emergency protocols that will be followed by Regions and all Local Teams. In the Regional structure, communications now include notifying the Regional Executive Director.

SOPA's Crisis Communication Plan: In the event of a crisis situation at any level, it is critical that the appropriate Special Olympics Pennsylvania staff or volunteers are contacted. It is also critical that the Crisis Communications Team Coordinator is also contacted in the event of most Level 2 and all Level 3 emergencies to determine how to communicate the appropriate message to key publics and Special Olympics Pennsylvania constituents. The defined levels of emergencies can be found on the Crisis Card (back), within the Crisis Plan, and all other Crisis-related materials that are linked below.

The SOPA Senior Leadership Team (President and CEO and his/her direct reports) has overall responsibility for responding to and managing all crisis situations. In addition, a Crisis Communications Team (CCT) shall be responsible specifically for communication policy. The CCT determines and enacts the communications strategies best suited to resolve a specific crisis situation. The members of the SOPA Senior Leadership Team and SOPA's VP of Marketing & Communications serve as the core Crisis Communications Team.

### **Onsite steps for crisis management;**

1. Survey the situation
2. Contact the proper authorities or emergency personnel (Ex. 911)
3. Assure the safety of those around
4. Notify Local Team Team Leader or SOPA contact based on the level of emergency
5. Complete an Incident Report Form

\*As a volunteer, you are a Mandated Reporter. Report suspected child abuse by calling ChildLine at 1-800-932-0313 or to report a suspected abuse of adults with disabilities, call the Adult Protective Services Hotline at 1-800-490-8505.

\*If the situation has the potential to damage SOPA's reputation, you must contact the state office's Crisis Communications Coordinator at 855-701-9030, who will serve as the single designated spokesperson for media inquiries. Additionally, notify your Team Leader who will notify the Regional Executive Director.

### **Procedures (for promoting of Crisis Communications steps)**

#### **Team Leader will;**

- Continue to communicate the existing Crisis Communications policy to their volunteers and provide Crisis Communications cards as a reference.
- Include the Regional staff in the crisis communication chain, in addition to the State Crisis Communications Coordinator.
- Forward completed Incident Reports to the Regional Administrative Manager.

#### **Regional Staff will;**

- Assist in communicating the existing Crisis Communications policy to Local Teams.



- Work to ensure that volunteers have access to the appropriate information needed to handle emergency situations (example: athlete medicals; VSys Anywhere access).
- Ensure a link to the Crisis Communications policy and Crisis Card is available on the Regional website (if applicable)

#### **State staff will;**

- Research/implement additional mechanisms for communicating emergency/crisis communications.

#### **Additional Resources (links)**

[Crisis Communications Plan](#)

[Crisis Communications Management](#)

[Crisis Communications Card](#)

[Social Media Crisis Plan](#)

## **Region and Local Team Information**

Information will be found at the local, Regional and state levels:

- State: Website, social platforms, Monthly Update, e-communications
- Regional: Website, social platforms, e-newsletter, e-communications
- Local Teams: Social platforms, website, newsletter (if applicable), e-communications

#### **Procedures**

##### **Region Staff will;**

- Regions have established a communications plan to ensure that its content complements information sent on the State and Local Team level to avoid duplication of effort or inundation of content.

#### **Additional Resources (Links)**

[SOPA Website](#)

## **Regional Communication Methods**

Regions will continue to depend on state managed communications (ex. Monthly Update; e-communications to specific team leaders) while the Region also establishes its own communications. Regions are welcome to create a newsletter that can be distributed to athletes, volunteers, sponsors, elected officials, community members, etc.

#### **Procedures**

##### **Regional Office will;**

- Establish communication avenues and promote throughout the Region ensuring all levels know what to expect or where to find Region information. This “plan” will be mirrored across all Regions with the flexibility to adjust for location needs.

**State Office will;**

- The State Office and Regions will work together to ensure that volunteers are not bombarded with emails and a communications calendar will be established to help organize this effort.

## **Communication Management on Regional Level**

Communication expectations are a two-way flow and may start at a point in the following flow design:

State to Region → Region to Team Leaders → Team Leaders to volunteers (i.e. coaches) Volunteers to Athletes/Families

If you communicate outside of this flow, you must ensure that those “in-between” are included by CC: or advance notice. (For example: For an email from Region to Volunteers, Team Leaders (or appropriate liaison) would be cc’d or receive advance notice of the communication).

## **Managing Communications outside of the Internet**

SOPA recognizes that all athletes and volunteers do not have access to technology such as the internet. Printed information will be made available through mail or training site distribution by the originator. Information can also be included on social media. It will be important to establish strong relationships with local group homes to ensure that athletes living there have access to all the information that they need.

**Procedures****Regional Office will;**

Regions will inform its volunteers and athletes of their primary modes of communication so that they know where to look for particular updates and information.

## **Region and Local Team Leadership Meetings**

Regional staff will convene monthly Leadership meetings with representatives from each Local Team to include Team Leaders, Fundraising, Sports and Community. Each Region will determine what method of communication works best for them and the broader groups. Local Team subcommittees may continue to gather on a regular basis, however, this is not mandated. It will be based on what works best for them. Zoom may play an important role in these methods of communication.

**Procedures****Local Team will;**

- Attend monthly meetings, as per their assignment

**Regional Staff will;**

- Develop meeting schedules for all Team positions
- Determine schedule for Region wide coach meetings
- Determine schedule for Region wide athletes/family, support meetings (i.e. pre State Games or new medical policies)

## SOPA Email Addresses for Regional/Local Team Roles

Ideally, SOPA will provide uniform email addresses for each Regional role/position. All paid staffers will have email addresses and the hope is to move in this direction for team leaders as well. The goal would be to establish generic email addresses that will help eliminate the need to create a new email address every time there is volunteer turnover. The email address would instead remain the same and new login information will be provided to the new volunteer leader.

## Public Relations

### Regional Branding

Regional branding will be used across the Region. Branding for Local Teams will include logos specifically designed for uniforms and social media to feature Regional representation along with each Local Team. New and updated brand marks will be available for promotional materials, web and social media representations that will always include the Region's official name.

#### Procedures

##### Local Team will;

- Use either the shield or no shield style logo for uniforms that incorporate the Regional name and Local Team
- Utilize Regional brand for other apparel/materials, like warm-up suits or banners

##### Regional Staff will;

- Adopt the use of a new Regional logo, that includes Local Teams
- Create promotional materials for its use that will bear the new Regional logo

##### State will;

- Produce updated brand marks for use by Regional staff and Local Teams

#### Additional Resources (links)

[Global Brand Guidelines & Resources](#)

[Local Team Tools \(Marketing\)](#)

### Media Relations

Media management across the Region will be led by the Regional Executive Director and Regional staff working closely with Local Teams and Community Team Leaders.

#### Procedures

##### Community Team Leader will;

- Submit Public Relations (PR) information and opportunities to the Regional office

- Share any existing media contacts or relationships with the Regional office

**Regional Staff will;**

- Serve as primary contact with local and Regional media
- Draft and distribute press releases
- Actively pursue PR media opportunities to highlight activities, athletes, volunteers and events across the Region
- Work with the Community Team Leaders to be aware of all media relationships and opportunities
- Coordinate media surrounding larger scale Regional events (ex. Polar Plunges, Invitationals, etc.)
- Create PR request form for Local Teams (also useful for storytelling, newsletters, updates) and distribute as needed
- Coordinate with the State Office when necessary

**Additional Resources (Links)**

Media Database Link – *Coming Soon!*

Marketing & Communications Manual for Local Teams – *Coming Soon!*

**\*\***The manual is updated regularly and will be reviewed again this year.

## **Marketing Materials**

Marketing materials will be created at the Regional level for use by Local Teams. Local Teams may create flyers and other materials to support and promote local events and activities. Templates for these materials will be made available by the Regional Office.

**Procedures**

**Local Teams will;**

- Using provided templates, create promotional materials as needed for local fundraisers and events; and, provide draft versions to the Regional Executive Director for final approval.

**Regional Staff will;**

- Provide marketing materials for use at the local level
- Provide templates for promotional materials that can be updated by Local Teams
- Create marketing materials for athlete recruitment
- Create marketing materials for volunteer recruitment

**Additional Resources (Links)**

[Global Brand Guidelines & Resources](#)

[Local Team Tools \(Marketing\)](#)

## Website Management

A Regional web presence will be established, resulting in a total of 9 overarching Regional websites statewide. Local Teams that have an existing web presence will transition over to a web construct (pages) that has been created within the Regional site.

### Procedures

#### Local Team will;

- Designate a volunteer to manage their portion of the Regional website, if needed
- Receive training on how to manage their portion of the Regional website
- Provide web content to the Regional office
- Receive restricted access to the Regional website to manage their portion of the site
- Provide updated event, training site information and schedules to the Regional office

#### Regional Staff will;

- Manage the Regional website (standardized web content) and work with Local Teams to manage their presence within the site

#### State Office will;

- Be responsible for the overall maintenance of the site

### Additional Resources (Links)

Regional website template – *coming soon!*

Guidelines and training for how to manage the template – *coming soon!*

[Global Brand Guidelines & Resources](#)

## Marketing Tools

Dropbox will continue to be used as the main “storage house” for all files broken out by Region/Local Team. Marketing and Communications materials have been updated as Regional representations.

### Additional Resources (Links)

[How to Navigate Dropbox](#)

[Dropbox Link to Local Team Tools](#)

## Social Media

Regional social media should be used to engage local athletes and volunteers as well as share information across the Region, grow public awareness in general, provide content that Local Teams can share on their pages, post

events, and mission-driven messaging. The handle or names of all of the Regional social media pages should be consistent across all of the various platforms used.

### **Procedures**

#### **Regional Staff will;**

- Manage the Regional social media accounts

## **Social Media Accounts**

Each Region will have its own Facebook page that links to the State Office account. The State office will assist the Regions with setting up their social media accounts in a way that connects the state, Regional and Local Teams.

#### **Local Team will;**

- Maintain existing social media accounts, if desired
- Use only social media branding logos and avatars provided by the SOPA Communications Department, keeping with consistent branding across the Region and across the state
- Follow social media policies, procedures and guidance provided by the SOPA Communications Department

#### **The Regional Office will;**

- Be responsible for populating all of its social channels with content
- Manage the various requests and messages that the pages receive
- Follow social media policies, procedures and guidance provided by the SOPA Communications Department

#### **State Office will;**

- Set up all Regional Facebook Pages
- Provide branding logos and avatars to be used by Local Teams
- Provide social media policies, procedures and guidance

### **Additional Resources (Links)**

Updated social media policies, guidelines and avatars – *Coming Soon!*

[Local Team Social Media Overview Final](#)

[SOPA Social Media How-To Guide](#)

[Social Media Advertising One-Pager](#)

[Dropbox Link to Local Team Tools](#)

[Global Brand Guidelines & Resources](#)

[Social Media Policy](#)

[Social Media Crisis Plan](#)

## **Social Media Account Management and Rights**

Regional staff will manage their accounts and will obtain administrative rights for the Local Team pages within their Region, enabling them to update or simply assume control as a result of volunteer turnover.

## Procedures

### Local Teams will;

- Grant the Regional office access to all of their social media channels
- Ensure that any new Facebook page/group or presence is created via the Regional Facebook page (keep ownership within the organization)

### Regional Office will;

- Request administrative access for all Local Team Facebook pages as well as groups
- Request administrative access/logins for all Local Team social media accounts

## Number of Social Media Accounts

Official social media accounts held by both Regional and Local Teams will be limited to one per platform (Facebook, Instagram, Twitter, etc.) as we do not want to divide the audience or muddle the messaging. There can, however, be an unlimited number of groups for specific interests (Ex. Young Athletes, Athlete Leadership) which would live under the page. Regions and Local Teams are encouraged not to create a separate page for each fundraising event, but rather utilize event pages which allow for co-hosts and increases audience participation.

### Additional Resources (Links)

[Social Media Policy Updated Final](#)  
[Local Team Social Media Overview Final](#)  
[SOPA Social Media How-To Guide](#)  
[Social Media Advertising One-Pager](#)  
[Social Media Crisis Plan](#)

## Social Media Guidelines

### Communication Implementation Team Recommendation:

The current guidelines will be adapted for a Regional approach and be made available before the end of 2020.

### Additional Resources (Links)

[Social Media Policy Updated Final](#)  
[Local Team Social Media Overview Final](#)  
[SOPA Social Media How-To Guide](#)  
[Social Media Advertising One-Pager](#)  
[Dropbox Link to Local Team Tools](#)  
[Global Brand Guidelines & Resources](#)  
[Social Media Crisis Plan](#)

## Social Media Materials

All materials will be updated to maintain a consistent look and feel.

### Additional Resources (Links)

[Dropbox Link to Local Team Tools](#)

## Monitoring Social Media Accounts

The Regional staff will monitor the Regional pages and have access to Local Team pages and it is expected that both Local Teams and Regional staff will monitor content.

### **Procedures**

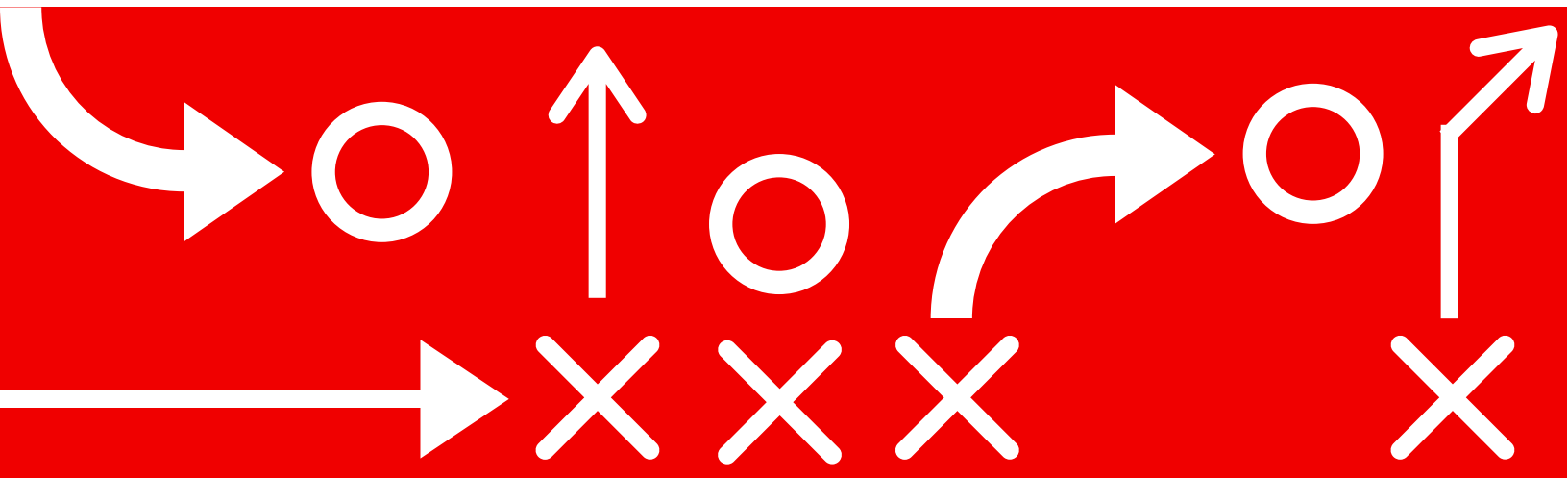
- A process will be established to help Local Team Leaders report content that is offensive or questionable as well as looping the State Office in during a social media crisis. The social media policy and guidelines will be updated to include this plan. It will be published in this Playbook when complete and any needs before available, contact your Regional office.

### **Additional Resources (Links)**

[Local Team Social Media Overview Final](#)



# FINANCE



# FINANCE

## Budget Preparation

### Local Team Budgets

Local Teams will prepare revenue and expense budgets for local activity. Regional staff will convene meetings with respective Team Leaders (Fundraising, Community and Sports) to work through the process and identify any areas of Regional cost sharing and collaboration. Regional Executive Director will work with respective Regional Team Leaders to make budget recommendations that include local revenues and expenses. Final combined Regional budget will be submitted by the Regional Executive Director.

#### Procedures

##### Local Teams will;

1. Sports, Fundraising and Community Leaders will submit the proposed budget for their respective area of activity to the Local Team Leader.
2. Once reviewed by the Local Team Leader, the information will be entered into the Microix budget worksheet provided by the SOPA Finance staff. If a Local Team has a Finance Coordinator, that person will complete the worksheet. If a Local Team does not have a Finance Coordinator, the worksheet will be completed by the Team Leader.
3. The Team Leader will review the worksheet for accuracy.
4. The Team Leader will submit the budget to the Regional Executive Director for review and approval.

##### Regional Executive Director will;

1. Combine the budgets for each Local Team in the Region into a consolidated Regional budget.
2. Incorporate budget items specific to Regional staff operations such as office space, into the overall Regional budget.
3. Review and adjust the consolidated Regional budget as necessary before submitting it to the Chief Program Officer.
4. Submit the Regional budget to the Chief Program Officer for review and approval.

##### State office will;

1. Combine the Regional budget with other budgets from around the state to be presented to the Finance Committee of the Board.
2. Present the final budget to the SOPA Board of Directors for approval.

## Financial Records

Regional staff, Team Leaders and Finance Coordinators (if applicable) will have access to financial information for all Local Teams in the Region. New Team Leaders or Finance Coordinators should contact SOPA Controller at [ddurkin@specialplympicspa.org](mailto:ddurkin@specialplympicspa.org) for training and access.

#### Additional Resources

[Drillpoint](#)

[FADS](#)

[Microix Software](#)

## Financial Reporting

Regional staff will report on finances via Team Leader meetings as appropriate. The Regional Executive Director holds the ultimate reporting responsibility.

### Purchasing

Once a Region has an approved budget, permission to spend approved amounts at the local level is assumed unless specific direction is given from the Regional Office that spending is inappropriate at that time. Submission of a Request to Spend form and/or invoice payment requests will be made through Microix by either a Finance Coordinator or Team Leader. All invoice payments will be approved by the Regional Office.

#### Procedures for expenditures greater than \$100

1. Spending for budgeted items is permitted once the Regional budget has been approved.
2. **Local Team** will complete a "Request to Spend" form for all expenditures greater than \$100.
3. **Local Team** will submit a "Request to Spend" form via email to either the Finance Coordinator or Team Leader.
4. The Finance Coordinator or Team Leader will create a requisition form in Microix.
5. If the requisition is created by the Finance Coordinator, it will require approval from the Team Leader, then be sent to the Regional Office for approval.
6. If the requisition is created in Microix by the Team Leader, it will be sent directly to the Regional Office for approval.
7. The **Regional Office** will review and approve or decline the requisition.
8. The **Regional Office** approval will generate an email to the requisition creator, either the Finance Coordinator or Team Leader.
9. Finance Coordinator or Team Leader notifies initial requester of approval to spend funds.
10. Funds are spent.
11. All invoices are submitted to either the Finance Coordinator or Team Leader, who will properly code and follow established check request procedure in Microix.

#### For expenditures less than \$100

- Spending for budgeted items is permitted once the Regional budget has been approved.
- Payment can be made with SOPA credit card or reimbursement request.

### Additional Resources

Reimbursement Form – *Coming Soon!*

[Centre Suite](#)

## Purchasing Authorization

The Regional Executive Director can grant spending authority to those deemed appropriate at the local level. Once a Region has an approved budget, permission to spend approved amounts at the local level is assumed unless specific direction is given from Regional Office that spending is inappropriate at that time

## Credit Card Usage

Credit cards are issued to all Regional staff and up to two cardholders per Local Team if authorized by the Regional Executive Director. Timely expense submission (in Centre Suite) is the responsibility of the cardholder. Regional staff will manage their individual activity in Centre Suite.

### Procedures for expenditures greater than \$100

1. Spending for budgeted items is permitted once the Regional budget has been approved.
2. **Local Team** will complete a “Request to Spend” form for all expenditures greater than \$100.
3. **Local Team** will submit a “Request to Spend” form via email to either the Finance Coordinator or Team Leader.
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7. The **Regional Office** will review and approve or decline the requisition.
8. The **Regional Office** approval will generate an email to the requisition creator, either the Finance Coordinator or Team Leader.
9. Finance Coordinator or Team Leader notifies initial requester of approval to spend funds.
10. Funds are spent.
11. All invoices are submitted to either the Finance Coordinator or Team Leader, who will properly code and follow established check request procedure in Microix.

### For expenditures less than \$100

- Spending for budgeted items is permitted once the Regional budget has been approved.
- Payment can be made with SOPA credit card or reimbursement request.

## Additional Resources

Reimbursement Form – *Coming Soon!*

[Centre Suite](#)

## Invoices

A Request to Spend form must be submitted and approved for all invoices and requests for payments. Invoices and requests for payments (reimbursement) will be submitted via Microix by either the Finance Coordinator or Team Leader.

### Procedures

**Local Team will;**

- Submit all invoices and requests for payments via Microix by either the Finance Coordinator or Team Leader.

#### **Regional Staff will;**

- Approve invoices that are deemed appropriate.

#### **Timeline**

- Invoice or request for payment submitted by close of business on Fridays.
- Regional Office will approve invoices that are deemed appropriate by Monday.
- Checks processed Tuesday morning by SOPA Finance staff.

### **Reimbursement**

Once a Region has an approved budget, permission to spend approved amounts at the local level is assumed unless specific direction is given from Regional Office that spending is inappropriate at that time. Submission of a request to spend form and/or invoice payment requests will be made through Microix by either a Finance Coordinator or Team Leader. All invoice payments will be approved by the Regional Office.

#### **Procedures for expenditures greater than \$100**

1. Spending for budgeted items is permitted once the Regional budget has been approved.
2. **Local Team** will complete a "Request to Spend" form for all expenditures greater than \$100.
3. **Local Team** will submit a "Request to Spend" form via email to either the Finance Coordinator or Team Leader.
4. The Finance Coordinator or Team Leader will create a requisition form in Microix.
5. If the requisition is created by the Finance Coordinator, it will require approval from the Team Leader, then be sent to the Regional Office for approval.
6. If the requisition is created in Microix by the Team Leader, it will be sent directly to the Regional Office for approval.
7. The **Regional Office** will review and approve or decline the requisition.
8. The **Regional Office** approval will generate an email to the requisition creator, either the Finance Coordinator or Team Leader.
9. Finance Coordinator or Team Leader notifies initial requester of approval to spend funds.
10. Funds are spent.
11. All invoice are submitted to either the Finance Coordinator or Team Leader, who will properly code and follow established check request procedure in Microix.

#### **For expenditures less than \$100**

- Spending for budgeted items is permitted once the Regional budget has been approved.
- Payment can be made with SOPA credit card or reimbursement request.

#### **Additional Resources**

Reimbursement Form – *Coming Soon!*

[Centre Suite](#)

## Reimbursement Process

All expenditures must follow the above Request to Spend process. Once approved, funds can be spent.

### Procedures

#### Local Team will;

- Receipts are submitted to either the Finance Coordinator or the Team Leader.
- Finance Coordinator or Team Leader will submit a check request via Microix for reimbursement.
- If an unapproved or unbudgeted expense is submitted, it will be held until the fiscal year end for review and may (or may not) be approved by the Regional Executive Director for reimbursement.

## Centralized Purchasing

Centralized purchasing options for statewide and Regional needs will be pursued as available. Local Teams will not be required to use centralized vendors if more competitive pricing can be secured with another vendor. This will take into consideration other incentives and benefits.

#### Regional Staff will;

- Share secured centralized purchasing options with Local Teams as they become available

## Depositing Funds

The current local process of using three depository banks will continue if within a Region.

#### Local Team will;

- Local Teams will be responsible for depositing cash or checks received at the local level.
- Make deposits within 48 hours of receiving cash or checks.
- Record deposit information in FADS by the Finance Coordinator or Team Leader.

#### Regional Administrative Manager will;

- Be responsible for depositing funds received at the Regional office.

#### State office will;

- Reconcile depository bank statements to assure proper Local Team and Regional coding.

## Annual Inventory Audit

An annual inventory count is required at year-end for the audit. This function is the responsibility of the Regional Sports Director, with support from Local Sports Leaders.

# LOCAL TEAM LEADERSHIP ROLES

## Local Team Leader

### **Position Overview Statement**

This position will provide guidance and coordination for the Local Team. They will “oversee” the coordination of SO activities within the Local Team ensuring our mission is met and policies/procedures are followed. This volunteer, with prior discussion with the Regional Executive Director, may add additional volunteers within the Local Team (above and beyond Sports, Community, and Fundraising Team Leaders) to assure activities are managed at an optimal success level.

### **Sports**

- In coordination with the Sports Team Leader, this position will assure Training Site and Competition Management is being met according to the Special Olympics Rules (i.e., 4:1 athlete/volunteer ratio, safety requirements, etc.).

### **Finance**

- Prepare and compile Local Team Budget as part of Regional Budget to include but not limited to; training, competition, FR, etc.
- Manage finance requests approval assuring expenses are within approved Regional budget

### **Fundraising**

- Assure Regional Development Director is notified of local fundraising events and activities
- Assure cash management procedures are followed at all fundraising events
- Assure all funds raised are entered into the FADS system

### **Community**

- Coordinate volunteer and athlete recruitment efforts with Community Team Leader and Regional office
- Assure all communications are up to date including social media and website pages

### **General Oversight**

- Meet with Local Leadership Team comprised of volunteer positions Sports Team Leader, Community Team Leader and Fundraising Team Leader, to assure all Local Team needs are met and coordinated, providing assistance as needed
- Provide assistance to Regional office staff as needed
- Coordination with Regional Administrative Manager for the management of Local Team Contracts, Insurance Certificates
- Assure Strategic Plan Goals for the Region are implemented within the Local Team. A Regional Plan will be developed and supported by all Local Team Leaders in conjunction with the Regional Executive Director.
- Attend regularly scheduled Regional Team Leadership Meetings

### **Reporting Requirements**

Provide regular updates to;

- Regional Executive Director
- Local Leadership Team

### **Time Commitment Per Week**

Time commitment will vary based on local teams' activity levels throughout the year. Consider an average to be 7 to 10 hours per week.

## Fundraising Team Leader

## **Position Overview Statement**

Local Fundraising Team Leaders will work in partnership with the Regional Development Director to coordinate and execute local and Regional fundraising activities and events. The Fundraising Team Leader will also work collaboratively with their counterparts from throughout the Region, and will contribute to the development of a Regional Fundraising Plan.

The Fundraising Team Leader may select an assistant, or build a team of volunteers to help with these responsibilities.

## **Position Responsibilities**

### **Local and Regional Fundraising Events**

- Notify the Regional Development Director prior to all new, reoccurring or proposed fundraising events, including third-party events
- Work with the Development Director and local team to plan and execute existing and new fundraising activities occurring at the local level.
- Manage volunteers supporting fundraising activities and events.
- Work with the Development Director to create an annual fundraising budget (as a part of the regional budget) to be reviewed and approved.
- Establish a Local Fundraising Team that can assist with the implementation of local fundraising activities and events, and serve as the team's Leader

### **Cash Management at Fundraising Events**

- Designate a minimum of two volunteers (or one volunteer and a Regional staff member) to accept cash or checks at events
- Designate two volunteers to complete the Cash/Check Log by filling in the cash and checks received
- Working with Local Team Leader to ensure all cash, checks, and credit card slips collected at an event are deposited, no later than 48 hours following an event. Per financial procedures, it is preferable if deposits are made within 24 hours following an event
- Working with Local Team Leader to ensure all funds raised are properly entered into the FADS system

### **General Fundraising Oversight**

- Attend regular Regional Fundraising Leadership Team Meetings
- Maintain a list of donors and sponsors supporting fundraising activities.
- Work with the Development Director to ensure all major donors and sponsors are formally recognized on a regular basis.
- Provide the Regional Development Director with support, as needed, to prepare grant applications to local and regional grant makers, including foundations, corporations, and local government.

## **Reporting Requirements**

Provides regular updates to:

- Development Director
- Fundraising Leadership Team
- Team Leader



## **Time Commitment Per Week**

5 – 10 hours per week with an increase in hours leading up to a fundraising activity.

## **Sports Team Leader**

### **Position Overview Statement**

The Sports Team Leader will be responsible to see that required functions in their area are completed and serve as the communication link between the Region and the Local Team. The Sports Team Leader represents the Local Team at the Regional planning level.

This position will work with the Regional Sports Director and the other local Sports Team Leaders within the Region to develop and execute the Regional Sports Plan and goals. They will be part of a collaborative strategic growth effort of sports activities that supports the recruitment of new SOPA eligible athletes, volunteers and community partners. They will be responsible for the oversight of athlete and coach training, competitions and uniform and equipment management. The Sports Team Leader may select an assistant, or build a team of volunteers to help with these responsibilities.

### **Training**

#### **Athlete Training Site Expectations**

- Be responsible for meeting minimum Quality Standards of each training site
- Identify facilities for trainings, and as needed, process contracts
- Submit budget for equipment, uniform, facility needs
- Notify Regional Administrative Manager of any changes in training schedule to adjust the “event” in VSys
- Assure all Head Coaches have multiple copies of Accident/Incident Report form

### **New Training Site or New Sport**

- Discuss with local team volunteers and the Regional Sports Director the establishment of new training sites as needed to geographically serve additional athletes or to add a new sport
- Assess Local Team needs for new training sites or sports
- Review all proposed new training sites to assure the need, interest and sustainability

### **Coach Training**

- Coordinate with Regional Administrative Manager to work with new coaches to register for upcoming Training Schools and ensure that all new coaches have completed their required trainings

### **Competitions**

#### **Intra-Local Team or Intra Regional Play**

- Coordination of opportunities (such as scrimmages or competitions of a small scale) with other training sites in and outside your Local Team. One potential outcome is “league play” type coordination among Local Teams within a Region
- Contact Regional Sports Director for coordination across the Local Team with potential “league play” schedule
- Communicate with Head Coaches and Regional Sports Director for new competition requests to assure Region-wide coordination

### **Out of Region Competition Opportunities**

- Include planned participation in competitions in budget. If not included in approved budget,

- Sports Team Leader must get approval from Regional Executive Director in advance of registration
- Share anticipated event participation calendar with Regional Sport Director prior to each season

### **Out of State Sports Opportunities**

- Confirm all SOPA policies are adhered to; including but not limited to registration, volunteer background checks, and valid athlete/unified partner medicals, coach to athlete ratio, transportation and housing policies. If proposed participation is not included in annual budget, Sports Team Leader may request approval from Regional Executive Director

### **Allocations for State Level Events**

- Send Local Team allocation request to the Regional Sports Director

### **Equipment/Uniforms**

- Ensure proper care/inventory of equipment
- Submit uniform/coach needs by deadline
- Provide budget to Local Team Leader

### **SOPA Sports Camp**

- Complete a Letter of Intent (LOI), requesting the number of athletes and coaches they want to send to Camp and submit to the Regional Office

### **Reporting Requirements**

Provide regular updates to;

- Regional Sports Director
- Local Team Leader
- Sports Leadership Team

### **Time Commitment Per Week**

This will be an ebb and flow schedule. Based on number of sports and proximity to competition hours will vary. 5-10 hours a week.

## **Community Team Leader**

### **Position Overview Statement**

The Community Team Leader will be responsible to see that required functions in their area are completed and serve as the communication link between the Region and the Local Team. The Community Team Leader represents the Local Team at the Regional planning level.

In conjunction with the Regional Community Director, the Community Team Leader seeks to connect to community resources, groups, service organizations and others throughout their local area to increase involvement and awareness of Special Olympics. The Community Team Leader works to grow the Local Team primarily through collaboration with the Regional office to support outreach to volunteers and athletes. This position also works to maintain communications, and build partnerships with families, volunteers, and other mutually beneficial resources in the community. The Community Team Leader may select an assistant, or build a team of volunteers to help with these responsibilities.

### **Responsibilities Include:**

#### **Athletes and Volunteers**

- Promote athlete and volunteer opportunities within their community
- Connect the Regional staff to organizations within their community that are potential sources of athletes and volunteers. In turn, the Local Team and the Region will collaborate to work with agencies and organizations serving potential athletes for local and region-wide recruitment partnerships
- Forward interested athlete contact information to the Regional Office for processing as outlined in the Regional Playbook
- Forward interested volunteer contact information to the Regional Office for processing and onboarding of new volunteers
- Coordinate Athlete Leadership needs with the Region

### **Events/Activities**

- Coordinate local family activities, communications, recognition, social activities and events
- Collect all event details to be shared with Regional Administrative Manager to be entered into VSys as an Event
- Details will include event information and specific volunteer needs

### **Budget Preparation**

- Community Team Leaders will submit the proposed budget for their respective area of activity to the Local Team Leader

### **Communications/Awareness**

- Provide Program Communication on all program activities, including local training and competitions, and other local events.
- Maintain local communication flow with regional sources for up-to-date info on local training and competition, local fundraisers and other local activities (for example, ensuring the regional website, social media, flyers are up to date)
- Community Outreach for region needs, where resources are located in the local program area
- Identify existing personal contacts and partnerships with the Regional Office so the Regional Office can expand those opportunities
- Help to identify potential partners within their local community
- Attend Regional Community Team Leader meetings representing the Local Team

### **Reporting Requirements**

Provide regular updates to;

- Local Team Leader
- Regional Community Director
- Community Leadership Team (if a team of volunteers has been created)
- Other\* (such as SOPA coordinators for initiatives such as PR, Healthy Communities and Young Athletes)

### **Time Commitment Per Week**

Time commitment may vary depending on prioritizing the work throughout the year. Generally the position requires 5 - 7 hours a week. An assistant and additional volunteers should be recruited to handle specific projects (such as conducting Young Athlete sessions). In the beginning, the position may require additional hours until teams are established and priorities set.

Attend monthly meeting with Regional Staff and other Community Team Leaders from the Region.

## **Finance Coordinator**

*Coming Soon!*

# GLOSSARY

**1:1** - Individual responsible for an athlete in a one on one capacity at an event

**1:4** - required ratio of Class A volunteers to athletes during all activities

**AC** - Assistant Coach

**AHOD** - Assistant Head of Delegation

**AL U.** - Athlete Leadership University

**AR** - Athlete Representative

**AthC** - Athlete as Coach

**Athlete Application for Participation** = Athlete Medical

**Bulk Email** – The VSys database has the ability to send bulk emails to email addresses saved in the VSys database. Bulk emails will be generated and managed primarily by state and Regional staff. Email recipient lists can be defined by group such as Local Team or sport, volunteer role such as head coach and other perimeters.

## Procedures

- **Local Teams will;**
  - Request Regional Administrative Manager send bulk email as needed
  - Requests will be reviewed on a case by case basis
  
- **Regional Staff will;**
  - Manage, create and send bulk emails
  - Bulk emails can be created by the Regional staff on behalf of a team

**CCT** - Concussion Training

**Class A Volunteers** - A Class A volunteer is someone who is or may be in immediate contact with athletes. Class A volunteers are required to have background checks completed before assuming their role. Class A volunteers will also be required to complete trainings.

**Class B Volunteers** - A Class B volunteer is someone with casual or limited contact with athletes, such as Event Volunteers.

**Classy** - SOPA's online fundraising registration software

**CSOA** - Coaching Special Olympics Athletes - Basic educational course for coaches

**DV** - Delegation Volunteer

**GLVPR**-Greater Lehigh Valley Pocono Region

**GM** - Global Messenger

**GMS-Games Management Software**-The Games Management Software (GMS) is a tool used to gather and organize athlete registration information for competition events, divisions and to track results. GMS is used primarily by administrators for State, Sectional and Regional events. GMS can be used by Local Teams to manage local events such as Scrimmages and Invitationals. Training is provided to Teams by state office staff.

**Regional Office**

- Used to create Regional competition events
- Provide training for each Team's Games Organizing Committee (GOC) for future use and management

**GO** - General Orientation

**GOC** - Games Organizing Committee

**H&F Coordinator** - Health and Fitness Coordinator

**HC** - Head Coach

**HOD** - Head of Delegation

**ID** - Intellectual Disability

**IDMP** – Integrated Digital Marking Program

**IUS** - Interscholastic Unified Sports, high school sports teams inclusive of students with and without intellectual disabilities, train and compete similar to a varsity sport within their school.

**IYL** - Inclusive Youth Leadership - co-governed leadership, students with and without intellectual disabilities.

**LETR-Law Enforcement Torch Run** –

The Law Enforcement Torch Run (LETR) for Special Olympics Pennsylvania unites officers from law enforcement agencies and corrections departments across the state in a year-round effort to raise funds and awareness for the Special Olympics movement. The Torch Run efforts to raise funds include: collecting corporate sponsorships, coordinating third party events, and hosting unique fundraising events such the Polar Plunge, Beaver Stadium Run, Torch Runs and other fundraising events. The Pennsylvania Law Enforcement Torch Run has the support of multiple Local Municipal Police Departments, the Office of the Attorney General, PA Chiefs of Police Association, the Fraternal Order of Police, the PA Department of Corrections, the PA Sheriffs Association, the Pennsylvania State Police, the PA National Guard Counterdrug Program, and the Constables Association.

**Local Program/Team** - A designation area where Special Olympics Pennsylvania is administered. Most "Local Programs/Teams" are county boundary but some are multiple counties and a few are cities.

**MATP** - Motor Activities Program

**Microix** - SOPA's budget and check request software

**NGB** - National Governing Body

**Online Portal-**

For Volunteers: SOPA's Online Portal is a self-management tool to access Class A and Class B volunteer records in the Vsys One database. The Online Portal is accessible via a web browser and does not require administrative rights to access. As part of the process to become a new SOPA volunteer and submitting the volunteer registration form, volunteers will create a profile and log in credentials. Within the Online Portal, volunteers can update contact information, complete and sign-up for trainings and sign-up to volunteer at events.

For Athletes: This site is currently used for athletes to register for Athlete Leadership University and will be expanding for additional athlete use.

**PB** - Protective Behaviors

**Raiser's Edge** - SOPA's Donor software

**RED** - Regional Executive Director

**Region** - A cluster of teams who form a Region with a dedicated staff to support activities.

**Registration Designation** – Athletes and Volunteers will register with a geographic (Local Team) location but their primary placement for sectional and State competitions will be under the Regional banner.

**SOI** - Special Olympics International

**SONA** - Special Olympics North America

**SOPA** - Special Olympics Pennsylvania

**STA Form** - Sports Training Application, used to submit practicum and continuing education hours for sport coach certification

**State Level Events:**

**EFS** - Eastern Fall Sectionals

**CFS** - Central Fall Sectionals

**WFS** - Western Fall Sectionals

**FF** - Fall Festival, Fall Fest

**EBS** - Eastern Bowling Sectionals

**CBS** - Central Bowling Sectionals

**WBS** - Western Bowling Sectionals

**WG** - Winter Games

**IWG** - Indoor Winter Games

**ESS** - Eastern Spring Sectionals

**CSS** - Central Spring Sectionals

**WSS** - Western Spring Sectionals

**SG** - Summer Games

**Team** - The term now used for a “Local Program” within a Region.

**Term Serv - Terminal Service** - Terminal Service is a remote desktop connection to Special Olympics Pennsylvania (SOPA) servers and databases including: Vsys One, GMS 7, Microix, Drillpoint and FADs. Some database tools require additional log in credentials and training. If applicable, the user will be provided the necessary materials. Volunteers who are selected as Local Team Management Team Members can be granted access to Terminal Service upon completing their background check and receiving a status of Green: Unrestricted.

**UCS** - Unified Champion School

**UP** - Unified Partner

**USA Games** = National Games for programs within United States of America, Team PA delegation

**UYC** - Unified Youth Committee - organized group of students, meet regularly with co-governance structure, plan Whole School Engagement activities

#### **VSys One:**

VSys is the administrative tool for SOPA’s volunteer and athlete database. VSys is used primarily by administrators at the local, Regional and state level to manage the records of athletes and volunteers. In order to access the VSys database, users must also be granted access to SOPA Terminal Service, the software vehicle to access VSys. Access rights are determined by SOPA and Local Team position and status.

#### **VSys Anywhere:**

VSys Anywhere is the web enabled access tool to the VSys database. VSys Anywhere is accessible through a web browser such as Internet Explorer, Google Chrome, Edge, Safari or Firefox and does not require access through the remote desktop connection (Terminal Service). VSys Anywhere includes a limited set of features compared to VSys. This tool can be used on-the-go and can be used on a smartphone or other mobile device when connected to the internet. Frequently used actions include:

- Search Athlete/Volunteer records
- Edit Athlete/volunteer records
- Upload athlete medicals
- View upcoming expiring items
  - Trainings, medical, background checks
- Run reports

**VSys Anywhere, VSys web enabled software will allow access to records.** A tiered level of access has been created based on the need of the Regional and local level. Role/Access levels include;

- **SOPA Staff** – Access to all records in the state
- **Regional Staff** – Access to all records in the Region.



- **Regional Office Volunteers** – Potentially volunteer(s) who does admin assistance at the Regional office. Similarly, access to all records in the Region.
- **Regional Committee Members** – Depending on the committee type, access to all records in the Region. Access locally if it is decided a local committee needs access.
- **Local Volunteers** – Access to only records in their Local Team.
- **Coaches** – Only access to the athletes and volunteers registered with their training site.

#### **Online Portal:**

##### **For Volunteers**

SOPA's Online Portal is a self-management tool to access Class A and Class B volunteer records in the VSys One database. The Online Portal is accessible via a web browser and does not require administrative rights to access. As part of the process to become a new SOPA volunteer and submitting the volunteer registration form, volunteers will create a profile and log in credentials. Within the Online Portal, volunteers can update contact information, complete and sign-up for training and sign-up to volunteer at events.

##### **For Athletes**

This site is currently used for athletes to register for Athlete Leadership University and will be expanding for additional athlete use to include training site registration.

**World Summer Games** = WSG, PA will be a part of SO USA delegation, to attend event

**WSE** - Whole School Engagement - campaign or activity that raises awareness for entire school community

**YA or YAP** - Young Athlete, Young Athlete Program

**YAC** - Young Athlete Chaperone