

The Mountaineers

Program Evaluation

A tool for volunteer leaders and staff to guide strategic program decisions

Background

The Mountaineers' mission is to enrich the community by helping people explore, conserve, learn about and enjoy the lands and waters of the Pacific Northwest. We do this by offering a wide variety of programming to communities in Western Washington. As a non-profit organization, we have the unique challenge of providing easy access to programs that meet a community need while remaining fiscally sound. To strike this delicate balance, staff and volunteers must carefully assess each program and make informed and strategic decisions about where to invest limited resources.

How to use this tool

Each year, committee leaders are encouraged to evaluate each activity before planning for the following year. While this can be done at any point, it is useful to do this exercise as a part of the annual budget process. This evaluation tool is broken into three parts:

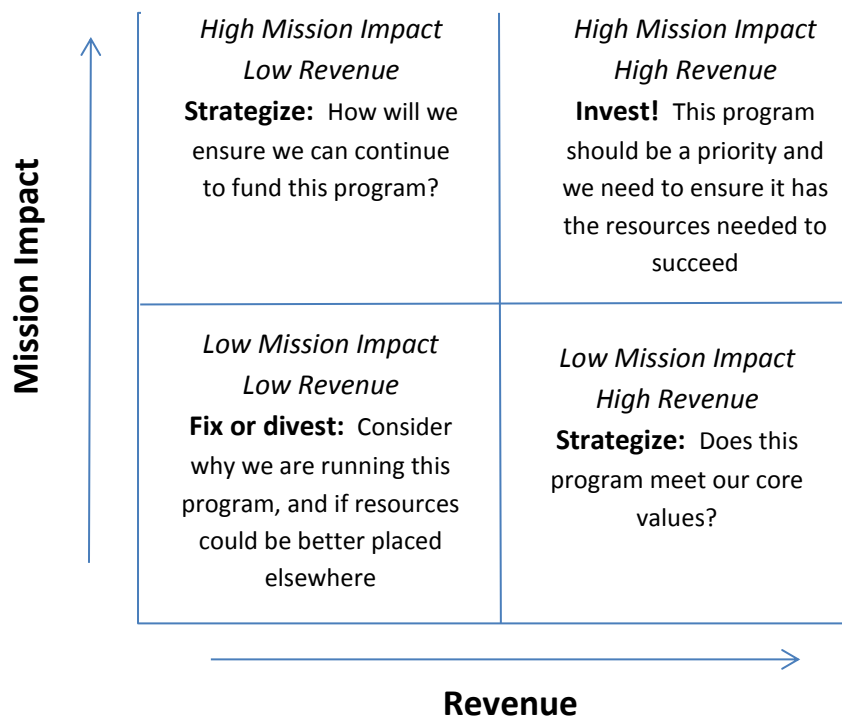
Primary Program Analysis – How does the program fit into The Mountaineers? What is the *value* of the program to our organization?

Secondary Program Evaluation – What is the current success rate of the program, and how does it fit into our current Strategic Plan?

Additional Evaluation Tools – For programs that require in-depth analysis, several tools are provided to help facilitate that process and drive future decisions.

Primary Program Analysis

To remain viable as a non-profit organization, we must achieve our mission and remain fiscally sound. As is the case in most non-profits, some of our programs are designed to run at a loss because they are critical to our mission, while other programs generate surplus revenue to support mission-critical programming. Although those revenue-generating programs may not be mission-centered on their own, we know that we cannot achieve our mission without the funds to do so. Below is a chart that can help guide decision-making about our programs.



Not all programs must have significant mission impact, nor must all programs generate surplus revenue. However, we must achieve a balance to remain viable. Programs that achieve a high mission impact *and* generate surplus revenue are keepers – programs that we want to be sure to invest in to ensure continued success. If programs have minimal mission impact and run at a loss or break even, we should ask why we’re running them and consider cutting them altogether. This may be true even if the program has a long standing history with the organization. Programs that were once relevant may no longer be. Programs that have a high value in one area and low in another may be important to our organization’s success, but require careful strategy to ensure they support and are supported by the balance of mission-impact and revenue.

On the following page is a scorecard that can be used to evaluate a program’s mission value and revenue value. Once you have a score for each axis, you can place each of your committee’s programs on the grid on the following page, and get a clear picture of your committee’s program structure and role in the organization at large.

NOTE: Be as honest and objective as you can. In all non-profits, people have close emotional ties to programs because they are the result of peoples’ hard work and vision. Many programs will run their course and fade away, and that’s okay. However, there is nothing absolute about this grid. It is designed to generate informed discussion.

Assign fiscal score to the program according to the following scale:

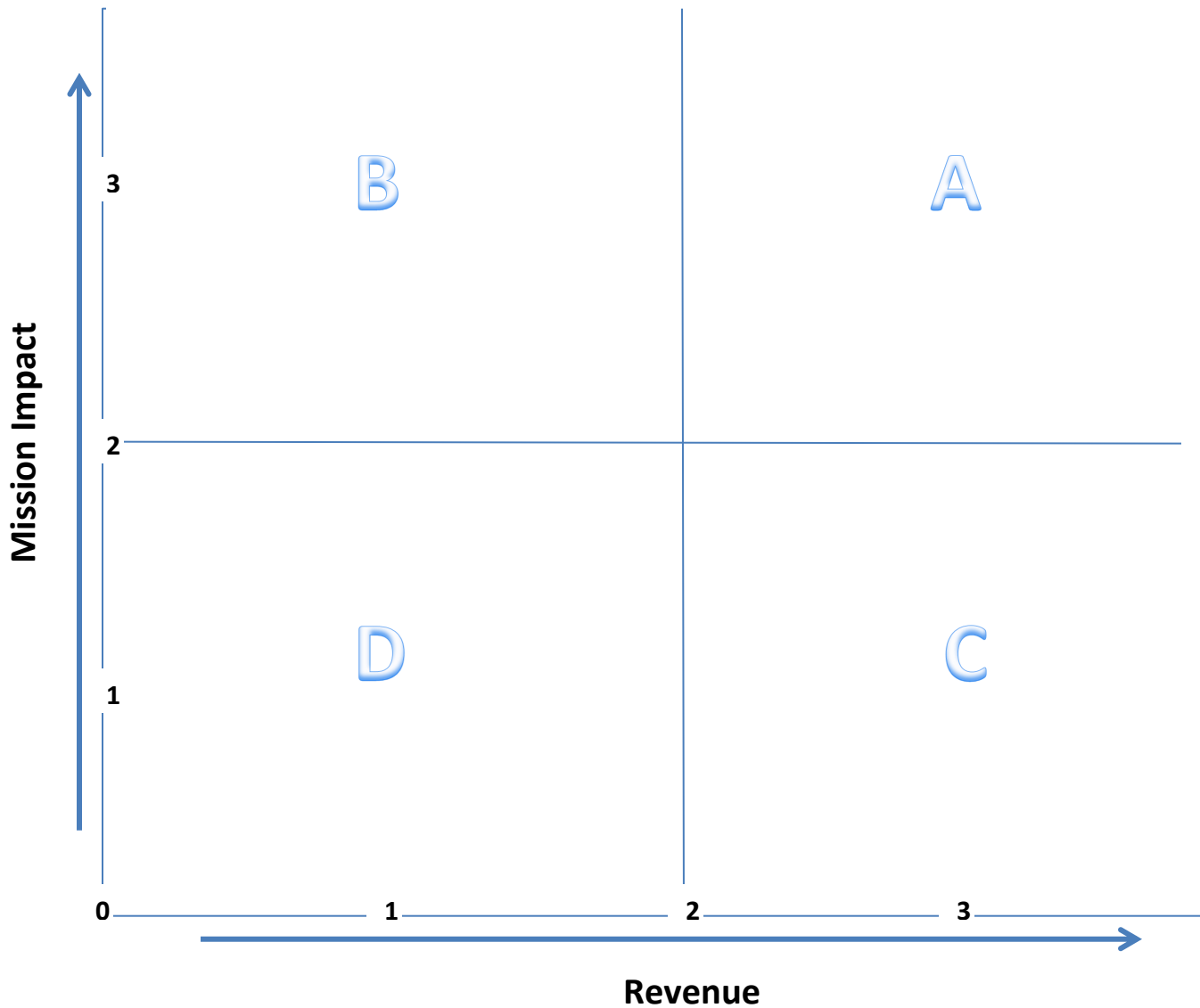
- Expenses exceed revenue: **0**
- Revenue exceeds direct expenses by 0-25%: **1**
- Revenue exceeds direct expenses by 25-35%: **2**
Your Program covers overhead costs
- Revenue exceeds direct expenses by more than 35%: **3**

Mission Impact

Below are 8 questions that will rank 0-4. Average the score here:

1. Does this meet a need in the community?
0=there is no need; 4=there is great need
Score: _____ Notes: _____
2. Is any other organization providing this service?
0=yes, and the market is close to saturated; 4=no one else is providing this service
Score: _____ Notes: _____
3. Are you serving a population that typically has limited access to this kind of activity?
0=not at all; 4=entirely
Score: _____ Notes: _____
4. Does this program teach outdoor skills that participants can use in the future?
0=no; 4=that is the primary focus
Score: _____ Notes: _____
5. Does this program teach or inspire conservation?
0=no; 4=that is the primary focus
Score: _____ Notes: _____
6. Does this program help to build a community of outdoor enthusiasts?
0=not really; 4=very successfully
Score: _____ Notes: _____
7. Is this program volunteer-led?
0=mostly paid instructors; 4=entirely volunteer led
Score: _____ Notes: _____
8. Is this program focused on your committee's *primary* goals?
0=not at all; 4=it is our primary focus as a committee
Score: _____ Notes: _____
9. Is this program an area of expertise for The Mountaineers?
0=not at all; 4=it is our primary focus as an organization
Score: _____ Notes: _____

Now that you have a revenue score and a mission impact score, place this program in the appropriate spot on the chart on the next page.



Now What?

Write some notes.

- ➔ If your program is in quadrant A, congratulations! Make some notes about what is needed to continue its success, and move on to the Secondary Program Evaluation.
- ➔ If your program is in quadrant B, strategize. Make some notes about how you will ensure this program continues to be funded.
- ➔ If your program is in quadrant C, strategize. Ask yourself whether this program at least meets our core values as an organization.
- ➔ If your program is in quadrant D, write down why you are currently running the program. Consider ways to push it towards quadrants B or C. Consider divesting altogether.

Next: You've decided the program makes sense to continue running, or you want to investigate further before making the decision to stop running it. Move on to the Secondary Program Evaluation

Secondary Program Evaluation

This section is designed to evaluate your programs *now* (not in the distant past, and not in the future), and it considers the *quality and strength* of the program as it is currently delivered, and the relevancy to the current strategic plan.

Program Satisfaction		<input type="text"/>
less than 50% satisfied/very	0	
50%-75% satisfied/very	1	
76%-85% satisfied/very	2	
86% + satisfied/very	3	

How many participants renew their membership after participating?		<input type="text"/>
less than 50%	0	
50%-75%	1	
76%-85%	2	
86%+	3	

How satisfied are your volunteer leaders with this program?		<input type="text"/>
less than 50% satisfied/very	0	
50%-75% satisfied/very	1	
76%-85% satisfied/very	2	
86% + satisfied/very	3	

What is this program's 3-year enrollment trend?		<input type="text"/>
more than 10% decline	0	
flat, but below capacity	1	
flat, at capacity	2	
more than 10% growth	3	

Give your program a Strength Score by averaging the above four scores

- ➔ If your program's score is between 2.5-3, you are in great shape! Be sure you understand *why* the program is doing so well so you can be intentional about keeping it that way.
- ➔ If your program's score is between 1.75-2.5, your program probably needs some strategic attention right away. This doesn't mean your program isn't worth running, but it probably means it takes a lot of extra effort to make it successful each year, and runs the risk of not running in the future. By fixing the score, you can ensure the strength and stability of the program in the future.
- ➔ If your program's score is lower than 1.75, it is struggling to survive. Look carefully at whether it makes sense to continue the program. Consider why this program is so important, what the program's impact and outcomes are, and why it's score is so low. If you determine that the program is important enough to continue, strategize ways to quickly raise its strength score.

Additional Evaluation Tools

Once you've determined that there is a program your committee believes should continue, you may have further questions you'd like answered to inform your future decisions. For example: "How can we improve enrollment?" "How can we continue to fund this program?" "How can we improve volunteer satisfaction?"

The following tool can help organize your thoughts to make some decisions.

SWOT Analysis

SWOT stands for Strengths, Weaknesses, Opportunities, Threats. This is a two-phase evaluation tool. In Phase 1, you will identify the strengths and weaknesses of your program. These are internal aspects and may include things like quality instruction, niche program (no one else offers it), volunteer burn-out, and low enrollment. In Phase 1 you'll also identify external forces that may impact your decisions – Opportunities and Threats. These may include things like potential partnerships, grant opportunities, social trends in favor of or working against participation in our programs, the emergence of a new competitor.

Once you've listed aspects of your program in each category, Phase 2 takes a look at the interplay between these aspects. You'll look at your strengths and opportunities and look for natural areas of investment. For example, if a strength of your program is that it creates a strong community around your activity, and an opportunity is a local community college that is trying to find ways to get their students outdoors, there is obvious potential for success in this area.

When comparing weaknesses to opportunities, you may find that a particular opportunity is attractive enough that you will invest in turning your weaknesses into strengths. Conversely, you may realize that a potential opportunity simply isn't worth pursuing because it doesn't match your program's strengths.

When comparing strengths to threats, you will find areas where your program is well-equipped to handle the threats or even turn the threats into opportunities.

When comparing weaknesses to threats, you will likely find areas where you should divest if it does not compromise the program. If the threat is great, you may need to strategize how you will minimize the threat very strategically.

On the following pages are an example of the tool in use, followed by blank pages for your use.

SWOT Analysis Template - SAMPLE (THIS IS A HYPOTHETICAL SITUATION)

State what you are assessing here ____Rock Climbing for Dog Owners Program_____

What question are you trying to find the answer to?

We believe our program meets a need and is important to our mission, but it isn't currently financially sustainable. We don't think canceling the program is the right answer. How can we grow the program and make it sustainable?

Strengths

- Great community
- High quality instruction
- Great safety record
- Leave No Trace with dogs part of the program promotes responsible recreation and gives us a good local reputation
- Frequent trips keep people engaged
- Participants comply with leash laws

Weaknesses

- Enrolment is low and we think the wide age span is a deterrent to new participants
- Need more instructors
- Program doesn't cover costs – subsidized by other climbing programs

Opportunities

- Forest Service is offering grants to organizations that can help educate dog-owners about responsible trail & crag use
- Puyallup Fair has reached out to you looking for participation from niche programs like yours, and this could help recruit new members.

Threats

- USFS permit system will affect some of our trips
- Meet-Up hosts a similar program

	Strengths (Internal)	Weaknesses (Internal)
Opportunities (External)	<p>Strengths/Opportunities</p> <p>Forest Service Grants Opportunity + Great Instruction and LNT practices = potential natural partnership</p> <p>Puyallup Fair participation opportunity does not have a clearly matched strength</p>	<p>Weaknesses/Opportunities</p> <p>Forest Service Grants Opportunity + need more instructors + program doesn't cover costs = question whether we have the capacity to fulfil USFS commitment, but grant funding would help us cover costs, and it fits in our strengths.</p> <p>Puyallup Fair participation opportunity + need more instructors = not a good place for our resources because we don't believe it will truly drive participation</p>
Threats (External)	<p>Strengths/Threats</p> <p>USFS Permit System + strong LNT practices = we will be good partners with the forest service and can leverage for permits</p> <p>Meet-up programs + quality instruction = our programs have greater value and a trustworthy reputation in comparison to meet-up</p>	<p>Weaknesses/Threats</p> <p>USFS Permit System + Program doesn't cover costs = we must fix our financial situation</p> <p>Meet-up programs + low enrolment = we believe we can increase enrolment by better marketing the value of our program</p>

Summary

We believe that by partnering with the Forest Service, we can procure seed funding through USFS grants to help our program grow. This partnership will also help us successfully navigate the permitting system. With that funding, we can have the resources to grow our program, ultimately making it sustainable through program fees

SWOT Analysis Template

State what you are assessing here _____

What question are you trying to find the answer to?

Strengths

Weaknesses

Opportunities

Threats

	Strengths (Internal)	Weaknesses (Internal)
Opportunities (External)	Strengths/Opportunities	Weaknesses/Opportunities
Threats (External)	Strengths/Threats	Weaknesses/Threats

Summary

