

AGENCY MANAGEMENT TEAM

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AGENCY MANAGEMENT TEAM OVERVIEW

It is the vision of Special Olympics Wisconsin (SOWI) and the Agency Management Committee that Agency managers will recruit and train additional volunteers to share the responsibilities, and also the benefits of being involved with Special Olympics.

An Agency Management Team (AMT) is one design for dividing Agency tasks that SOWI staff has seen that works well and efficiently. An AMT is a working team, not an advisory committee or governing board, which is directed by the Agency manager. It may or may not include all the members listed, and may include other positions you have found necessary in managing the tasks of your Agency.

Regardless of how you divide the tasks or what you call the volunteers who support the Agency, the key issue is that volunteers have a clear understanding of what their role is and there is an open and consistent line of communication between the manager and volunteers. Agency managers who currently work with a support team of volunteers typically have some type of written volunteer job descriptions and conduct regularly scheduled meetings where volunteers share their progress and needs. Some Agencies also publish an Agency newsletter (formal or informal) or create a Facebook group (see the *Communication* section for guidelines) to keep everyone informed.

To assist you with the process of establishing a team of volunteers to support your Agency, we have created and included the following documents:

- Agency Management Team Position Descriptions (included in this section)
- Agency Management Team Overview (included in this section)

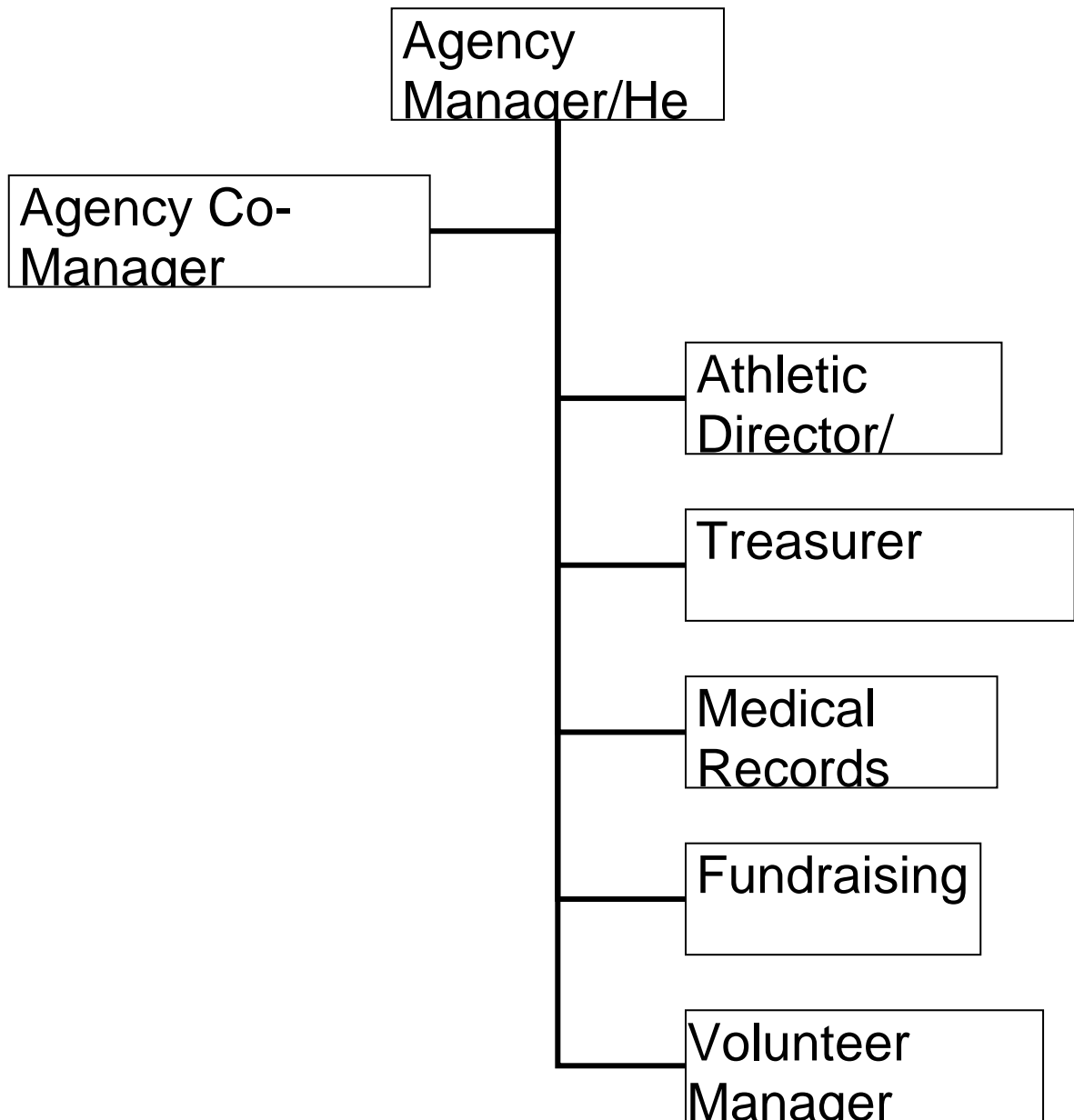
Finally, the Agency log in page on the SOWI website has been enhanced and expanded to include online monitoring of athlete medical and volunteer rosters as well as Agency best practices. Like all things in SOWI, we count on our Agency managers to make things better; this includes our Agency Management page on the website which needs your interaction to make it great.

SOWI staff is here to support Agency managers so you can, in turn, support the Agency. Please utilize SOWI staff to assist your Agency in developing and maintaining an AMT, strategies to recruit volunteers, publicizing achievements and happenings through earned media, to create a succession plan, or simply when you need to take a sabbatical or gain stronger support when facing a difficult Agency issue.

AGENCY MANAGEMENT TEAM DESCRIPTION

The purpose of the AMT is to divide the work of managing an Agency between many hands, therefore providing the foundation for enhanced services to athletes and allowing more volunteers to reap the benefits of being involved with Special Olympics. An AMT is a working team, not an advisory committee or governing board, which is directed by the Agency manager. An Agency may choose not to fill all the positions listed below and/or create additional positions which better match the needs of the Agency. An Agency may also edit the job descriptions to best fit their volunteers' skill sets and the Agency's needs. Remember, athletes involved in Athlete Leadership Programs (ALPs) may be a resource for all committees.

All AMT members (including key athlete volunteers) must be registered Class A volunteers. The Agency manager is aware of any volunteer restrictions and should consider this when assigning key leadership roles (i.e. someone with a financial restriction may coach, but should not be collecting bowling fees).



Agency Manager: The Agency manager plans, organizes, directs and coordinates programs and services for the athletes in the Agency in accordance with established policies to further achieve the goals, objectives, standards and mission of SOWI. (In some cases, a co-manager is enlisted to help fulfill the manager duties. In this case, one of them will be listed as the main contact for the Agency.)

Athletic Director: The athletic director is responsible for overall sports management for the Agency. An alternate to this approach is to have one person other than the head coach in charge of each sports season, allowing for an “off season” for key volunteers.

Agency Head Coach: The head coach is responsible for providing athletes with comprehensive training and preparation for local, Regional, District, Sectional and State level competition.

Agency Treasurer: The treasurer is responsible for all aspects of financial administration for the Agency (cannot be a family member of the Agency manager or co-manager nor have financial restrictions).

Agency Medical Records Manager: The medical records manager is responsible for ensuring the SOWI medical exam policies and procedures are adhered to so the athletes may train and compete.

Agency Fundraising Manager: The fundraising manager is responsible for formulating and enacting a development plan to meet the financial needs of the Agency.

Agency Volunteer Manager: The volunteer manager is responsible for coordinating and recognizing Agency volunteers.

AGENCY MANAGER POSITION DESCRIPTION

Title: Agency Manager

Description: The Agency manager plans, organizes, directs and coordinates programs and services for the athletes in the Agency in accordance with established policies to further achieve the goals, objectives, standards and mission of Special Olympics Wisconsin (SOWI). The completion of responsibilities will be performed personally by the Agency manager or through other Agency volunteers.

Qualifications: The desire and enthusiasm to manage the Agency program to the best of their abilities. Experience as a leader with management, organization and communication skills, as well as knowledge of sports management, volunteers, and persons with intellectual disabilities. Manager must be a registered Class A volunteer with no financial restrictions. In the event this position is filled by an athlete, s/he needs to be ALPs registered and screened.

Primary Responsibilities: (If an Agency has a co-manager, he/she would share these responsibilities.)

- 1) Behave in a manner consistent with SOWI's core values of mutual respect, positive attitude, accountability, teamwork and dedication.
- 2) Promote the mission of Special Olympics and uphold the philosophy, principles and policies of Special Olympics, Inc. and SOWI for the benefit of the athletes.
- 3) Serve as the primary contact for all mailings, e-mail, phone calls and paperwork for the Agency from the Regional and Headquarters office and those affiliated with the Agency. (In the case that an Agency has a co-manager, only one of them will be listed as the main contact for the Agency in the SOWI database.)
- 4) Direct safe, quality training for the athletes and explores other SOWI initiatives to enhance the athlete experience.
- 5) Oversee arrangement of competition opportunities at all levels of Special Olympics for the athletes.
- 6) Oversee all financial matters and work with Agency Management Team to develop and monitor the Agency budget.
- 7) Ensure funds are raised and expended according to SOWI policies to meet the needs identified in the Agency budget.
- 8) Develop a communication system to regularly update coaches, volunteers, family members, and the media.
- 9) Recruit eligible athletes and volunteers needed to implement a quality local program
- 10) Review and sign Codes of Conduct (i.e. Athlete, Volunteer, Family and Spectator) prior to beginning of each sport season or at least annually.
- 11) Work with the management team to nominate local stakeholders for SOWI awards.

Support: The Agency manager reports to the appropriate Regional office. Agency mentors are available for additional support as agreed upon by staff and the Agency manager.

Benefits to Volunteer: Managing an Agency allows opportunities for developing marketable job skills, creating personal and professional relationships, directing your own volunteer time, enhancing your physical fitness, making a tangible difference in the lives of individuals with intellectual disabilities, and more.

Time Commitment: The number of hours per week depends on the size and involvement level of the Agency. The time commitment increases around Regional and State competitions.

Work Location: The Agency manager may work out of their home, workplace office, classroom or other facility as they deem appropriate.

Date of Redesign: The Agency is reviewed annually through the Agency registration and accreditation process at which time the Agency manager job description is reviewed.

AGENCY ATHLETIC DIRECTOR POSITION DESCRIPTION

Title: Agency Athletic Director

Description: The Special Olympics athletic director is responsible for the overall sports management for the Agency. An alternate to this approach is to have one person other than the head coach in charge of each sports season, allowing for an “off season” for key volunteers.

Qualifications: The desire and enthusiasm to oversee athlete training to the best of their abilities. Experience as a coach with sport-specific knowledge, as well as knowledge of sports management, volunteers, and persons with intellectual disabilities. Athletic director must be a registered Class A volunteer. In the event this position is filled by an athlete, s/he needs to be ALPs registered and screened.

Primary Responsibilities:

- 1) Behave in a manner consistent with Special Olympics Wisconsin’s core values of mutual respect, positive attitude, accountability, teamwork and dedication.
- 2) Serve as the Agency liaison regarding sports matters.
- 3) Recruit and facilitate training and certification of a head coach for each sport.
- 4) Ensure the head coach for each sport fulfills his/her responsibilities.
- 5) Ensure head coaches and athlete coaches maintain current sports certification.
- 6) Facilitate communication between head coaches and report back to the Agency Management Team regarding sports issues.
- 7) Ensure consistency between sports regarding budget, uniforms, transportation, facilities, volunteer support, etc.

Support: The athletic director reports to the Agency manager. Resource materials complete with a comprehensive *Competition Guide* are included in the *Agency Manager Handbook*. The Regional Athletic Director also serves as a resource for rules, competition forms and general sports questions.

Benefits to Volunteer: Serving as the athletic director allows opportunities for developing marketable job skills, creating personal and professional relationships, directing your own volunteer time, making a tangible difference in the lives of individuals with intellectual disabilities, and more.

Time Commitment: The number of hours per week depends on the size and involvement of the Agency. The time commitment increases around Regional and State competitions.

Work Location: The athletic director may work out of their home, workplace office, classroom or other facility they deem appropriate. Some duties may involve visits to the training sites.

Date of Redesign: The Agency is reviewed annually through the Agency registration and accreditation process at which time the athletic director position description is reviewed.

AGENCY HEAD COACH DESCRIPTION

Title: Agency Head Coach

Description: The head coach is responsible for providing athletes with comprehensive training and preparation for local, Regional, District, Sectional and State level competition. The completion of responsibilities will be performed by the head coach or through other Agency volunteers.

Qualifications: The desire and enthusiasm to provide athlete training to the best of their abilities. Experience as a coach with sport-specific knowledge, as well as knowledge of sports management, volunteers, and persons with intellectual disabilities. Each team advancing to state-level competition is required to have a coach certified in that sport. Likewise, each individual sport that an Agency sends to state-level competition is also required to have a coach certified in that sport. Head coach must be a registered Class A volunteer. In the event this position is filled by an athlete, s/he needs to be ALPs registered and screened.

Primary Responsibilities:

- 1) Behave in a manner consistent with Special Olympics Wisconsin's (SOWI) core values of mutual respect, positive attitude, accountability, teamwork and dedication.
- 2) Select, assess and train Special Olympics athletes considering athlete choice and interest:
 - a) Athlete selection: The head coach will recruit athletes and properly complete and submit all required medical and registration materials by established deadlines.
 - b) Assessment: The head coach will assess each athlete to determine the individual and/or team skill level for training and competition in selected sports.
 - c) Training: The head coach will develop individualized training programs for each athlete. The program will include instructions in fundamental skills, conditioning, competition and rules. The training program should be a minimum of eight sessions prior to the first level of competition.
- 3) Know, understand and abide by the official *Special Olympics Sports Rules*.
- 4) Know and understand the sport being coached.
- 5) Maintain current sports certification.
- 6) Execute the legal duties of the head coach:
 - a) Provide proper planning for each step of training and competition.
 - b) Provide and maintain a safe and secure physical environment.
 - c) Use acceptable and safe equipment.
 - d) Ensure appropriate sport skills instruction and safe competition.
 - e) Match athletes according to strength, size and ability.
 - f) Continually assess each athlete for participation in appropriate activities within, not challenged beyond his or her abilities and capabilities.
 - g) Inform athletes of inherent risks associated with a specific sport.
 - h) Ensure acceptable supervision and maintain an adequate volunteer-to-athlete ratio.
 - i) Establish an emergency action plan that includes procedures for emergency medical support, postponements or cancellations, crisis communication, and incident and accident reporting.
 - j) Provide appropriate medical support at all times.
 - k) Maintain accurate records.
 - l) Keep up-to-date medical information on hand for all of the athletes that you oversee, including during practices, travel, and at competitions.

Support: The head coach reports to the athletic director. SOWI provides training and resources.

Benefits to Volunteer: Coaching allows opportunities for developing marketable job skills, creating personal and professional relationships, directing your own volunteer time, enhancing your physical fitness, making a tangible difference in the lives of individuals with intellectual disabilities, and more.

Time Commitment: The number of hours per week depends on the size and involvement level of the Agency. The time commitment increases around Regional and State competitions.

Work Location: Most duties are performed at the training site.

Date of Redesign: The Agency is reviewed annually through the Agency registration and accreditation process at which time the head coach position description is reviewed.

AGENCY TREASURER POSITION DESCRIPTION

Title: Agency Treasurer

Description: The treasurer is responsible for all aspects of financial administration for the Agency. The completion of responsibilities will be performed personally by the treasurer or through other Agency volunteers.

Qualifications: The desire and enthusiasm to support the Agency program to the best of their abilities. Experience and knowledge in bookkeeping (i.e., accounts payable, bank reconciliation, and preparation of financial statements) is a plus. The treasurer must be a registered Class A volunteer with no financial restrictions and may not be a family member of the Agency manager or co-manager. In the event this position is filled by an athlete, s/he needs to be ALPs registered and screened.

Primary Responsibilities:

- 1) Behave in a manner consistent with Special Olympics Wisconsin's (SOWI) core values of mutual respect, positive attitude, accountability, teamwork and dedication.
- 2) Protect and maintain the confidential aspect of financial matters.
- 3) Serve as the Agency liaison regarding financial matters.
- 4) Know, understand and abide by the SOWI financial policies and procedures.
- 5) Work with other members of the Agency Management Team to develop an Agency budget. Maintain and report where the budget stands at Agency Management Team meetings.
- 6) Follow the in-house accounting procedures for expenses and revenue (see *Finance*) and monitor the Agency's account balance.
- 7) Utilize the *In-Kind Contribution Receipt* and *Certificate of Exemption* when appropriate.
- 8) Maintain accurate financial records (i.e. all income and disbursement records, receipts, SOWI account statements, travel expenses, invoices, and bills etc.).

Support: The treasurer reports to the Agency manager. The SOWI Headquarters maintains all financial records and can provide assistance upon request. All monthly financial statements are provided on the Agency log in page on the SOWI website.

Benefits to Volunteer: Serving as treasurer for an Agency allows opportunities for developing marketable job skills, creating personal and professional relationships, directing your own volunteer time, making a tangible difference in the lives of individuals with intellectual disabilities, and more.

Time Commitment: The number of hours per week depends on the size and involvement level of the Agency.

Work Location: The treasurer may work out of their home, workplace office, classroom or other facility as they deem appropriate.

Date of Redesign: The Agency is reviewed annually through the Agency registration and accreditation process at which time the treasurer position description is reviewed.

AGENCY MEDICAL RECORDS MANAGER DESCRIPTION

Title: Agency Medical Records Manager

Description: The Special Olympics medical records manager is responsible for ensuring the Special Olympics Wisconsin (SOWI) medical exam policies and procedures are adhered to so the athletes may train and compete. Completion of responsibilities will be performed personally by the medical records manager or through other Agency volunteers.

Qualifications: The desire and enthusiasm to support the Agency to the best of their abilities. Experience in records management, as well as accuracy skills and attention to detail a plus. The manager must be a registered Class A volunteer. In the event this position is filled by an athlete, s/he needs to be ALPs registered and screened.

Primary Responsibilities:

- 1) Behave in a manner consistent with SOWI's core values of mutual respect, positive attitude, accountability, teamwork and dedication.
- 2) Know, understand and abide by the SOWI medical policies and medical deadline dates.
- 3) Communicate with athletes and parents/guardians to ensure they know, understand and abide by SOWI medical policies and medical deadline dates.
- 4) Serve as the liaison between the Agency and the Regional and Headquarters offices, as well as between the Agency and the athletes and parents/guardians regarding medical records.
- 5) Notify athletes and parents/guardians well in advance of when their *Application for Participation* is going to expire.
- 6) Check completed *Official Special Olympics Release Forms* and *Application for Participation* for completeness and accuracy according to the instructions and make a copy for the Agency files.
- 7) Mail the completed and accurate *Official Special Olympics Release Forms* and *Application for Participation* to the SOWI Headquarters office prior to the medical deadline date.
- 8) Keep accurate athlete medical files, including copies of the medical forms and athlete reports and maintain confidentiality regarding sensitive athlete information.
- 9) Ensure that the head coach for each sport has up-to-date medical information for the athletes they are overseeing.
- 10) Facilitate medical forms being organized and transported to all SOWI sanctioned events in case of emergency.
- 11) Maintain supply of blank forms/instructions (available free of charge through SOWI Regional or Headquarters office and on the SOWI website).

Support: The medical records manager reports to the Agency manager. The SOWI Headquarters maintains all athlete medical records and can provide assistance upon request. The Athlete Records Manager at SOWI Headquarters can be a resource for specific athlete roster questions.

Benefits to Volunteer: Serving as the medical records manager allows opportunities for developing marketable job skills, creating personal and professional relationships, directing your own volunteer time, making a tangible difference in the lives of individuals with intellectual disabilities, and more.

Time Commitment: The number of hours per week depends on the size and involvement level of the Agency. The time commitment increases around medical deadline dates.

Work Location: The medical records manager may work out of their home, workplace office, classroom or other facility as they deem appropriate.

Date of Redesign: The Agency is reviewed annually through the Agency registration and accreditation process at which time the medical records manager position description is reviewed.

AGENCY FUNDRAISING MANAGER DESCRIPTION

Title: Agency Fundraising Manager

Description: The fundraising manager is responsible for formulating and enacting a fundraising plan to meet the financial needs of the Agency. The completion of responsibilities will be performed personally by the fundraising manager and/or through other Agency volunteers.

Qualifications: The desire and enthusiasm to support the Agency program to the best of their abilities. Experience and knowledge in budget planning, special event planning, and sales as well as excellent oral and written communication skills. The manager must be a registered Class A volunteer and if overseeing and handling money at fundraisers, must not have any financial restrictions. In the event this position is filled by an athlete, s/he needs to be ALPs registered and screened.

Primary Responsibilities:

- 1) Behave in a manner consistent with Special Olympics Wisconsin's (SOWI) core values of mutual respect, positive attitude, accountability, teamwork and dedication.
- 2) Serve as the Agency liaison regarding fundraising matters.
- 3) Know, understand and abide by the SOWI fundraising guidelines.
- 4) Work with the Agency treasurer to develop and meet its goals of an Agency budget.
- 5) Maintain records of all fundraising activities (i.e., cost/gain, net/gross, raffle license reports, sales tax reports) and files of fundraising volunteers, corporate and community donors.
- 6) Understand and, when appropriate, coordinate Agency participation in statewide fundraisers which benefit the Agency (i.e. Perfect Split, The Law Enforcement Torch Run®, Polar Plunge®, etc.).
- 7) Conduct fundraising activities and represent the Special Olympics fundraising program to volunteers and the public.
- 8) Recognize and thank contributors, event sponsors and volunteers.
- 9) Develop new contacts and funding sources.
- 10) Complete and submit the SOWI *Fundraising Project Application Form* prior to any project or event.
- 11) Utilize the *In-Kind Contribution Receipt* and *Certificate of Exemption* when appropriate.
- 12) Strives to maintain a fundraising goal of keeping cost to raise a dollar as low as possible. Be sure to assess the costs associated with any fundraiser, and try to keep them as low as possible to maximize net revenue.

Support: The fundraising manager reports to the Agency manager. Resource materials complete with successful fundraisers and sample letters are included in the Fundraising section of the Agency Manager Handbook. The Regional Director of Development also serves as a resource for potential community connections and best practices.

Benefits to Volunteer: Serving as fundraising manager for an Agency allows opportunities for developing marketable job skills, creating personal and professional relationships, directing your own volunteer time, making a tangible difference in the lives of individuals with intellectual disabilities, and more.

Time Commitment: The number of hours per week depends on the size and involvement level of the Agency.

Work Location: The fundraising manager may work out of their home, workplace office, classroom or other facility as they deem appropriate.

Date of Redesign: The Agency is reviewed annually through the Agency registration and accreditation process at which time the fundraising manager position description is reviewed.

AGENCY VOLUNTEER MANAGER DESCRIPTION

Title: Agency Volunteer Manager

Description: The volunteer manager is responsible for recruiting, coordinating and recognizing Agency volunteers. The completion of responsibilities will be performed personally by the volunteer manager or through other Agency volunteers.

Qualifications: The desire and enthusiasm to support the Agency program to the best of their abilities. Experience and knowledge in working with volunteers, as well as interpersonal and communication skills. The manager must be a registered Class A volunteer. In the event this position is filled by an athlete, s/he needs to be ALPs registered and screened.

Primary Responsibilities:

- 1) Behave in a manner consistent with Special Olympics Wisconsin's (SOWI) core values of mutual respect, positive attitude, accountability, teamwork and dedication.
- 2) Serve as the Agency liaison regarding volunteer matters.
- 3) Know, understand and ensure all Agency volunteers are registered and abide by the SOWI official volunteer registration policies and procedures.
- 4) Review the Class A volunteer rosters and update volunteer contact information through the Agency log in page on the SOWI website or Regional and Headquarters offices as necessary.
- 5) Work with the Agency manager to assess volunteer needs and create and revise written job descriptions.
- 6) Communicate with other Agency Management Team managers who are utilizing volunteers to ensure they are trained, have sport certifications as necessary, and understand their roles and the Code of Conduct.
- 7) Develop and implement ways to recognize volunteers for their efforts.
- 8) Work with the Agency manager, athletic director or head coach to ensure all volunteers attending State Games on behalf of the Agency are Class A volunteers before the Games entry deadline date.

Support: The volunteer manager reports to the Agency manager. Resource materials are included in the *Agency Manager Handbook*. Volunteer in-service training materials are available from the Regional or Headquarters offices. The Volunteer Records Manager at SOWI Headquarters can be a resource for specific volunteer roster questions.

Benefits to Volunteer: Serving as volunteer manager for an Agency allows opportunities for developing marketable job skills, creating personal and professional relationships, directing your own volunteer time, making a tangible difference in the lives of individuals with intellectual disabilities, and more.

Time Commitment: The number of hours per week depends on the size and involvement level of the Agency.

Work Location: The volunteer manager may work out of their home, workplace office, classroom or other facility as they deem appropriate.

Date of Redesign: The Agency is reviewed annually through the Agency registration and accreditation process

AGENCY ACCREDITATION - INTRODUCTION

The name *Special Olympics* and its logo are copyrighted. SOWI is granted permission to use this name and logo by Special Olympics, Inc. through adherence to Special Olympics, Inc. policies, reporting processes and general rules. In turn, SOWI grants this privilege to sub-Programs (Agency level) through adherence to SOWI policies.

Key Policies are outlined in each section of the AMH and it is the responsibility of the Agency Managers to know and understand the policies. If SOWI becomes aware of lack of adherence, there will be a cooperative effort to address it. This may include an updated status:

- **Approved:** Your Agency has earned the rights and responsibilities of training, competition and fundraising in the name of Special Olympics. The accreditation privileges are assessed on an annual basis. If it should come to our attention that your Agency falls short of the accreditation standards anytime during the year, a provisional status may be assigned.
- **Provisional:** The purpose of provisional accreditation is to cooperatively address those minimum standards which were not met. During the course of this provisional status, the rights and responsibilities of training, competition and fundraising in the name of Special Olympics are ones that you and your Agency may continue to use. However, if all areas of concern are not corrected, you run the risk of losing all allocations and rights.
- **Not Approved:** If the above listed concern(s) are not addressed, all financial accounts will be frozen or closed and allocations for all Games attendance will be pulled. A carefully designed action plan will be set by Regional staff and the Directors of Field Services for implementation. Once the action plan is met, full activity may begin again.

Enlisting and maintaining quality Agencies is a cooperative effort between all levels of the organization for the benefit of the athletes served. If someone is interested in starting a new Agency or an existing Agency is seeking a new manager or to close all together, they should contact their Regional staff as well in advance as is possible. From there, the Directors of Field Services can lend a hand as needed.

SOWI's main priority when an Agency closes is to do our best to ensure the athletes, families, and volunteers from the Agency may continue their involvement in SOWI if they so choose. In some cases, there are other Agencies nearby. For others, the transition process may be delayed while we work to establish an alternative Agency. In the case of the latter (or if no new Agency can be found), all Agency funds and assets may be held for a period of 6 months; then the Agency funds will be set aside for Agency assistance grants in the future.

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