



**Special  
Olympics  
Michigan**



THE OFFICIAL

# PROGRAM GUIDE

2024 EDITION



## **State Office**

### US Mail

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Mt. Pleasant, MI 48859

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Special Olympics Michigan  
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- Unified Programs:  
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# Section 1

## Policies and Procedures

- Mission and Vision
- Area Director and Staff List
- Regions and Area Programs/Area Map
- Board of Directors and Emerging Leaders
- Policies and Procedures

## **Mission Statement**

The mission of Special Olympics is to provide year-round sports training and athletic competition in a variety of Olympic-type sports for all children and adults with intellectual disabilities. Athletes are given continuing opportunities to develop physical fitness and athletic skill, demonstrate courage, experience joy and participate in a sharing of gifts, skills, and friendship with their families, other Special Olympics athletes, and the community.

## **Vision Statement**

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

## **Goal of Special Olympics**

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

## **Founding Principles of Special Olympics**

The principles on which Special Olympics was founded, and which must continue to guide the operation and expansion of the global Special Olympics movement, include the following:

- People with intellectual disabilities can, with proper instruction and encouragement, enjoy, learn and benefit from participation in individual and team sports. Individual and team sports are adapted as necessary to meet the needs of those with special mental and physical limitations.
- Consistent training under the guidance of qualified coaches, with emphasis on physical conditioning, is essential to the development of sports skills. Competition among those of equal abilities is the most appropriate means of testing these skills, measuring progress, and providing incentives for personal growth.
- Through sports training and competition, people with intellectual disabilities benefit physically, mentally, socially, and spiritually; families are strengthened, and the community at large, both through participation and observation, is united with people with intellectual disabilities in an environment of equality, respect, and acceptance.
- Every person with intellectual disabilities, who meets the eligibility requirements, should have the opportunity to participate in and benefit from the sports training and athletic competition programs offered by Special Olympics.
- Special Olympics must transcend all boundaries of race, gender, religion, national origin, geography, and political philosophy. Along with offering sports training and competition opportunities to all eligible persons with intellectual disabilities in accordance with uniform worldwide standards.
- Special Olympics celebrates and strives to promote the spirit of sportsmanship and a love of participation in sports for its own sake. To that end, Special Olympics aims to provide every athlete with an opportunity to participate in training and competition events which challenge that athlete to his or her fullest potential, regardless of the athlete's level of

ability. Special Olympics therefore requires that Special Olympics games and tournaments offer sports and events, which are appropriate for athletes of all levels of ability.

- Special Olympics encourages sports training and competition opportunities at the area and community level (including schools) as a means of reaching the greatest number of eligible athletes.

### **Vision Statement**

Sport will open hearts and minds towards people with intellectual disabilities and create inclusive communities throughout Michigan.

### **Diversity, Equality, and Inclusion**

Diversity, Equity, and Inclusion are at the heart of all that we do at Special Olympics Michigan as we come together to promote dignity and unity to create a world where everyone belongs. We will value and celebrate our differences, understanding that diversity and inclusion create an organization that delivers better results, with love and compassion, for the athletes and communities we serve.

### **Special Olympics Michigan Program Structure**

The State of Michigan is divided into geographic regions and local program areas to help facilitate registration, competition and communication.

Each Local area offers official Special Olympics sports training and competition opportunities for athletes (individuals with intellectual disabilities) and Special Olympics Unified Sports® partners (individuals without intellectual disabilities).

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

### **Athletes**

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

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

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

athletes are encouraged to participate in Special Olympics as volunteers, coaches, and/or Unified Sports partners.

## **Volunteers**

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

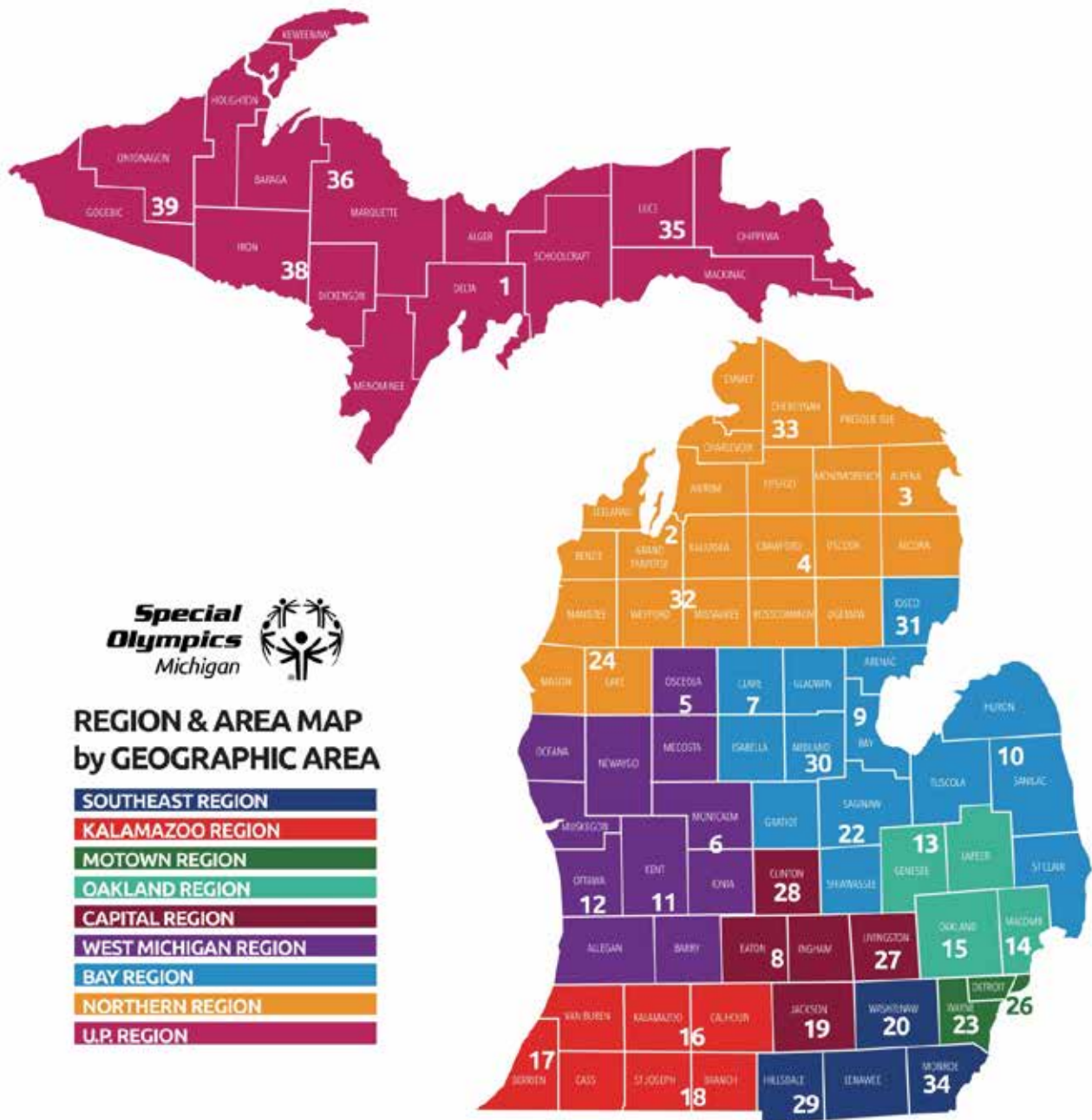
## **Special Olympics Professional Structure**

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

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

## **Description of Area Structure**

There are currently 36 local area programs grouped in 9 geographic regions. Each region is assigned a Field Service Staff person.



### Area Directors Policy

The President/CEO shall have the authority and responsibility to appoint Regional Managers and Area Directors for Special Olympics Michigan. The Area Director is the individual who has the overall managerial responsibility for the program within a designated geographic area.

As the appointed agent of Special Olympics Michigan, his or her primary function is to guide and direct the program throughout the area in accordance with the standard procedures and policies set forth by Special Olympics Michigan and Special Olympics, Inc.

He or she shall communicate regularly with the designated state staff on programs, planning, and problems affecting the area program. The Area Director should refer controversial issues immediately to Special Olympics Michigan.

**Staff**

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**SOMI Board of Directors**

For a list of the Board of Directors, please visit the SOMI website at [www.somi.org](http://www.somi.org) and click on “About Us” and then “Board of Directors”.

The affairs of Special Olympics Michigan are governed by a Board of Directors, which has ultimate legal and fiscal responsibility to Special Olympics, Inc., for the conduct of Special Olympics Michigan. The day- to-day operations of Special Olympics Michigan are managed by the President & CEO who is appointed by the Board of Directors and Special Olympics Michigan Staff.

**Young Professionals Activation Committee (YPAC)**

In recognition of the need to recruit more young professionals and in alignment with the Strategic Plan, the Board of Directors authorized the creation of a Young Professionals Activation Committee.

YPAC Mission

The Special Olympics Young Professionals Activation Committee is charged with developing a talented pool of passionate, committed, potential successors for the Board of Directors of Special Olympics Michigan (SOMI).

YPAC Vision

As a group composed of individuals from various disciplines and backgrounds the YPAC will utilize the professional backgrounds and talents of its membership to enhance the awareness and sustainability of SOMI’s program offerings.

YPAC Strategic Areas of Focus

- Professional Development - Members have opportunities for networking with other young professionals, attend speaker series, and more to enhance their own professional career.
- Volunteerism - Members serve as volunteers for events to be able to give back to their community, and to be a part of the Special Olympics mission in action.

- Fundraising - Members are tasked with creating a signature event that they YPAC hosts as a fundraiser for Special Olympics Michigan. They also participate in fundraisers such as Polar Plunges, the gala, and more!

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### **Coach and Volunteer Registration Policy**

Each Class A volunteer/coach who participates in any Special Olympics activity, shall have on file with the designated local coordinator or area director, an approved application for participation which includes: a Volunteer Management System (VMS) profile, Protective Behaviors, Volunteer Orientation, Concussion training and Communicable Disease Waiver forms. These forms & trainings are to be completed on our online Volunteer Management System (VMS). Forms/trainings will be valid for three years from the date they are signed.

### **Volunteer and Staff Dating Policy**

Special Olympics prohibits any Special Olympics staff member or Class A volunteer (excluding spouses of athletes and athletes who are volunteers) from dating or having a sexual relationship with any Special Olympics athlete. In the event that Special Olympics Michigan learns of any dating or sexual relationship, the organization immediately shall require either: i) that the staff member or volunteer end his or her association with Special Olympics; or ii) that the association between the staff member or volunteer and Special Olympics will be terminated. If an athlete volunteer is in a role of authority such as a chaperone or coach, this policy will prohibit the athlete volunteer from working directly with a Special Olympics athlete that they are dating or having a sexual relationship with.

### **Reporting Responsibility**

It is the responsibility of all directors, officers and employees to comply with the Code of Conduct and to report violations or suspected violations in accordance with the Whistleblower Policy.

### **Acting in Good Faith**

Anyone filing a complaint concerning a violation or suspected violation of the Code must be acting in good faith and have reasonable grounds for believing the information disclosed indicates a violation of the Code. Any allegation that proves not to be substantiated and which proves to have been made maliciously or knowingly to be false will be viewed as a serious disciplinary offense.

### **Confidentiality**

Violations or suspected violations may be submitted on a confidential basis by the complainant or may be submitted anonymously. Reports of violations or suspected violations will be kept confidential to the extent possible, consistent with the need to conduct an adequate investigation.

### **Handling of Reported Violations**

The Compliance Officer will notify the sender and acknowledge receipt of the reported violation or suspected violation within five business days. All reports will be promptly investigated, and appropriate corrective action will be taken if warranted by the investigation.

### **Athletes with Criminal Records or a History of Violent Abusive Behaviors Policy**

Special Olympics Michigan is an athlete-centered movement that welcomes athletes with intellectual disabilities to participate in sports training and competition. The health and safety of all Special Olympics participants is of paramount importance to Special Olympics Michigan. Participants should feel that every Special Olympic event is a safe and positive experience and should not be fearful of other athletes, coaches, or volunteers.

Because of our inclusive philosophy, if an athlete is found to have been convicted of violent crimes or who engaged in violent, abusive, or disruptive behavior, Special Olympics Michigan will set procedures to provide a fair and even-handed approach, so that all athletes are treated consistently under similar circumstances.

Upon notice that an athlete is on the sex offender list, published or unpublished, regardless of the offense tier, the athlete is notified that he/she cannot participate in the program. An athlete can appeal the court decision and bring the documentation back to SOMI for reinstatement on a case-by-case basis.

### **Athlete Registration Policy**

Each athlete, prior to participation in any Special Olympics activity, shall have on file with the designated local coordinator or Area Director a valid Application for Participation. A copy of the form must be sent to the state office by the Area Director. This form must be filled out properly, according to SOMI registration procedures in the SOMI Program Guide for an athlete to participate in any phase of Special Olympics training, competition, or event. Forms will be unacceptable if they cannot be read. A form will be valid for three years from the date the form was signed by approved medical personnel.

### **Blood Borne Contagious Infection Carriers Policy**

Whereas: Special Olympics, Inc. has issued the following rules regarding Blood Borne Contagious Infection Carriers:

It is not necessary, desirable, nor justifiable to discriminate against any individual having ordinary behavior on the basis that they are a carrier of a blood-borne contagious infection.

Under casual social interaction, carriers of a blood-borne contagious infection pose no danger to those around them; therefore it is neither necessary nor justifiable to exclude them from participation in Special Olympics activities, nor isolate them from other participants in dormitories or sports competition.

Participants may have a blood-borne contagious infection that is new and unknown; therefore, universal precautions should be used for every exposure to anyone's blood, saliva, or other bodily fluid;

Whereas: Special Olympics Michigan has recognized that the Center for Disease Control recommends that blood and bodily fluid precautions be consistently used for all persons regardless of their blood-borne infection status referred to as "Universal Blood and Body Fluid Precautions" or "Universal Precautions;" and

Whereas: Special Olympics Michigan is responsible for developing policies, guidelines, regulations, educational materials, and procedures for the health and safety of all athletes, volunteers, and staff;

Therefore: The following guidelines have been established regarding blood-borne contagious infection carriers participating in the Special Olympics Michigan program:

- When an athlete is a blood-borne contagious infection carrier, specific reference will be indicated on the Health Appraisal Form, which is required for each participating athlete.
- All identified carriers will be assigned a personal chaperone unless behavior warrants a less restrictive ratio of up to 4:1 athlete-to-coach ratio. Regardless of ratio, the athlete's chaperone will:
  - Monitor and restrict the athlete's interpersonal activities to those conducive to good hygiene.
  - Encourage good hygiene while the athlete is participating in team and individual sports.
  - Supervise sleeping quarters and eat meals with the carrier athlete to encourage proper eating habits.
  - Report immediately to the medical staff any incident observed by the chaperone where the carrier athlete breaks the skin of another person by scratching, biting, etc.

Note: At no time would an identified blood-borne contagious infection carrier share a bed with another person.

When questions arise contact the medical director, and, if needed, the medical advisory council to review information as to a specific case.

### **Bodily Fluid Handling Policy**

In the interest of the health and safety of the athletes, volunteers, and staff, Special Olympics Michigan has established universal precaution procedures for handling injuries and other situations involving the exposure and possible transfer of bodily fluids.

### **Housing Policy**

- Gender - Athletes and volunteers may not share a room with an athlete or volunteer of the opposite gender with the exception of a parent/guardian rooming with a child.

- Housing in a facility that has multiple private rooms in addition to living space (such as a condominium or dormitory) all genders may be assigned to one condominium, if necessary. Private rooms may not be shared by individuals of the opposite gender. Chaperones are required to be housed in the condominium and the coach / chaperone to athlete ratio (as outlined in the supervision section of the policy) must be maintained.
- Use of barracks or other facilities (such as a gym) where a large number of individuals are assigned to one room athletes and volunteers must be separated as much as possible by gender.
- Supervision – The coach/chaperone to athlete ratio of at least one properly registered coach/ chaperone to every four athletes must be maintained during overnight events. Proper supervision cannot be maintained without having a coach/chaperone present in the room at all times. All coaches/chaperones must be screened in accordance with the Special Olympics U.S. Volunteer Screening Policy. A coach/chaperone should be in each room.
- Area Directors should notify parents of the rooming situation. Area Directors must use discretion when putting athletes in rooms and consider age, gender, team, etc.
- One-on-one consists of one athlete to one chaperone. This will include special housing for the one-on-one athlete and chaperone, based on athlete need on a case by case basis.
- Young Athletes – Young Athletes events that involve overnight activities require increased supervision; therefore, Young Athlete participants must be accompanied by a properly registered and screened parent, guardian or an individual designated by a parent or guardian for all overnight activities. Rooming assignments for Young Athletes should be separate from the remainder of the delegation.
- Notification – Special Olympics Michigan will secure signatures from parents/guardians or athletes who are legally responsible for themselves, acknowledging the possibility for overnight activities and the policy for housing assignments on the athlete registration form.

### **Severe Weather Policy**

In the case of extreme weather, the decision to cancel a Special Olympics event will be determined cooperatively by the Tournament Director and Special Olympics Michigan. For Winter Sports if the temperature reaches 30 below wind chill we will cancel the event.

If they decide to conduct the event, Area Directors are responsible for using their best judgment in deciding whether or not their area attends the event. Refunds will not be given if an area is unable to attend.

If a district event is canceled, advancement will be handled in the following manner:

- Area quotas for advancement will be 25 percent of the number of teams that have registered for the tournament, excluding byes. Teams that had previously been given a bye will advance also.
- If an Area Director chooses, a registered area will be guaranteed that one team will advance to the State Senior Basketball & Skills Finals.

- If an area's quota does not exactly equal 25 percent, the determination of rounding the number of teams advancing will be based on the space available at the state tournament.

When SOMI cancels a tournament due to extreme weather, a refund will be given only after all expenses are covered, if the area is charged for the tournament.

### **Policy on Minimum Age for Coaches/Chaperones**

Persons chaperoning athletes to state tournaments and Games must be at least 18 years old at the time they are chaperoning the athletes to the event. Coaches may be under the age of 18, but a responsible person over the age of 18 must be in attendance at all practices and events.

### **Service Animal and Assistance Animal Policy**

Special Olympics Michigan supports the use of Service Animals in accordance with regulations outlined in the Americans with Disabilities Act (ADA) and the laws of the State of Michigan.

The ADA defines a service animal as any guide dog, signal dog, or other animal individually trained to provide assistance to any individual with a disability. Service animals perform some of the functions and tasks that the individual with a disability cannot perform for him or herself.

There are service animals that assist persons with many kinds of disabilities in their day-to-day activities, some examples include:

- Alerting persons with hearing impairments to sounds.
- Pulling wheelchairs or carrying and picking up things for persons with mobility impairments.
- Assisting persons with mobility impairments with balance.

### **Service Animal and Assistance Animal Guidelines**

Special Olympics Michigan will permit service animals to accompany people with disabilities in all areas where members of the public are allowed to go in accordance with regulations outlined in the Americans with Disabilities Act (ADA) and the laws of the State of Michigan.

There are guidelines on the public appropriateness, behavior, and training expected of an animal working in public places. Special Olympics Michigan is NOT responsible for the care or supervision of animals.

#### **Public Appropriateness**

- Animal is clean and does not have an offensive odor.
- Animal will adhere to directions to urinate and defecate in designated appropriate locations.

#### **Behavior**

- Animal does not solicit attention, visit or annoy any member of the general public.
- Animal does not disrupt the normal course of business.



- Animal does not vocalize unnecessarily, i.e. barking, growling or whining.
- Animal does not show aggression towards people or other animals.
- Animal does not solicit or steal food or other items from the general public.

### Training

- Animal is specifically trained to perform three (3) or more tasks to mitigate aspects of the person's disability.
- Animal works calmly and quietly on harness, leash or other tether.
- Animal is able to perform its tasks in public.
- Animal must be able to lie quietly beside the handler without blocking aisles, doorways, etc.
- Animal is trained to urinate and defecate on command.
- Animal stays within 24" of its handler at all times unless the nature of the trained task requires it to be working at a greater distance.

The Area Director or supervising program person, for which the athlete seeks to participate, requires answers to the following questions. If the animal is deemed a service animal, then the Area Director must notify the State Office at the time of registration.

1. Is the animal required because of a disability?
2. What work or task has the animal been trained to perform?
3. What is the plan that will be put in place by the owner or athlete for care of the animal while the athlete participates in the event? Who will chaperone the animal?

A service animal is NOT a pet. Pets whose sole function is to provide comfort or emotional support do NOT qualify as service animals.

When questions arise involving emotional support animals, Special Olympics Michigan will abide by the facility rules in regard to assistance animals, (i.e. schools, hotels, residence halls).

## **Section 2**

# Athlete Participation

- Eligibility
- Athlete Code of Conduct
- Athlete Appeal Process
- Registration
- Athlete Leadership

## **Eligibility for Participation in Special Olympics**

Special Olympics training and competition is open to every person with intellectual disabilities who is at least eight years of age and who registers to participate in Special Olympics as required by the Special Olympics General Rules.

There is no maximum age limitation for participation in Special Olympics. Children who are at least six years old may participate in age- appropriate Special Olympics training programs offered by SOMI or in specific (and age- appropriate) cultural or social activities offered during the course of a Special Olympics event. Such children may be recognized for their participation, or through other types of recognition approved by SOI, which are not associated with participation in Special Olympics competition. However, no child may participate in a Special Olympics competition (or be awarded medals or ribbons associated with competition) before their eighth birthday.

The Young Athlete program is for 2-7 year olds.

Participation in Special Olympics is open to all persons with intellectual disabilities regardless of the level or degree of that person's disability, and whether or not that person also has other mental or physical disabilities.

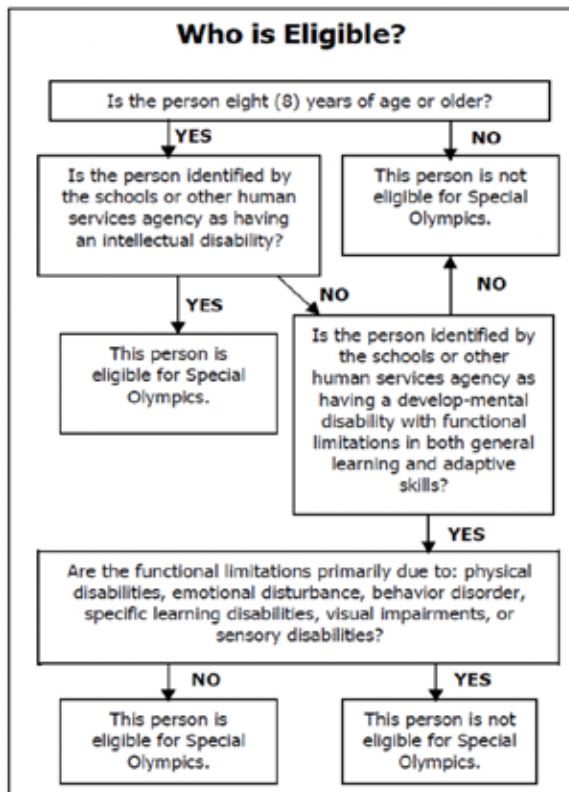
A person is considered to have intellectual disabilities (for the purposes of determining eligibility for Special Olympics participation) if that person meets any one of the following requirements:

- The person has been identified by an agency or professional as having intellectual disabilities as determined by their localities;
- The person has a cognitive delay, as determined by standardized measures such as intelligent quotient or "IQ" testing or other measures, which are generally accepted within the professional community in the U.S. as being a reliable measurement of the existence of a cognitive delay.
- The person has a closely related developmental disability. A "closely-related developmental disability" means having functional limitations in both general learning (such as IQ) and in adaptive skills (such as in recreation, work, independent living, self-direction, or self-care).

However, persons whose functional limitations are based solely on a physical, behavioral, or emotional disability, or a specific learning or sensory disability, are not eligible to participate as Special Olympics athletes.

One of Special Olympics' founding principles is that "Special Olympics must transcend all boundaries of race, gender, religion, national origin, geography, and political philosophy, and offer sports training and competition opportunities to all eligible persons with in accordance with uniform worldwide standards."

A person who does not meet the eligibility standards may participate as a Unified Partner during competition.



### Athlete Enrollment

Persons interested in becoming a Special Olympics Michigan athlete can begin the enrollment process by filling out the athlete interest form on the Become an Athlete page at SOMI.org. Once submitted, the form is sent to SOMI Field Service staff who then forward the information on to the local area program at the area’s official email address.

### Young Athletes™

Young Athletes™ is an early childhood sports play program for children ages 2-7 with intellectual disabilities and their peers, which includes games, songs and other fun activities. The benefits to this program have been proven worldwide. First and foremost, these activities help children improve physically, cognitively and socially. This program also raises awareness of the Special Olympics program and serves as an introduction to the resources and support available within Special Olympics Michigan.

This program is designed to address two specific levels of play. Level 1 includes physical activities focused on developing fundamental motor tracking and eye-hand coordination.

Level 2 concentrates on the application of these physical activities through a sports skills activity program and developing skills consistent with Special Olympics sports play. The activities will consist of foundational skills, walking & running, balance & jumping, trapping & catching, throwing, striking, kicking and advanced skills.

## **Athlete Code of Conduct**

The Athlete Code of Conduct is outlined as follows. This Code of Conduct is available from the state office as a form for athletes to sign.

Each athlete signs the Code of Conduct along with a parent/guardian or witness. It is required that athletes are instructed by their coaches before each season on the code of conduct and the coach has them sign the form. Coaches should turn all forms into the Area Director after each season.

Special Olympics Michigan adheres to the highest ideals of sport in the tradition of the Olympic movement. The Special Olympics Oath, "Let me win. But if I cannot win, let me be brave in the attempt," represents the ideal of competition that every Special Olympics athlete tries to achieve.

I understand that my participation in Special Olympics is a call to excellence for me to train and compete in ways that bring honor to me, my family and to Special Olympics. I pledge to uphold the spirit of this Code of Conduct, which is only a general guide for my conduct and does not describe all types of good behavior and bad behavior. If I do not obey this Code of Conduct, my Program or a Games Organizing Committee may suspend me from Special Olympics either temporarily or permanently. If I am suspended from Special Olympics, I can appeal the decision in accordance with the Special Olympics athlete's appeal process.

I pledge that...

### **Sportsmanship**

- I will practice good sportsmanship and act in ways that will bring respect to my coaches, my team, Special Olympics, and me.
- I will not use bad language, such as swearing or insulting other persons, and will not fight with other athletes, coaches, volunteers or staff.
- I will show respect towards my fellow athletes, coaches, and volunteers at all times. I will not make fun of other people or criticize them, but will give them praise and positive recognition.

### **Training and Competition**

- I will train regularly and attend scheduled practices and meet training criteria set by my coaches and area program. I will try my best during training/practices and competitions.
- I will learn and follow the rules of my sport, and I will ask questions when I do not understand.
- I will not hold back in divisioning preliminaries in order to get into an easier heat in the finals.

### **Personal Responsibility**

- I will not make unwanted physical, verbal, or sexual advances on others through any form of e-communication or telephonic communications.

- I will not drink alcohol, vape, smoke in non- smoking areas, or use medical marijuana/marihuana or illegal drugs at Special Olympics' venue sites, and I will not take drugs for the purpose of improving my performance.
- I will obey all facility and venue rules.
- I will obey all federal, state and local laws and Special Olympics rules.
- I will not bully or harass any other person. Harassment or bullying is any gesture or written, verbal, graphic, or physical act (including electronically transmitted acts via internet, cell phone, or electronic communication device) that is reasonably perceived as being motivated either by any sexual or perceived characteristic, such as race, color, religion, ancestry, national origin, gender, sexual orientation, gender identity and expression; or a mental, physical, or sensory disability or impairment; or by any other distinguishing characteristic. Such behavior is considered harassment or bullying whether it takes place on or off the field, at any Special Olympics event, or in a vehicle.
- I will obey and adhere to the guideline of “no recreational swimming” during all SOMI Events. The health and safety of athletes is all-important.
- I will tell someone if I do not feel safe and/or if I am being hurt.

Refer to the coach's code of conduct and parent/spectator code of conduct.

### **Disciplinary Steps for Violating the Athlete Code of Conduct**

The progressive disciplinary steps outlined as follows may be taken when an athlete violates the Code of Conduct. A sanctioned area representative may begin the disciplinary process at whichever step is appropriate to the circumstances. The area representative must notify the Area Director of any action that is taken.

- Step 1: Verbal warning is given to the athlete and to parent/guardian or caseworker with a written copy of the Incident Form to the Area Director.
  - If an athlete is arrested for any reason, they will be suspended until they are cleared through the court system.
- Step 2: A written Incident Form must be completed which gives warning to the athlete with a copy to the Area Director and parent/guardian or caseworker.
- Step 3: The Area Director conducts a personal meeting with the athlete to review the unacceptable behavior and to agree on a plan for improvement. If the athlete is under 18, or over age 18 and has a guardian, he/ she will be accompanied by a parent/guardian or caseworker. If the athlete is over 18 and does not have a guardian, he/she may choose to have another adult present. It is recommended to always have another adult/guardian present when meeting involving disciplinary issues. The meeting will be documented in writing and copies distributed to the athlete, Area Director, state office, and parent/guardian or caseworker.
- Step 4: The athlete is suspended from practices or competitions for a specific time period (such as fall sports season). The Area Director must be contacted before an athlete is suspended. The Area Director will discuss the circumstances and must approve/ disapprove

the action. The action will be documented in writing and distributed to the athlete, parent/guardian or caseworker, and the state office.

Any further action must be referred to the Area Director. The Area Director and program staff responsible for area management will approve any further action to be taken. Further action could be, but is not limited to, suspension for a longer period and permanent expulsion.

### **Athlete Appeal Process**

The athlete has the right to appeal any disciplinary action to the Area Director. The athlete or the athlete's representative must submit a written notice of appeal with a copy to the Area Director and to the President/CEO of Special Olympics Michigan. This notice should include a request for a meeting and should be made within 30 days of being notified of the disciplinary action.

The appeal will be heard by the Area Director, Field Service staff or Special Olympics Michigan senior administrator, and the chair from the Program Committee or designee not involved with the situation. A decision must be rendered in writing within 21 days following the meeting and may reverse, amend, or affirm the disciplinary action. The decision shall be submitted to the athlete and the area program. The decision should include, if applicable, a plan of action for the athlete to correct the unacceptable behavior that led to the disciplinary action.

### **Participation of Athletes with Criminal Records or a History of Violent or Abusive Behaviors**

Because of our inclusive philosophy, the issue of how to treat athletes who have been convicted of violent crimes or who engage in violent, abusive or disruptive behavior is particularly sensitive.

Special Olympics Michigan balances the principles of inclusiveness and of providing a safe environment for all athletes, volunteers, and staff members when making disciplinary decisions..

### **No Mandatory Criminal Background Checks of Athletes**

An Area Director can request a background check if they suspect an athlete has an issue.

Athletes who apply to volunteer for Special Olympics Michigan, however, will be treated the same as all other volunteer applicants.

Therefore, SOMI does a background check on all Class A volunteers

If an individual with intellectual disabilities is rejected as a volunteer, that individual may apply to be an athlete, in which case we will evaluate the individual using the criteria outlined below. Unified Partners over the age of 18 will have a background check conducted through the VMS system in order to participate.

SOMI will use the criteria or options below to review each case.

When dealing with athletes with violent criminal records or with a history of violent, abusive, or disruptive behavior, Special Olympics Michigan will take into account several factors when determining the severity of an incident and what, if any, action needs to be taken. The criteria

established must be applied on a case-by-case basis. At a minimum, the criteria will include the following:

1. Type of Offense/Incident - Violent behavior that damages property, while not to be ignored, and will not be accorded to the level of seriousness as behavior that injures or is intended to injure a person, such as a physical assault or sexual assault.
2. Time of the Offense/Incident Occurred - A recent offense or incident is of greater concern than one that took place many years ago (assuming no further incidents). SOMI will recognize that an individual can change and merit re-evaluation.
3. Number of Offenses - Has the athlete committed multiple offenses or incidences of a similar nature, or are there a few isolated incidences?
4. Athlete Capacity - Is the athlete high or low functioning? We will determine if the athlete understood his/her conduct at the time of the offense/incident.
5. Medication - Was medication a cause of the behavior, either through its omission or its effect on the athlete? Adjustments in medications or protocols could reduce the risk or potential for adverse behaviors.
6. Athletes on the Sex Offender Registry- any athlete who is on the sex offender registry, published or unpublished, will not be allowed to participate or volunteer in the program.

### **Options**

Depending on the facts, SOMI may immediately move to suspend an athlete or take other action it deems necessary to protect all of its athletes, volunteers, and staff.

1. Allow the athlete to participate on a probationary basis. This gives the program, the athlete, and the family a chance to review conduct on a systematic basis and to make any changes the program deems necessary. The athlete and the parent/guardian will be informed from the outset that participation is conditional upon continued satisfactory behavior, what the probationary period is, and the system for review.
2. Ensure there is a one-on-one volunteer to chaperone the athlete. The volunteer must be informed of the athlete's past behavior (without violating any privacy laws) and should be capable of helping the athlete avoid situations that may trigger unacceptable behavior. If the athlete participates as part of a group home or other type of facility, the program may require that home or facility to provide the volunteer.
3. Require the athlete attend counseling or Anger Management Courses. Athletes exhibiting certain types of behavior may respond well to counseling services including anger management, stress reduction, or psychotherapy. Special Olympics Michigan cannot provide these services; however, we can require that the athlete attend such meetings or sessions as a condition of participation.
4. Require the athlete attend counseling or prohibit athletes with histories of violent behavior from overnight trips. This option is less desirable than assigning a one-on-one volunteer to an athlete who has previously engaged in inappropriate behavior or violent behavior, but would be appropriate when the risk to others cannot be sufficiently eliminated by a volunteer.



5. When an athlete is found to be listed on the criminal sexual assault registry the athlete is excluded from all Special Olympics participation.
6. Restrict the sports in which an athlete may compete. Some sports, such as polo hockey and basketball, involve physical contact and emotion that can agitate an athlete to the point that he/she has a violent reaction. One option is to steer the athlete into sports such as track or aquatics with a lower likelihood of physical contact.
7. Suspend the athlete temporarily. A temporary suspension for a defined period of time may be the best solution depending on the seriousness of the behavior. The program will make clear to the athlete and parent/guardian what steps must be taken for reinstatement, including when the review will take place, by whom, and what factors will be considered.
8. Expel the athlete from or deny participation in Special Olympics. This is the last, and least desirable option, in as much as it is the harshest for an athlete and is the most likely to lead to litigation. Thus, expulsion or denial of participation must be subject to due process safeguards, including a hearing and right to appeal, in order to protect the athlete and the program.
9. If an Athlete on the sex offender registry has made an appeal through the court system and has the charges expunged from their records, they may ask for an appeal to participate in the program.

### **Liability**

Special Olympics Michigan will take reasonable precautions to protect the health, safety, and rights of all who participate in Special Olympics.

Special Olympics Michigan is not obligated by law to permit a potential athlete with a criminal record or a history of violent or abusive behavior to participate. However, if we conclude that the athlete should not participate, the program will be acting prudently within its rights as a Special Olympics Program.

### **Application for Participation**

Every athlete must submit a valid Application for Participation prior to participation in any Special Olympics activity (including sport practice). Sport Season is 8 to 12 weeks prior to the state competition for that sport. Athletes must submit a health form and communicable disease waiver prior to attending an organized practice.

- The Application for Participation must be completed by the athlete's parent or legal guardian. (The form can be completed by the applicant if he/she is over 18 years old and is acting as his/her own legal guardian.)
- The Application for Participation must be signed and dated by a licensed physician (M.D. or D.O.), a licensed physician's assistant, or a certified nurse practitioner acting under the supervision and authority of a physician (M.D. or D.O.).
- Of particular importance on the Application for Participation are: the athlete's medical history, the athlete's current physical condition, and the signature with date of the medical personnel who has evaluated the athlete. All questions in the health history section must be

filled out completely with explanations given for all “yes” answers. The form will be invalid without this information.

- In addition, if the parent or legal guardian signs the Application for Participation in athlete release form and indicates any restrictions as to medical treatment, media release, use of likeness, etc., then the form is considered invalid. No institution, group home, or individual may sign on behalf of the parent or legal guardian. You must also review the concussion awareness page and sign that you understand.
- The correct form to use is an Application for Participation available on SOMI.org website. A form is valid for three years from the exam date if the forms are properly completed, signed, and dated. No other forms than SOMI medical forms are accepted.
- We no longer accept MHSAA physical forms. If a school-based athlete is receiving a physical form, they should also have the SOMI Medical Form complete.
- It is highly recommended that an area reviewing authority be used within the area to monitor the completeness and accuracy of the Applications for Participation. For SOMI Culminating Events, the application will be reviewed for completeness and accuracy by a SOMI sports department representative.
- Note to coaches, families, and caregivers: Please make sure that the Application for Participation form is completed properly, signed, and dated prior to your athlete’s first training session or practice, otherwise, he/she will not be allowed to participate. This rule is very clearly stated in the Special Olympics General Rules, Section 6.02. Properly-completed forms ensure the safety and wellbeing of your athlete and also protect you.
- All athletes will be treated with dignity and respect regardless of sexual orientation or gender identification or modification. This will be handled on a case by case basis.

### **Registration of Unified Partners**

All unified partners must complete the Class A Volunteer and Unified Partner Registration Form and code of conduct form (in VMS System). SOMI will initiate a background check on applicants over the age of 18.

A Unified partner is a peer without an intellectual disability. Unified Partner forms will expire every three years.

Unified Partners under the age of 18 need to be included in the 4 to 1 ratio.

### **Participation by Individuals with Down syndrome who have Atlantoaxial Instability**

1. Athletes with Down syndrome are not required to automatically undergo an x-ray exam to participate.
2. An athlete with Down Syndrome who has been diagnosed by a physician as having an Atlantoaxial Instability condition may be permitted to participate. If a licensed medical professional qualified to conduct a thorough neurological evaluation, states the cause of the symptoms will not result in additional risk of neurological injury due to sports participation, and certifies that the athlete may participate.

3. The licensed medical professional, the athlete or the parent or guardian of a minor athlete, must sign an informed consent acknowledging they have been informed of the findings and determinations of the physician. The statements and certification forms approved by SOI, "Special Release for Athletes with Symptomatic Spinal Cord Compression or/or symptomatic Atlantoaxial Instability" shall be documented.

### **Religious Objection**

Special Olympics respects the religious beliefs of all its athletes. Our standard application form normally requires each athlete (or his/her parent, if the athlete is a minor) to give Special Olympics permission to arrange for emergency medical treatment, including hospitalization, for any athlete if a medical emergency arises during his/her participation in Special Olympics under circumstances in which neither the athlete nor his/her parent is available to consent to that emergency treatment. If there are religious objections to approving that provision a religious objection form needs to be completed and put on file at the state office. The Emergency Medical Care Refusal Form can be found on the SOMI website.

### **No Recreational Swim Policy**

Special Olympics Michigan has a no recreational swimming policy for all SOM-sponsored events, including local, regional and state-level events. The health and safety of Special Olympics athletes is all important.

### **Athlete Leaders (AL)**

Athletes are trained to be leaders within the Special Olympics movement and their own communities. Through sports training and competitions, Special Olympics helps people with intellectual disabilities (ID) achieve joy, acceptance and success. They gain the confidence that comes with achievement and feel empowered.

Special Olympics Michigan has various training programs to prepare athletes for their leadership role. These training programs prepare athletes to serve on committees, develop public speaking skills, train to become coaches and officials.

### **Inclusion Starts with Athletes Leaders**

Athlete Leaders empowers people with intellectual disabilities to develop their skills and undertake meaningful roles in their communities.

### **Athlete Leadership Council**

SOMI is dedicated to providing quality sports experiences for all athletes. The Athlete Input Council (AIC) provides athlete leaders the opportunity to share their ideas and concerns to create a quality program. Field Service staff will work directly with area programs to identify the AIC and to meet and share regularly. Athletes can be nominated for the AIC through their Area Director.

### **Global Messenger**

The Special Olympics Global Messenger training teaches athlete leaders how to give the skills and confidence needed for public speaking. Athletes learn how to dress appropriately for professional

settings, build conversation skills and to give public speeches. Global Messengers speak at engagements such as recruitment events, volunteer groups, sponsors and donors

### **Athlete Leader**

Athletes who wish to further their leadership journey can partake in the Athlete Leadership Training which expands on the skills learned during Global Messenger Training. In addition to public speaking, these Athletes walk away with skills that will better equip them to be involved in both their SOMI community and in the community at large.

### **Coach**

Coaches play a unique role in Special Olympics, working hands-on with athletes to provide the sports skills and spirit they need to compete. Athletes will need to make a commitment to attend certification training by the Program office then apply your training.

### **Official**

Special Olympics will provide athletes information so they can participate in sport National Governing Body certification programs as an official or other skilled sport personnel. Athletes who have become certified officials have served in that capacity at Local, State, Provincial, National, Regional and World Games.

### **Subprogram and Program Committees or Board of Directors**

Training is provided to prepare athletes to participate in Special Olympics programming and policy meetings. Training focuses on awareness and listening skills and reading financial reports.

Many Programs have had several athletes on its Board of Directors and others have held key leadership positions in the state.

### **Handbook for Athletes Leaders**

For complete details on Athlete Leaders procedures and policies, visit [SOMI.org](http://SOMI.org).

### **Athlete Leadership with Special Olympics Michigan**

Athletes who are interested in leadership opportunities through SOMI will start by taking the Unified Global Messenger training. After this, Global Messengers can apply for further opportunities from Athlete Leadership training to Health Messenger training and much more!

### **Global Messenger Training**

Global Messengers are trained to build public speaking and presentation skills that will be used to share their Special Olympics story. This training is for everyone! Athletes, Unified Partners, Volunteers, Coaches and Families can be a part of this fun Unified training experience.

### **Athlete Leadership Training**

Athletes who have completed the Unified Global Messenger Training will come together for a four-part Leadership Development Training, where they will be trained in communication skills, public speaking, and life skills development. Athletes participating in this training will graduate prepared to share their story as an athlete leader and will have opportunities to get involved with leadership

opportunities on the local, regional and state level. The Athlete Leadership training is an introductory leadership development course and will provide the opportunity for athletes to serve in a variety of leadership roles.

#### Highlights of Different Skills Gained from being an Athlete Leader

- Leadership Development and training
- Special Olympics History and Mission
- Team Building and Communications
- How to best use social media platforms and online safety
- Developing a Speech
- Computer Skills
- Fundraising Tools
- And so much more!

#### **Health Messenger**

Health Messengers will be trained to serve as a health and wellness leader, educator, advocate and role model within their Special Olympics communities and the community at large. Athlete Leadership Training and application is required.

#### Athlete Leadership Opportunities:

**Athlete Leadership Council:** SOMI is dedicated to providing quality sports experiences for all athletes. The Athlete Leadership Council (ALC) provides athlete leaders the opportunity to share their ideas and concerns to create a quality program. Field Service staff will work directly with area programs to identify the ALC and to meet and share regularly. Athletes can be nominated for the ALC through their Area Director.

**Athlete Lunch and Learns:** All SOMI Athletes are invited to a quarterly leadership retreat, where Athletes will learn leadership and vocational skills in a fun and exciting environment. Lunch & Learn topics will be posted prior to the event and Athletes will have the opportunity to pre-register.

**Athlete Internship Program:** Athlete Leaders looking to grow in their professional careers can apply for intern positions throughout SOMI. As an athlete intern you will gain real life work experience as well as the opportunity to build and maintain working relationships over the course of six months. Athlete Leadership Training and application is required.

**Subprogram and Program Committees or Board of Directors:** Training is provided to prepare athletes to participate in Special Olympics programming and policy meetings. Training focuses on awareness and listening skills and reading financial reports. Special Olympics Michigan always has an athlete board member and has athletes serve on board subcommittees to provide direction to specific issues and topics.

Many Programs have had several athletes on its Board of Directors and others have held key leadership positions in the state.

Handbook for Athlete Leaders: For complete details on Athlete Leaders procedures and policies, visit [SOMI.org](http://SOMI.org).

## **Section 3**

### Medical & Safety

- Medical Council
- Procedures

### **Medical Advisory Council**

This is an advisory council serving under the program committee to advise the program committee on medical concerns of Special Olympics Michigan athletes or events. This is a sub-committee that will meet as necessary when the program committee requests their expertise. The committee should be made up of various health professionals and SOMI staff.

### **The Health Insurance Portability & Accountability Act (HIPAA)**

A Special Olympics Program is not required to comply with HIPAA's privacy regulations simply due to their operational requirement of collection of athlete medical information prior to an athlete's participation in the Program. Further, participation by a Special Olympics Program in the Healthy Athletes program does not subject the Program to HIPAA's privacy regulations. Areas should keep information as confidential as possible.

### **Concussion Training**

All Certified Coaches are required to complete concussion training in order for their certification to be in full effect. The two programs most accessible are the CDC and NFHS online training course. Once they complete the training, Coaches are required to turn in their certificate of completion to the Coordinator of Sports & Volunteers. Coaches must take the training every three (3) years.

### **Body Fluid Handling Procedures**

In the interest of protecting the athletes and volunteers, open wounds or skin lesions should be aggressively treated. Whenever a laceration or wound where oozing of blood occurs, the practice or game should be stopped as soon as possible, and the athlete or volunteer should leave the event and be given prompt medical attention. The athlete or volunteer may not return to play until the bleeding is stopped, any oozing blood is covered with appropriate dressings, and blood on equipment is cleaned. Coaches should bring a couple of extra uniforms in case of a body fluid injury.

Universal Precaution Kits will be available at each SOMI Culminating Event and should also be used at local and area training and competitions. A Universal Precaution Kit should contain bleach and bleach alternative, bio- hazard bags, paper towels, vomit solidifier and scoop, and sharps container. Some of the precautions you should take include the following to prevent transmission of blood-borne infections, such as HIV (Human Immune Deficiency Virus) and Hepatitis B:

1. If you will be touching someone with an open bleeding wound or any possibility of blood exposure, wear gloves. If you will be in contact with any bodily fluid (particularly saliva or urine), wear gloves. Gloves are found in every first aid kit and at all first aid stations. Please make sure that you always have an ample supply with you. Throw contaminated gloves in the biohazard bag in the first aid kit or at the stations.
2. Always wash your hands after touching athletes especially if blood or body fluids are involved (even though you wore gloves). If this is not possible, use good hand washing techniques before eating.
3. If for some reason you have used a sharp item (needle, scalpel or lancet), please deposit it in a red "sharps" box (biohazardous waste container) at the nearest first aid station. Do not attempt to bend, break or manipulate the sharp instrument by hand.



4. Saliva has not been implicated in HIV transmission; however, each first aid station should be equipped with mouthpieces (collapsible masks or resuscitation bags to be used in mouth-to-mouth resuscitation).
5. If you have an open wound, especially on the hands, avoid providing first aid care of injuries unless gloves are worn or until your wound heals.
6. If you have any further questions or concerns regarding infection control, please contact your local health department or the person responsible for medical coverage at the event.

SOMI's position on hiring an interpreter and other service providers.

It is SOMI's desire to make the experience a positive one for all athletes. There are times when additional support is needed to make the Special Olympics Michigan experience meaningful. Volunteers are always welcomed to assist athletes with the accommodations necessary to make their experience as positive as possible. Funding for such supports are not subject to the ADA.

### **Crisis Communication & Incident Report Filing**

Reporting Action Steps Guide for Accident/Injury

In the event of a serious incident, follow the guidelines below, keeping everyone involved as calm as possible throughout.

1. Assess the situation and remove all unnecessary individuals from the area. Only essential personnel should be present.
2. Appoint others to keep the area clear.
3. Appoint a person or person(s) to stay with the individual(s) involved at all times. Instruct the volunteer(s) to not render any treatment beyond his/her training. Do not move an injured individual unless he/ she is in immediate danger.
4. Determine if medical support (on site or ambulance) needs to be contacted. If yes, do so immediately. Have athlete Application for Participation form ready for medical personnel.
5. Determine if law enforcement needs to be contacted. If yes, determine whether 9-1-1 or the local non-emergency number should be used.

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Non-emergency Number

6. If a family member/guardian/ friend cannot accompany the athlete/volunteer to the hospital, either stay with the athlete or appoint someone to go until a family member/guardian/friend can arrive.
7. Contact your Area Director

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Area Director Phone Number

8. In the event of a serious incident or crisis immediately contact the Special Olympics Michigan State Office, 1-800-644-6404. Explain the situation, SOMI will start coordinating any assistance needed.
9. You or your Area Director should contact the appropriate family/guardian of athlete/volunteer, and apprise them of the situation.
10. Cooperate with medical personnel and/or law enforcement in completing necessary paperwork and SOMI's Incident Report Form.
11. In the event of media presence, speak from the statement on your Crisis Communication plan and do not speculate or expand upon this statement. Refer all media calls to Tim Hileman, President and CEO, 616-307-9911 or Bo Parker at 989-774-4393.
12. Once incident/crisis is over and the athlete(s)/volunteer(s) involved have all been released to their own supervision or the supervision of others, call the state office, the appropriate family/ guardian of the athlete(s)/ volunteer(s), and your Area Director and apprise all of status.
13. Complete an Incident Report Form and fax to Special Olympics State Office at 989-774-3034 within 24 hours. Forms can be found on the SOMI Website in the Resources section.

### **Reporting Behavior Issues**

#### Reporting Action Steps Guide for Accident/Injury

1. If there has been an injury to someone and it requires medical attention, or if there is a threat of violence, call 911. Make sure to complete the First Report of Accident/Injury form if someone is hurt or if there is destruction of property.
2. Depending on the nature of the incident, the athlete, partner, or volunteer may be suspended or arrested.
3. The Area Director will communicate any disciplinary actions to the athlete and his/her parent or guardian.
4. If behavior warrants a suspension, the state office will communicate this in writing to the coach/volunteer/athlete.

### **Reporting Abuse/Neglect**

All "A" Volunteers and SOMI employees are mandatory reporters of any suspected abuse. In the event of suspected abuse, please follow the steps below.

1. You are required to report suspected abuse/neglect by calling the Michigan Department of Human Services at (855) 444-3911 or 911 for local law enforcement. You must give a verbal report within 24 hours and/or a written report within 72 hours.
2. Complete the Misconduct or Inappropriate Behavior report form. Call the state office to report within 24 hours.

### **Position on Keeping Participants Safe**

Special Olympics Michigan believes that EVERYONE, including staff, volunteers, parents, caregivers and coaches has a role to play in ensuring the safety of Special Olympics athletes. We take this

responsibility seriously and have implemented a number of steps to help make participating in Special Olympics not only rewarding, but safe.

Special Olympics Michigan will abide by the federal and state laws for mandated reporters and is committed to ensuring that all staff, registered coaches, and Class A volunteers are trained in the mandated training procedures to report abuse of any athlete who participates in our program.

Special Olympics Michigan has developed resources for parents and care providers, updated the Protective Behavior Training, Volunteer A forms, and Codes of Conduct forms to include mandated reporting requirements and guidelines. This information will be shared through trainings, on the website, and at the area level.

## Section 4

### Sports Training

- Sports Training
- Coaching
- SOMI Culminating Events
- Uniform Guidelines
- Regional Event Information
- Invitational Sports Events
- Procedures for Adding or Eliminating Sports
- Criteria for Advancement
- Sportsmanship
- Event Cost

## **State Event Timeline**

Please refer to the online event pages and AD Dashboard for the state event timeline.

## **Sports Training**

### **Training Mission**

Sports training is the center of the Special Olympics mission. SOMI's goal is to make appropriate, high-quality sports training available to every Special Olympics athlete year-round.

Training allows athletes to improve their physical fitness, sports skills, interpersonal skills, and competitive ability. Special Olympics promotes the healthy athlete because the skills learned in Special Olympics training often translate into greater success in the athlete's family life, schoolwork, employment, and community life.

### **Athlete Training Requirements**

In order for an individual or team to participate in competition, the athlete or team must be involved in an eight-week training program and receive training and competition opportunities. A minimum 10 hours of training must occur before a culminating event. Training usually consists of 1-4 hours each week for eight weeks.

Although it is the desire to include every athlete that is training in all the games we offer, due to the many athletes we have competing in the state, it is not always possible. That is why we offer area, regional and a variety of state events to give all the athletes quality competition opportunities.

Coaches who are training athletes in a particular sport should follow the established SOMI sports seasons (see notes under each sport in [sport specific rules](#)). The sports season is 8-12 weeks prior to the state competition for that sport. SOMI establishes sports seasons to provide maximum training time for the athletes and to coincide with competition opportunities.

Athletes must compete in area or regional Spring/Winter Games prior to competition at the state level. Training in team sports must include at least three competitions or games played against other Special Olympics teams, unless approved by SOMI Sports Director. SOMI encourages year-round fitness training and life-long involvement in recreation/leisure activities.

## **Coach/Chaperone Responsibility**

### **1. Places athletes' health and safety first**

Coaches/chaperones shall place the health and safety of Special Olympics athletes above all else. When traveling to state competitions, coaches/chaperones are expected to provide for their athletes' physical and emotional needs 24 hours a day. Responsibility for the athletes does not stop after their competitions or after they have gone to bed in the evening.

Coaches/ chaperones must act at all times as the parent or guardian providing praise/commendation as well as discipline.

**2. Knowledgeable in sports rules**

Coaches shall be knowledgeable of all existing Special Olympics (both SOMI and SOI) and National Governing Body competition rules and regulations and prepare their athletes prior to competition in accordance with those rules.

**3. Willing to follow the rules and model good sportsmanship**

Coaches/chaperones shall abide by the letter and spirit of the rules and be responsible for conducting themselves with appropriate behavior and in a sportsmanlike manner at all times. Coaches who do not conduct themselves in this manner or who are offensive by action or language toward athletes, other coaches, volunteers, opponents, officials, and/or spectators may be prohibited from coaching.

**3. Encourages athletes to put forth their best efforts**

Coaches/chaperones shall be honest and instruct athletes to compete with maximum effort in all preliminary trials and finals, or he/she may be prohibited from coaching by the Games and/or Sports Rules Committee at the specific competition. Coaches should review the Athlete Code of Conduct with athletes before or at the first practice.

**4. Follows no recreational swimming policy**

It is the responsibility of the coach/chaperone to follow and adhere to the guideline of “no swimming” during all SOMI Events. The health and safety of athletes is all-important. Coach/chaperone take athletes swimming at hotels, this will be considered a violation of the Code of Conduct, and the persons responsible will receive a letter of warning and may be separated from the program.

**5. Follows the “no alcohol/tobacco/or controlled substances” policy**

The use of alcoholic beverages, vape, tobacco, medical marijuana/marijuana, and/or controlled substances is not permitted at any training or competition venue per Section 4.09a of the SOI General Rules.

**6. Carries all athletes’ forms**

It is the responsibility of the coach/chaperone to carry a copy of each athlete’s Application for Participation form at practices and competition.

**7. Obey all laws**

I will obey all federal, state and local laws and facility, venue, and Special Olympics rules. I will not bully or harass any other person. Harassment or bullying is any gesture or written, verbal, graphic, or physical act (including electronically transmitted acts via internet, cell phone, or electronic communication device) that is reasonably perceived as being motivated either by any sexual or perceived characteristic, such as race, color, religion, ancestry, national origin, gender, sexual orientation, gender identity and expression; or a mental, physical, or sensory disability or impairment; or by any other distinguishing characteristic. Such behavior is considered harassment or bullying whether it takes place on or off the field, at any Special Olympics event, or in a vehicle.

**8. Report all abuse or suspected abuse**

I will report suspected abuse to the Michigan Department of Health and Human Services or call the police at 911 and notify Special Olympics Michigan within 24 hours. Failure to report could result in legal consequences.

#### **9. Coach/Chaperone Code of Conduct Forms**

Available on the SOMI website in the Resources section

### **Unified Sports® Coaches**

The most important person to the success of the Unified Sports® team is the coach. The key elements in coaching a Unified team include:

1. **Role** – An effective and successful coach is not simply one who helps a team win. Equally important is his or her contribution to the teaching, improving, and application for sports skills, building team spirit and sportsmanship on and off the field, and helping instill positive values in all members of the team. Remember that the athletes look up to their coaches as role models, therefore, it is important that coaches represent the program appropriately. The most important thing to remember as a coach is that the athletes are looking to have fun – that should be your goal as well.
2. **Sports Knowledge** – Coaches must possess a good knowledge of the sport, the rules of each sport, and be able to apply that knowledge in practice and competition settings. It is important that coaches take part in organized training sessions to upgrade their knowledge about the sport, learn new practice activities, study game strategies, and share ideas and knowledge with other coaches.
3. **Practices** – Each coach must encourage regular attendance at training sessions for all athletes on the team. This leads to the further improvement of sports skills, increased teamwork, camaraderie, and improved performance during games and competitions. Every athlete should receive a minimum of one and one half hours of practice per week under the direction of a qualified coach. It is desirable to practice more often than one time per week. If transportation precludes practicing more than one time per week, coaches should have team members arrive early on game days to take part in additional practice sessions. In addition, coaches can develop individualized home training plans for athletes.
4. **Coach Everyone** – Each member of the team will benefit from the directions of a qualified coach. Find ways to involve each team member in your program or conditioning, skills development, and team play. Everyone on your team plays a different role to the team's success.
5. **Focus on Teamwork** – Do not allow any member of the team to dominate play. A solid teamwork approach should be present from the first practice to the final game of the tournament. Sometimes supporting the efforts of your team to extend their relationships off of the playing field helps establish strong bonds among team members. The Unified Sports® motto is, "During the game we're teammates, after the game we're friends."
6. **Coach and Partner** – Unified Coaches can act as a coach and partner for the following sports: Bowling, Golf and Cycling. All Unified Team Sports must have a non-playing coach.

## **Training for Coaches**

Today's coaches - whether in Special Olympics or other sports programs - are expected to know the rules and skills relevant to the sport they coach and practice good sportsmanship.

To ensure that Special Olympics athletes receive training and competition of the highest quality, SOMI provides educational sessions for all individuals who work with athletes. Courses are offered in coaching a specific sport, coaching principles, managing venues/games, officiating, and first aid/CPR. A general orientation, protective behavior and concussion training online course is also required.

SOMI's courses are intended to keep all coaches and volunteers up-to-date on new rules, issues, techniques, and safety concerns. SOMI encourages both new and long-term coaches as well as volunteers to attend these courses as there is always more to be learned. The head coach of team sports and head coach of individual sports 1 for 16 athletes, must be certified to get awards at state competition.

Areas not in compliance will be notified and athletes (teams) will participate for participation ribbons only.

Training guides and resources are available at [www.specialolympics.org](http://www.specialolympics.org).

## **Courses offered by SOMI**

### **General Orientation and Protective Behavior & Concussion Training**

This basic introduction to Special Olympics covers the organization's mission and philosophy, organizational structure, intellectual disabilities and eligibility, policies and procedures, sports opportunities, initiatives, and required rules. The General Orientation, Protective Behaviors and Concussion Training are required for all interested in working with Special Olympics athletes (Protective Behaviors and Concussion Training must be updated every 3 years). Can be found at: <https://www.somi.org/coaches-corner>

### **Sport-specific Skills Course**

The Skills Course is offered in each sport that is offered by SOMI and focuses on the basic skills and strategies of that sport. It provides an application of the Special Olympics Mission and philosophy in a sports-specific way. The Skills Course includes a classroom session, an activity session performing the skills with the trainers, and a model training session with SOMI athletes at some trainings.

### **Coaching Special Olympics Athletes Course**

This course is designed for the new coach with sport experience and the veteran Special Olympics coach looking to improve his or her training and coaching skills. This course deals with coaching athletes with intellectual disabilities including mental, psychological, and other social considerations. This course is offered through American Sports Education Program for \$16.95. It is a great course for new coaches in preparation for their first Special Olympics coaching role. This course prepares coaches to use their sport-specific knowledge in coaching athletes with intellectual



disabilities. For veteran Special Olympics coaches, this course serves as a reminder of the essentials sometimes forgotten after years of coaching. This course can be found at <https://coacheducation.humankinetics.com/collections/64>

### **Unified Sports® Course**

Special Olympics Unified Sports® is a program that combines approximately equal numbers of Special Olympics athletes and athletes without intellectual disabilities (partners) on sports teams for training and competition. Age and ability matching of athletes and partners is specifically defined on a sport-by-sport basis. Unified Sports® enables athletes to develop higher-level sports skills and experience meaningful inclusion in their community. This training can be taken online at <https://nfhslearn.com/courses/61127/coaching-unified-sports>. In addition to taking the Unified Sports Course each person needs to obtain sports specific certification to be certified coach. [Coaching Unified Sports Course \(nfhslearn.com\)](https://nfhslearn.com/courses/61127/coaching-unified-sports)

### **Games Management Training School**

This session covers the major management areas of Special Olympics games and tournaments, such as administration, financial development, public relations, support services, special events, competitions, and volunteers. It also includes instruction on organization and management, committee work, and delegation.

### **Official Training Course**

This session offers general information about Special Olympics, rules interpretations and modifications, and practical experience with athletes. The training school is designed for individuals who want to officiate and who have no other officiating certifications from a national governing body, high school, college, or intramural program and also for officials who wish to become more familiar with SOMI athletes prior to serving as an official. Potential to have training with the governing body.

### **Comprehensive Mentoring**

This process is intended for those coaches who have coached outside of Special Olympics for many years (possibly at the high school or college level). To obtain certification through the mentoring program coaches have to coach alongside an established certified, mentoring Special Olympics coach (minimum of 5 years of experience is required to be a mentoring coach) in their particular sport for ten hours and do some additional work outlined on the application, including developing practice plans, attending competitions, and completing the required Class A volunteer documents. After the coach has coached for ten hours and done the additional work outlined on the form, they submit the form to the State Office. Once approved, the individual will be certified to coach the following sport season (for example, if a coach completes mentoring for basketball during the 2019 season they will be certified to coach in 2020).

### **How to Register for a Course or Training School**

SOMI, along with the local areas and regions, hold numerous courses throughout the year. To receive information for training schools or to register visit: <http://somich.vsyshost.com/vsys>

Registration for all training schools must be done through the state office. An area may submit registrations for a group, or each person may enroll individually. The fee for a training school is \$10.00 per person which covers the cost of certification material, i.e. printing, id badge and certificate. Participants are encouraged to register early as courses and training schools may be canceled due to lack of registrants.

### **Certification for Coaches**

SOMI offers certification for coaches through Special Olympics, Inc. The certifications are for coaching, officiating, venue management, and games management. Each coach must update their certification every 3 years. Once the coaches certification has expired, Recertification can be obtained by viewing an online recertification video and taking a quiz, completing the online concussion training, or attending a CPR training (only allowed once every six (6) years), Sports rules meeting, i.e. High School Athletic Association Meeting, First Aid, any training that will enhance coaching skills or mentoring into another sport. All certifications and recertifications are month and date specific. All certifications will advance to the month and date of your most recent completed recertification. Proof of each training must be sent to the state office. Other governing bodies certification may be allowed, contact SOMI Sports Department for approval.

For coaches to be certified by SOI, they must meet the following requirements:

1. Complete the on-line General Orientation and Protective Behavior quizzes at <https://www.somi.org/coaches-corner>
2. Completion of a sport-specific training school.
3. Create a VMS profile and complete required trainings and sport qualifications.
4. Coaches also can be certified through the mentoring program. In this case, the coach must meet the following requirements:

### **Mentoring**

1. Complete and turn in Volunteer A Form, Application for sports training, and mentor log.
2. Complete the online General Orientation, Concussion Training and Protective Behavior Quiz at: <https://www.somi.org/coaches-corner>
3. Completion of sports-specific instruction from a coach certified in that sport, must be approved by Area Director and Director of Sports and Training.
4. Completion of the coach - mentor log form.
5. Completion of a 10-hour practicum in the sport for which they are trained, with athletes in attendance.
6. Review mentor training agenda with certified coach doing the mentoring and complete the checklist.

### **Mandatory Coaches Certification**

Head Coach Definition: The head coach is considered to be the lead coach that is training the athletes in preparation for competition.

## **Team Sports**

The head coach for each team must be certified (in that sport) in order for the team to attend the state-culminating event and obtain an award. Upon registration to a state event, each area must fill out Registration form stating who their certified coach is and any assistant coaches to be turned in with registration. Each area will be notified by the correction date on who does not have a certified coach for that sport. The head coach must be listed on the roster information sheets provided to the state office at the time of registration and can only coach one team at the culminating event. Each team must have their own coach at events.

## **Individual Sports**

The head coach for a group of athletes training in a sport must be certified at a ratio of one certified coach for every 16 athletes. (This does not change the 4:1 athlete to chaperone ratio required to attend state events). The head coach, by definition, must be the coach that has been training the athletes in preparation for competition.

The head coach must be listed on the coaches' registration that must be provided to the state office at the time of registration.

Resources for Coaches (and others in competition positions)

Special Olympics, Inc. publishes resources for coaches and competition personnel:

- Sports Skills Program guides (SSPs)
  - Guides for each sport that list the skills needed to be successful in the sport. SSPs are written in simple terms with a task analysis for each skill. They also include exercises and drills for the athletes and coaches to use during practices. \* Log on to [www.specialolympics.org/sports.aspx?loc=footer](http://www.specialolympics.org/sports.aspx?loc=footer)
- Unified Sports® handbook
  - This handbook serves as a rulebook and a resource for the Unified Sports® program and is available on the SOMI website.
- Special Olympics website
  - The Special Olympics, Inc. website is an excellent source for SOMI coaches. The site has coaching guides for all of the sports that are offered along with the SOI rules. The address is [www.specialolympics.org](http://www.specialolympics.org).
  - Special Olympics Michigan has web pages for each sport we offer, visit [www.somi.org](http://www.somi.org), then Sports and Our Sports to select from the list of sports.
- Young Athletes™
  - Special Olympics offers Young Athletes™. This program is designed for athletes age 2 –7 years old and offers an interactive activity program. This program introduces young children and their families to the world of Special Olympics. Young Athletes resources are available at the SOMI website by clicking on Programs and then Young Athletes.

You may also contact the SOMI state office to learn more about gaining access to any of these materials.

## **SOMI Culminating Events Information**

### **Registration**

#### **Dates and Deadlines**

Registration dates and deadlines are published annually. Deadlines are extremely important as the final event numbers factor into divisioning, schedules, lodging, meals and other event.

#### **General Guidelines on Culminating Event Registration**

- If a team roster or individual entry is received past the deadline, the team or individual cannot compete in that event. This applies to both athletes, partners and alternates.
- Current Application for Participation forms or Unified Partner form for all athletes must be on file when registration is sent to the state office. If forms are not on file, the Area Director will be notified the athlete will be dropped from the upcoming event.
- All coaches/chaperones must be registered in the VMS system at registration date and complete the online General Orientation, Protective Behavior and concussion training.
- In multi-sport competitions coaches may only coach one sport. Exceptions may be made for Fall Games.

#### **SOI on Coach and Volunteer Registration**

Each Class A volunteer/coach to participate in any Special Olympics activity, shall have on file in VMS an approved application for participation which includes: Volunteer Class A registration, Protective Behaviors, concussion training, volunteer orientation, and the communicable disease waiver. These requirements will be valid for three years from the date they are completed.

#### **Coach/Chaperone to Athlete Ratio**

When entering a delegation for an event, you must have a coach/chaperone-to-athlete ratio of at least one to four. The only exception is that Area Directors, coaches or chaperones may choose to have a ratio for athletes who are blood-borne contagious infection carriers (1:1 ratio is not required). A BBCIC athlete should never share a bed with another person. An area can choose to have a smaller ratio if required within reason and affordability for behavior or medical concerns.

Areas that do not adhere to the one-to-four ratio for housing will be charged for extra rooms used. Other options: Areas can purchase cots, bring extra bedding, sleeping bags or put mattresses on the floor.

Qualified athletes may serve as chaperones/assistant coaches for an event if over the age of 18. They cannot participate as an athlete for that sport and they must be registered in VMS and a background check will be conducted.

Unified Partners can act as a chaperone if over the age of 18 with Area Director approval, and a background check will be conducted however, they may not act as a coach in that sport, except in bowling, golf and cycling.

### **SOI Policy on Coach/Chaperone to Athlete Ratio**

The ratio of a coach/chaperone to athlete participating in any Games, tournament or event is a ratio of one registered coach/chaperone to a maximum of four (4) athletes participating unless exempt by specific prior policy (i.e. one on one participants). It is recommended that area directors not chaperone at any annual State Games. Amended June 3, 2016

### **Selecting Athletes to Attend SOMI Culminating Events**

Coaches should be sure that the athletes they bring to SOMI Culminating Events are not only physically trained in their sport, but also prepared to handle the emotional challenges that may face them. A decision to bring athletes with severe behavioral problems should be carefully considered. All too often these athletes cannot adjust to their new environment. This experience is not beneficial or enjoyable for the athlete or others traveling with the athlete. (Also see Criteria for Advancement to Higher Level Competition) All registered athletes are required to travel and stay with the area delegation. All registered coaches are required to travel and stay with the area delegation.

### **Registration Packet**

Prior to each SOMI Culminating Event, a registration packet will be e-mailed to each Area Director. It is the responsibility of the Area Director to make copies of these materials and disseminate them to all coaches and local programs within their area. A typical registration packet includes:

1. Confirmed Delegation
2. Excel Registration document
3. Team Evaluation Questionnaires (TEQ)
4. Games Score Submission
5. Housing Sheets if applicable

The registration process includes confirmed delegation, registration document, score submission, TEQ (for team sports) and deadlines dates. Only Area Directors and Assistant Area Directors may send in registrations. All information sheets and scores must be returned to the state office by the requested date, or you receive participation only ribbons.

### **Registration**

On the confirmed delegation deadline, the Area Director should call, email or fax the state office to report the numbers of athletes, number of teams, and type of teams (Junior, Senior, Modified, Unified, etc.); the number of coaches, chaperones and guests; as well as how many hotel rooms the area will need(if applicable). All registration must be submitted to the state office on the excel sheet no later than the registration deadline. This is the last day that athletes and teams can be registered for the event. No athletes will be accepted after this date.

## **Billing**

Billings will be prepared based on the confirmed delegation numbers (registration numbers). Registration payments will be deducted from your account on the payment date. For Summer and Winter Games if confirmed delegation numbers do not match registration numbers, the area will relinquish the rooms or be charged for the extra spots for the rooms.

## **Missed Deadlines/Conciliation Process**

If the registration or any other deadline is missed, requests for exception must be taken to the SOMI Board Program Committee and the Area Director must be the one to make the request. The Area Director will be notified prior to the meeting but may or may not be requested for the Program Committee Meeting, which is usually done via conference call.

## **Athlete Alternates**

Alternates attend the event only when replacing a registered athlete who does not attend. When dropping an athlete prior to a SOMI Culminating Event or at the event site, only registered alternate athletes can be added. A pool of alternates from your own area can be formed for bowling, bocce, horseshoes and golf (nine-hole and Unified only). Alternates do not attend state events unless activated in the sport. Awards are only given to team members listed on rosters and present the day of the event. (Example: if you have eight people listed on your original roster you can only bring eight people to the event, if you drop one athlete they are replaced with one alternate.) It is strongly suggested to list alternate athletes. Alternate athletes must be specific to the sport they are training in.

In team sports, each team is allowed Three Alternates. For Unified Teams, they are allowed up to 4 alternates. Unified Partner alternates will follow the same procedures as athlete alternates.

For rules regarding alternates, please refer to the Alternates section on page 52.

## **Rosters**

Each roster must:

1. Be completed on the Roster Excel document found on somi.org
2. List the minimum required number of athletes as well as alternates.
3. Include a Team Evaluation Questionnaire (TEQ).
4. List the results of three games. (Results must be submitted on-line to the state office by the date listed in the initial mailings.) They should include area#, full team name and scores.

Rosters cannot be changed after being submitted to the state office.

## **Team Evaluation Questionnaires (TEQ)**

Team Evaluation Questionnaires are a mandatory part of registration for SOMI Culminating Events with team sports. The Area Director will be informed about any non-submitted team evaluation questionnaires after registration deadline

After being informed, if the team does not submit a Team Evaluation Questionnaire by the minimum required time to submit determined by the sports department, the team will be placed in a division, and the team will only participate for participation ribbons. Team Evaluation Questionnaires are to be completed online at <https://www.somi.org/coaches-corner>

**Games Scores**

Three (3) mandatory game scores must be submitted to the SOMI State Office. If more games are played all scores should be submitted. These scores must be from games played among Special Olympics teams only- preferably teams within the tentative divisions, or other teams if approved by SOMI sports director before scores are due. Scores must be submitted with both team name and areas in which they are from. Teams may play other sports organizations, if approved by the Director of Sports & Wellness in extenuating circumstances, again before the due date of scores. Game scores must be played against other teams in the same sport ex: Softball plays softball team. Incorrect: softball team plays soccer team.

Volleyball – Traditional best of 3 sets equal 1 match, 3 matches (9 total set scores must be submitted to the state office) Modified – minimum 6 total set scores must be submitted.

Volleyball - A match is equal to one full game, therefore 3 match scores are due to the State Office. Within a match there are sets; each set is played to 25 points except the deciding 3rd or 5th set, which is played to 15. Traditional division matches will play the best 3 out of 5 sets, with the winner being the team who wins three sets. Modified division matches will play the best 2 out of 3 sets, with the winner being the team who wins two sets. Match scores, as well as the set scores within those matches, should all be turned in. For Traditional teams 3 Match Scores are due (minimum of 9 set scores); for Modified teams 3 Match scores are due (minimum of 6 set scores).

**Sample Scores**

	Set 1	Set 2	Set 3	Set 4	Set 5	Winner
Team A	25	22	19	25	15	X
Team B	20	25	25	18	13	

**Minimum Housing Standards and Best Practices**

(refer to Housing Policy in Section 1)

- A. SOMI must provide for adequate separation of participants in order to allow for personal privacy.

- B. The housing facility will provide adequate sheets, blankets and towels, or each athlete must have available to them a personal sleeping bag and towels.
- C. Cots should be requested from the facility to increase the number of beds available, when available.
- D. Air mattresses may be utilized to increase the number of beds available.
- E. Area Directors should use discretion when putting athletes in rooms and consider age, gender, team, etc. A chaperone should be in each room. Area Directors should notify parents when special rooming situations occur.
- F. Supervision- Hotels – Whenever possible, reserve connecting rooms so chaperones have direct access to the athletes’ rooms. If connecting rooms are not available and the chaperone is in a room separate from the athletes for which they are responsible:
  - a. Ensure the chaperone has a key to the athletes’ room.
  - b. Ensure the athletes know how to reach the chaperone at all times.
  - c. Consider hall monitors.
  - d. Whenever possible leave the doors to private rooms opens so chaperones can monitor each room.
  - e. Whenever possible, the chaperone should be assigned to a location in close proximity to the athletes he/she is supervising.
  - f. Family Members – family members are prohibited from staying in athlete housing unless the family member is an official member of the registered delegation.
  - g. Athletes are required to stay in the room they are registered for. They are not to leave the delegation and stay with family members that are housed separately from the registered delegation.
  - h. Accommodations will be made to accommodate delegations with circumstances that include transgender, one on one athletes and BBCIC athletes.
- G. If a facility other than a hotel, motel, or dormitory is being used for housing, the owner of the facility must provide in advance to SOMI a letter stating their approval for the use of the facility to house a Special Olympics delegation.

Limited cots or rollaway beds will be available by the hotel so it is recommended areas bring air mattresses or sleeping bags as the situation arises and it is recommended that one person be in each bed whenever it is possible. If bed sharing is required, Programs may consider having athletes pack sleeping bags and require athletes to sleep in his/her sleeping bag on top of linens that are provided.

If areas choose to stay overnight for a one-day event they must follow minimum housing standards.

### **Victory Dances**

Only athletes who are registered athletes for that event may attend the dances.

### **Early Release Forms**

The Area Director must approve early departures of athletes. An Early Release form should be signed by a guardian or relative. If they are not available, then a coach and the Area Director must sign it and it should be kept on file with the Area Director.



## **Procedures for Divisioning**

The procedures for divisioning have been developed to assist competition managers in applying the principles of fair and equitable competition to athletes of all ability levels. An athlete's ability is the primary factor in divisioning. The ability of an athlete or team is determined by an entry score from a prior competition or is the result of a time trial or preliminary event at the competition itself. Other factors in establishing competitive divisions are age, gender and roster information sheets

Ideally, a sufficient number of athletes or teams will participate at every competition so that equitable divisions of three to eight athletes or teams can be structured.

Experience has shown that in some competitions, however, there will not be a sufficient number of athletes within every age, gender and ability level to structure ideal divisions.

At each SOMI Culminating Event, tentative divisions will be set based upon submitted game scores, roster information sheets, previous years' results, and/or any additional competitive play.

If a coach feels they have been placed in the wrong division, they should notify the SOMI Tournament Director following the initial division process. It is highly recommended that the coach be involved in the division process.

## **Age Groups**

Special Olympics Michigan will utilize age groups as follows:

### Young Athletes

- Ages 2-7

### Individual Sports

- Ages 8-11
- Ages 12-15
- Ages 16-21
- Ages 22-29
- Ages 30+

### Team Sports

- Ages 15 and under (junior)
- Ages 16 and over (senior)

Age/gender groups may be combined if a sufficient number of athletes are not registered within offered events.

### Division Categories for Team Sports

Divisions will be based on the following categories:

Basketball - Male, Female, Junior, Senior & Unified

Volleyball – Male, Female, Junior, Senior & Unified

Softball - Male, Female, Junior, Senior, Unified & T-Ball

Soccer – Junior, Senior & Unified 11-a-side, 7-a- side, 5-a-side

Poly Hockey – Male, Female, Junior, Senior & Unified

Flag Football – Male, Female, Junior, Senior & Unified

Divisions may need to be combined, based on gender and/or age, if there are not at least three teams within an offered category. It is highly recommended that the coach or a representative be involved in the division process. If not specified by category, teams will be placed in Senior Male division.

### **Divisioning for Team Sports**

Each team must play at least three (3) games against another Special Olympics team prior to the State Final Tournament entry deadline. SOMI will initially set divisions based on a pre- tournament procedure, the TEQ (Team Evaluation Questionnaire), past history of the team, and recent games scores.

### **Preliminaries, Time Trials, and Team Sports**

To ensure equitable divisions in individual sports, athletes must participate in mandatory preliminaries or time trials, when prelims or time trials are held. If an individual misses the prelim or time trial, or has not submitted a qualifying score, he or she is placed in a non-competitive division only.

Three (3) games must be played in basketball, softball, soccer, poly hockey, flag football and volleyball and scores turned in on the designated date.

### **Forfeits**

During divisional play, forfeit times (defined as 15 minutes after the scheduled start time) will be strictly enforced. If a team is not ready to play, a forfeit will be called. If a team forfeits a game at a SOMI Culminating Event the game will count as a loss and the team will still have the opportunity to compete for an award.

If extenuating circumstances arise, coaches must make every attempt to contact the Games Director to inform of a delay or cancellation, and if time allows consideration may be given by the Games Director.

### **Tie-Breaking Procedures**

In the event of a three-way tie in a three-team round-robin division, runs or points allowed will be the determining factor in breaking the tie. The tie break would be (1) the team that allowed the least number of runs/points from the total of both games. If records are still even, double awards will be given. (2) the team that allowed the least number of runs/points in their best game. If teams are still tied,

The following is an example under scenario (2). The scores of three games were:

- Team A beat Team B 5-3;
- Team B beat Team C 4-1; and
- Team C beat Team A 6-3

Team B, which allowed six runs, would be in first place. Team C, which allowed seven runs, would be in second place. Team, A which allowed nine runs, would be in third place.

### **Uniform Guidelines**

For uniform guidelines and specifics, please refer to the Special Olympics Brand Identity Guidelines found in the Resource section of the SOMI website.

All team uniforms are required to have a SOMI logo. Penalty for each team sport without logoed uniforms the area will be FINED the cost of putting the logos on the uniforms. Area Directors will be notified after the event when a team is in violation.

The following guidelines apply to uniforms for all Special Olympics sports:

- Blue jeans and denim-type clothing are not permitted.
- Please refrain from using neon safety green (color) at state events as they coincide with medical and cause confusion during an emergency.
- It is forbidden to wear any object that may cause injury or give an artificial advantage to any player. Forbidden objects include, but are not limited to, head gear, jewelry, casts, or braces. Exceptions will be made for religious or medical medallions and flat wedding bands. If worn, they must be removed from chains and taped or sewn under the uniform.
- T-shirts, if worn, must be of uniform type and quality and be sanctioned by the area.
- The name of the program may be placed on the front of the jersey or shirt. The name of the athlete may be placed on the back of the jersey or shirt.
- All team members should have uniforms that are identical in color and style unless otherwise indicated in specific sports rules (such as goalie attire).
- The SOMI logo must be on all team uniforms that are in the property of Special Olympics. Sponsorship logos are NOT allowed on competition uniforms.

Please refer to the section for your sport within this Program Guide for detailed uniform instructions.

Uniform guidelines can be modified as needed to accommodate the individual disability or medical condition of an athlete.

## **Uniform Guidelines**

### **Uniform Numbering**

For uniform guidelines and specifics, please refer to the Special Olympics Brand Identity Guidelines found in the Resource section of the SOMI website.

For teams using their uniforms for more than one sport, it is recommended that shirts be numbered utilizing the basketball regulations. This type of numbering allows shirts to be used in most other sports offered by SOMI. Basketball rules state that numbers are required on the front and back of uniforms. Numbers on the front must be at least four inches high and six inches high on the back. No digits higher than 5 can be used, i.e. 55 okay, 66 no.

For Unified Sports teams the athlete should have even number jerseys and the partner will have odd number jerseys. This is recommended but not mandatory.

### **Uniforms for Opening Ceremonies**

For the Opening Ceremonies of the State Summer Games or Winter Games, all athletes in a delegation should wear matching shirts, which display the area program name and logo. Matching hats are optional. Sponsorship logos are NOT allowed.

### **Registration for State Winter Games and State Summer Games**

Each Area must turn in a confirmed delegation request form approximately three months prior to the State Winter Games and State Summer Games.

#### How SOMI Determines Quotas

1. SOMI receives confirmed delegation request forms from the areas.
2. SOMI receives a total number of beds available from the host facility.
3. SOMI determines a membership percentage for each area (the total number of athlete forms for the area on file at the state office multiplied by 100 then divided by the total number of athletes in Michigan).
4. SOMI determines guaranteed area slots membership percentage multiplied by beds available.
5. SOMI then compares request forms to guaranteed slots and distributes the slots to areas, which requested less slots than they were guaranteed. The remaining slots are considered "extra" slots available for distribution. (For example, Area 1 requests eleven slots and the area's membership percentage provides for 43 slots. Area 1 is given its eleven slots and the remaining 32 slots are available to areas which did not have their total request met). Each area is guaranteed 12 slots.
6. Areas who received their request are removed from further consideration.
7. SOMI determines the remaining number of beds available.

8. SOMI determines which areas have not had their total request met and totals the membership percent-ages. The total of the membership percentages is multiplied by a number, which allows the total to equal 100%.
9. SOMI determines the extra slots to be redistributed (new membership percentage multiplied by extra slots).
10. SOMI continues this procedure until all available slots are distributed.

Note: For Summer and Winter Games, if registration does not match confirmed delegation the area will be charged for the extra spots for the rooms.

## **Recording Scores**

### **Summer Games**

For Summer Games registration, a time, distance, or score should be recorded for each event the athlete participates in (there are a few exceptions for some events) by score due date. The score submitted should be the best score the athlete has performed in a recent practice or competition. Areas should make every effort to obtain a current score, and, as a last resort, they can refer to last year's final delegation reports for repeat athletes. Please reference sport rules for measurement specifications. For Athletics scores measurements need to be taken in meters; for Swimming they must be taken in yards.

### **Winter Games**

For Winter Games registration, levels if needed for sports must be submitted by score due date. Final heats will be determined after preliminary time trials are completed at the event.

### **Athlete Alternates**

For individual events we recommend you have 25% alternates listed. For bowling, bocce, and horseshoes, areas can register a pool of alternates that will only replace a dropped athlete in the same sport and area. For team sports, athletes must be on the roster at time of registration. Any individuals registered for doubles without a partner will be automatically placed as an alternate and will only be activated in replacing a drop.

### **One-Sport Rule**

Athletes are invited to compete in only one sport at both the State Winter and State Summer Games. Within the sport, athletes can compete in two events at the State Winter Games and three events at the State Summer Games.

Athletes competing in team sports must choose between team competition and individual skills contest competition. Refer to the specific event registration materials for additional restrictions on number of events available to athletes.

Exceptions may be made for State Fall Games.

### **Corrections at Summer Games**

Scores and times should be submitted by score due date. The state office should be notified of the

wrong age or gender but no changes to events will take place. Area Directors are responsible for athlete corrections during the registration process.

### **Challenging Athletes**

Special Olympics Michigan encourages coaches to challenge the athletes to reach their full potential. Although very appropriate for some Special Olympics athletes, participation in events such as the Standing Long Jump, Softball Throw, and the 50 Meter Dash do not truly allow most athletes to maximize their skills.

Coaches should attempt to enter athletes in events where training and effort allow the athlete to achieve success at the highest possible level.

Athletes must participate honestly and with maximum effort in all preliminary and final competitions. Sportsmanship will be enforced at all state events.

### **Basketball Competition**

The District Basketball Tournament will be conducted throughout the state in early March. There will be a State Sr. Male Basketball Finals offered for senior males at the end of March.

All Basketball competitions will be single elimination competition with a consolation round, unless there is a division of three. A division of three will play round robin. All teams are guaranteed two games. Divisions will be set up to have 3 or 4 teams. Five team divisions will be used in rare cases only.

Special Olympics Michigan follows the Michigan High School Athletic Association rules for basketball with the modifications listed in this Program Guide.

Please note that there is only one set of rules that all teams will be using. The modifications will apply to everyone.

Every possible effort is made to ensure fair and equitable competition for teams and their placement in division. (Byes may be offered to the State Senior Basketball to teams that have been determined "clearly superior" or "clearly inferior" by SOMI staff and the District Basketball Tournament Director.) These teams would have their status determined upon the completion of the events and must participate in their assigned division at the District Basketball Tournament.

"Clearly superior" teams identified prior to the District Basketball Tournaments may be moved to another district site in which equitable competition opportunities exist.

### **Awards**

#### **Area/Invitational Events**

Place ribbons and/or participation awards can be given to all athletes. If medals are awarded they may not be larger than 13/8 inch and cannot have SO logo on them and must be awarded to all

participants. The same award must go to all participants. Alternates will not receive an award unless replacing a dropped athlete.

### **Regional Events**

Awards may be presented at regional events and ordered by the hosting area, after approval from SOMI.

Team Regional Events - trophies or ribbons may be presented. If medals are awarded they may not be larger than 15/8 inch. Medals and ribbons must be ordered through MTM. Any questions contact somiforms@somi.org.

### **District Events**

Special awards or ribbons will be awarded at all districts basketball tournaments.

### **State Events**

Medals and ribbons will only be awarded to athletes present the day of the event.

Alternates will not receive an award unless replacing a dropped athlete.

### **Registration for Regional/Area/Invitational Events**

The hosting area must submit a Local Event hosting form online to the state or regional office in your area to have the games established.

All registration must be processed on the GMS 7 system no later than the date established by the hosting area.

### **Regional Event Information**

Regional events are a higher caliber event in which areas within a region combine efforts and resources to offer competition. An example of this is to offer Spring Games as a Regional event. The purpose of a Regional Event allows areas to come together resulting in saving of resources, volunteer hours and opportunities for sponsorship. Regional Sports Events are identified as events attended by areas from the same region and organized and hosted by an area within that region.

- At least three areas within the region must attend the regional event.
- Special Olympics competitions, at the regional level, are high caliber and modeled after State competition, enabling more athletes to experience quality, higher level competition.
- SOMI State Competition Rules must be enforced.
- Sponsorship will be sought for regional competitions by the host area or SOMI Staff.
- Awards may be presented at regional competitions. Awards will be ordered by the hosting area after approval from SOMI. Information can be obtained through the Sports Department at the state office.
- If assistance is needed contact the Director of Sports and Wellness.
- Opening Ceremonies take place and awards ceremonies or closing ceremonies must occur.
- No invitational, regional, or area event can be held on the same day as a state event.

Procedures for adding or deleting sports at SOMI state events.

### **Adding a sport or event**

While offering 23 official Special Olympics sports, SOMI recognized that a number of sports or events sanctioned by Special Olympics, Inc., are still available to local and agency programs and could be added to the official list of SOMI sports offered at the state level

Criteria for development of new sports

- The proposed sports or event must be an officially recognized sport by Special Olympics, Inc.
- All athletes or coaches participating in the proposed sport or event must adhere to the policies and/or rules established by SOMI and SOI.
- The suggestion or inquiry for a new sport or event can come from anyone involved with SOMI (coach, Area Director, state staff, family members, offering at World Games, etc.).
- SOMI medical advisory committee must review the sport or event to determine if it meets the accepted health and safety standards.
- A survey will be going out to coaches and Area Directors to determine interest.
- Once interest is demonstrated, the sport or event will have a two-year developmental period where it can be offered at area, regional, and state events.
- Demonstration of the sport or event must be held at state games or the annual Leadership Conference.
- Training schools would be offered to promote the new sports or event.
- A sports management team comprised of sports-special individuals would be developed to assist with training.
- After the two-year demonstration period and a demonstration is held at state games or the December Leadership Conference, the sport or event would be evaluated for meaningful competition.
- If meaningful competition is assured, the Program Committee will be consulted.
- In a team sport, it is suggested that meaningful competition means that 16 teams are participating to make at least four divisions. This is a guideline and will be reviewed by the Program Committee for assessment of equitable competition.
- In individual sports, adding a sport will be on a case by case basis given that the above considerations are met.
- The Program Committee along with the President Advisory Council will make the final recommendation to the President & CEO about whether the sport or event should be added at the state level.

### **Eliminating a sport or event**

The elimination of a sport from SOMI state events will be determined using the listed criteria.

Criteria for the elimination of a sport

Answering the questions below should determine if a sport is “at risk:”



1. Are there enough athletes participating in the sport to have meaningful competition?
2. Are there adequate numbers of qualified coaches to train athletes safely?
3. Are sports rules well-defined for SOMI athletes to compete?
4. Is the sport cost-effective?
5. Are there safe and appropriate facilities for competition?

Once a sport is determined as “at risk,” it will enter a two-year probationary period. (It will be considered “at risk” for one-year and then enter the two-year probationary period.)

A survey will go out to determine if interest in the sport remains and whether interest exists in reviving the sport.

During the probationary period, efforts will be made to revive the sport.

Efforts to revive the sport during the probationary period will include the following:

Emphasis will be placed on training schools for that sport. Area Directors, coaches, parents, etc. will be informed that the sport is at risk and needs to be revived or it will be deleted.

The state office will offer additional support as needed in order to help rebuild the sport. The sport management team for that sport will help with additional support. Bonus quotas may be given to state games for that sport. After the probationary period, it is suggested that a team sport or event must have 16 teams or at least four divisions to continue to be offered at the state level. This is a guideline and will be reviewed by the Program Committee for assessment of equitable competition.

Individual sports will be reviewed on a case-by-case basis.

## **Procedures for hosting a Regional or Invitational Tournament**

### **Selecting a name for your event**

When picking a name for your event, keep in mind that you must include the word “regional” or “invitational.” The reason for this is that we have had many unfortunate misunderstandings about exactly what type of event is being held. If it is named a regional event, then every area within the region should be aware of the plans and have the opportunity to give some input into the organization of the event.

### **Inviting/Accommodating Participants**

When picking a name for your event, keep in mind that you must include the word “regional” or “invitational.” The reason for this is that we have had many unfortunate misunderstandings about exactly what type of event is being held. If it is named a regional event, then every area within the region should be aware of the plans and have the opportunity to give some input into the organization of the event.

- A. Each area is managed by an Area Director who must be notified about your event if you want to invite that area's individuals and/or teams. All participants must be approved by the Area Director to attend.
- B. The SOMI Application for Participation must be valid and filed on site for each Special Olympics athlete. We recommend that you ask for these forms ahead of time so you and/or your medical staff have time to review them. You must adhere to the Special Olympics Michigan Board-approved Athlete Registration Policy for your event.
- C. If housing is offered, refer to the Special Olympics Michigan Minimum Housing Standards Policy for regional or invitational events and the Coach/Chaperone to Athlete Ratio.

## **Rules**

You must use the rules published by the SOMI State Office, Special Olympics, Inc., and the National Governing Body at your regional or invitational event. If you have questions regarding these rules, please call the Director of Sports & Wellness.

## **Event Committees**

- Ceremonies: Each event must begin with an Opening Ceremonies. Events must also include an award presentation and/or a Closing Ceremonies. The award presentation can serve as the Closing Ceremonies depending on what event is being held.
- Special Events: Special events must be organized if the athletes will have a lot of free time. Short, one-day events may not need this committee.
- Officials: Each sanctioned event must use certified or trained officials.
- Games Management Resource Guide: Refer to Games Management Structure for other optional committee ideas.

Criteria for advancement to higher level competition

## **State Competition**

Attending and competing in Special Olympics Michigan state events is a privilege for any athlete. Unfortunately, not all athletes can attend every event.

The number of athletes that the area sends to state events depends on the following issues:

### **1. Area funds available**

The amount that the area can afford to send financially. Registration fees, housing, meals, transportation, uniforms, equipment and other expenses are all paid out of the area funds.

### **2. Quotas**

Whether quotas have been established by Special Olympics Michigan. Sometimes quotas are set due to limited space and housing. If a quota is set, invitations to events will be determined by local membership numbers of athletes registered and training within a specific sport.

Although it is the desire to include every athlete that is training in all the games we offer, due to the many athletes we have competing in the state, it is not always possible. That is why we offer area, regional and a variety of state events to give all the athletes quality competition opportunities.

### **Area/Invitational Sports Events**

Invitational events are planned opportunities for areas to compete as additional competition.

This is a good way for teams to get their scores in, games opportunities and additional practice outside their areas. Invitational Sports Events can involve areas from more than one region. All invitational events should be posted on the area calendar and submitted to Director of Sports & Wellness. The purpose of this includes the following:

1. Invitational events are planned by the host area that invites areas to compete.
2. SOMI Competition Rules will be enforced.
3. SOMI can forward information to other areas for participation Rules/Guidelines can be reviewed before the event is announced.
4. Place ribbons and/or participation awards can be awarded at an area or invitational event.
5. Host area must complete the Event host form and return to the State Program Staff. The form is available online at our website [www.somi.org](http://www.somi.org), or contact State Program Staff.
6. No invitational, regional, or area event can be held on the same day as a state event.

### **Sportsmanship**

Having good sportsmanship is crucial to the well-being of the athletes and all affiliates of Special Olympics.

Please remember the following points when attending any Special Olympics event:

#### **Good Sportsmanship**

Remember that Special Olympics is about giving athletes an opportunity to develop physical fitness, demonstrate courage, experience joy and participate in a sharing of gifts, skills and friendship.

- Support the athlete without ridiculing or intimidating
- Do NOT use profane or abusive language at any time.
- Allow coaches to coach, and officials to officiate.
- Programs should remind delegates, family & friends of these Sportsmanship guidelines to make an enjoyable experience for all who attend.
- Be a positive role model for all athletes, coaches and fans.
- Respect every athlete, coach and official.
- Applaud good performances and efforts from all individuals and teams. Congratulate all participants on their performance, regardless of the game's outcome.
- Focus on the athletes' effort and performance, rather than whether they win or lose.

- Encourage athletes to play according to the rules and to settle disagreements without resorting to hostility or violence.
- Show respect for your team's opponents. Without them, there would be no game.
- Swearing and/or inappropriate language will not be tolerated at Special Olympics Michigan events.
- Respect the rights, dignity and worth of every person regardless of their gender, ability, cultural background or religion.

### **Parent/Spectator Code of Conduct**

Special Olympics is committed to the highest ideals of sport and expect all parents and spectators to honor Sport and Special Olympics. All Special Olympics parents and spectators should observe the following code:

- Remember athletes are participating for their enjoyment. Encourage participation, but do not force it.
- Applaud good performances and efforts from all individuals and teams. Congratulate all participants on their performance, regardless of the game's outcome.
- Focus on the athletes' effort and performance, rather than whether they win or lose.
- Encourage athletes to play according to the rules and to settle disagreements without resorting to hostility or violence.
- Never ridicule or yell at people for making a mistake or losing the competition.
- Remember that athletes learn best by example. Appreciate good performance and skillful plays by all participants.
- Respect the decisions of officials and teach athletes to do the same.
- Show appreciation for volunteer coaches, officials, teachers and administrators. (Remember, without them there would be no participation).
- Condemn the use of violence in any form, whether it is by spectators, coaches, officials or players.
- Show respect for your team's opponents. Without them, there would be no game.
- Encourage athletes and coaches to follow the rules and the officials' decisions.
- Swearing and/or inappropriate language will not be tolerated at Special Olympics Michigan events.
- Respect the rights, dignity and worth of every person regardless of their gender, ability, cultural background or religion.
- Obey all federal, state and local laws, facility and venue rules and Special Olympics rules.

Special Olympics Michigan reserves the right to dismiss parents and/or spectators from any Special Olympics Michigan event if the Parent and Spectator Code of Conduct are violated.

#### Disciplinary steps for violating Parent/Spectator Code of Conduct

- 1st Violation: distribution of the Parent and Spectator Code of Conduct warning.
- 2nd Violation: removal from Special Olympics Michigan event for the remainder of the day.
- 3rd Violation: removal for remainder of the season.

SOMI reserves right to permanently remove based on severity and/or frequency of behavior

- Refer to the Athlete Code of Conduct
- Refer to the Coach Code of Conduct

Event	Total Budgeted Cost for 2023 Event	Discounted Area Cost per person
State Winter Games (4 day)	\$535	\$150
State Summer Games (3 day) Coaches/Chaperones only	\$239	\$115
Training Schools (name badge and materials)	\$25	\$10

The

registration fee will be transferred from the Area account to the state account on the payment date.

**Team Roster Size**

Roster sizes for team events reflect the minimum requirements of the National Governing Bodies. Roster minimums and maximums are as follows:

Sport	Min.	Max.
5-A-Side Soccer	6	10
5-A-Side Soccer - Unified	7	10
7-A-Side Soccer	8	14
7-A-Side Soccer Unified	9	14
11-A-Side Soccer	12	16
11-A-Side Soccer Unified	12	16
Basketball	6	12
Unified Basketball	7	12
Flag Football	6	12

Flag Football Unified	7	12
Poly Hockey	7	13
Poly Hockey Unified	9	13
Softball	11	15
Volleyball	7	12
Volleyball Unified	8	12

You may register 3 alternate players for every team sport.

Unified Sports® may register 4 total (2 athletes & 2 partners) alternate players for every team sport. When replacing dropped athletes an athlete must replace an athlete and a Unified Partner will replace a Unified Partner. Unified Sports® teams must register proportionate athletes and partners. Unified Partners are a peer without intellectual disability.

Sport rules and guidelines are located on SOMI.org

Note: Any Michigan teams selected for World Games/National Games must use the approved World Games/National Games roster sizes. Usually, the World Games/National Games roster sizes are smaller than the number of athletes allowed by SOMI.

### **Honest Effort**

Athletes must participate honestly and with maximum effort in all preliminary and/or final competition. Any athlete that achieves a final score 15% better than the preliminary score, for the event that they are participating in, shall be subject to disqualification from the competition. SOMI will submit to the Area Director all disqualification scores. Area Directors will discuss with coaches an action plan to eliminate future athlete violations.

During State Athletics competition, if an athlete performs substantially different than their preliminary score they will be reheated into a division that is a better representation of their ability.

# Section 5

## Sport

- Team Roster Information
- Unified Sports

Note: Sport guidelines and rules can be found at [SOMI.org](https://SOMI.org)

## **Unified Sports®**

### **Player Development vs Unified Guidelines**

#### **What is Unified Sports®?**

A program that combines approximately equal numbers of Special Olympics athletes and peers without intellectual disabilities (designated as “partners”) on sports teams for training and competition against other Unified Sports® teams. Unified Sports® teams are organized to provide meaningful involvement for all participants. Every teammate should play a role and have the opportunity to contribute to the team. Meaningful involvement also refers to the quality of interaction and competition within a Unified Sports® team. Achieving meaningful involvement by all participants on the team ensures a positive and rewarding experience for everyone.

Unified Sports® are designed to be competitive and also to create friendships on and off the field amongst SOMI Athletes and Unified Partners. Teams should be comprised of both athletes and partners with similar ability levels.

#### **Uniforms**

When ordering Unified team uniforms Athletes should have even numbers and Unified Partners should have odd numbers. This assists with further distinguishing athletes and partners.

Also see pages 44-45 for the uniform guidelines that apply to all sports (i.e., no denim, jewelry, etc.). All other uniform guidelines should be followed per sport.

#### **SOMI Unified Sports®**

The following sports have Unified rules and are hosted at state level competitions.

- Athletics (Team Track & Field)
- Alpine & Cross Country Skiing
- Basketball
- Bocce
- Bowling
- Cycling
- Figure Skating
- Flag Football
- Golf
- Kayaking
- Poly Hockey
- Snowboarding
- Snowshoeing
- Soccer
- Softball
- Speed Skating
- Volleyball



All SOMI rules are to be followed unless otherwise noted on that sport's particular rule page within the program guide. Teams should register as Unified Teams when they are attending a state level competition.

### **Partner/Athlete Selection**

Unified Sports® should be comprised of athletes and partners of similar ability levels and ages. When forming a team, each player (partner or athlete) should have a meaningful role on that team.

It is important to select partners and athletes of similar abilities and ages to create the highest level of meaningful involvement for all players on a team.

There are no rules differences between Unified Sports® and Player Development.

When selecting a team, it may be difficult to select partners and athletes of the same age or ability, if such is the case, the Player Development model should be utilized.

The Player Development level is comprised of partners of a higher ability level paired with athletes of lower ability level. Player Development level is designed to develop lower ability players skill level.

Both Unified Sports® and Player Development levels receive awards based on their games played. The graphics below show the differences in ability level. Note a Unified Level team can be comprised of athletes and partners that are both of a lower ability level.

Please refer to the Unified Sports Three Models comparison on the area resource dashboard to see the different levels.

### **How to start Unified Sports®**

Unified Sports® are beneficial to both SOMI Athletes and Unified Partners and introduce both parties to a social atmosphere that creates inclusion and acceptance. There are various ways to start a Unified program in your area.

Proper sport selection – It is important to select a sport that is fitting for your athletes and partners. Not all participants may be able or have a meaningful role in a sport such as flag football, however a sport such as golf, bocce or bowling may be more appropriate.

Recruiting partners – Partners can be recruited from many places. When recruiting partners, think of organizations in your area that may have interest in participating in sports.

- Colleges & universities
- Unified Champion Schools
- Community rec leagues
- Church youth groups
- Local volunteer organizations
- Partners or Civic Organizations

- Volunteer databases

Practice & Scheduling – Once you’ve recruited your team, you can reach out to the SOMI State office to find other Unified teams to schedule games against. Partners and athletes should practice and compete together regularly.

Principle of meaningful involvement – Every player (partner or athlete) must have a meaningful role on each team. In order to ensure fair play and fun it is important that each player have a role they can fill. It isn’t expected that everyone on a team scores 3 goals, but a role such as defensive specialist or shooter can ensure all players have a role.

### **Unified Sports® General Rules**

All Unified Partners must be registered as part of the team and must participate in practice and team activities. They must play with that team only

All teams must have a non-playing head coach. Unified Partners cannot serve in both roles for the same team.

Unified Partners over the age of 18 can serve as a chaperone for events. However, they must be registered as a chaperone.

All Unified Partners over the age of 18 must complete the volunteer A form on the Volunteer Management System. For Unified Partners under the age of 18, they may complete a physical volunteer A form. Background checks will be completed on all registered Unified Partners over the age of 18. All athletes participating in Unified Sports must have the SOMI athlete participation form up to date.

All Unified Champion Schools and SO College Unified Partners and athletes must have a valid form on file with the state office for state events.

Partners should never dominate or take over a game. If this does occur, partner domination will be called accordingly. Partners are allowed to score.

### **Unified Champion Schools and Unified Sports®**

All Unified Champion Schools are required to host at least one Unified Sport® during their school year.

This is a great way to grow Unified participation for school aged athletes. Unified Champion Schools can participate within their own schools, against other schools or at a Special Olympics sanctioned tournament.

Unified Champion Schools Unified Sports® follow the same rules as community based Unified programs.

### **SO College Clubs and Unified Sports®**

You can start a Unified Sports® program on a campus near you! Many colleges offer intramurals or recreation programs that can offer Unified programming with the athletes in your area!

For more information regarding SO College or how to start Unified Sports® on campus, please contact SOMI at (989) 774-3911 or visit: [www.somi.org/program/so-college](http://www.somi.org/program/so-college)

### **Training**

Special Olympics North America partnered with the National Federation of High Schools to offer a FREE online Unified Sports training. To take the training, log on to <http://nfhslearn.com/courses/36000>

If you would like a face to face training course or webinar hosted in your area, please contact SOMI at (989) 774-3911.

### **State Event Information**

For questions regarding state events rules or how to start a Unified Sports® team, contact the Senior Director of Sports and Wellness at (989) 774-3911.

## **Section 6**

### Area Management

- Area Programming
- Volunteers
- Families

## Volunteers

### Volunteer Responsibilities

Volunteers make it possible for Special Olympics athletes to benefit from sports training and competition. Special Olympics Michigan depends upon caring volunteers who will interact positively with the athletes and other individuals, act in a mature manner, and demonstrate a high level of responsibility.

As a volunteer, you are expected to:

#### 1. Fulfill the responsibility of your assignment

- Carry out all aspects of your assignment
- Attend required meetings
- Ask questions if you do not understand your duties.

#### 2. Set an example for the athletes

- When serving as a volunteer, do not engage in any activity considered inappropriate or illegal such as drinking alcohol, using illegal drugs, use medical marijuana or use profanity at any training or event sites.
- Do not vape or smoke at training or event sites.
- Avoid any behavior, which may be misunderstood or misinterpreted by the athlete
- Be helpful to and show respect toward others associated with Special Olympics Michigan.

#### 3. Model good sportsmanship and behavior

- Support the decisions of referees, judges and committees and use proper protest procedures.
- Be respectful during ceremonies and help the athletes behave likewise.
- Praise athletes for their efforts and encourage them to be happy for the successes of others.
- Support and encourage the other volunteers and staff.

#### 4. Be continually vigilant and aware of the safety of the athletes

- Never leave an athlete unattended.
- Report anything you observe which you feel may cause harm.
- Never put yourself in a compromising situation.
- I understand that I am a mandatory reporter by law and will report any suspected abuse. I also understand the legal consequences for not reporting suspected abuse within 24 hours.

#### 5. Be loyal to your commitment to Special Olympics Michigan

- Look for constructive ways to overcome obstacles.

- Address concerns and complaints to those who can correct or change the situation.
- Be a responsible guardian over any information you may have about others (athletes, volunteers, and staff).

#### 6. Grow, learn, and challenge yourself through your involvement with Special Olympics Michigan

- Be open to new ideas and new ways of doing things.
- Extend your involvement into other roles of leadership and training.
- Enjoy the challenge of learning about and from individuals who are different than you.
- Delight in the difference that your involvement makes in the lives of the athletes, their families, and those you meet through Special Olympics.
- Offer constructive suggestions for legitimate improvements to Special Olympics Michigan events and activities.

#### Action steps for reporting abuse/neglect/behavior issues for volunteers

All Special Olympics volunteers and staff are mandatory reporters of any suspected abuse. In the event of suspected abuse, the following steps are to be followed.

You are required to report suspected abuse/neglect by calling the Michigan Department of Health and Human Services at (855) 444-3911 or call the local law enforcement at 911. You must give a verbal report within 24 hours/ and or a written report within 72 hours to the Department of Human Services.

The Misconduct or Inappropriate Behavior Report Form must be completed for Special Olympics Michigan. Contact the Special Olympics State Office at (800) 644-6404 within 24 hours to report the incident and action steps taken.

If Special Olympics Michigan is notified that a volunteer has neglected, abused, or acted in any inappropriate manner with any participant of the program, immediate steps are taken to report the incident and to investigate the allegation. If abuse or neglect is reported, the complainant will be asked if they reported this to DHSS or contacted the police. If not, SOMI will proceed with the action steps necessary to investigate and determine the reporting process.

A written incident report must be completed by the complainant or through the assistance of Special Olympics Field Staff personnel. There will be a phone call and a letter immediately sent to the volunteer, Area Director, Director of Field Services, and the President and CEO notifying them of the allegations made towards the volunteer and the temporary suspension of the volunteer while it is being investigated.

There will be a background check done immediately. If the background check indicates conviction for: child abuse, sexual abuse or misconduct, neglect, assault, kidnapping, physical abuse, murder, manslaughter, arson, theft, fraud, larceny, prostitution-related crime, or controlled substance crime. No appeals are accepted except in the case of mistaken identity.

Volunteers with DWI, DUI, or comparable offenses or three or more moving violations within the past three years are automatically disqualified from driving on behalf of Special Olympics for seven years.

A written incident report will be completed and the Field Service staff will meet with the Area Director and volunteer to review and determine a plan of action. The meeting will be documented in writing and copies distributed to the Area Director, volunteer and state office. The state office will keep a file and indicate on the volunteer file if suspended or permanent expulsion from the program.

The volunteer has the right to appeal any disciplinary action. The coach/chaperone must submit a written notice of appeal, with a copy to the Area Director and to the Director of Field Services and the President & CEO of Special Olympics Michigan. This notice must include a request for a meeting within 30 days of being notified of the disciplinary action.

The Area Director, the Director of Area Management or the President & CEO will hear the appeal, and the Chair from the Program Committee or designee not involved with the situation. A decision must be rendered in writing within 21 days following the meeting and may reverse, amend or affirm the disciplinary action. The decision shall be submitted to the coach/chaperone and to the Area Program and should include, if applicable, a plan of action for the coach/chaperone to correct the unacceptable behavior that led to the disciplinary action.

### **Volunteer Registration**

All volunteers must register and be approved by Special Olympics Michigan. The registration procedure and forms are important tools for ensuring the safety and well-being of our athletes and volunteers. SOMI seeks volunteers who care about the athletes and the integrity of the program offered to those athletes. SOMI will not tolerate volunteers who display a lack of respect or put the athletes at risk in any way. All volunteers must take the General Orientation and Protective Behavior course online at <https://sosaas.azurewebsites.net/MI/application> and complete the Volunteer Management System (VMS) prior to volunteering with the program.

### **SOI Policy on Volunteer Registration**

In compliance with Special Olympics, Inc. policy, Special Olympics Michigan must register and classify all volunteers. Two classifications exist. Those with close contact to athletes, or who have administrative or financial roles, must fill out a Volunteer A registration form, complete General Orientation training, and complete Protective Behaviors training at the time of registration. The A registration form and Protective Behaviors training must be renewed every three years. One-day volunteers must sign in on a Volunteer C registration form and a photo I.D. must be verified. Special Olympics Michigan will conduct background checks on all A volunteers using a national vendor that includes all available online sex offense registries to protect the safety of all athletes. Volunteers will only be assigned as appropriate. Volunteers may be excluded as listed in the volunteer exclusion procedure. The Board Program Committee will handle appeals.

## Procedure for Registering Volunteers

### 1. Determine the category for the volunteer

Special Olympics, Inc. has established two classifications for volunteers as follows:

#### Class A

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

#### Class C

- Volunteers who have only limited contact with athletes generally, (walk-on-volunteers) who sign on the day of the event.

### 2. Procedures for Class C Volunteers

- Registration: Class C volunteers sign in at the event for which they are volunteering. They are permitted to register the day of the event. When checking in, they must provide the following information: name, complete address, telephone number, and group affiliation if applicable (such as Kiwanis, Boy Scout Troop 703, etc.). Volunteers must sign consent for SOMI to use name and likeness to promote or publicize the purpose of Special Olympics. Upon completion of event please send Volunteer C form to the Volunteer Coordinator.
- Training/Orientation: Class C volunteers should receive training regarding their volunteer duties and SOMI's expectations of them as volunteers. The training may occur in a meeting prior to the event or be outlined in written materials, which the volunteers must read prior to the event.
- Background Check: National background checks will not be conducted for all Class C volunteers.

### 3. Procedures for Class A Volunteers

- Registration: All Class A volunteers must register with the SOMI state office by completing and submitting the A Volunteer Registration Form. Photo identification will be checked by the Area Directors. A release to conduct a background check and use of name and likeness to promote and publicize for the purpose of Special Olympics must be signed.
- Training/Orientation: Class A volunteers should receive training and written materials regarding their volunteer duties and SOMI's expectations of them as volunteers.
- Background Checks: Area Directors (or SOMI staff who work directly with the volunteer) will conduct reference checks on all volunteers. Background checks will be conducted every 3 years. Class A Volunteers must be screened using a national vendor that includes the sex



offender registry for Michigan. In addition, SOMI may conduct a statewide criminal background check. Motor Vehicle Record checks are required if the applicant answers “yes” to the questions regarding suspension or revocation of driver’s license, on the Volunteer Application or if SOMI has received information through the screening process that the applicant may have motor vehicle related convictions. SOMI will make the determination regarding the level of involvement allowed for a volunteer, based on the background check through a National vendor.

SOMI will make a recommendation on whether the individual can serve as an A volunteer. If the individual is rejected as an A volunteer, the Area Director will be notified. The individual can appeal the decision to the SOMI President/CEO, his/her designee, and the SOMI Board of Directors Program Committee.

If the volunteer has been charged with one of the following crimes it is an automatic disqualifier; with no appeal process. Conviction for crime of:

- Child abuse
- Sexual abuse of a minor/adult
- Causing a child’s death
- Neglect of child or any other individual for whom the potential volunteer had/has responsibility
- Kidnapping
- Murder
- Manslaughter
- Felony assault
- Arson
- Criminal sexual conduct
- DWI, DUI, or comparable offenses or three or more moving violations within the past three years automatically disqualifies the volunteer from driving on behalf of Special Olympics for seven years.

### **Filing of Volunteer Registration Forms prior to State Competitions**

All volunteers listed on the housing forms for state competitions must have completed and signed their Class A Volunteer Registration Forms. These forms must be sent in to the state office with all other registration materials by the corrections date for each tournament. They must also complete the Protective Behavior Training and General Orientation sessions on-line every 3 years.

If incomplete or missing volunteer registration forms are not corrected by the registration date, the Class A volunteer will be considered a drop. Areas may appeal to the Program Committee to bring that volunteer.

## **Area Program**

### **Definition of an Area Program**

An area is defined by Special Olympics Michigan as a geographic location of varying size that meets minimum programming standards. An area is empowered to organize, fund, and otherwise administer a Special Olympics program as part of SOMI.

Criteria to be used in granting an area program will include population density, diversity and its relation to current and potential athlete numbers and economic conditions and opportunities, distance involved, and socio-political factors which may include local delivery systems such as school districts, community health organizations, recreation commissions, ARCs, and other advocacy groups and organizations.

The uniqueness and identity of each area will be taken into consideration when making or changing area boundaries. However, each area is part of SOMI and has no separate legal entity status.

### **Policy on Area Accreditation**

Area programs must apply for and be accredited annually by Special Olympics Michigan. The area must turn in a completed Application for Area Accreditation (Annual Plan/Final Report) to field service staff by December 15 of each program year. Any area not accredited by January 1 will be given a written thirty (30) days' notice to complete the application, during which time an area would have a provisional status of accreditation for sixty (60) days. All accreditation certificates will be presented by the Leadership Conference. Because an incomplete area Application for Area Accreditation can hold up the status of the state accreditation from SOI, it may cause the closing of an area program.

Therefore, if the state office does not receive the application after the expiration of 30 days, the area will lose its authorization to organize, conduct and promote Special Olympics, to raise funds for these purposes, and to use the name Special Olympics and the Special Olympics logo, symbol, or seal. The area athletes will not be allowed to register or compete in events.

Upon accreditation, the state office will authorize the area to administer the Special Olympics program. An area may request a waiver to the above policy to the Board of Directors Program Committee.

### **Area Accreditation**

Application for Area Accreditation will be sent out early October and will be due back mid-December.

### **Board Policy on Area Quality Program Standards for Area Programming**

The Quality Program Standards set forth by SOMI are as follows for areas to meet the annual accreditation standards:

1. The area will show growth in the program as defined by the individual area management team, regional manager and SOMI Field Service/Leadership Team through various initiatives, such as

Athlete Leadership, Global Messengers, Parent/Family activities, MATP, Young Athletes, Unified Sports, Health & Wellness programs, and Unified Champion Schools.

2. Every area will provide a year round sports training and competition program.

- All registered athletes must train and/or compete in at least one sport per year.
- The area must offer training and/or competition opportunities in at least one (1) sport at the area level during each of the four (4) sports seasons sanctioned by SOMI.
- Areas must offer programming to athletes of all ages, children through adults.
- The area must attend at least three (3) regional and/or state events, with a minimum of one (1) being a state event (summer, winter, basketball or fall games, Poly Hockey/Bowling).

3. The area will provide proper sport-specific equipment and uniforms, use appropriate facilities, and follow SOMI uniform guidelines as outlined in the Program Guide when participating in any events at the area/regional/state events.

4. The area will provide for the recruitment, orientation, and training of volunteers and will follow all policies and registration guidelines established by SOMI and SOI as set forth in the Program Guide.

5. The area will have an active management team with a minimum of six (6) members, which includes an Athlete Representative, Fundraising Representative and a Parent/Family Representative. Management Teams must meet at least four (4) times a year.

6. The area will complete the annual accreditation, an annual calendar or events, a balanced budget, and the annual census.

7. The area will utilize the SOMI logo and all public relations materials as specified in the Program Guide. The area will follow the technology guidelines, including email, electronic newsletter, social media, fact sheets, and websites.

8. The area will maintain a balanced budget, follow fundraising guidelines, and participate in state-wide fundraising efforts as determined by SOMI.

9. The area director and/or their representative must attend the Annual Leadership Conference and Regional Team Meetings as scheduled.

### **Policy on Area Management Teams**

Each area must have an Area Management Team that consists of a minimum of six people. The Area

Management Team is recruited, appointed, and retained by the Area Director. The Area Management Team must meet at least four times a year. The term of an Area Management Team member is for two years, and they may be reappointed.

### **Area Management Teams**

#### **Assistant Area Directors and Local Coordinators**

Assistant Area Directors and local coordinators will be appointed by the Area Director as needed. Assistant Area Directors and local coordinators will be responsible for carrying out the assignments set forth by the Area Director.

#### **Area Management Team Members**

The purpose of the Area Management Team (AMT) is to establish a working structure for the area and to assist the Area Director in the development and implementation of area programs consistent with the policies of Special Olympics, Inc. and Special Olympics Michigan.

It is the responsibility of the AMT to offer input regarding the quality and quantity of events and games to be offered, number of athletes recruited for involvement in the program, participation by various institutions and schools within the area structure, annual budget considerations, fundraising endeavors, public relations strategies, etc., and to assist the Area Director in completing a comprehensive Area

#### **Annual Plan and the Application for Area Accreditation**

The Area Management Team serves as a viable and necessary liaison between the area Special Olympics program and the community's human and material resources. Representatives from a broad segment of the community are desired.

Team members take an active role in planning and implementing program goals and developing the Area Annual Plan.

An Area Management Team must consist of no less than six members counting the Area Director. A management team member may be responsible for no more than two positions. The Area Director may assume operational responsibility for no more than one additional position and should not be the Financial Representative.

Appointed AMT members must be responsible for the following mandatory Area Management Team positions. These positions are best operated as committees instead of the responsibility of one individual. They include:

- Athlete Representative
- Competition Representative
- Outreach Representative
- Financial Representative (not a second option for AD)
- Parent/Family Representative
- Fundraising Representative

- Public Relations Representative
- Medical Representative
- Training Representative
- Volunteer Representative

All of the AMT positions are committee based. We encourage areas to develop these committees.

The team also could include the following members:

- Coach Representative
- Community Representative
- Local ARC representative
- City and County Parks and Recreation Department
- Personnel
- Athletic Coaches Association Members
- Local educators, business persons, civic organization members

A well-developed Area Management Team should become self-perpetuating, replacing or adding members as needed. A given member's term on the management team shall be for two years, and members may be reappointed. Term of membership shall begin on January 1st and conclude on December 31st.

The Area Director and/or AMT representative should seek community persons to fill the various sub-committee responsibilities dealing with games or program activities.

### **Area Management Team Meetings**

The Area Management Team is encouraged to meet monthly, but is required to meet at least four times a year with an agenda and meeting minutes on file for each meeting. The Area Director serves as the chairperson of the Area Management Team and is responsible for scheduling meetings.

### **Area Management Team Recognition**

An Area Director may recognize individual members of the Area Management Team in several ways. Purchase of individualized clothing items such as coats or shirts with members' names and positions on them, gift certificates to a restaurant or sports store, or a team retreat would be appropriate. This expense must be budgeted for in the area budget and should be limited to a \$100 value per team member or approximately \$1,000 in total. This recognition should in no way hinder or be cost-prohibitive to area programming. The team members cannot be given a cash gift. Special Olympics funds cannot be used on alcohol.

## **Area Budget Schedule**

Area budgets will be sent to areas in July and will be due to Field Service Staff mid-late August (specific due dates will be sent with budgets).

### **Volunteer Area Director Financial Token of Appreciation**

1. Rules for the payment of the \$599:
2. The AD must have served for a full year to be eligible.
3. The AD must have been in place at the beginning of the year to be eligible. This means January to December.
4. If an eligible AD leaves under good standing during the year, the token will be prorated and given when they leave. The amount will be prorated to the last full quarter the area director served.
5. If the AD is terminated for any reason they are not eligible for the Financial Token of Appreciation.
6. Only volunteer area directors will receive the Financial Token of Appreciation. There may be instances that an area director could be paid a stipend for other services depending on the funding source and outside work being done. For example: Unified Champion Schools (USC) administration of a large scale program with multiple schools.
7. If an area Director owes SOMI money for any reason, it will be deducted from the \$599.
8. The token will normally be paid out of state funds.
9. The payment check will be issued on the last check run of the year and will be mailed to the AD. If there are two ADs, the token will be split.
10. This will not be a merit based system. It is a Token of Appreciation for the work that an area director does for SOMI. If an area director's performance is deemed unacceptable, the regional field services person will take action to work with the AD or work to replace the AD if necessary.
11. Annually the President & CEO will provide the list of acceptable candidates to the Accounting Department for concurrence and the CEO will write the year end letter awarding the token.

## **Area Technology Needs**

Areas are expected to care for the SOMI technology as if it were their own. SOMI technology is to be used for SOMI business only and not for personal use. No Spam email is to be sent using SOMI technology or with a SOMI email address. Music and games files are not to be downloaded onto any SOMI computer.

Backups of all computer files must be done on a regular basis. Updates from Microsoft and virus scan software must be installed at a minimum of weekly.

All technology purchases must be pre-approved by the State Office before purchase regardless of cost. Return the Technology Purchase Request Form to the Information Systems Manager for approval.

All Area cell phones that are provided by SOMI are to be ordered through Accounting at the State Office. Areas can enter into a contract with prior approval from the SOMI accountant.

## **Technology**

A current computer compatible of running needed software listed below. Areas are expected to bring the SOMI laptop to all conferences and training sessions. Games entries are to be done on the laptops so bringing them to the games will be very helpful.

Backup method for SOMI information is needed. This could be a flash drive, external drive, or any external method of storing information. The best backup option is uploading to Google drive via [drive.google.com](https://drive.google.com). Log in with [areaXX@somi.org](mailto:areaXX@somi.org). You may also send any data you wish to the State Office for secure backup.

Each area program will possess all of the following technology:

- A current Windows computer with internet capability. GMS will not run on a Mac.
- Email capability. All areas should use [areaXX@somi.org](mailto:areaXX@somi.org) as their official SOMI email address.
- An inkjet or laser printer
- Answering machine or voicemail
- Copier or access to a copier
- Internet access – high speed access is preferred for accounting purposes
- Scanner – not required but is the most efficient way to submit copies of athlete health appraisals and accounting receipts.

## **Software**

- MS Office Suite (Word, Excel, Publisher...). When computers are purchased through the State Office, they will be delivered with the Office Suite installed.
- Adobe Acrobat Reader
- Internet browser (Chrome, FireFox, IE 11.0 or other browser)
- Games Management System (GMS) for athlete database is online. It is the area program's responsibility to update their athletes and send all current health appraisals to the State Office as soon as you get them. Do not wait until you get a problem sheet saying the forms are expired. All athlete activity (games, trainings, etc.) is to be entered by the state into GMS.
- Virus scan software: it is imperative that this is kept up-to-date. AVG and Avast are good free options.
- All Windows updates MUST be done as soon as they become available.

## **Subject Line on Emails**

The President's Advisory Council has made a recommendation to put Special Olympics on the subject line of emails. If you don't do this, some people might just delete the email thinking it is spam. Adding signature taglines to your email is a good way to publicize an upcoming event, our website, or your Facebook page.

## Area Web Presence

- Website: Every area program has an official web page on SOMI.org. Areas are not allowed to start their own website somewhere else. Areas are also not to give permission for a local program or a volunteer to create one for them.
- Social Media (Facebook, Twitter, Instagram etc.): Areas that have social media accounts must have a member of the SOMI Marketing and Communications team from the State Office as an administrator for your page. If it is an account without administrator rights, the log-in and password must be filed with the State Office. This guarantees that the rights to the page will always remain with Special Olympics Michigan and its associated local area program in the event of any change in management team or staff. If your area wishes to start a new social media account of any kind, contact the Marketing and Communications team at the State Office for assistance.

## Area Director

### Primary Qualities Needed

The Area Director's primary responsibility is to provide year-round sports training and competition at the area level. Area Directors should possess the following attributes to carry out this responsibility:

- Adequate time to do the job
- Leadership ability
- Experience and background in Special Olympics or a closely related activity
- Ability to exercise good judgment
- Good communication skills
- Organizational and administrative abilities
- Understanding and acceptance of the basic philosophy and mission of Special Olympics
- Personal and professional integrity
- Effective interpersonal and communications skills
- Enthusiasm for working with persons with intellectual disabilities or closely related developmental disabilities
- Experience and ability to work with volunteers
- Support Statewide fundraising efforts
- Conflict Management Skills

### Games and Program Responsibilities

- Establishes a year-round sports training and competition program for all eligible persons with intellectual disabilities.
- Determines a year-round schedule of events for the area.
- Promotes participation in training schools
- Coordinates and approves all transportation arrangements within the area



- Secures, maintains, and updates athlete information on the GMS computer program. Be sure to send changes to the state or regional email accounts.
- Submits the original copy of the Application for Participation to the state/regional office.
- Provides for GMS registration, orientation and training for new volunteers, then submits forms to state/regional

#### Administrative Responsibilities

- Applies annually for area accreditation, which includes developing an annual budget, an annual area plan, and profile report and yearly calendar.
- Establishes administrative procedures for the area program according to SOMI policies and procedures, and SOI general rules.
- Establishes an Area Management Team and meets with the team at least four times a year.
- Attends meetings/conferences of Area Directors each year (state and region)
- Accounts for all financial activity within the area
- Compiles an inventory of area equipment and updates it yearly
- Delegates program activities through the Area Management Team representatives

#### Public Relations and Community Responsibilities

- Works within the local community to increase the number of participants and volunteers (Outreach)
- Coordinates PSAs, news releases, and arrangements for news coverage relating to local and area games and programs with SOMI.
- Gives appropriate recognition to volunteers, service groups, and others who provide assistance and service to Special Olympics
- Promotes Special Olympics as a vehicle for improving the physical health, fitness, and self-esteem of persons with intellectual disabilities or closely related developmental disabilities

#### Fundraising Responsibilities

- Establishes a plan to raise funds to cover the area's budget annually
- Works within the local community to increase financial resources
- Accounts for all fundraising events within the area
- Participate in state signature events and cooperative fundraising.

#### Appointment, Resignation, and Termination of Area Directors

Any person interested in becoming an Area Director should contact the Field Services staff member in their Region or the President/CEO. Area Directors will be appointed by the President/CEO of Special Olympics Michigan after completion of a recruitment process to determine the best candidate for the position.

An Area Director resigning from Special Olympics Michigan is requested to submit written notice to the President/CEO 30 days prior to the Area Director's last day of service. An Area Director who is

terminated may be given up to 30 days' notice by the President/CEO of SOMI or his/her designee. Suspension of an Area Director can be immediate.

## **Other Area Management Team Job Descriptions**

### **Assistant Area Director**

Assist the Area Director in completing assigned duties as well as serving as the Area Director Representative when the Area Director cannot be present. The role of the Assistant Area Director will vary in each area, and it is up to each specific Area Director to outline what his/her responsibilities will be.

A minimum of five hours per week, year-round, in addition to attending the area meetings and events. It is recommended that assistants be appointed for a one-year term, however, assistants can be re-appointed indefinitely. He/she must be familiar with and committed to the philosophy and programs of Special Olympics and the resources in the community. The Assistant Area Director must have good organization and communication skills, as well as experience and knowledge of working with people. He/she must be able to relate to volunteer personnel and be able to delegate responsibilities to committees.

Prior to assuming the position, the Area Director will provide training on what the job of Assistant Area Director entails. The Assistant Area Director should know how to use existing files, follow proper channels of communication, understand the approval process for projects or expenditures through the area, be aware of committee structure, and know and enforce the policies of Special Olympics International, the chapter, and the area program. In the event that the Area Director resigns or is unable to serve as the Area Director the Assistant Area Director will become the interim Area Director until a new Area Director is appointed.

### Responsibilities

1. Assist the Area Director in identifying key volunteers to serve on the Area Management Team.
2. Assist the Area Director in writing and carrying out the goals of the program.
3. Serve in an Area Management Team position as assigned by the Area Director if qualified and interested.
4. Assist the Area Director in maintaining a current list of athletes and local programs.
5. Assure that the area follows all local, state and national Special Olympics policies and guidelines.
6. Assist the Area Director in getting the rules information out to all volunteers.
7. Help to educate the public about what a person with intellectual disabilities can do.
8. Assist the Area Director as requested.
9. Serve as a resource to local coaches, ensuring that current rules and appropriate training techniques are being used throughout the year.
10. Assist with fundraising as needed.

11. Attend Area Management Team meetings and participate in the planning and evaluation process for the area.

### **Fundraising Representative**

The Fundraising Representative is responsible for coordinating the acquisition of funds necessary to operate the area program. This person will work with the Area Director to assist the funding needs of the area for the upcoming year, and develop and implement a plan for meeting those financial needs.

This person should be knowledgeable in the area Special Olympics program, as well as the local communities where funds will be solicited. A background in “asking for money” is necessary for this position. The Fundraising Representative must be creative in his/her approach to raising funds for the area, and have a genuine interest in asking people within the area to financially support the area Special Olympics program.

Fundraising Representative should attempt to develop a committee to assist in running various events. Select each person who is in charge of a specific fundraiser to serve on the committee.

#### Possible Guidelines

1. Work with the Area Director, Financial Representative, and the Area Management Team to develop a realistic, functional revenue budget and fundraising plan for the area.
2. Explore and identify financial resources available in the area.
3. Develop an area policy consistent with the state and national guidelines to authorize, implement and coordinate ongoing and future fundraising events.
4. Develop and implement fundraising events and promotions utilizing area financial resources and area volunteers.
5. Work with the Special Olympics Michigan development staff in connection with state and national fundraising events taking place within the area. (LETR, Wertz, Water Warriors).
6. Provide input relative to area fundraising activities for the area financial accreditation report.
7. Follow accounting rules in regard to reporting requirements for fundraising events and donor receipting.
8. Polar Plunge event coordination.
9. Work with LETR Liaison and SOMI office on upcoming LETR events
10. Attend Area Management Team meetings and participate in the planning and evaluation process for the area.

### **Public Relations Representative**

The Public Relations Representative is responsible for coordinating all area public education/public relations activities with the Area Director and the Special Olympics Michigan Marketing and Communications Staff.

This person should be knowledgeable about Special Olympics, at the area, state and national level. A background in journalism, public relations or marketing is helpful, but not mandatory. An interest in working with the media and the general public is necessary. Provide a positive message of Special Olympics Michigan and have good networking skills are a plus. Computer skills are required.

#### Possible Guidelines

1. Assess public education/relations needs within the area.
2. Develop a year round plan for educating and informing the public about Special Olympics Michigan.
3. Work with the Area Director and all members of the Area Management Team to publicize and promote all aspects of the program (training, fundraising, etc.).
4. Develop a working relationship with media in area.
5. Prepare area e-newsletters on a quarterly (at least) basis
6. Act as the liaison between the Area program and Area media. Coordinate media coverage of area events prior to, during and following events.
7. Perform other duties and responsibilities that may be a priority for your area regarding public education/relations.
8. Keep SOMI State office informed of Area competitions, fundraisers and other events for Area page and calendar of events. Work with staff to implement website, Facebook, twitter etc.
9. Attend Area Management Team meetings and participate in the planning and evaluation process for the area.

#### **Medical Representative**

The Medical Representative is responsible for working with the Area Director to ensure all medical aspects of the area program are in line with the guidelines of Special Olympics Michigan. This person will work with the Area Director to ensure the well-being of athletes involved in the area program.

This person should be knowledgeable in the area Special Olympics program, as well as possess the necessary training and experience to fulfill the responsibilities of the position.

#### Possible Guidelines

1. Serve as a communication link between the area program, and community health agencies.
2. Be responsible for ensuring that appropriate medical coverage is available for all area events, both training and competition.
3. Attend Area Management Team meetings and participate in the planning and evaluation process for the area.
4. Keep updated information on athlete forms. Send out notice prior to expiration date.
5. Assist in setting up free Health Appraisal clinics when possible. Assist athletes in finding opportunities for health Appraisals.
6. Secure medical personnel for state games attendance.

7. Utilize athlete medical update form prior to athletes' attending events.
8. Encourage and promote Healthy Athletes® opportunities for athletes at State Games, and seek Healthy Athletes® opportunities at local events.

### **Competition Representative**

The Competition Representative is responsible for ensuring, with the Area Director, that quality competition is taking place at the area and or regional level. This person will work with the Area Director to assess the competition needs within the area and to develop and implement a program of quality competition throughout the area. This person should be knowledgeable in the facets of Special Olympics competition, as well as the rules and procedures for implementing area-wide competition. A background in sports with experience in setting up competitive events with large numbers of athletes is recommended.

#### Possible Guidelines

1. Recruit a Games Management Team to organize/administer games/tournaments.
2. Acquire games/tournaments facilities and work with the Area Director/state office with any facilities contracts.
3. Recruit certified or well trained and experienced volunteer officials and scorekeepers.
4. Serve on games/tournament rule committees.
5. Assure games/tournaments follow all Special Olympics competition rules and National Governing Body rules and competition guidelines as outlined in the Summer/Winter Official Special Olympics Rules Book utilize any modifications as outlined within the Special Olympics Michigan Program Guide.
6. Attend a Games Management training school.
7. Assure that games training is taking place for volunteers prior to the events and that all volunteers on the Games Committee involved in competition planning have registered in VMS and completed all necessary training.
8. Attend Area Management Team meetings and participate in the planning and evaluating process for the area program with the Area Director.
9. Assure that the awards procedure for the athletes is a meaningful and dignified event and following State rules.
10. Assure that the area's team/individual uniforms are appropriate and comply with competition
11. Assure that Equipment is in safe working order and is secured in a safe location
12. Assure that the area is participating in 12 sports
13. Promote and assist with the development of Unified sports, MATP and YAP within the area.
14. Assure athletes are participating in eight (8) weeks of training.
15. Serve on Regional Sports Committee
16. Send quarterly updates on regional/area competition schedules to the Director of Sports and Training.

### **Financial Representative**

The Financial Representative of the area is responsible for coordinating all financial reporting

activities within the area. The Financial Representative should have a working knowledge and understanding of generally accepted accounting principles in order to evaluate accounting reports. This person will work with the Area Director and should have the ability to implement Special Olympics Michigan accounting procedures

#### Possible Guidelines

1. Gather financial data (i.e. Financial Edge account report) to present to the Area Management Team during scheduled meetings.
2. Report to the Area Director, and communicate to the area management team and the area of the revenue and/ or expenditure activity.
3. Assist the Area Director in completing the financial section of the Application for Accreditation (budget) and the final year-end accounting reports.
4. Act as a source of financial information for the Area Director.
5. Develop a system (with the Area Director) to ensure that the following duties are performed:
  - a. Deposit area revenue
  - b. Organize, code and submit expenses to state office for payment
  - c. Track cash advances to ensure the support and redeposit of advanced funds are accounted for
  - d. Maintain compliance of reporting fundraising events
  - e. Act as contact person for state office questions regarding area finances
  - f. Other duties/functions necessary to perform the job
6. Attend Area Management Team meetings and participate in the planning and evaluation process for the area.

#### **Volunteer Representative**

The Volunteer Representative must recruit, match and arrange training for a sufficient number of volunteers to make sure the area program is able to run efficiently. The Volunteer Representative must be committed to the philosophy, needs and rewards of volunteerism, have good organization and communication skills, and experience and knowledge of working with people. Delegate committee responsibilities to sub-committee chairpersons.

The Volunteer Representative would work various hours each week, in addition to attending all area meetings. The goal would be to recruit, retain, recognize, and organize with the proper utilization of volunteers.

#### Possible Guidelines

1. Obtain from Area Director, local coordinators or Area Management Team, a listing of the types of volunteers needed, qualifications and time needed for each job.
2. Maintain job descriptions for area volunteer positions and include training duties.
3. Appoint a volunteer committee to assist in recruiting, interviewing, placing, recognizing and overall managing of area volunteers.

4. Follow up on all referrals from the state office or local volunteer agencies (VAC, RSVP, etc.) so that interested people are provided a chance to assist the area program.
5. Hold interviews for potential volunteers to determine their interests and skills.
6. Work with the Area Director so that all volunteers are assigned to the appropriate local coordinator or committee person and to the appropriate training programs that match their interests.
7. Communicate with the chairpersons of each committee or program to arrange in-service training for volunteers.
8. Arrange activities to thank all volunteers for their services.
9. Ask volunteers to evaluate their time as a volunteer and the program.
10. Ensure that supervisors of volunteers perform a general evaluation of their volunteers and the usage of volunteers for the event.
11. Work with the Area Director to nominate an outstanding volunteer each year and submit it to the state office for statewide recognition.
12. Ensure that all volunteers complete the appropriate volunteer registration form as required by Special Olympics International (A volunteer form for coach, chaperone and individual with fiscal administrative authority; one-day volunteer - sign in).
13. Complete a personal reference check on any new volunteer assigned to an A volunteer level position.
14. Create and maintain a current volunteer database
15. Arrange for thank-you letters or appreciation notes to retain and increase volunteers in the program.
16. Follow up with volunteer inquiries that are forwarded from the state level.
17. Update Area web pages with volunteer needs.
18. Use E-lists to recruit volunteers for events.
19. Attend Area Management Team meetings and participate in the planning and evaluation process for the area.

### **Training Representative**

The Training Representative is responsible for coordinating area training. He/she will work closely with the Area Director and state sports staff to ensure that coaches, officials and games committee people receive the training necessary to do the best job for the athletes. It is also the responsibility of the Training Representative to monitor athlete training within the area. It is recommended that this individual have knowledge of the Special Olympics sports and training program.

The Training Representative must have a variety of sports contacts for recruiting clinicians for training schools, have good organization and communication skills, and have experience and knowledge of working with people. He/she must also have experience with Special Olympics

International (certified Special Olympics coach, official or games director would be preferred).

A minimum requirement would be to attend area meetings.

Possible Guidelines

1. Develop and monitor the area training program in coordination with the Area Director and local coaches so that the area-training program meets the needs of the athletes.
2. Assist the state sports staff in setting the training school calendar by giving input on what training is needed in the area.
3. Recruit athletes to assist at the training schools hosted by Special Olympics Michigan in the local area.
4. Complete the necessary forms required by the state. Sign applications for certification for coaches, officials and games directors from the area.
5. Annually assess the area-training program and work with the Area Director in completing the training portion of the area accreditation.
6. Establish a list of practicum sites and supervisors for training school attendees and make sure this information is shared with coaches after completing a training school.
7. Assist with the acquisition of facilities for certified coach's training schools.
8. Check bi-annual reports provided by the state level and follow up with coaches to turn in missing forms to state office.
9. Check area missing volunteer forms sheet for state events and turn in volunteer A-forms and certifications by deadline.
10. Provide updated coaches contact information to the state office
11. Forward monthly coaches e-newsletter to volunteer coaches in the area.
12. Educate all volunteers to take online quizzes for general orientation, protective behaviors and concussion training.
13. Attend Area Management Team meetings and participate in the planning and evaluation process for the area.

### **Outreach Representative**

The Outreach Representative is responsible for the year-round implementation of plans and activities to recruit eligible persons who are interested in participating in Special Olympics.

This person should be familiar with the Special Olympics philosophy, as well as the area Special Olympics program. Good organizational and communication skills, combined with experience in working with people, will be helpful. The Outreach Representative should be willing to work with other Area Management Team members in spreading the benefits of Special Olympics. He/she should be familiar with resources in the community providing services to persons with intellectual disabilities. He/she should also be able to delegate responsibilities to committee volunteers.

### **Possible Guidelines**

1. Develop and implement a year-round plan to recruit eligible people who are not currently participating in Special Olympics. Plans should include reaching out to private and public schools, adults, vocational centers, institutions, group homes, ARCs, etc. Plan should include the following activities: Identify possible sources of athletes (i.e., school, group homes, etc.). Target number of eligible athletes from various sources. Develop an athlete data base for all students in the last year of high school. Provide information (i.e., mailings, PSAs, personal



contacts, etc.) on Special Olympics to various sources. Develop a “registration campaign” to involve new athletes (athlete enrollment kits).

2. Conduct awareness programs and demonstrations at targeted schools and agencies. Utilize resources for Young Athletes, School Resource Guide and Unified Sports Program.
3. Attend Area Management Team meetings and participate in the planning and evaluation process for the area.

### **Athlete Representative**

The Athlete Representative is responsible for coordinating athlete input into the Area Management Team. They are a liaison between the Area Management Team and athletes. They will disseminate and gather information to and from the athletes of the area. They will operate under the direct supervision of the Area Director.

This person should be a current Special Olympics athlete with the ability and desire to be a part of a team.

#### Possible Guidelines

1. Represent the Area Management Team point of view to athletes.
2. Represent the athlete’s point of view on the Area Management Team
3. Attend Area Management Team meetings, region meetings, state meetings or other meetings as required
4. Attend or assist at area training sessions
5. Participate in Athlete Leadership Programs (AL)
6. Represent the area through personal presentations to service and civic organizations.
7. Be a role model for the other athletes of the area.
8. Attend a Global Messenger Training if they haven’t already.
9. Possess a positive attitude with self confidence and self-esteem. And be able to communicate verbally and demonstrate good behavior.

### **Parent/Family Representative**

The Parent/Family Representative is responsible for coordinating a communication network to reach all parents of Special Olympics athletes within the area. This person will work with the Area Director to establish the parent communication network in order to update parents on events and happenings within Special Olympics, both area and statewide.

The Parent/Family Representative should attend area meetings and the number of hours would vary from week to week. The goal would be to recruit and increase the parent/family involvement and serve as the parent/family spokesperson.

#### Possible Guidelines

1. Represent the parent’s point of view on the Area Management Team.

2. Responsible for recruitment and involvement of area parents for volunteer participation in the area program.
3. Establish an area parent email list, and update list as necessary.
4. Coordinate the involvement of area parents in a parent/family hospitality area at each area event.
5. Act as the contact person for the Special Olympics Michigan Parent/Family Advisory Council within the area.
6. Establish a parent committee within the local programs of the area in order to involve more parent participation.
7. Work closely with the Area Director as a member of the Area Management Team, attend meetings in the planning and evaluation process each year.
8. Help organize and administer an area booster club and arrange family
9. Assist with coordination of bringing new parents on board and working with outreach and training representatives to help increase participation with the Young Athletes™ Program.
10. Attend Area Management Team meetings.

## **Families**

### **Role of Parents and Families**

Parents and family members of persons with intellectual disabilities believe that with proper training and support, persons with intellectual disabilities can benefit from participation in the Special Olympics program. The designated parent/family member includes not only the athlete's natural family, but also guardians, foster families, facility supervisors, concerned friends, and extended family.

As a member of the Special Olympics, we believe that there is an opportunity to take an active role in influencing matters that contribute to the social and physical development of the athlete through sports training and competition.

As a member of the Special Olympics, we believe that there is a responsibility to assist in the offering of the Special Olympics program. Opportunities for involvement exist in the raising of local, area and state funds, transporting athletes, serving as a member of the Area Management Team, training, or in any number of ways as needed. Results of this involvement may be shown in the strengthening of the family unit and the athlete's positive self-image, which is carried over into the classroom, job, community and home.

### **Special Olympics Michigan Position on Keeping Participants Safe**

Special Olympics Michigan believes that EVERYONE, including staff, volunteers, parents, caregivers and coaches has a role to play in ensuring the safety of Special Olympics athletes. We take this responsibility seriously and have implemented a number of steps to help make participating in Special Olympics not only rewarding, but safe.

Special Olympics Michigan will abide by the federal and state laws for mandated reporters and is committed to ensuring that all staff, registered coaches, and Class A volunteers are trained in the mandated training procedures to report abuse of any athlete who participates in our program.

Special Olympics Michigan has developed resources for parents and care providers, updated the Protective Behavior Training, Volunteer A forms, and Codes of Conduct forms to include mandated reporting requirements and guidelines. This information will be shared through trainings, on the website, and at the area level.

## **Section 7**

### Outreach Initiatives

- Outreach & School Initiatives
- Unified Champion Schools
- Young Athletes
- SO College Clubs
- Health and Wellness

## **Outreach**

Outreach or athlete recruitment is a never-ending goal of Special Olympics Michigan. It is critical that the opportunity to participate is made available to any interested athlete. The resources listed below are available to assist in the recruitment process. Contact SOMI for outreach materials if you are seeking additional information.

## **School Initiatives**

### **Unified Champion Schools**

Special Olympics Unified Champion Schools is an education-based project that uses the sports and education programs of Special Olympics to activate young people across the U.S in order to promote school communities where all young people are agents of change – fostering respect, dignity and advocacy for people with intellectual disabilities. Special Olympics believes that through sports young people can make a difference in friendships, schools and communities.

Key characteristics:

- Youth Leadership
- Anti-Bullying Message
- Unifying Programming
- Positive School Climates

### **Core Activities**

- Youth Leadership & Advocacy: Each school forms a Youth Activation Committee (YAC) comprised of students with and without disabilities that work with the school staff liaison to make decisions on Unified Champion Schools activities for the year. YACs plan and implement the program together. They also engage in community service projects together.
- Whole School Engagement: Through anti-bullying R-word campaigns, students influence their school population to stop using the word retard(ed) as a put down. Campaigns are designed by the YAC and look different in each school. They may include things such as week-long banner signing projects, a week of morning messages or an assembly to name a few.
- Inclusive Sports: Unified Sports combine students with and without disabilities on the same team as meaningful partners, creating friendships on and off the field through practice and competition. Students can participate within their school setting, against other schools or at Special Olympics competitions. At the elementary level schools Young Athletes may be used as the unified sports component. Unified Sports at the High School Level have expanded to regularly scheduled league play within their athletic conferences.

To become a Unified Champion Schools, a school will commit to assign a liaison to work with a core group of students to form the Youth Activation Committee (YAC) for the school. They will plan and implement the Core Activities for the school year. Special Olympics Michigan Unified Champion

Schools staff will work directly with each school providing resources and support to ensure a quality program.

Funding may be available to start Unified Champion Schools in your school. Information can be found on our website – [www.somi.org](http://www.somi.org) under the Unified Champion Schools tab.

Complete a brief application and a SOMI staff member will contact you directly. If you have questions or need further information please contact us at: [unifiedschools@somi.org](mailto:unifiedschools@somi.org) or visit [www.somi.org/schools](http://www.somi.org/schools)

### **Young Athletes™ (YA)**

Young Athletes is an early childhood sports play program for children ages 2-7 with intellectual disabilities and their peers, designed to introduce them into the world of sports. The benefits to this program have been proven worldwide. First and foremost, these activities help children improve physically, cognitively and socially. This program also raises awareness of the Special Olympics program and serves as an introduction to the resources and support available within Special Olympics Michigan.

Young Athletes is designed to address two specific levels of play. Level 1 includes physical activities focused on developing fundamental motor tracking and eye-hand coordination. Level 2 concentrates on the application of these physical activities through a sports skills activity program and developing skills consistent with Special Olympics sports play. The activities will consist of foundational skills, walking & running, balance & jumping, trapping & catching, throwing, striking, kicking and advanced skills. Special Olympics Michigan designed a training book with 10 lessons that is available to volunteers to run the program. We also provide a free play equipment kit which is filled with everything needed to implement the program.

There are several ways that Young Athletes are run in Michigan. In schools teachers are using our lessons and equipment to supplement what they are already doing. By teaming up with us they are teaching their students from a different perspective – sports. They also are able to enlist volunteers from High Schools or student clubs to partner with their students to provide valuable lessons to both age groups. Parents play groups and afterschool programs are another option. Volunteers use our available free materials to teach our Young Athletes skills and social interaction that will help them both in and out of the classroom. They are on their way to participate in Special Olympics Michigan sports program. We are also teaming up with colleges and universities to engage future leaders in our program. We provide training and materials and they run the program on campuses with the children. To download the Young Athletes Activity and Resource Guide go to [www.somi.org/youngathletes](http://www.somi.org/youngathletes)

### **SO College Clubs**

SO College Clubs are programs that connect college students and individuals with intellectual disabilities through sport to build friendships and help lead the social justice movement of Special Olympics. Created by college students for college students, the network seeks the membership of campuses that seek the common goals of enhancing the lives of people with intellectual disabilities

and building a more accepting world for all. SO College Clubs host programs on campus, but also can support area programs.

- Core Elements - SO College Clubs are made up of three core elements: Inclusive Sports, Youth Leadership, and opportunities for Full Campus Involvement. Together these components can help students work for and with Special Olympics athletes to help transform school campuses into communities of acceptance and respect.
- Sports - Start an inclusive Unified Sports team comprised of college students and Special Olympics athletes; or host a local or state level Special Olympics event. Unified Sports can be comprised of competitive teams or as recreational sports just for fun. SO College Clubs can participate in Unified Sports within their own school, but can also participate in intercollegiate competition. Unified Rivalry Series utilize the excitement of varsity athletics rivalries bringing together unified teams from each school. National Intramural and Recreational Sports Association (NIRSA) Regional and National tournaments provide schools to participate in Unified Divisions at NIRSA level events.
- Leadership - SO College Clubs can function as a student-led club that is fully recognized by your school; or students can be a part of the Games Organizing Committee for the local or state Special Olympics.
- Involvement - Host an awareness campaign, such as Spread the Word the End the Word®; coach at the local level, or invite students to become Fans in the Stands at local Special Olympics games and cheer on the athletes or take the plunge.

### **Connecting with local area programs**

It is suggested that SO College Programs connect regularly to share schedules, resources and opportunities for involvement. Areas and SO Colleges should coordinate to maximize participation of athletes and align with current area programming.

For more information or to get an SO College Club started in your area contact [unifiedschools@somi.org](mailto:unifiedschools@somi.org) or visit [www.somi.org/program/so-college](http://www.somi.org/program/so-college)

### **Health and Wellness Programs**

Special Olympics Michigan focuses on how to help all members of our community with being healthy and promoting wellness through education and resources both in competition and outside. Between the Healthy Athlete Initiatives and the Healthy Community programs, we aim to help the athletes become healthier and give them access to treatment that they may not have.

Despite a mistaken belief that people with intellectual disabilities receive the same or better healthcare than others, they typically receive substandard care or virtually no health care at all. Special Olympics Michigan brings health care opportunities to the athletes, allowing them to improve their overall health in a comfortable environment.

Learn more at [www.somi.org/program/special-olympics-health](http://www.somi.org/program/special-olympics-health)

## **Healthy Athletes®**

The mission of Healthy Athletes® is to improve athletes' ability to train and compete in Special Olympics. Athletes receive a variety of health screenings and services in a series of clinics conducted in a welcoming, fun environment.

Health care professionals and students are trained to provide the screenings in an effort to educate the professional community about the health needs and abilities of persons with intellectual and developmental disabilities.

Michigan provides the following services at various events throughout the state:

### Opening Eyes®

- Provides vision screening services for athletes
- Provides refractive testing
- Fabricates eyeglasses as indicated
- Provides sunglasses and protective eyewear

### Special Smiles®

- Screens the teeth, gums, tongue and mouth
- Educates about correct brushing and flossing
- Teaches the importance of diet to oral health
- Fabricates custom mouth-guards for contact sports
- Refers to community providers for necessary dental care

### FUNfitness

- Surveys general exercise habits
- Assesses flexibility, functional strength and balance
- New assessment of aerobic fitness in 2005
- Educates in home exercises to improve performance
- Provides simple exercise tools
- Facilitates community referral as needed

### Healthy Hearing

- Screens hearing acuity
- Creates custom swim plugs
- Makes minor repairs on hearing aids
- Consults on hearing aids, noisy environments
- Recommends medical or audiology evaluations



## Health Promotions

- Content varies with the health needs of the population, e.g. U.S. Programs have focused on nutrition (prevention of obesity), hydration, skin protection, tobacco avoidance and bone health.
- Empowers and motivates athletes to make good lifestyle choices that will improve their long-term health-using interactive educational games, literature
- Health screenings at Games include BMI and BMD measurements and Bone Density testing.
- Seeks to find the best way to convey and reinforce key concepts and information to people with ID, to encourage healthy lifestyle choices.

## Fit Feet

- Evaluate the skin, nails, bones and joints of the feet
- Examine the function of the foot and gait
- Examine the shoes and socks of athletes

## Med Fest®

- Free health exams are conducted for athletes.

## Strong Minds

- Increase athlete awareness of active coping strategies that can be used in competition and in life
- Support athletes to identify stress management/coping strategies that they like and think they will use
- Provide resources on good coping for athletes, coaches & caregivers
- Start conversations about stress, coping, and emotional wellness
- Provide training and experiences for mental health students and professionals to discuss emotional well-being with individuals with Intellectual Disabilities.

## Healthy Young Athletes

- A prescreening to be completed by the child's parent, legal guardian, or primary caregiver prior to a screening event or while waiting to see a provider at the screening.
- A developmental screening which is intended to be used to identify potential developmental strengths and delays in areas like language and communication, social-emotional skills, problem-solving, fine motor skills, and gross motor skills. (see [s.somi.org](https://www.somi.org) for more information)
- A medical screening focused on identifying underlying medical conditions that could contribute towards growth and developmental delays, as well as behavioral issues.

- Resources and referrals for families and caregivers. The materials will highlight concerns addressed during the screenings, information on follow-up care, resources that support a family as they navigate the healthcare system and related support services and strategies for health and wellness in the home.

### **Healthy Communities**

The Healthy Communities program is unique, as it is recognized and accredited by Special Olympics International. Through commitment to reducing inequality in health care status and increasing access to community health resources programs are given the official title of Healthy Community. The main goal is to create year-round access to quality health care for the Special Olympic athletes.

Through Healthy Athletes, fitness and wellness programs, and with other partnerships, Special Olympics is paving the way for inclusive health.

We are focused on giving the Special Olympic community resources to keep their health on track, because good health is important for someone to have the ability to work, learn, engage with friends and family, and to participate in the sports they love.

### **Coaches**

It is important as a coach to keep your team healthy both on and off the field. In order to have a team compete to the best of their ability, they must be taking care of their health and wellness needs. Coach Health Guides for tips on how to help your athletes during the season are available online or by contacting the State office.

To help your athletes stay fit between sports seasons we have Fit 5 Fitness Cards, which contain exercises that are available to improve ability through focused movements- from a level 1 beginner to level 5 advanced. Improve endurance, strength and flexibility at each level as well as overall health.

The Fit 5 At Home Guide can be used for athletes to track their progress in achieving their fitness and personal goals for physical activity, nutrition, and hydration. Fit 5 is based on the three goals of exercising 5 days per week, eating 5 total fruits and vegetables per day, and drinking 5 bottles of water per day. This guide has tips on exercises for endurance, strength, flexibility, and balance and has healthy snack and meal options, along with tips to help you stay hydrated. Use this guide to learn new ways to stay healthy. Also, check out the chart in the back that you can use to track your progress!

Looking for inspiration to keep your athletes motivated to eat healthy and exercise more. Check out all of our resources on-line, which includes a video, and learn how variety, consistency, intensity and purpose are all related to the combination of exercise and nutrition to help better your overall wellness.

## **SOMifit**

This 10-12-week program combines the dedication to improving health, fitness, and wellness through a variety of activities. SOMifit helps athletes become healthier and develop lifelong healthy habits, while also providing resources to athletes that they may not have regular access to.

If you are interested in starting a SOMifit Program near you, fill out this survey to get more

information:

[https://docs.google.com/forms/d/e/1FAIpQLSd6GQQuy6Ozt47\\_zq3YE6mvdmkBoo\\_6HQ0wlPZSrAmV1RrVSA/viewform](https://docs.google.com/forms/d/e/1FAIpQLSd6GQQuy6Ozt47_zq3YE6mvdmkBoo_6HQ0wlPZSrAmV1RrVSA/viewform)

## **Section 8**

### Development & Marketing

- Fundraising & Development
- Raffles
- Partnerships
- LETR
- Funding Splits
- Third party fundraisers
- Marketing & Communications
- Awards Program

## **Fundraising & Development**

### **General Fundraising Guidelines**

Successful fundraising follows these basic guidelines:

1. Fundraising events and activities should present a positive image of Special Olympics Michigan and support the purpose and mission of Special Olympics.
2. Fundraising activities and any solicitation activities in overlapping Areas must be approved by the Chief Executive Officer (CEO) or their designee.
3. SOMI must restrict its fundraising activities to the State of Michigan.
4. Areas may not conduct mail solicitations of individuals unless approved by the CEO or their designee. This action would violate our contract with SOI.
5. Grant requests should only be made within your respective area. Areas can contact grant writer Nancy Joseph-Recknagel at reckn1nl@cmich.edu or (248) 538-1598 for assistance.
6. Advertising for fundraising events also must make clear to the general public who will receive the benefits/proceeds from the event. For example, if a golf outing is held to benefit SOMI, the golf outing's promotions should say "to benefit Special Olympics Michigan or "to benefit Special Olympics athletes."
7. Fundraising events and projects should be conducted in a cost-effective manner with consideration for the cost to raise a dollar. Expenses incurred as part of fundraising activities should not exceed 25% and should try to be kept at 15% or lower. (As recommended by the Michigan Attorney general)
8. Outside, or third-party organizations or corporations raising money on behalf of SOMI should be strongly encouraged to follow this 25% guideline as well. Additional third-party rules involving receipting are available from the state office.
9. Names of anyone requesting to be excluded from the fundraising list needs to be given to the state office by December 31st annually.
10. Note (\*) The SOMI staff will have primary responsibility for relationships with statewide companies. This means that we will be creating sponsorships and growing relationships with companies that have previously dealt with various levels of the organization. It is hoped that through cultivation of the total relationship, we can better serve and hopefully grow that contribution.

### **Guidelines for Families Raising Funds to Attend National and World Games**

Family members, employers of family members, fraternal groups, or others may conduct fundraising events to offset costs of family members to attend National and World Games events.

The fundraising event's purpose must state clearly that it is to benefit the family - not the athlete of Special Olympics Michigan.

Any publicity, in any medium, print, radio, etc. must clearly communicate that the purpose of the fundraising event is to benefit the family – not the athlete of Special Olympics Michigan.

Notification of the fundraising events is to be made to the Area Director for their awareness, whom will contact the appropriate state office staff for their awareness as well.

### **Board Policy on Donor Restricted Gifts**

Due to legal obligations, gifts given by donors that are restricted in any way are to be received by the legal entity Special Olympics Michigan, Inc. These gifts include permanently restricted or temporarily restricted funds. It is the fiduciary responsibility of the Board of Directors to receive these gifts, correspond with the donor as to the intent of these funds, and to ensure that they are used accordingly to the donor's wishes.

Tobacco and Alcohol Policies Association of the SOMI name and logo with tobacco products and alcoholic beverages

SOMI shall not allow the manufacturers or distributors of tobacco products, alcoholic beverages, or non-alcoholic beer products to publicly or visibly connect the name or trademark of their products with Special Olympics in any way. This rule applies to all events including fundraisers.

The above provision does not preclude SOMI from:

1. Accepting blind (unacknowledged) and unidentified contributions (cash or in-kind) from such manufacturers or distributors.
2. Allowing such manufacturers or distributors to link the trademarks of their products other than tobacco or alcoholic beverages with Special Olympics.

Alcohol distributors can sponsor Special Olympics fundraising or special events (not games or competitions) as long as the company name does not have a beer or alcohol brand, or any alcohol, beer, wine words or references.

Special Olympics, Inc. has final authority on these issues. SOMI must contact SOI if there is any question of its ability to accept funds or other support from a business associated with tobacco products or alcoholic beverages. SOI's decision on the matter is binding.

### **Raffle Rules and Regulations**

All Raffle Licenses are required to come through the SOMI state office because of the rules and regulations of the Charitable Gaming Commission and our Auditors.

Games of chance are controlled by the Charitable Gaming Division of the Michigan Lottery. The website for this is [www.michigan.gov/cg](http://www.michigan.gov/cg). This website has everything you need to know about holding raffles and the rules, regulations and guidelines to follow. You can get the raffle license application from this website. We are no longer able to pull individual area Millionaire Party (Texas Hold 'em) licenses. There are also IRS rules and guidelines we must follow so please read through these and be sure you stay in compliance with all these steps for holding a raffle. Being able to continue fundraising through this great avenue depends on everyone adhering to these rules.

### **SOMI Receives the Raffle Application**

The Area completes page 2 of the raffle application and submits it to Stephanie Graham in Accounts Receivable at the SOMI state office. A check will be cut from the area account to cover the license fee. The secretary will then get the board chair signature necessary for Page 1. If you need help or have any questions regarding raffles, please contact Stephanie Graham at (989) 774-7462. You can fax it to (989) 774-3034 but please follow up with a phone call ensuring the state office received your application and check request.

All raffles must have a set of “house rules” in place before the raffle date. Stephanie Graham can send a sample of house rules once application has been received.

On a separate sheet of paper with the fax or in the email please give the dollar amount value to each prize you are raffling.

If conducting a raffle where you are having raffle tickets printed (not 50/50 tickets), please submit what your ticket is going to look like. This must accompany the Raffle License Application. Note: when creating any type of flyer for your event, it must receive approval from Stephanie Graham. Note: Tickets and advertisement flyers cannot be printed until after the license number has been issued. The license number must be printed on these materials.

The state office will keep a copy of the application and Stephanie Graham will enter it into our raffle database.

When you receive the license through the Charitable Gaming Division, you must then let Stephanie Graham know the raffle license number by faxing a copy of the license. This will be entered into the raffle database

Please note: It takes 6 weeks for the Charitable Gaming Division to process a Raffle License Application. The SOMI state office needs at least 2 weeks prior to that to cut the license fee check and to obtain the board president signature so make sure to plan your events at least 8 weeks out. There is no way around their process. We cannot rush a license through.

Please plan your event accordingly. Allow enough time to print and sell your raffle tickets. Do not wait to submit a raffle license. Once you have all the information needed you can apply 18 months in advance of your event. If there are any changes to the original application, then it must be submitted in writing to the Charitable Gaming Division.

Remember: Raffle tickets must have the license number on the ticket. If you are raffling off a car, snowmobile or anything with a value equal to or greater than \$5,000 you should list on the ticket that the winner is liable for all taxes. Any large raffles like these please notify the state office before your event and we can do the calculation for you and let you know the amount that needs to be withheld from the winner prior to giving them the prize as required by the IRS Reportable Income regulations. The amount we have to withhold currently is 25% of the retail value of the prize. This amount is subject to change.

## **During the Raffle**

Display the raffle license and house rules in clear view. (If you can tack it or tape it to a wall that would be best).

Whomever you selected as the event Chairperson must be at the event. That person is responsible for all paperwork involved. They must be a volunteer, board member or staff of our organization for at least six months and have a Volunteer A form on file.

Once the winner is drawn immediately have them sign a copy of the Prize Distribution Form which you will get from Stephanie Graham prior to your event. A sample of this form is in the forms section in the back of this guide. This form **MUST** be filled out completely with the winner's name, address, phone and social security number and signed by them.

Please have all raffle winners complete this form before giving them their prize. If they refuse to sign, then pick another winner. We must adhere to the IRS guidelines and SOMI's Auditors. If the prize is not reportable, we will not send them a W2G.

Make a copy of the winning ticket(s) to send in with the Prize Distribution Form and the Raffle Financial Statement.

## **After the Raffle**

You must submit the completed Raffle Financial Statement to Stephanie Graham. The financial statement is due to Charitable Gaming Division by the 10th day of the month following the event. Keep in mind the SOMI state office needs time to obtain the board chair signature on the financial statement. Delaying this procedure could hold up any future raffle license applications. If there is an outstanding Financial Statement due to the Charitable Gaming Office, they will not issue any further raffle licenses until the said (late) Financial Statement is submitted. (Assistance is available for completing these forms). Make sure you write down the cost of the license and the cost of printing any tickets. All information will be entered into the state office raffle database.

Submit a copy of the completed Prize Distribution Form to the state office.

Submit a copy of the winning ticket to the state office.

IRS Requirements:

IRS rules require the completion of a W2G (income statement). This is the form the IRS wants for reporting gambling winnings, which includes raffles. It is summed up as follows:

1. If the prize is valued at greater than \$600 and is at least 300 times the ticket price for the raffle, it is reportable as income.
  - Example A: \$5 ticket price with a \$500 prize. Note reportable because the prize is not over \$600.



- Example B: \$5 ticket price with a \$1,200 prize. Not reportable, even though it is over \$600 because it is not over 300 times the ticket price of \$5 (\$1,500).
  - Example C: \$2 ticket price with a \$650 prize. Reportable because it is over \$600 and 300 times the ticket price (\$600).
2. If the prize is over \$5,000 and 300 times the ticket price we are liable for income tax withholding on the raffle prize. The amount we have to without currently is 25% of the retail value of the prize. This amount is subject to change.
- Example: \$10 ticket price, \$6,000 prize. This is reportable to the IRS and we would have to withhold \$1,500 from the prizewinner before the possession of the prize.

Only one person can be listed as the winner. One person must report the income.

SOMI requires all winners fill out a Prize Distribution Form (please see form on page 88) before any prizes are awarded. As you can see by the previous formula, there are several different ways and formulas on reportable income on a prize. We must have the Prize Distribution Form on file to be in compliance with the Charitable Gaming Rules, Auditors, and the IRS requirements. This will be extremely helpful at the end of the year when it is time for SOMI to send out W2G's. SOMI can do the calculation at that point and see whether it is reportable or not. Additionally, if you have any prizes over \$5,000, please let us know before the drawing date and we can do the calculation for you and let you know the amount that needs to be withheld from the winner prior to giving them the prize as required by the IRS Reportable Income regulations.

For Raffle rules, regulations or questions please contact: Stephanie Graham at (989) 774-7462

For IRS rules, regulations or questions please contact: Roger Yob at yob1ra@cmich.edu or (989) 774-4386

Note: there are different rules for a Millionaire Party License. Areas can not apply for licenses.

### **Frequently Asked Questions**

1. Would I need a Large Raffle License if the total value of all prizes awarded in one day is less than \$500.00?
  - a. Answer: No. That would be a Small Raffle License for \$15.00. A Large Raffle license is required if the total value of the prizes awarded in one day is over \$500.00.
2. Do I need more than one raffle license if I am doing several 50/50 drawings on the same date?
  - a. Answer: No. If the total amount of prizes is over \$500.00 you would need a Large Raffle License for \$50.00 and when filling out your application your start and finish time must correspond when you do the first and last drawings. You can do as many raffles within that time frame as you desire.
3. I want to conduct a raffle and give away large cash prizes but I am not sure I will sell enough tickets and am concerned I will lose money on my event. What do I do?

- a. Answer: There is a disclaimer you can write that states if a certain quantity (you need to state how many) tickets are not sold, the drawing will revert to a 50/50 raffle with the minimum prize of \$xxx (indicate dollar amount) awarded. This must be on the original application or you have to request in writing not less than 20 days before the gaming event. Note: The Charitable Gaming Division needs 10 days in advance a written cancellation for an event.
- 4. If I have a 50/50 raffle and have several drawings but my prizes are worth less than \$100.00 would I need a raffle license?
  - a. Answer: If the total value of ALL raffle prizes awarded during the entire day does not exceed \$100.00 you would not need a license and there is no presale of tickets and it is a single gathering event. If the total value of prizes awarded exceeded \$100.00 then you would need a small raffle license for \$15.00.
  - b. Example: Drawing 4 separate tickets and awarding \$30.00 to each winner constitutes a small raffle license because the total prizes awarded in a single day would be \$120.00 over the \$100.00 allotted.

**Prize Distribution Form**

Date \_\_\_\_\_

Name \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Phone \_\_\_\_\_ Social Security Number \_\_\_\_\_

Prize: Cash or Value \$ \_\_\_\_\_ Item Description \_\_\_\_\_

Statement of Acceptance:

I have received the above prize on this date.

\_\_\_\_\_  
Signature of Winner

\_\_\_\_\_  
Date

\_\_\_\_\_  
Witness

\_\_\_\_\_  
Date

Please note: A social security number is required for ALL prizes.

### **Alcohol Distribution at Events**

SOMI volunteers may not sell alcoholic beverages at any event including fundraisers unless we first purchase a liquor license and liquor liability insurance for that event. Events conducted by SOMI that offer alcoholic beverages should follow the risk management recommendations of SOCIP.

### **Liquor Licenses**

Please contact the state office at (989) 774-3911 for insurance and Liquor Control Commission information.

### **Tax-Exempt Purchases/Tax I.D. Number**

The Special Olympics Michigan tax-exempt identification number is only to be used when a representative of SOMI is purchasing items for use in a Special Olympics program. Outside groups or individuals are not authorized to use this number. Both the IRS Federal Identification Number and State of Michigan certificate for tax-exempt sales as issued to Special Olympics Michigan are to be used by SOMI only.

### **Issuing Receipts**

The SOMI state office will issue receipts for all contributions received. If applicable, donors can use these receipts for a deduction on their taxes as verified by their tax preparer. It is a Special Olympics Michigan procedure to issue receipts to all donors unless the money received is for a payment of services, payment for return on cash advance or for reimbursements.

Receipts should only be given to the "direct donor." If donations are received through a third party, SOMI must issue the receipt to that third party. For information or receipting third-party entities, contact the CFO.

For example, if the Jaycees hold a carnival event and they present a check to SOMI, then SOMI would issue a receipt to the direct donor, in this case, the Jaycees. SOMI would not issue receipts to the many individuals who attended and gave money at the carnival.

### **Association with other Organizations**

#### **Prohibition on forming separate entities**

SOMI is prohibited from establishing or affiliating with any other corporation, partnership, foundation, trust, supporting organization, endowment fund or endowment organization, or any other entity without SOMI's prior written consent. Any request for affiliation must go through the SOMI State Office before the request is sent to SOMI.

#### **United Way**

Programs considering participation in a United Way campaign must ensure that participation will not result in any "fundraising blackout" time periods or other obligations that would conflict with Special Olympics Michigan's obligations under the integrated direct mail program (IDMP), other fundraisers conducted by the state, national and international offices, sponsorship activities, or the General Rules.

Contact SOMI for more information prior to applying for United Way funds. The President/CEO must sign all United Way applications and contracts.

### **Partnerships**

SOMI is authorized by SOI to seek Partnerships. However, Special Olympics, Inc. also has existing and developing relationships with corporations and other organizations that provide financial and other support to SOI and its programs. To prevent conflicts or interference with these relationships, SOMI programs must adhere to the following policies in their contacts with corporate and other organization Partners:

#### **First Option to SOI Partners**

When seeking corporate support for an event or program, Special Olympics Michigan must check to see if that company is in competition with any of SOI's Partners. (SOI is required to give written notice to SOMI of its exclusive Partners and other fundraising activities in Michigan.) If so, SOMI must first offer SOI's corporate Partners the opportunity to support that event or program. (The General Rules describe in detail how to approach SOI's Partners.) If SOI's corporate Partners decline the option, then SOMI may offer the opportunity to other corporations or organizations.

#### **Identification of Partners**

Corporate Partners or other organizations, which support SOMI, shall be recognized in signage or promotional materials as a "partner" or "supporter" of that SOMI event or program. SOI does not permit any corporate partner or organization to add its company or product name to the name of any Special Olympics games, tournaments, events, demonstration, training event, or other activity excluding fundraising events.

Example of unacceptable Partner identification: Ameritech State Summer Games or Coca-Cola Area 2 Spring Games. Example of acceptable Partner identification: Area 2 Fall Games sponsored by SpartanNash, Inc.

If a business or organization conducts its own event to benefit SOMI, the business or organization's event must be identified as such, for example, "CompanyTOCFun Run to benefit Special Olympics Michigan." Areas with any questions about appropriate wording or advertisements should contact the state office.

#### **Partner Names or Commercial Messages on Athlete Uniforms**

To avoid commercial exploitation of persons with intellectual disabilities no uniforms, bibs, or other signs bearing competition numbers, which are worn by Special Olympics athletes during competition or during Opening or Closing Ceremonies of any Games, may be emblazoned with commercial names, logos, or messages.

For example, if a Partner is Smith Computer Store, SOMI cannot print "Smith Computer Store," the store's logo, or its slogan, "We're high tech in your small town," on any athletes' uniforms or competition bibs.

## General Partnership Procedures

- The General Rules of Special Olympics, Inc. and the policies of Special Olympics Michigan shall govern all relationships. The mission of Special Olympics must be upheld.
- All contracts and Partner agreements require Special Olympics Michigan's approval and a signature from the CEO.
- Area Partnerships cannot conflict with state, national, or international contracts or agreements.
- Contract or agreement terms cannot exceed the length of the accreditation period.

## Sponsor-A-Champ Mailings

Areas have asked, "Can I do a Sponsor-A- Champ mailing?" The short answer is that areas cannot send letters to individuals but they can send a small targeted mailing to local businesses in their areas. Here is the verbiage from the SOMI and SOI (IDMP) Agreement:

IDMP will be Program's exclusive source of direct mail, residential telemarketing and online fundraising during the Term, subject to any exceptions or terms contained in the Agreement, the Procedures Document or the Online Giving Procedures.

a.) Exclusivity, Direct Mail. Program shall not mail or permit to be mailed any fundraising appeal (or any public education materials that contain an explicit fundraising solicitation) to existing Donors or potential donors in its jurisdiction or any other jurisdiction, or otherwise conduct or authorize third parties to conduct any direct mail programs on Program's behalf. This restriction includes, but is not limited to newsletters containing an appeal (e.g., Sponsor an Athlete, Support Our Summer Games, Join Our Giving Circle). Program shall not, however, be prohibited from including envelopes with language such as, "Please accept my donation to support Special Olympics [Program]" in newsletters that Program sends to stakeholders for the sole purpose of sharing Program-related information, such as information about Program activities, upcoming events, and other relevant content.

Notwithstanding the foregoing, upon receiving the prior written consent of SOI, Program may mail or permit to be mailed invitations to a fundraising event (defined only as an event for which there is a stated fee for admission or participation), provided such invitations either: (1) do not include a request for a donation other than the amount charged for attending the event; or (2) include the following statement: "I cannot attend, but enclosed is my gift of \$XX." Such solicitations may only be sent to select audiences. SOI will provide written guidance to Program on permitted events and types of audience allowed. For the avoidance of doubt, all other invitations to fundraising events, regardless of whether funds are raised at the event or in connection with that event, are prohibited under this Section

3.01. The preceding sentence shall not prohibit Program from using the mails to conduct Donor Cultivation.

b.) Exclusivity, Telemarketing. Program shall not call or permit to be called in connection with any fundraising appeal (or any public education messages that contain an explicit fundraising solicitation) existing Donors or potential donors in its jurisdiction or any other jurisdiction, or otherwise conduct or authorize third parties to conduct any telemarketing programs on Program's behalf. This shall not prohibit Program from using the telephone to conduct Donor Cultivation or solicitation of Business Donors or to conduct calling by DialAmerica to benefit Special Olympics.

b.) Exclusivity, Online. Program is encouraged to promote online donation form established by SOI in online and offline communications. Except as otherwise permitted in the Black-out Calendar, Program shall not process funds online (including, without limitation, one-time and monthly donations, memorial and tribute contributions, and renewal gifts) except through individual giving pages established in accordance with procedures established by SOI in the Online Giving Procedures and that SOI can track in accordance with this Agreement. Notwithstanding the foregoing, Program may participate in the following online activities: (a) friends-asking-friends events in which participants in a program-sponsored event ask friends and families to "sponsor" participants, so long as the Program does not explicitly request donations for such event be made directly to Program; (b) auctions or online merchandise shops that allow donors to purchase merchandise, so long as any donations made on such sites that do not include a purchase are made through the individual giving pages; (c) external self registered accounts to raise funds such as GoodSearch or similar programs where a percentage of the sale by a third party benefits an unrelated charity; (d) online ticket sales for in person events (e.g., Gala or golf tournament) when the purpose of the page is to process the ticket sales and Program does not explicitly request donations be made in addition to the ticket purchase; and € Donor Cultivation efforts that include a special online link to allow select individuals to make donations. The preceding sentence shall not prohibit Program from using online communications to conduct Donor Cultivation.

Notwithstanding the foregoing, upon prior written notification to the other party briefly describing the campaign, both Program and SOI may conduct up to two special fundraising efforts in the course of the year, each not to exceed a four week period, that do not use individual giving pages (each, a "Special Campaign"). Revenue generated from a Special Campaign shall not be included during the times set forth in the Black-out Calendar. A Special Campaign must be a unique appeal rather than the promotion of existing campaigns. Program and SOI agree to use reasonable efforts to ensure that any Special Campaigns do not contain conflicting messages from IDMP Communications.

### **Contracts**

All fund-raising agreements entered into by Accredited Programs shall be in writing, and must include the following minimum contract protections, unless otherwise approved in advance and in writing by SOI: (which are described fully in the SOI General Rules, Section 7.07):

- 7.07 (a) Approval of Third Party Use of SO Marks  
The Accredited Program shall have, and must actually exercise in each instance, a right of advance written approval of all materials (such as promotional literature or merchandise) to be developed or distributed by any third party which will bear the name of the Accredited

Program, the SO Logo (which may be used only in conjunction with the name of the Accredited Program), or any other SO Mark which SOI has licensed that Accredited Program to use. Through such approval process, the Accredited Program shall ensure that such third party fully Special Olympics Official General Rules 106 Special Olympics complies with all SOI ownership rights to the SO Marks, with the Graphics Standards Guide, and with other applicable provisions of the Uniform Standards.

- 7.07 (b) Ownership of Accredited Program Assets  
The Accredited Program shall retain, and be recognized explicitly by all third parties as retaining, exclusive ownership of all Accredited Program assets which will be used or developed by a third party through the use or exploitation of any SO Marks, such as ownership of all donor lists and records containing the Accredited Program's list of active or lapsed donors.
- 7.07 (c) Inspection of Financial Records  
The Accredited Program shall have the right to inspect and audit, with reasonable notice, all books and records and other financial documentation of a third party which relate to the third party's performance under the agreement, and a right to receive properly documented financial reports from the third party concerning the revenues raised from the project for the Accredited Program.
- 7.07 (d) Fees and Expenses  
The agreement must clearly identify whether the Accredited Program will be responsible for paying any fees or expenses in connection with the project, including those incurred by subcontractors or other parties who will perform services for the third party which is contracting directly with the Accredited Program, and must explicitly protect SOI from any liability or responsibility to any third party for payment of such fees or expenses.
- 7.07 (e) Insurance Coverage  
The agreement must require that the third party contracting with the Accredited Program obtain adequate insurance coverage for its activities in connection with the project, in amounts acceptable to the Accredited Program, including, but not limited to, coverage protecting the Accredited Program's interests in relation to the third party's access to donor lists, cash contributions to the Accredited Program, or other tangible or intangible assets of the Accredited Program. Special Olympics Official General Rules 107 Special Olympics
- 7.07 (f) Compliance with Laws and Voluntary Standards  
The agreement must explicitly require the third party to comply with all laws and regulations which apply to its activities under the agreement with the Accredited Program, including, if applicable, the laws of the Accredited Program's jurisdiction governing charitable solicitations and cause-related marketing contracts, as well as all Voluntary Standards (as defined in Section 5.11), if any, which may apply in that Accredited Program's jurisdiction.
- 7.07 (g) Indemnification  
The agreement must require that the Accredited Program be indemnified by the third party from damages, costs, expenses and attorneys' fees arising out of any claims that might be made against the Accredited Program by any party stemming from the third party's failure to perform its obligations under the contract, or its unauthorized use of any SO Mark.



- 7.07 (h) Length and Termination of Contract  
The agreement must specify the length or term of the agreement with the third party, the timing and circumstances under which the Accredited Program may terminate the agreement by providing written notice to the third party and must permit the Accredited Program to terminate the arrangement promptly if the third party defaults in performing its obligations under the agreement.

### Online Fundraising

- An Online Fundraising Page allows fundraisers to ask for donations from family and friends all over the world at no cost.
- You can share your online fundraising page on social media platforms.
- Online donors immediately receive their receipt via email for tax purposes.
- You can set up email lists, track donations and customize your page.
- It is easy to send emails to update donors on your progress and remind people to donate.
- Donations made by credit card are typically 25% higher than those made by cash or checks.
- Donors are asked if they also want to cover the minimal credit card fee.

### Online Fundraising

SOMI accepts donations at SOMI.org or over the phone by calling (800) 644-6404. Each area should be working towards using online fundraising for their area fundraisers. Special Olympics Michigan provides an area webpage through Classy to add their events. These area pages are only allowed for events and can not be ongoing or for open solicitations, as per the IDMP contract. Currently there are several webpages through Classy for online fundraising, examples: Polar Plunge, Statewide Events (i.e. Torch Run, Wertz Warriors and Water Warriors), CMU Homecoming 5K and Area Events. With changes in technology online fundraising is a great way to raise additional funds and collect information about individuals who are registered. Call the state office (989) 774-3911 to have a Classy page set up for your area.

### Law Enforcement Torch Run® (LETR)

Law Enforcement Torch Run® is a worldwide fundraising and awareness program that benefits Special Olympics. The money is raised through community runs, t-shirt sales, raffles, Polar Plunges, Agency events, straight donations, and sponsorships. For more information contact Andrea Rachko at (989) 774-3911.

### Growing your LETR program

If you have a personal relationship with a law enforcement/corrections officer and they are not active in the LETR, please pass along their information to LETR Liaison (Andrea Rachko) and/or LETR Director (John Card) so that they can set up a recruitment meeting which will include an invite to the Area Director as well.

Please remember that not everyone in the law enforcement/correction community is aware of what the Law Enforcement Torch Run® is about. If you encounter someone from the law enforcement/corrections community who may be interested, let us know.

Please contact the state office LETR Liaison to determine if we (LETR) have an active team captain or individual in your area. The team captain can help educate the interested officer about the LETR program.

As with any volunteer; law enforcement/corrections officers may have limited capabilities on how they may be involved, so we always approach them with a variety of ideas when we first meet with them. Starting out slow is okay. For instance, we try to get them to attend the Kickoff Conference or to a statewide event.

LETR is here to help you raise money and awareness for SOMI and will try to develop programs within your area. We will continue to do what we can to recruit law enforcement/correction officers to be involved in fundraising efforts within your area.

### **Polar Plunges**

For information on Polar Plunges please contact LETR Liaison Andrea Rachko at [andrea.rachko@somi.org](mailto:andrea.rachko@somi.org)

### **Policy on Fundraising**

Communication is a key factor in establishing and maintaining development activities that fund successful programs for Michigan athletes with intellectual disabilities. Therefore, Special Olympics Michigan's fundraising plans and goals affecting areas will be conveyed on an ongoing basis to eliminate duplication of effort and ensure that current or developing programs are not jeopardized.

Effective fundraising programs require developing and maintaining relationships with donors that are based on honest and clear understandings. This requires that all individuals seeking funds for Special Olympics Michigan programs and events concisely communicate the specific program that is a benefactor of the donor's involvement.

Developing fundraising programs that will enhance Special Olympics Michigan's positive image, purpose, and philosophy is essential to the continuation of a successful sports program for athletes who have intellectual disabilities.

This requires that fundraising is structured to provide "winning" programs for the athletes and "winning" opportunities for donors while complying with policies adopted by Special Olympics, Inc. and Special Olympics Michigan, Inc.

The state office of Special Olympics Michigan will provide the programs ongoing fundraising training and support programs. The assistance will aid in the development and continuation of strong programs for all athletes throughout the state.

Areas may not raise funds or utilize resources outside of their area without approval of SOMI. Statewide corporations or foundations can only be approached after approval is given by Special Olympics Michigan.

## **Planned Giving**

The language used in planned giving and estate documents is crucial to assure that the donors' intent is followed. Please contact Tim Hileman at t.hileman@somi.org or (989) 774-3911 for guidance in speaking with anyone who contacts you regarding a planned or estate gift. He will assist the donor and the estate planning team in crafting appropriate language to use in various circumstances.

## **Third Party Event Guidelines**

### **What is a Third Party Event?**

A third party event is a fundraising event that is implemented by an outside organization for the benefit of Special Olympics Michigan. There are three types of Third Party Events as follows:

1. Level One (Community Based) – Example:
  - A high school group wishes to conduct a car wash and give the proceeds to Special Olympics Michigan.
  - A professional organization wishes to conduct an event (i.e. a golf tournament) and give the net proceeds (or a portion thereof) to Special Olympics Michigan. All funds will be generated from within the organization's membership.
2. Level Two (Community Based) – A professional organization or individual wishes to conduct a golf tournament and give the net proceeds (or a portion thereof) to Special Olympics Michigan. The organization/individual plans to solicit local sponsorships and players from the community at large.
3. Level Three (Statewide or Nationally Based) – A corporation wishes to conduct a cause-related marketing campaign whereby a portion of the sales from every product sold or service performed is donated to Special Olympics.

### **Why is this important to me?**

Third Party Events tend to be local in nature. Therefore, it is likely that someone wanting to conduct a third party event would contact the SOMI office nearest to them. Staff from all functions of our organization are contacted regarding these events. If you are contacted regarding a third party event, here is a list of do's and don'ts:

- If you are uncomfortable working with the organization/individual on the third party event contact the SOMI State Office and they will assist you or work with the individual directly.
- SOMI staff/volunteers should have only minimal involvement with the event (i.e. attend the event for the photo opportunity of receiving a "big check"). If SOMI staff/volunteers are more involved than this, there is a possibility that this event could be construed as a SOMI event and any liability arising from the event would fall to SOMI.
- The sponsoring organization/individual is responsible for all sales, marketing and promotion of the event. SOMI should never provide postage, blank letterhead, SOMI prizes, or

correspondence on SOMI letterhead for the sponsoring organization/individual to use in their fundraising efforts.

- Never supply funding from SOMI to the event.
- Never allow the third party to utilize the SOMI tax ID number.
- Never allow the third party to utilize SOMI's name or logo unless the SOMI State Office licenses (allows) the third party to use the marks.
- Never allow the third party to apply for licenses/permits in the name of SOMI.
- SOMI liability insurance coverage will never be extended to cover a third party event.
- All print and collateral materials used by the third party must be approved by the SOMI State Office and comply with SOMI guidelines.
- A Third Party Event application and Memorandum of Agreement must be completed and forwarded to the SOMI State Office prior to approval for the event.

### **Background**

Third party events and/or programs are implemented by outside organizations or individuals for the benefit of Special Olympics Michigan, with minimum or no assistance from SOMI.

The sponsoring organization/individual must be respected in the community and one whose reputation will enhance the SOMI's public image. Care should be taken to ensure that the sponsoring organization is not using SOMI's name to offset bad publicity or to improve an otherwise unfavorable public image.

Criteria to use when entering Third Party Event relationships

The following criteria will apply to all third party events/programs conducted on behalf of SOMI:

1. No event/program, which involves agreement with any organization or individual to raise funds on a commission, bonus or percentage basis will be considered.
2. No event/program will be considered if it involves the sale of tickets, products, or services by use of the telephone.
3. The sponsoring organization is responsible for all sales, marketing and promotion of the event.
4. Hazardous events will not be considered.
5. If only a portion of the proceeds will go directly to SOMI, the sponsoring organization must clearly disclose to purchasers, participants, etc., the approximate amount of dollars and/or percent of the proceeds that will go to SOMI.
6. Publicity and/or promotional materials released to the mass media referencing the SOMI's involvement require advance approval from SOMI.
7. SOMI will not supply any funding to finance a third party event/program and will not be responsible for any debts incurred.
8. Area staff may approve level one events/programs. Level two and three programs require appropriate state and area staff approval.

9. Any use of the SOMI service marks (name and logo) is prohibited unless SOMI licenses the third party to use the mark. All print and collateral materials must be approved by SOMI and comply with existing guidelines regarding the use of the SOMI service mark.
10. Use of SOMI's tax identification number by the third party organization is never allowed.
11. All checks from participants of third party events and programs must be made out to the third party organization, not SOMI.

Level Two and Three events/programs should meet the following additional criteria:

1. Representatives of both organizations prior to the event/program must sign a letter of agreement outlining the sponsoring organization and SOMI's responsibilities.
2. The sponsoring organization should provide SOMI with a list of targeted corporate sponsors. SOMI reserves the right to exclude solicitation of specific sponsors.

Level Three events/programs should also meet the following additional criteria:

1. SOMI must be protected from any type of damage or injury that occurs as a result of the third party's product or event. The agreement must be approved by the SOMI Legal Department and signed before the sponsorship or promotion can take place.
2. Anytime an area or areas enter into a promotional arrangement that goes beyond the geographic boundaries of that area(s), coordination must take place with the State SOMI Office.
3. A memorandum of agreement should be signed by both parties and accompanied by a detailed project description, including a timeline, budget, promotional objectives, and a minimum guarantee of monies to be provided to SOMI.
4. The sponsoring organization should provide SOMI with a summary of results relevant to the event/program.

## **Marketing & Communications**

### **Public Relations and Promotions**

SOMI branding materials can be found in the online Marketing & Communications Toolkit at: [www.somi.org/marcomtoolkit](http://www.somi.org/marcomtoolkit)

Downloadable items available in the toolkit include, but are not limited to:

- Logos: SOMI, area-specific, LETR, SO College, Unified Champion Schools, sports icons and more
- Font: Ubuntu font (the official font of Special Olympics)
- Branding Guidelines
- Videos: promotional, program-specific, PSAs, event highlight videos and more
- Press Release Templates
- Booklets and Brochures in PDF format

- PowerPoint Presentations: A general SOMI PowerPoint that can be edited for other uses

The SOMI State Office, area programs, and local programs should use their best efforts to attract spectators to Special Olympics events and generate coverage by local news media to increase public awareness of and support for the needs and capabilities of children and adults with intellectual disabilities.

Areas are encouraged to use a brochure or fact sheet describing their sports offerings, and schedule and send out an electronic newsletter on a regular basis utilizing the official SOMI branding materials.

### **Special Olympics Michigan Logo**

The official Special Olympics logo, created in 1985 and revised in 2012, is the trademark of Special Olympics programs around the world. Used consistently, the logo plays an important part in projecting the image of Special Olympics as a strong, united organization composed of programs at the community, county, area, state and national levels worldwide.

SOMI and its areas must use the logo provided properly and follow the rules established by Special Olympics, Inc. (SOI).

### **Proper Logo Format**

SOMI must follow SOI's Brand Identity Guidelines in their use of the logo. The Guide includes rules such as official logo colors (Red (Pantone® 186) and Grey (Pantone® 418)), acceptable use of other colors, size limits, and proper formatting. There are many variations of the logo that can be found on the SOMI website in the Resource Center.

There is only one logo that Special Olympics Michigan will use for local and state purposes. Areas can showcase their local teams and Areas in other ways. As described in the Brand Identity Guidelines, the Program name must be in Ubuntu font and typography guidelines can also be found in the Brand Identity Guidelines. There are logo options in 1-line, 2-line, centered and web/online formats. They also come in single color, two color or white. There should be free space left around the logo.

For all logo uniform guidelines and specifics, please refer to the Special Olympics Brand Identity Guidelines found in the Marketing and Communications Toolkit ([somi.org/marcomtoolkit](http://somi.org/marcomtoolkit))

If areas have questions concerning the use or format of the logo, contact the Marketing & Communications department at the state office.

### **Required Uses of the Logo**

The SOMI logo must be used on all official materials including stationery, business cards, news releases, letterhead, Games programs, flags, banners, athlete number tags, posters, brochures and all informational material distributed to athletes, sponsors or the general public. The standardized branding must be utilized.

## **Website**

All Areas have Area webpages within the Special Olympics Michigan website and are NOT permitted to create their own website. This is important for branding consistency. Each area page has a direct link corresponding with its area number. For example: Area 1 is [www.somi.org/area1](http://www.somi.org/area1), Area 32 is [www.somi.org/area32](http://www.somi.org/area32), etc.

Each area has the ability to add events to the SOMI website's online calendar. To have an administrative account created on your area's web page, which allows access to add events to the calendar, contact Bo Parker at [bo.parker@soimi.org](mailto:bo.parker@soimi.org).

Areas are encouraged to review their web pages regularly and contact the Marketing & Communications Department with any content changes they may have, such as contact info, sports offered, etc.

## **Social Media**

Areas are encouraged to utilize Area Facebook pages. If your area does not have its own Facebook page, contact Bo Parker at [bo.parker@soimi.org](mailto:bo.parker@soimi.org) to have one created.

Area Facebook pages are a great place to promote what's going on in your area, post photos and communicate with current and potential athletes, families and volunteers.

Please alert the Marketing and Communication department at the SOMI state office of any new or existing social media sites that you use.

All Area Facebook pages must have a member of the Special Olympics Michigan Marketing and Communications department as one of its administrators.

Having SOMI employees as administrators provides

1. means of technical support,
2. support in dealing with potential media and legal inquiries and
3. ensures continuity for the Facebook group in the event of other administrators leaving Special Olympics Michigan.

Upon completion of an employee or volunteer's time with SOMI, administrator privileges for Area and/or State Facebook groups will be relinquished. Failure to comply will result in a cease

and desist letter giving the option to relinquish administrative rights or face further possible legal action.

## **SOMI Social Media Presence**

Special Olympics Michigan is active on the following social media platforms:

- Facebook: [facebook.com/SpecialOlympicsMichigan](https://facebook.com/SpecialOlympicsMichigan)

- Facebook is a powerful social network that combines newsfeeds from your friends and what they “like” across the internet. It can help you stay in touch with supporters, network with other organizations, gain advocates for the cause, drive fans to events, boost the visibility of your local website and share photos or videos.
- Twitter/X: @SpOlympicsMI
  - Twitter is a microblogging service that allows you to share what is going on right now in 280 characters or less. Twitter can help you connect with athletes and supporters, see what people are saying about your program, share important content via photos, videos, or web links, and let everyone know about your next big competition or event.
- Instagram: SpOlympicsMI
  - Instagram is a picture and video-sharing app available on iOS and Android devices in which users can upload, share and view pictures and videos.
- LinkedIn: Special Olympics Michigan
  - Stay connected with Special Olympics Michigan on LinkedIn.
- Flickr: flickr.com/specialolympicsmichigan
  - Flickr is a picture-sharing website and app in which users can upload, share and view pictures. SOMI posts high resolutions on Flickr following state events.

### **Social Media Standards and Etiquette**

Any Special Olympics Michigan employee or volunteer engaging in social media dialogue as an official representative of the organization is required to meet the following standards:

- Be Responsible - Remember that you are speaking directly on behalf of Special Olympics Michigan.
- Be Accountable - Don't behave differently online than you would in any other public setting. Give a timely response and monitor your conversation.
- Consider Your Audience - Our fans and followers are parents, athletes, coaches, teachers, volunteers, area directors, donors, sponsors/partners and staff. Consider what you are publishing and make sure it caters to the needs of these individuals without alienating anyone. For example: If posting from or about an event, consider what each one of these groups following from home or on their phone from the event would want to know.
- Bring Value - Consider posting frequency: find the balance between keeping the community updated and turning them off with too many posts. When deciding whether to post information, decide how much value this will bring to others. Consider the journalistic five W's and H (Who, What, When, Where, Why, How). How does this impact the people you are communicating with and why do they care?
- Pick Your Battles and Accept Your Mistakes - Don't pick fights. Be the first to correct your own mistakes. If a Facebook fan says something in poor taste, respond to them politely and honestly and try to answer the question or correct the facts. If you don't have all the facts, do not make them up. Check with a SOMI staff member who has knowledge about the subject before providing an answer or ask this staff member to follow up directly.



- Be Respectful - Always take a moment to think of what you're saying and how it could be interpreted by different parties. Do not get political in your posts. Special Olympics has no partisan identity. Consider how your words reflect the organization's mission and make sure you are being a good representative of SOMI.
- Protect Confidential and Copyrighted Information - The online community has the power to speak out and have their voices heard. Businesses and non-profit organizations must respond honestly, openly and transparently. However, this doesn't mean blaring out private information before it becomes public. If it's questionable, keep it quiet.

Refer to SOMI's Social Media Policy for area social media account requirements, how to handle media and legal inquiries, and discipline and consequences for non-compliance. When in doubt, contact a member of the SOMI Marketing & Communications department.

Social media is a natural way to further Special Olympics Michigan's mission and we want to work together to do so.

### **Purpose**

With the rise of new media and next generation communications tools, the way in which Special Olympics Michigan (SOMI) employees and volunteers can communicate internally and externally continues to evolve. While this creates new opportunities for communication and collaboration, it also creates new responsibilities for SOMI employees and volunteers.

### **Scope**

As with other technology, social media has proper and improper uses when used by people employed by or representing Special Olympics Michigan. This policy is designed to help you understand what is required of you when you declare an affiliation with Special Olympics Michigan. For a complete list of SOMI's social media presence as well as guidelines for social media standards and etiquette, see SOMI's Social Media Guidelines.

### **Media and Legal Inquiries**

Blog postings and other social media discussion forums may generate inquiry about Special Olympics Michigan news and information. If a member of the media or an independent blogger requests information about a state-run event, press release, marketing materials, or corporate strategy, please contact Lourin Sprenger, Marketing & Communications Manager at [lourin.sprenger@somi.org](mailto:lourin.sprenger@somi.org).

If an external blog, news site, or other media outlet requests an interview with you regarding an area-run event and you need help with this request, please contact Lourin Sprenger, Marketing & Communications Manager at [lourin.sprenger@somi.org](mailto:lourin.sprenger@somi.org).

Athletes are encouraged to complete SOMI Media Training prior to interacting with journalists or making on the record comments. Athletes Leaders have completed this as part of their training.

## **Discipline and Consequences of Non-Compliance**

If you fail to comply with this policy, you will be subject to discipline, up to and including termination of employment from Special Olympics. In addition, depending on the nature of the policy violation or the online channel content, you may also be subject to civil and/or criminal penalties.

Because you are legally responsible for your postings, you may be subject to liability if your posts are found to be defamatory, harassing, or in violation of any other applicable law. You may also be liable if you make postings which include confidential or copyrighted information (music, videos, text, etc.) belonging to third- parties. All of the above mentioned postings are prohibited under this policy.

## **Statewide Public Relations Guidelines and Expectations**

Special Olympics Michigan will conduct communications activities, which improve the flow of communication to promote the Special Olympics program to potential athletes, volunteers, and donors, and to create public awareness. Electronic newsletters, press releases, website updates, Facebook, meetings and postings on community calendars are examples of area/region communications activities. The following are some guidelines and expectations to follow when conducting communications activities in your community:

### **Media Outreach**

The Marketing & Communications Department has press release templates and other materials that can be helpful in promoting your program or event. Press release templates can be downloaded from the Marketing & Communications Toolkit at [www.somi.org/marcomtoolkit](http://www.somi.org/marcomtoolkit). For review of materials to be distributed to the media, or assistance with media partners located in your region please contact Lourin Sprenger, Marketing & Communications Manager at [lourin.sprenger@somil.org](mailto:lourin.sprenger@somil.org).

### **Collateral Materials**

Branding materials and guidelines must be followed.

All printed collateral materials to be distributed by SOMI must be approved by the state office as far in advance as possible (3-4 weeks preferred). This includes posters, programs, brochures, banners, T-shirts, fliers, etc. The Special Olympics Michigan logo should be included on any official materials distributed by SOMI.

All printed materials must be on branding materials.

Print jobs must be coordinated with Bo Parker at [bo.parker@somil.org](mailto:bo.parker@somil.org). Any paid services must be approved. Area Directors/Area Management Teams must plan this into their timeline for getting materials printed for events and promotions.

The SOMI web address, [www.somil.org](http://www.somil.org) should be on all collateral materials.

## Public Relations Materials

The following public relations materials are available from the state office:

### Information Sheets

- Special Olympics Michigan fact sheet
- Area fact sheet
- Young Athletes™ fact sheet
- Healthy Athletes® fact sheet
- Unified Champion Schools® fact sheet

### Publications

- The Torch Newsletter (formerly eSpirit)
- Posters
- Banners
- Digital Promotional Videos
- Fact Sheets
- Family Handbook
- School Resource guide
- Young Athletes Activity & Resource Guide

## Special Olympics Michigan Annual Awards Program

All nomination forms can be found in the Resources section of the SOMI.org website, deadlines and submission information will be distributed through a weekly AD Alert. (Area Directors not on the distribution list, contact [somi@somi.org](mailto:somi@somi.org).)

## SOMI State Winter Games Awards

- Rick VanderSloot Winter Sports Award - This award is given to the SOMI athlete who best demonstrates the philosophy of “Nothing is impossible if I try” in winter sports training and competition. The award is given during the State Winter Games at Opening Ceremony in memory of Rick VanderSloot, a Winter Games volunteer.
- Timothy Krause Bunbury Award - This award is given to a SOMI athlete who competes in Alpine Skiing. The athlete must have trained diligently, approached the sport with enthusiasm, maintained his or her sense of humor, and achieved excellence at his or her ability level. The award is given out at the Closing Ceremony of the State Winter Games in memory of Timothy Bunbury, an avid skier who passed away as a young man.

## SOMI State Summer Games Awards

- SpartanNash Healthy Athlete of the Year Award - This annual award recognizes a SOMI athlete who exemplifies a healthy lifestyle and the Special Olympics Oath. The athlete must

strive for wellness, a balance of the mind, body and spirit. The ideal candidate will eat a well-balanced diet and dedicate time outside of Special Olympics training and competitions to exercise. He/she will be brave in all attempts and will promote healthy living to fellow SOMI athletes. He/she will either be a Global Messenger or have the ability to become a Global Messenger, as the selected athlete will have numerous public speaking engagements dictated by SOMI and SpartanNash, Inc. The award will be presented at Opening Ceremony at the State Summer Games.

#### SOMI State Fall Games Awards

- Perkins/Cottee Sportsmanship Award - The Perkins/Cottee Sportsmanship Award is an annual award presented to a soccer athlete who demonstrates a positive attitude and is a gracious winner or loser. The award is given in honor of Dick Perkins and Doug Cottee, longtime Special Olympics Games Directors and GM Mens' Club Retirees for more than 30 years. Dick passed away in 2013, so this award has been created in honor of his memory and the work that he and Doug have done for Special Olympics. The award presentation will take place during the Fall Classic. [LS3] The award recipient is determined by the Board Program Committee.

#### **Special Olympics Michigan Hall of Fame Awards**

This occurs annually in early December.

Inspirational Athlete - The Inspirational Athlete Award is an annual award presented at both the area and state levels. Area Directors may determine the appropriate procedure and time for naming and recognizing their area's Inspirational Athlete. The state Inspirational Athlete Award will be announced at The SOMI Hall of Fame Awards Ceremony. The criteria for selecting the Inspirational Athlete consists of the following items:

- The athlete should exemplify the motto, "Let me win. But if I cannot win, let me be brave in the attempt."
- The athlete should show a strong desire to do their best.
- The athlete should display good sportsmanship and appreciation for fellow athletes.
- The athlete should encourage others to compete toward their greatest abilities.
- The athlete should exhibit a positive attitude toward Special Olympics training and competition.

Outstanding Coach Award - Special Olympics Michigan recognizes the tremendous amount of time and personal effort that volunteer coaches give to our athletes. To thank them and to make the public more aware of the role that coaches play in our program, one coach from each of the 36 area programs is honored, with one overall Outstanding Coach each year.

The following criteria may be used when naming the Area Coach of the Year:

- Years of coaching at Special Olympics

- Number of sports coached
- Number of sports in which coach is certified
- Number of athletes coached in a typical year
- Other ways the coach is involved (parent/family activities, fund-raising, leadership, etc.)

Outstanding Area Volunteer Award - Special Olympics Michigan relies on the support of 20,000+ volunteers statewide to make its programs a reality. By honoring a volunteer from each of the 36 local area programs, we hope to recognize the tremendous commitment and contributions made to our program by volunteers. The following criteria may be considered when naming Area Outstanding Volunteers:

- Years of involvement with Special Olympics.
- Nomination forms must show that the nominee has made a demonstrated impact upon Special Olympics programming at the local/area level through volunteering in a variety of capacities such as: coach, chaperone, fundraiser, publicist, office help, advisory council, accounting, etc.

Outstanding Family of the Year Award - This award is for the family that has made and continues to make a unique and lasting contribution to our program and athletes. The following criteria may be considered when naming Family of the Year:

- Years of involvement with Special Olympics
- This family has made SOMI a better place than if they had not been involved.
- Nomination forms must show that the nominee has made a demonstrated impact upon Special Olympics programming at the local/area level through volunteering in a variety of capacities such as: coach, chaperone, fundraiser, publicist, office help, advisory council, accounting, etc.

Outstanding Service Awards - Special Olympics Michigan wants to recognize the tremendous contributions made by a variety of individuals, organizations, and businesses to our programs and athletes. Nominations for Outstanding Service Awards may be submitted in any or all of the following categories:

- Media (radio, television, newspaper)
- Civic Organization/Agency
- Business/Corporation
- Sports (Organization, Athlete)
- Education (University, School, School District, or Teacher, Administrator, etc.)
- Family
- Fundraiser (individual, committee, group, or event)

Gamechanger Award - The Game Changer Award is an award to Special Olympics Michigan to celebrate an individual who's helped the organization thrive during the past few challenging years.

This award is to highlight the work of individuals that have advanced our movement forward and elevated how Special Olympics Michigan operates for the foreseeable future.

The Gamechanger Award will be announced at The SOMI Hall of Fame Awards Ceremony. The criteria for selecting the Gamechanger Award consists of the following items:

- The individual has been involved with Special Olympics Michigan over the past 3 years.
- The individual should have a tangible accomplishment, project, or objective that can be cited in “changing the game” for SOMI.
- The individual has made SOMI a better place than if they had not been involved.

Spirit Award - The Spirit Award recognizes an individual involved with Special Olympics Michigan who has had a positive impact on the program and represents the “spirit” and ideals of the program.

Hall of Fame - The Hall of Fame is an annual award established as the highest tribute paid to persons who have made a significant impact on the athletes, volunteers, and/or programming of SOMI. When submitting a nomination for this prestigious award, the nominating party should consider the following criteria:

- The nominee’s service must have made a significant impact upon the athletes, volunteers or programs of Special Olympics Michigan.
- The nominee must have at least 15 years of experience with Special Olympics Michigan showing multiple levels of involvement by the person in the program, requiring state and at least one other level (i.e. local, area, national or international).
- A one-page essay, which cites the reasons why the nominee should be considered for the SOMI Hall of Fame, must be included. This should include specific details around the areas where they have volunteered and had an impact.
- Support letters from coaches, schools, athletes, etc. are encouraged. List the multiple roles the person has served in.
- The state, national and international involvement needs to be a service such as serving on a task force or committee, or part of the national or international delegation (e.g., local, area, state, national and international games committee or task force, international or national coach, USLC, national or international committee, fundraiser, management team member, event director, volunteer coordinator, assistant area director, etc.).

### **Wertz Warriors & Water Warriors Grant Process**

The purpose of these grants is to enhance the programming at the area/local level. Preferably, grants will be awarded for tangible items, which will be used for many years. Examples of funding requests might be, but are not limited to equipment, uniforms, program supplies, etc.



# Section 9

## Finance & Insurance

- Finance and Accounting
- Sales Tax License
- W-9 Form
- Tax Exempt Form
- 501(c)(3) Status Letter
- In Kind Gift Receipt Form
- Insurance
- Event Flow Chart



## **Finance and Accounting**

Special Olympics Michigan is a 501c3 non-profit service organization. While SOMI maintains different cost categories for each area program, the overall funding, expenses, investments lie within the overall organization.

## **Policy on Accountability**

A variety of persons and groups are interested in the reported expenses and revenue of Special Olympics Michigan.

- The first are those who donate money, services or materials.
- The second represents the Board of Directors, who have the responsibility to conserve and expend the assets of Special Olympics Michigan for stated purposes and objectives.
- The third is the President/CEO for Special Olympics Michigan who has the responsibility of carrying out the stated policies of the Special Olympics Michigan Board of Directors.
- The fourth is Special Olympics, Inc., which mandates financial accountability through the enforcement of the Special Olympics General Rules.
- The fifth is made up of those governmental jurisdictions who have the authority to control charitable solicitations through enacted legislation, as well as the local, state and federal governments, which grant tax exemptions and a solicitation license to Special Olympics Michigan.

Board members, staff, Area Directors, and volunteers responsible for Special Olympics Michigan funds have a unique relationship of trust to uphold. These key people are subject to rigid standards of honesty and integrity in the conduct of their Special Olympics financial affairs.

If a person is suspected of violating this relationship of trust through dishonesty or policy violations, appropriate action will be taken to investigate and resolve the situation. The final action taken is dependent upon the outcome of the investigation and the severity of the violation. The action taken may include, but not be limited to, removal from the position, dismissal, reassignment of position and prosecution if criminal violations are involved.

For this policy, the definition of dishonesty includes, but is not limited to, theft, fraud, and expense account abuses, floating of funds, or borrowing of Special Olympics Michigan funds for personal use.

## **SOMI Financial Accountability Procedures**

Areas are prohibited from creating their own bank accounts. Our first goal is to have every area within a reasonable distance from Mercantile Bank (SOMI's official bank), use that bank for depositing.

1. Determine if there are any Mercantile Bank banking options.
2. If there is not a Mercantile Bank within a reasonable distance, we will see if there is a PNC, or Huntington bank within a reasonable distance.

3. If one of the aforementioned is not a reasonable distance, the deposit will be mailed to SOMI's State Office for depositing.
4. Present our recommendations to the Program to review with the Area Director. The Regional Manager and Area Director will decide which solution is reasonable.
5. The area will cover the cost of printing reorders for deposit slips and "For Deposit Only" stamps.
6. Bank fees for NSF Checks: SOMI will deduct the amount of a returned check from the area account to which it was deposited. The fee is determined by the bank.

Our second goal is to receive all necessary expense receipts and revenue information in a timely manner. Expense reimbursements must be submitted within 60 days of incurring the expense.

#### 1. Expenses

- a. Cash Advances - Unused cash must be re-deposited within 30 days of when the check was issued. In addition, a full reconciliation along with receipts that equal the funds spent must be turned in within 30 days of when the check was issued. The receipts must be properly approved and properly coded with the account number(s) to charge and identified with a project name if the expense is for a fundraiser. Missing Expense forms will not be accepted as a proper backup. If this procedure is violated, IRS Regulations allow a 1099 to be issued. If an individual has outstanding "issues" with an advance, they will not be eligible for another advance until all issues are resolved. Everyone will return all receipts and the balance to be deposited (personal check or money order) directly to the state office.
- b. Credit Card Receipts - Itemized receipts supporting any purchases made on credit will be turned into the State office once a month when the monthly billing statement is received. The receipts must be properly approved and properly coded with the account number(s) to charge and identified with a project name if the expense is for a fundraiser. If this procedure is violated, the credit card holder will be issued a notification of noncompliance. This action will be communicated to the individual, Area Director and Field Service Staff. If an individual receives three notifications, their credit card will be canceled and they will lose their privilege to charge expenses to the SOMI credit card.

#### 2. Revenue Batches

- a. The details of all revenue deposits must be submitted to Stephanie Graham in Accounts Receivable by 10 calendar days from when the deposit was made. Exceptions to submitting within 10 days are only allowed if prior approval is received from the business operations office.
- b. Details that must be included are: Name and address of each donor. The type/source of donation. (i.e. general donation, souvenir sales, etc.) If the gift was from a fundraiser, identify the project ID code or fundraiser name. Any direct benefit the donor received. (Describe the goods and value of items received.) If reporting an in-kind, list the value and a description of the donated item(s). Include what event (summer games, training, fundraising, etc.) the in-kind item(s) will be used for.

If this procedure is violated, the area responsible for the deposit will be issued a notification of noncompliance. This action will be communicated to the individual, Area Director and Field Service Representative. If an area receives three notifications, they will lose their privilege to deposit revenue and will be asked to mail all check revenue to the state office. Any cash received will have to be converted to a money order before it is mailed. Any areas wishing to just mail all deposits to the state office are free to do so. This will save on the transfer costs as well as cost of supplies.

All revenue received should be deposited in a timely manner. A notification of noncompliance will be counted if it is determined that the checks were held for more than a month of the time they were written, unless pre-approved (or communicated) by accounting.

These accountability procedures were implemented and effective on November 4, 2006.

## **Policy on Expenditures**

### **Classifications**

To provide adequate financial information, Special Olympics Michigan will classify expenditures on a “functional” basis. The “functional” classifications are:

- Program Services, which describe Special Olympics Michigan’s program activities, such as, area, regional and state games, training programs, clinics, and other activities for participants.
- Support Services - This account only applies to the state
- Management & General – through which management, administrative, and general non-program operating expenditures are charged, such as legal and accounting services, portions of salary, postage, printing, etc.
- Fundraising, which depicts cost, incurred to raise funds for program and support services.
- Policy on Revenue
- Donations - All donations generated through cash contributions, pledges, public support, in-kind services and fund raising events are to be recorded and reported according to SOMI Financial and Accounting Guidelines and Procedures. All local, state and federal solicitation and tax reporting laws, regulations and rulings must be followed. In addition, persons receiving donations for Special Olympics Michigan must abide by the revenue reporting procedures adopted by the state office of Special Olympics Michigan.

### **Donations to Nonprofit Agencies**

Generous individuals, organizations, and businesses donate cash, goods, and services to Special Olympics Michigan for the purpose of meeting SOMI’s program goals. In keeping with that intent, it is the policy of Special Olympics Michigan that donated cash, goods, and services will not be, in turn, donated to another nonprofit agency.

### **Board Policy on Audit**

The fundamental purpose of fiscal responsibility is to depict how Special Olympics Michigan has acquired resources and how the organization used the resources to accomplish the objectives of

the Special Olympics Michigan program. Special Olympics Michigan achieves fiscal responsibility through the adherence to accounting policies and procedures approved by the Board of Directors.

Therefore, be it resolved, that the Finance Committee of the Board of Directors of Special Olympics Michigan serves as the Audit Committee of the board for ensuring the compliance with policies and procedures of Special Olympics Michigan relative to fiscal responsibility. We will have an annual audit performed by an independent CPA firm.

## **Board Policy on Investment**

### **I. Introduction**

Primary Contact: Chief Financial Officer, Roger Yob. (989) 774-4386

#### **Purpose of this Investment Policy Statement**

This Investment Policy Statement (the "Policy Statement") outlines the goals and investment objectives of Special Olympics Michigan, Inc. ("SOMI"). Since this Policy Statement is intended to provide guidance for the Finance Committee ("the Committee") and the investment managers responsible for managing SOMI's assets, it outlines certain specific investment policies which will govern how to seek to achieve those goals and objectives. This Policy Statement, upon the review and approval of the Committee:

- Describes a risk posture for the investment of SOMI's assets;
- Specifies the target asset allocation policy for those assets;
- Establishes investment guidelines regarding the selection of investment manager(s), permissible securities and diversification of assets;
- Specifies the criteria for evaluating the performance of SOMI's investment manager(s) and of SOMI investment portfolio as a whole; and
- Defines certain responsibilities of the Committee, the consultant, the investment managers, and other specified parties.

The Committee believes that the investment policies described in this Policy Statement should be dynamic. These policies should reflect SOMI's current financial status, and the Committee's philosophy regarding the investment of assets. These policies should be reviewed by the Committee periodically and revised as necessary to ensure that they continue to reflect the current financial situation of SOMI and the capital markets.

This Policy Statement was prepared based upon the information provided by the Committee in the Merrill Lynch Investment Policy Statement Service Questionnaire. It is the Committee's responsibility to provide all the necessary and relevant information for its preparation. This information, as well as the Policy Statement itself, should be reviewed periodically for its continued accuracy and completeness.

### **II. Responsibilities of SOMI Representatives**

## **Board of Directors**

As fiduciaries, the Board of Directors is ultimately responsible for SOMI. They have delegated the following decisions to the following:

### **Finance Committee**

The primary fiduciary responsibilities of the Committee with respect to the oversight of the investment portfolio are:

Approve an investment policy statement and periodically review that statement for continued accuracy and completeness;

- Oversee the diversification of the portfolio assets to meet an agreed upon risk/return profile;
- Monitor the investment managers and the performance of the accounts under management;
- Consider the information provided by the consultant and other professional advisors and act accordingly;
- Monitor all investment, record keeping and administrative expenses associated with the accounts; and
- Review and deal prudently with conflicts of interest.

### **Board Policy on Board Reserve Funds**

Special Olympics Michigan, Inc. desires to build and maintain a Board-designated Reserve Fund equal to one year's operating budget. The Fund should be viewed as a long-term investment. Special Olympics Michigan will strive to attain this amount through annual deposits, earnings, and capital gains. Due to this, these funds are identified as unrestricted net assets on the Audited Financial Statements. The overall purpose of this fund is to ensure the perpetuity of Special Olympics Michigan.

### **Board Policy on Sale or Transfer of Assets**

The President/CEO must authorize in writing the sale or transfer of any asset(s) valued over \$500.

### **Board Policy on Fixed Asset Capitalization**

Special Olympics Michigan will regard fixed assets as capitalization when all of the following criteria are met:

1. Assets purchased, built or leased have useful lives of one year or more.
2. The cost of the asset (including installation) is \$5,000 or more. Multiple assets whose cost is less than \$5,000 but the aggregate requestor total is \$5,000 or more is capitalized.
3. The cost of repairing or renovating the asset is \$5,000 or more and prolongs the life of the asset.

Special Olympics Michigan will regard the purchase of software programs as fixed assets subject to the above capitalization policy, and will amortize over the estimated useful life of three years. Costs

associated with software maintenance and customer support are considered expenditures and will not be capitalized.

### **Board Policy on Area Expenditures**

Donations are given to Special Olympics Michigan for the primary purpose of supporting the goals and objectives of Special Olympics. To insure that the expenditures of those donated funds are for the stated purpose, area expenditures of donated funds are restricted to the following categories:

- Meals as necessary for implementation of the program.
- Lodging as necessary for implementation of the program.
- Meeting and registration fees for program tournaments, games, training schools, and conferences.
- Travel expense as necessary for program events.
- Telephone including cellular expenses as related to Special Olympics program business and events.
- Postage for Special Olympics program business and events.
- Office supplies required for program business and events.
- Printing costs as required for program business and events.
- Rental expense for implementation of the program.
- Professional fees (certified coaches, medical, and officials) as necessary for implementation of the program.
- Games supplies such as uniforms, medals and ribbons, equipment, and other supplies.
- Fundraising costs to support program implementation.
- Other such expenditures as authorized by the Board of Directors.

### **Board Policy on Revenue Reserves**

Area programs are encouraged to set aside funds to secure future programming. The Board recommends that the area programs maintain a reasonable fund balance as determined by the Special Olympics Michigan Board of Directors. If the audited fund balance exceeds the reasonable fund balance, the funds will be utilized to benefit programs for Special Olympics athletes.

### **Board Policy on Loan Funding and Deficit Spending**

It shall be the policy of the Special Olympics Michigan Board of Directors that no area program will loan funds. The Board of Directors does not permit deficit spending (creating a negative fund balance) by area programs. If an area is short funds needed to cover expenses, they may apply for Equity Funding. This covers emergency funding or a program's costs to come up to minimum standards. The area program must submit a written request to the President/CEO to obtain an Equity Fund grant. Upon review by the appropriate committee (outlined in the Equity Fund procedures), the grant application will be approved or disapproved.

### **Board Policy on Signatory Authority on Accounts**

The Board of Directors of Special Olympics Michigan, Inc. authorizes the signature of the corporation secretary/President/CEO on all current and future area financial accounts, including, but not limited to, demand deposit, savings account and investment.

The Board of Directors of Special Olympics Michigan, Inc. authorizes the corporation secretary/President/CEO to designate financial institutions, as depositories of Special Olympics Michigan, Inc. Exceptions must be approved by the President/CEO.

### **Board Policy on Purchase of Goods and Services**

The President/CEO must approve the purchase of any single asset, goods or services with a purchase price or cost in excess of \$500 in writing prior to the purchase. The President/CEO must approve in advance any quantity purchase of goods or services totaling over \$2,500, excluding transportation to and from events.

All assets must be titled in the name of Special Olympics Michigan, Inc.

### **Board Resolution for Centralization and Accounting Management Practices**

Special Olympics Michigan, Inc., being a single nonprofit charitable entity, recognizes and practices good fiscal stewardship of the funds contributed and spent in its name. The Board of Directors has the ultimate fiduciary responsibility for all funds contributed in the name of Special Olympics Michigan. In recognition of this and the following items, this resolution is put forth by the Board of Directors.

Whereas the Special Olympics Michigan (SOMI) Board of Directors hires an independent audit firm to conduct an annual audit; and the auditor's management letter to the Board listed a need for: increased investment opportunities, consolidation of funds for greater opportunities for growth of funds, addressing risk associated with funds being maintained in independent accounts statewide, and an integrated accounting system for the ease of the organization's management of its fiduciary responsibilities, and

Whereas Special Olympics, Inc. (SOI) recommended that SOMI staff adopt a single system of accounting for ease of determining and reporting to the Board the current fiscal status of the funds belonging to the organization, and that the Board develop an investment policy and provide a means to pool funds for greater return on investment, and

Whereas the turnover in the field in the positions of Area Director and accounting coordinator continues to present a challenge of timely and accurate accounting, now therefore

Be it resolved that Special Olympics Michigan will move to one integrated accounting system and will provide opportunities for greater growth and income by pooling funds. An implementation plan for these goals will be developed with input from a task force made up of Area Directors, accounting coordinators, staff, and Board members.

### **Board Policy on Records Retention**

#### **Purpose**

This policy provides for the systematic review, retention and destruction of documents received or created by Special Olympics Michigan in connection with the transaction of organization business. This policy covers all records and documents, regardless of physical form, contains guidelines for

how long certain documents should be kept and how records should be destroyed. The policy is designed to ensure compliance with federal and state laws and regulations, to eliminate accidental or innocent destruction of records and to facilitate Special Olympics Michigan's operations by promoting efficiency and freeing up valuable storage space.

### **Document Retention**

Special Olympics Michigan follows the document retention procedures outlined below. Documents that are not listed but are substantially similar to those listed in the schedule will be retained for the appropriate length of time.

### **Retention Schedule**

#### Permanently

- Articles of Incorporation
- Audit reports of accountants
- Capital stock and bond records: ledgers, transfer registers, stubs showing issues, record of interest coupons, options etc.
- Board bylaws
- Board meeting & board committee meeting minutes Board policies/resolutions
- Cash books
- Chart of Accounts
- Checks (canceled for important payments, i.e. taxes, purchases of property, special contracts, etc. (checks should be filed with the papers pertaining to the underlying transaction)
- Contracts and leases still in effect
- Correspondence (legal and important matters only)
- Deeds, mortgages, and bills of sale
- Depreciation schedules
- Financial statements (end of year, other months optional)
- Fixed asset records
- General and private ledgers (and end of year balances)
- IRS 990 tax returns IRS determination letter
- Journals
- Payroll registers
- Property records including costs, depreciation reserves, end of the year trial balances, depreciation schedules, blueprints, and plans
- Retirement and pension records
- State sales tax exemption letter
- State unemployment tax records
- Tax returns and worksheets, revenue agents' reports and other documents relating to determination of income tax liability
- Trade mark registrations Training manuals
- Union Agreements



- Volunteer forms (scanned)

#### Seven Years

- Accident/Injury reports and claims (settled cases)
- Accounts payable ledgers and schedules
- Accounts receivable ledgers and schedules
- Bank deposit slips
- Bank statements
- Checks (cancelled but see exception below)
- Earnings records
- Electronic fund transfer documents
- Emails to President/CEO (complaints, legal matters, etc.)
- Employee personnel records (after termination) Employee records relating to promotion, demotion or discharge (after discharge)
- Employment and termination agreements
- Expense analyses and expense distribution schedules
- Games/athletic participation records (GMS)
- Garnishments
- IRS 1099s
- Insurance records
- Inventories of products, materials, and supplies Invoices to customers
- Invoices to vendors Journal entries
- Notes receivable ledgers and schedules
- Options records (expired)
- Payroll records, summaries and returns, including payments to pensioners
- Payroll tax returns
- Sales Records
- Sales tax returns
- Scrap and salvage records (inventories, sales, etc.)
- Stock and bond certificates (cancelled)
- Subsidiary ledgers
- Time books
- Voucher register and schedules
- Vouchers for payments to vendors, employees, etc. (includes allowances and reimbursements of employees, officers, etc. for travel and entertainment expenses)
- Withholding tax statements

#### Six Years

- Leases (after expiration)

#### Five Years

- Accident reports & worker's compensation records
- Athlete medical forms (scanned)
- Employee salary schedules
- Grant applications and contracts (after completion)

### Three Years

- Agency financial records
- Bank Reconciliations
- Cash receipts
- Coach certification forms
- Contracts and leases (after expiration)
- Correspondence (general, including emails)
- Credit card receipts
- Duplicate deposit slips
- Employment applications
- I-9 forms (after termination)
- Internal audit reports (in some situations, longer retention may be desirable)
- Insurance policies (after expiration)
- Internal reports (miscellaneous)
- Petty cash vouchers
- Physical inventory tags
- Protective behaviors training confirmations (inactive)
- Unified partner forms (scanned)
- Volunteer registration forms (inactive)

### Two Years

- Employee timecards

### One Year

- Correspondence (routine) with customers or vendors
- Magnetic tapes and disks

### **Electronic Documents and Records**

Electronic documents will be retained as if they were paper documents. Therefore, any electronic files, including records of donations made online, that fall into one of the document types on the above schedule will be maintained for the appropriate amount of time. If a user has sufficient reason to keep an email message, the message should be printed in hard copy and kept in the appropriate file or moved to an "archive" computer file folder. Backup and recovery methods will be tested on a regular basis.

## **Document Destruction**

Special Olympics Michigan's Chief Financial Officer is responsible for the ongoing process of identifying its records, which have met the required retention period and overseeing their destruction. Destruction of financial and personnel related documents will be accomplished by shredding.

Document destruction will be suspended immediately, upon any indication of an official investigation or when a lawsuit is filed or appears imminent. Destruction will be reinstated upon conclusion of the investigation.

## **Compliance**

Failure on the part of employees to follow this policy can result in possible civil and criminal sanctions against Special Olympics Michigan and its employees and possible disciplinary action against responsible individuals. The Chief Financial Officer and Finance Committee Chair will periodically review these procedures with legal counsel or the organization's certified public accountant to ensure that they are in compliance with new or revised regulations.

## **SOMI Financial and Accounting Guidelines and Procedures**

### **Accountability**

The Special Olympics Michigan Board of Directors adopted a policy on Accountability on January 31, 2001 (refer to Board Policy on Accountability). Refer to Finance and Accounting section on Board Policies. Persons receiving donations or expending program funds on behalf of SOMI will abide by the financial accounting procedures adopted by the Board of Directors.

### **Centralization**

Effective December 31, 2003, all programs operating under Special Olympics Michigan, Inc. are utilizing a centralized accounting system. Therefore, all revenue and expense transactions are processed through the state office. Although our programs no longer possess individual checkbooks, access to petty cash funds is available. SOMI credit cards are also available according to the terms of the SOMI Credit Card Agreement as outlined in the Accounting Manual.

### **Revenues**

Areas deposit all funds into designated local bank accounts and verify all revenue and donor information. The state office is then notified of all deposit activities. Donor revenue receipts are then printed by the state office and mailed to the donors (please refer to the Accounting Manual). Cash collected at any fundraiser must be deposited in SOMI's bank account. Cash collected cannot be used for expenses incurred at fundraiser site. All revenue received should be deposited in a timely manner.

### **Expenses**

- Corporate Billing - Arrangements are made with vendors to establish corporate billing accounts that are submitted directly by the vendor to the state office where it is verified with each area and processed for payment (refer to the Accounting Manual).
- Direct Billing - Areas establish individual vendor accounts to purchase goods/services and submit transaction receipts to the state office for payment processing according to agreed upon terms (refer to Accounting Manual).
- Cash Advances - Individuals must submit a completed Cash Advance Request form via the area, for state events by the due date listed on the monthly reminder calendar. For area events, submit the completed Cash Advance Request form not less than two weeks prior to the event.
- Reimbursements - Individuals seeking reimbursement must submit transaction receipts via the area, who forwards the request to the state office for payment processing (refer to the Accounting Manual). Reimbursement requests must be submitted within 30 days of incurring the expense.

All questions concerning finance and accounting transactions can be directed to the Chief Financial Officer or other accounting members, or communicated through email at [acctsome@gmail.com](mailto:acctsome@gmail.com). Technology and software purchases must be preapproved by Joel Warner regardless of cost. Return the Technology Purchase Request Form to Joel Warner for approval.

### **Contributions and Revenue**

Program contributions and revenue are receipted on a SOMI-authorized receipt form. All revenue information is posted to a revenue ledger. Checks issued to and made payable to Special Olympics Michigan are not to be cashed. All revenue checks or cash must be deposited into a designated Special Olympics account.

### **Expenditures**

All expenditures for program services, support services, and fundraising are posted to an expense ledger specific to each program. Program expenses are to be made from the program account and must be appropriately supported.

### **Financial Report**

Area Directors must share a financial report with their Area Management Team on a regular basis. The fiscal year runs from January 1 to December 31. Accounting periods consist of one calendar month.

### **Reconciliation**

A monthly reconciliation of program revenues and expenditures to the bank statement must be performed.

## **In-Kind Donated Materials and Services**

Donated materials and services of significant amounts should be recorded at their fair market value when received. Fair market value should be established on an objective and clearly measurable basis such as the normal rent charge for a facility, advertised costs for a piece of equipment, or the posted price of food or beverage. If the nature of the materials is such that valuations cannot be substantiated, it is doubtful that they should be recorded as contributions. Volunteer time is only recorded if the contribution creates or enhances non-financial assets, or if specialized skills are required and would typically need to be purchased if not provided by donation.

The recording of donated materials and services is to be documented on the revenue receipt form as provided and authorized by Special Olympics Michigan.

In regard to in-kind receipting, we must be careful not to misrepresent our receipting intent. The Special Olympics Michigan in-kind receipt does not always represent a tax deduction to the donor. The reason for issuing receipts for donated goods is two-fold:

1. As a goodwill gesture in recognition of the donor's generosity.
2. To fit into the bookkeeping system of Special Olympics Michigan.

## **Michigan Sales Tax Exemption**

### **Items purchased for program use**

Special Olympics Michigan is exempt from Michigan sales tax on items that are purchased for use or consumption in connection with the Special Olympics program such as sports equipment or printing costs. To support your claim of exemption you should provide, to the seller, a copy of the tax-exempt certification letter. Copies of that certification can be obtained from the state office.

### **Items purchased for resale**

Any items purchased for resale, such as T-shirts for a fundraiser, are subject to Michigan sales tax. These items should be invoiced as tax exempt purchases. The sales tax liability will be determined when the revenue from these sales is deposited. Sales tax reports will be submitted to the State of Michigan by the state office. A copy of the Sales Tax License can be obtained from the Resources section of the SOMI.org website (refer to copy in this book).

## **Area Credit Card Procedures**

### Credit Card Distribution

1. Area programs may receive more than one credit card. The Area Director will be the approving administrator for card requests and card management.
2. The Area Director is responsible for overseeing how all cards are used within area program. The card holder is also responsible for ensuring that all charge receipts are submitted according to SOMI guidelines and that expenditures comply with SOMI policy and procedures.

3. Cardholders agree to follow the program guidelines for appropriate expenditures as stated in the Board Policy on Area Expenditures.
4. By accepting the card, the area representative assumes responsibility for the card and will be responsible for all charges made. The card will have no impact on the cardholder's personal credit. Although the card lists an individual's name, the card is issued under Special Olympics Michigan Inc.'s credit rating.
5. Cardholder must have an A/B Volunteer form on file at Special Olympics Michigan state office.

#### Credit Card Purchases

1. Areas must have a sufficient cash balance in their operating account to cover their expense activity for all cards assigned.
2. The card is not to be used for personal purchases or cash advances.
3. Reoccurring monthly charges with consistent dollar amounts (such as internet charges) can be automatically charged to the SOMI credit card. However, the Area Director must establish these payments with the SOMI accountant and/or the SOMI payables department prior to establishment.
4. All technology and software purchases must have prior approval before expense is charged to SOMI Credit Card. Submit the Technology Purchase Request Form to Joel Warner for approval.

#### Reporting

1. A monthly statement will be sent to each card holder. A receipt for each expense on that statement will be sent to the State Office by the due date indicated.
2. Each receipt must be coded with the expense allocation information. This includes cost center, internal order, general ledger account numbers and project ID if applicable. For meal receipts, it is expected the receipt is detailed, included attendees and purpose.
3. It is the cardholder's responsibility to obtain receipts from the merchant or supplier each time the card is used. If this does not happen the individual would need to fill out a missing expense voucher.
4. Cardholder accounts are subject to monthly internal audits and reviews. By accepting the card, the cardholder agrees to comply with these audits and reviews.
5. If a card is lost or stolen, immediately contact Fifth Third (1-800-375-1747) and the state office (1-800-644-6404.) Failure to report the loss or theft of a card will leave the cardholder responsible for any fraudulent charges incurred.

#### Penalties

1. Personal expenditures on the SOMI card are not allowed. If this happens the cardholder must reimburse the cost. If reimbursement is not made the card will be revoked.
2. Failure to turn in receipts for monthly statements by the due date will result in a notification of noncompliance.

3. If inappropriate expenditures are made a notice will be sent to the cardholder, with a copy going to the appropriate supervisor, explaining the action to be taken or the action expected of the cardholder. If the requested action has not been taken in a timely manner a notification of noncompliance or card revocation will occur.
4. Abuse of the card will result in a notification of noncompliance or revocation of the card and appropriate disciplinary action. Policy violations include, but are not limited to:
  - a. Alcoholic Beverages & Tobacco Products
  - b. Unacceptable expenses
  - c. Failure to return the card upon request

Failure to submit proper documentation in a timely manner to Accounts Payable.

5. Credit card privileges will be revoked after three non-compliant notifications.
6. To get a card reestablished if a card is revoked, terms of potential reissue will be discussed with the cardholder, President/CEO, Field Service Director and Chief Financial Officer. At this meeting, a plan must be formulated to get the cardholder in compliance and keep them there.

#### State Staff Credit Card Procedures Reporting

1. The cardholder is responsible for the credit card and all charges associated with it and should not lend it to anyone else.
2. Cash withdrawals are not allowed.
3. On a monthly basis, credit card statements will be emailed to staff. It is expected that all staff who are cardholders, review all the charges on the statement, attach all the necessary receipts to the statement and return to payable accounting on or before the deadline given in the email that went out with the statement. Remote office staff can email or fax the statement and all receipts back to accounting on or before the given deadline.
4. It is the cardholder's responsibility to obtain receipts from the merchant or supplier each time the card is used. If this does not happen, the individual would need to fill out a Missing Expense Form.
5. Each receipt must be coded with the expense allocation information. This includes cost center, internal order, general ledger account numbers and project ID if applicable (fundraiser). Detail as to the purpose of the expense is also required.
6. Cardholder accounts are subject to monthly internal audits and reviews. By accepting the card, the cardholder agrees to comply with these audits and reviews.
7. If a card is lost or stolen, immediately contact Fifth Third (1-800-375-1747) and the State Office (1-800-644-6404). Failure to report the loss or theft of a card will leave the cardholder responsible for any fraudulent charges incurred.

#### **Guidelines for Allowable Meal Expenses**

While not a common occurrence, areas may charge meal expenses for the following situations: donor stewardship, volunteer stewardship, area management business directly related to Special Olympics Michigan. If you have a question as to if a meal is an acceptable charge, contact your field

service representative. When turning in your receipt, IRS regulations require a detailed receipt for any meal; you need to include who was at the meal and for what purpose. If these are not within IRS & SOMI guidelines, the employee will be asked to reimburse the meal cost.

**Meal Allowances (including tips)**

Meal	High Cost Cities*
Breakfast	\$11.00
Lunch	\$17.00
Dinner	\$28.00
Maximum Allowance	\$56.00

Allowable Meal Expenses:

1. Meeting with an area management team directly related to SOMI
2. Donor Stewardship
3. Volunteer Stewardship

Coding Invoices/Receipts

1. Before you code an invoice or receipt, be sure to consult your budget to make sure that the expense is in fact budgeted for, and how it is coded. If you do not see that line item, consult your supervisor or accounting. If you are unsure of the coding, please at least write an explanation for the expense.
2. If an expense is part of an overnight/multiple day trip, please note that on your receipt, so that accounting is aware. This would be Per Diem.
3. Please be sure to include a brief description of the cost incurred along with the actual coding. This makes it easier for the accounting department to catch coding errors and record/describe it correctly.
4. Accounting will record as much detail as possible in Financial Edge.

Penalties



1. Personal expenditures on the SOMI card are not allowed. If this happens, the cardholder must reimburse the cost. If reimbursement is not made, the card will be revoked.
2. At the end of the billing cycle, a statement of the cardholder's charges will be emailed. A deadline will be given for when those receipts are due. The employee is responsible to collect all of the receipts and return them attached with the statement to accounting by the due date. Failure to get receipts in by that deadline will result in a notification of non-compliance.
3. Once an employee has 3 missing receipts (either on one credit card cycle or over a few cycles), the employee's supervisor is notified. The supervisor is expected to talk to the employee and attempt to find a solution to the issue. This will only happen until the employee reaches 9 total missing receipts for the year, and then the employee's credit card will be revoked. The supervisor would actually be notified 3 times – every third missing receipt. Training will be offered on request, by either the supervisor or an accounting staff as needed. Envelopes to hold receipts will be provided as requested.
4. If inappropriate expenditures are made a notice will be sent to the cardholder with a copy going to the appropriate supervisor explaining the action to be taken or the action expected of the cardholder. If the requested action has not been taken in a timely manner a notification of non-compliance or card revocation will occur.
5. Abuse of the card will result in a notification of non-compliance or revocation of the card and appropriate disciplinary action. Policy violations include but are not limited to:
  - a. Alcoholic Beverages & Tobacco Products
  - b. Unacceptable expenses
  - c. Failure to submit proper documentation in a timely manner to Accounts Payable
6. Credit card privileges will be revoked after three non-compliant notifications
7. A revoked credit card can only be reissued with the consent of the Chief Financial Officer, Chief Executive Officer, and Direct Supervisor. A plan of compliance would be formulated. The terms and conditions of the reissued card would vary from this document.

### **Emergency Funding Grant**

An Emergency Funding grant is available for areas that have a short term funding need. All requests should be directed to the President/CEO and the Chief Financial Officer. A written fundraising plan will be required and a plan for avoiding financial problems in the future will be developed. If funds are granted, a provision for repayment will be established. Funds are only available for grants if there is an available balance in the equity fund.

### **Endowment Spending Policy for Permanently Restricted Funds**

The following spending policy is intended for permanently restricted endowed gifts:

- The distribution rate for permanently restricted funds will be based on a total return approach, which utilizes both income and capital appreciation to be withdrawn for spending.
- The maximum allowable spending amount for all permanently restricted funds shall be 50% of the portfolio value that is greater than corpus. Corpus is defined as the sum of money that is set aside by a donor or group of donors to produce income for a specific purpose.

The allowable spending amount is subject to the additional spending limits set forth below. The formula shall be applied to permanently restricted funds created after January 1, 2014 and be applied to balances as of December 31st each year. The formula will be reviewed and approved annually.

- The spendable amount for permanently restricted funds created before January 1, 2014 will be determined by each fund's original agreement unless the donor or family representative of the donor agrees to our new Endowment Spending Policy for Permanently Restricted Funds.
- SOMI shall maintain a record of the historic dollar value of each permanently restricted fund.
- If the market value of a permanently restricted fund on December 31 exceeds the fund's corpus, then the maximum allowable spending from that permanently restricted fund shall be 50% of the fund's market value that is greater than corpus. The determined spendable amount shall be transferred to SOMI operating fund for its intended purpose by June 30th each year.
- If the market value of a permanently restricted fund on December 31 is less than that fund's corpus, then there will be no spendable amount from that permanently restricted fund.

### **Liquidity Policy**

SOMI desires to maintain a level of cash assets for the organization's operating accounts to be a range of 120 to 200 days of SOMI's annual expenses. The target amount within the desired range is 175 days. When the calculation falls below 120 days, the Finance Committee will be notified of the situation and recommended actions to return back to the desired range will be presented to the Finance Committee within 60 days.

When the calculation is nearing or exceeding 200 days, cash will be invested in the Cash Reserve Fund for State funds or a Program Investment account for the Areas.

### **Investment Withdrawals Policy**

Investment withdrawals greater than \$25,000 from the investment account have to be a written request to the investment firm that requires two signatures (one signature of the President & CEO and a second signature of the CFO). Withdrawals have to comply with all board policy, donor agreements for permanently restricted funds, donor agreements for temporarily restricted accounts and board designated accounts.

**Request for Taxpayer  
 Identification Number and Certification**

**Give Form to the  
 requester. Do not  
 send to the IRS.**

▶ Go to [www.irs.gov/FormW9](http://www.irs.gov/FormW9) for instructions and the latest information.

1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.  
**SPECIAL OLYMPICS MICHIGAN, INC.**

2 Business name/disregarded entity name, if different from above

3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following seven boxes.

Individual/sole proprietor or single-member LLC

C Corporation

S Corporation

Partnership

Trust/estate

Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ▶ \_\_\_\_\_

**Note:** Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is not disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.

Other (see instructions) ▶ \_\_\_\_\_

4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):

Exempt payee code (if any) \_\_\_\_\_

Exemption from FATCA reporting code (if any) \_\_\_\_\_

*(Applies to accounts maintained outside the U.S.)*

5 Address (number, street, and apt. or suite no.) See instructions.  
**CENTRAL MICHIGAN UNIVERSITY**

6 City, state, and ZIP code  
**MT PLEASANT MI 48859**

7 List account number(s) here (optional)

Requester's name and address (optional)

**Part I Taxpayer Identification Number (TIN)**

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

**Note:** If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

**Social security number**

			-					
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**or**

**Employer identification number**

3	8	-	1	9	6	4	6	4	3
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**Part II Certification**

Under penalties of perjury, I certify that:

- The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
- I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
- I am a U.S. citizen or other U.S. person (defined below); and
- The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

**Certification instructions.** You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

**Sign Here** Signature of U.S. person ▶  Date ▶ **01/01/2024**

**General Instructions**

Section references are to the Internal Revenue Code unless otherwise noted.

**Future developments.** For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to [www.irs.gov/FormW9](http://www.irs.gov/FormW9).

**Purpose of Form**

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

*If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.*



### Sales Tax License

Business Tax Section  
Michigan Department of Treasury  
P.O. Box 30427  
Lansing, MI 48909  
[www.michigan.gov/taxes](http://www.michigan.gov/taxes)

SPECIAL OLYMPICS MICHIGAN INC  
CENTRAL MICHIGAN UNIVERSITY  
MOUNT PLEASANT, MI 48859-0001

Notice Date:	November 19, 2022
Account Number:	38-1964643
Letter ID:	10037463042
Contact Us:	517-636-6925

Below is your Sales Tax License. The licensee is required to ensure the sales tax license is displayed or readily available on premises. Treasury will no longer be mailing multiple licenses for businesses with more than one location. To obtain another Sales Tax License and 24/7 access to your business information please visit [mto.treasury.michigan.gov](http://mto.treasury.michigan.gov).

The account number on the sales tax license is your business Federal Employer Identification Number (FEIN). If you do not have an FEIN, Treasury has assigned you a 9-character account number beginning with "TR".

You must notify the Michigan Department of Treasury of any changes to your business ownership, address or FEIN. To update any existing business information please visit Michigan Treasury Online (MTO) at [mto.treasury.michigan.gov](http://mto.treasury.michigan.gov).

Note: The expiration date for the sales tax license coincides with the calendar year it is issued for.

CUT ALONG THIS LINE

164 (Rev. 4-19)

STATE OF MICHIGAN

### Sales Tax License

DEPARTMENT OF TREASURY

SPECIAL OLYMPICS MICHIGAN INC  
CENTRAL MICHIGAN UNIVERSITY  
MOUNT PLEASANT, MI 48859-0001



Account Number: 38-1964643  
Expiration Date: December 31, 2023

Issued under authority of P.A. 167 of 1933, as amended.

For Office Use Only  
BP Number: 872088



## **Insurance**

### **Board Policy on Mandatory Fleet Insurance Policy**

All vehicles purchased or donated to Special Olympics programs in Michigan must be insured through an automobile policy purchased by the state office. Areas will pay their share of the premiums for the insurance coverage. The use of 15 passenger vehicles is strictly prohibited.

NOTE: Special Olympics Michigan does NOT use, and does NOT have insurance coverage for 15 passenger vehicles. This rule is per Special Olympics International policy as these vehicles are not covered by SOCIP. Make sure that any vehicles that are borrowed or rented are NOT 15 passenger vehicles.

### **Special Olympics Insurance Coverage Background**

Special Olympics, Inc. provides Special Olympics organizations in the United States and territories with accident and liability insurance coverage.

American Specialty Insurance Risk Services, Inc. (American Specialty), the insurance broker arranges for coverage through various insurance companies and negotiates insurance premiums based on claim experience, total number of participants, and total number of Special Olympics activities. Special Olympics, Inc. and U.S. programs share payment of the insurance premiums. The policy period is from January 1 to December 31 of each year.

### **Participant Accident Coverage**

When injuries resulting from an accident occur during a covered event or during covered travel to or from a covered event. This is an accident medical policy, not a sickness or illness medical policy. For example, it may cover the medical expenses caused by a broken leg, but not by appendicitis. An accident must occur in order for coverage to apply.

The accident medical insurance policy is in excess of any other valid and collectible insurance or medical plan applicable to the injured participant.

Injuries are defined as accidental bodily injury, injuries received while insured under this coverage and resulting independently of sickness and all other causes. A covered loss, for purposes of this insurance, will include: a) the repair or replacement of existing prosthetic devices such as artificial limbs, glass eyes, and artificial dental work; and b) bodily injuries arising as a result of a seizure (including epileptic seizures). To be covered, the injury must occur while: a) Participating in activities sponsored and supervised by Special Olympics; or (b) traveling to, during, or after such activities as a member of a group in transportation furnished or arranged by Special Olympics.

Covered event is defined as scheduled activity authorized, organized, and supervised by Special Olympics. With respect to competition activities, this includes pre-competition activities and practice sessions.

Covered event also includes activities authorized by Special Olympics that are directly supervised by registered Class A volunteers, but only when participation is part of the Special Olympics athlete's overall sports training for Special Olympics competition.

Directly supervised is defined as supervised in person by a registered Class A volunteer.

Registered Class A volunteer is defined as an individual currently registered in accordance with the Special Olympics Official General Rules, or other Special Olympics policies in effect during the policy period.

Insured persons are defined as U.S. Special Olympics athletes, (including Young Athletes) unified partners, managers, coaches, officials, chaperones, supervisors, fundraising participants, and other volunteers whose names are on file (registered) with Special Olympics while participating in a covered event. For forms and instructions on reporting an accident, call the state office.

Covered travel means travel that is:

1. Directly to or from the location of a covered event;
2. Authorized by Special Olympics; and
3. Supervised by staff members or designated representatives of Special Olympics.

Covered travel to a covered event commences upon departing from the designated meeting place for such travel and terminates upon arrival at the location of the covered event.

Covered travel from a covered event commences upon departing from the location of the covered event and terminates upon return directly to the designated meeting place.

### **Commercial General Liability**

This policy protects insured Special Olympics organizations, athletes, and registered volunteers from third party claims of bodily injury, property damage and personal and advertising injury due to alleged negligence arising from the conduct by Special Olympics during a Special Olympics activity. Under the policy, the insurer has a "duty to defend" until such time as legal liability has been established, and therefore, defense costs associated with the aforementioned general liability claims area paid regardless of legal liability.

In addition, the general liability policy has been endorsed to provide coverage for losses resulting from damage to property in the care, custody or control of Special Olympics, excluding watercraft, aircraft, autos, and Special Olympics owned property. The loss must occur during a Special Olympics conducted / sponsored event and Special Olympics must be found legally liable for the loss. The limit of liability is \$100,000, subject to a \$2,500 deductible per claim, for such property losses.

Additional Insureds: Entities with an insurable interest will be named as an Additional Insured, but only with respect to liability resulting from the negligent acts or omissions of Special Olympics, as requested and approved by American Specialty on behalf of Philadelphia Indemnity Insurance Company.

### **Hired Auto Physical Damage**

This policy provides coverage for physical damage claims arising as a direct result of the use of a commercially-rented vehicle by a Special Olympics employee, athlete, or registered volunteer for Special Olympics Michigan business with the permission from Special Olympics Michigan state office.

The deductible is \$1,000 per accident, and the coverage is for \$50,000 per vehicle limit.

A vehicle is considered commercially rented if:

- It is obtained from an entity of which the commercial purpose is renting vehicles for profit;
- A specific rental charge is made; and
- A rental contract is executed between the rental establishment and Special Olympics Michigan with respect to the particular vehicle.

If you are borrowing or renting a vehicle from a non-commercial renting company, please ask how insurance coverage would be handled for physical damage. If the company or organization expects Special Olympics to cover physical damage, please call the administrative assistant at the state office to get coverage.

### **Non-Owned & Hired Automobiles Liability**

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

Restrictions: Non-owned and hired auto liability coverage applies excess of any other valid and collectible insurance.

NOTE: Excess coverage is provided to Registered Class A Volunteers of Special Olympics Michigan who are using their personal vehicles on behalf of and with the permission of Special Olympics Michigan, and have a valid driver's license and insurance with at least the state minimum requirements.

Additionally, employees of Special Olympics Michigan are insured on an excess basis while using their own vehicles for Special Olympics Michigan business.

Covered Autos:

- Hired Autos – Special Olympics Michigan's autos that are leased, hired, rented (e.g. rental vehicles) for less than one month.
- Non-Owned Autos – Special Olympics Michigan's autos that are not leased, hired, rented or borrowed that are used for Special Olympics Michigan business (e.g. autos owned by employees or volunteers).

NOTE: No coverage is provided for losses caused by an uninsured/underinsured motorist to non-owned vehicles; however, uninsured / underinsured motorists' coverage is afforded for vehicles that are "commercially rented" by an insured.

### **Vehicle Insurance**

Any vehicle owned by a Special Olympics Michigan must be insured through the SOMI fleet insurance policy. In addition, titles should be registered to Special Olympics Michigan, Inc., which is the legal entity name, and the title should be filed at the state office. This insurance covers only vehicles belonging to SOMI. Anyone driving on behalf of SOMI needs to have a Volunteer A form.

### **Medical Volunteers**

This policy provides insurance coverage for Medical Malpractice claims for medical services rendered at a Special Olympics events by state registered Special Olympics Michigan volunteers, other than doctors, acting in capacity of a Special Olympics Registered Volunteer.

Coverage is not provided for doctors. Commercial medical service firms volunteering the services of their paid employees are not covered. However, should any of these employees volunteer their services on a personal basis, separate from their employment status, coverage would be extended provided such person is not a doctor and is a Special Olympics Michigan Registered Volunteer in accordance with the Special Olympics Official General Rules or other Special Olympics policies if effort during the policy period.

NOTE: Medical Malpractice coverage for Healthy Athletes physicians and for volunteer physicians volunteering their time at a Special Olympics event is provided under a separate policy. Please contact American Specialty for further information.

### **Certificates of Insurance and Contracts**

If a Special Olympics program is requested to sign a contract or provide a certificate of insurance to a facility or organization, please contact the administrative assistant at the state office for assistance. Any contracts must be reviewed prior to signing, and must be signed by or approved in writing by the President/CEO of SOMI.

Additional insured's include sponsors; managers or lessors of premises; lessors of leased equipment; and state or political subdivisions- permits as requested and approved by American Specialty Insurance Services, Inc. on behalf of Philadelphia Indemnity Insurance.

### **Property Insurance**

Special Olympics Michigan carries a business owners policy to cover losses due to theft, fire, and liability insurance (slip and fall accidents). All offices of Special Olympics Michigan should be scheduled and covered under the business owners policy. In addition, all storage facilities used to store Special Olympics Michigan equipment should be included on the inventory list and on file at the state office.



### **Board Policy on Alcohol**

Special Olympics Michigan prohibits its funds being used for the purchase of alcohol unless specifically approved by the Board of Directors.

### **Liquor License Request Policy**

Any request for Special Olympics Michigan to purchase a liquor license will be sent to the President/CEO, who shall have authority to review, and, after a thorough review to make sure all the requirements can be met, recommend it to the board. All approved license requests will be added to a Board of Directors meeting agenda under the Consent Agenda. If the President/CEO deems that Special Olympics Michigan cannot meet the requirements of the State of Michigan, safety or insurance requirements, the request will not be sent to the board for approval.

### **Liquor Liability**

For events (such as fund raisers or banquets) where alcoholic beverages are being served, please call the administrative assistant at the state office to determine whether special coverage needs to be in place.

If alcohol is being sold, special insurance needs to be purchased specifically for that event. This insurance needs to be applied for well in advance of the event. If a cash bar is being used, other options such as having the establishment selling the alcoholic beverages make SOMI an additional insured, or signing a hold harmless agreement with the establishment can be used.

It is important that you check for liquor liability coverage at all establishments where liquor is being sold or served. If you are not hiring a caterer or restaurant, you may need to get a liquor license from the State of Michigan (request a Liquor License application from the state office).

It is also important at events with alcohol to use risk management procedures such as (but not limited to):

- Using trained bartenders;
- Having a beginning and ending time for serving alcohol (with the ending time one hour before the event is over);
- Serving food (not just pretzels or chips) with the alcoholic beverages;
- Having transportation in place for those who may have over-indulged;
- Using small glasses;
- Not allowing pitchers for use by guests to pour their own drinks;
- Having non-alcoholic drinks available;
- Limiting the number of drinks a person can have by use of tickets;
- Using wristbands to help identify underage persons.

## **Board Michigan Liquor Control Commission License Resolution**

RESOLVED: That Special Olympics Michigan, through its duly authorized officers, approved an application to the Michigan Liquor Control Commission (MLCC) for a special license for the sale of either beer and wine, or beer, wine or spirits, for consumption on the premises to be in effect.

### **Risk Management**

When planning a Special Olympics event, it is advisable to set up a Crisis Management Plan and to review your event and facility for safety and possible risks. For assistance, please call the state office.

### **Special Coverage**

Some activities are outside of the normal scope of Special Olympics activities and require special insurance coverage. Please call the state office if your activity has unique circumstances to make sure that it is properly covered by insurance and that risk management guidelines are being followed.

The following red flag fundraising activities are EXCLUDED from the Special Olympics Corporate Insurance Policy and may only be deemed eligible for coverage if certain underwriting requirements are met and the activity is approved by the insurer prior to the event. Please contact the state office if you are aware of a fundraising activity involving any of the following red flag activities: golf ball drops; rodeos, fundraising events with greater than 5,000 people at any one time (other than a Polar Plunge winter fundraising event); firearms; political rallies; over the edge events; events involving alcohol; obstacle runs (including obstacles, barriers, paint, foam or other non-traditional challenge features); fundraising activities lasting more than 7 consecutive days; aircraft (other than plane pulls).

The following exclusions apply with respect to all Special Olympics events, fundraising and otherwise. Please contact the state office if any of your activities involve the following: hot air balloons; fireworks; rock climbing walls; mechanical amusement rides; inflatables; events involving alcohol; skydiving; aircraft; construction activities; watercraft (longer than 75 feet) and drones.

### **Non-Sports Special Olympics Outings**

This section provides guidelines regarding when an activity is covered by insurance and if it is appropriate for Special Olympics funds to cover that activity. Some activities may be considered official Special Olympics activities even if they are not linked to sports and competition.

#### **Definition of a Special Olympics Outing**

A Special Olympics outing is defined as an activity organized, sponsored, or run by Special Olympics Michigan. Some examples include:

- A kick-off picnic in the fall for athletes and their families.
- Athletes attend a special event fundraiser (e.g., golf outing) or public relations activity to help promote or support Special Olympics

- A coach takes his whole team to watch a sporting event when (a) the activity is mission-driven (see below) and (b) athletes on the team are representing Special Olympics (wearing their T-shirts or uniforms).
- A whole team goes out for celebratory ice cream cones after their last game as a team, and it is pre-approved by Special Olympics.

Events that would not be considered Special Olympics outings include:

- A coach invites a few athletes over to share a meal with his family. A picnic is held at a home of a volunteer and they invite guests to recreational swim, this is the liability of the homeowner and is not considered a Special Olympics Event.
- A volunteer wins free tickets to the fair and decides to take a few SOMI athletes.
- A coach takes the team to a museum during 'down time' while they are in a town for a tournament (a side trip), unless the trip is pre-approved by SOMI and the whole team participates.
- Free tickets to a professional sporting event are donated to Special Olympics and are given to athletes and families for their personal use.

### **Definition of Team Travel**

Team travel includes an official meeting spot or pick-up schedule, travel arrangements as a team (bus, car pool, etc.), and travel directly to/from the official activity. Team travel also may include a lunch or dinner stop if it is a long trip. Team travel does not include "side trips" (for example, stopping for an activity that is not an official Special Olympics event) or when an athlete and/or his/her family transport themselves to an event separately from the team.

### **Insurance Coverage for Outings**

The insurance company provides the following list of questions to help decide if there is insurance coverage for an outing. If you can answer "yes" to one or more of these questions, you may be covered. If you are unsure, you should contact the administrative assistant at the state office.

- Is it official Special Olympics business?
- Is the event involved in the overall training of the athlete(s)?
- Is the event controlled and approved by Special Olympics?
- Are you a representative of Special Olympics? Are you a registered volunteer or athlete?
- Has the event been organized completely through Special Olympics?
- Does Special Olympics have responsibility for the athlete(s)?
- Are you acting as an agent of Special Olympics in regard to this activity?

### **Use of Special Olympics Funds for Outings**

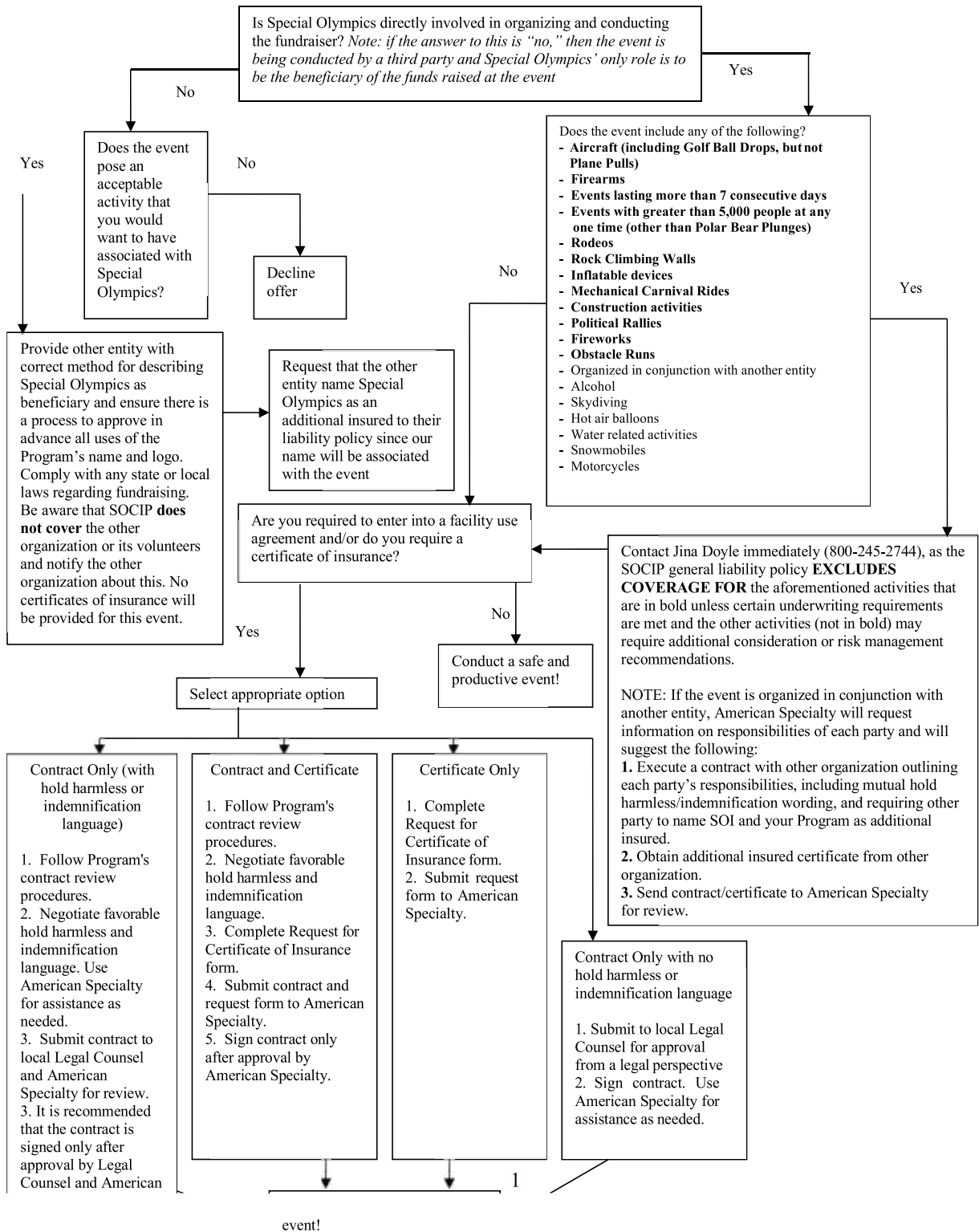
Money raised in the name of Special Olympics must be used for Special Olympics activities. Please review the following list of questions:

- Is the activity driven by the mission of Special Olympics—to provide year-round sports training and athletic competition in a variety of Olympic-type sports for children and adults with intellectual disabilities?
- Is funding available for this activity?
- Is the activity providing publicity or raising funds for Special Olympics?
- Is the activity being provided for the whole team as a sport-specific activity, in line with training?
- Have you obtained pre-approval for organizing or participating in this activity?

### **Obtaining Pre-Approval**

The next person in line of authority may provide pre-approval. For example, for a coach, the Area Director may provide pre-approval. For an Area Director, the Regional Manager may provide pre-approval. Other state staff may be contacted to provide guidance on risk management, financial concerns, or other questions.

## Event Flowchart





***Special  
Olympics***  
*Michigan*