Program Assessment Methodologies
Outline

• Program Assessment Bands
  – Significant Resource Programs
  – Moderate Resource Programs
  – Marginal Resource Programs

• Overview: Assessment Flowchart

• Protocols:
  – Significant Resource Programs
  – Moderate Resource Programs
  – Marginal Resource Programs
Program Assessment “Bands”

**RESOURCE IMPACT**

**SIGNIFICANT**
Expenses* > $50k or
Staff Labor** > 1.5 FTE

**MODERATE**
$15k < Expenses ≤ $50k or
1.0 FTE < Staff Labor ≤ 1.5 FTE

**MARGINAL**
Expenses ≤ $15k or
Staff Labor ≤ 1.0 FTE

**ASSESSMENT PROCESS**

A Board Task Force will be formed to conduct assessments.

MRS volunteers and staff will conduct assessments (coordinated by a HQ Director).

Assessments will be conducted by HQ Directors.

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* - Annual Direct Expenses
** - 1 Full Time Equivalent (aggregated labor) ~ 2000 hours/year.
Overview: Assessment Flowchart

MRS routinely assesses programs and services to ensure alignment with MRS’s Strategic Plan, MRS’s core values, member preferences, and community needs. Details on MRS’s program assessment protocols can be found at [https://www.mrs.org/about-mrs/governance/program-assessment](https://www.mrs.org/about-mrs/governance/program-assessment).

The first step in this process is for the project lead(s) for existing or proposed programs to submit the program review information detailed below to the MRS Headquarters Director for the program area.

SECTION 2: PROGRAM REVIEW INFORMATION TO BE PREPARED BY PROGRAM LEAD

Program Reference: Please provide commentary and data on expected and/or realized outcomes:

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Who is/will be the primary audience (if applicable), secondary audience?</td>
<td></td>
</tr>
<tr>
<td>How does/will the program advance MRS’s Strategic Priorities?</td>
<td>1) Engage members in MRS</td>
</tr>
<tr>
<td>2) Advance member careers</td>
<td></td>
</tr>
<tr>
<td>3) Promote materials research and innovation</td>
<td></td>
</tr>
<tr>
<td>How does/will the program enhance the visibility and relevance of MRS to members and stakeholders?</td>
<td>Please provide evidence of impact and outcomes (statistics, surveys, etc.)</td>
</tr>
<tr>
<td>How does/will this program offer unique or superior benefits for members compared to other societies or organizations?</td>
<td>Please provide details on competitive programs and a comparison of the programs to MRS.</td>
</tr>
<tr>
<td>How does/will this program help MRS evolve rapidly to remain at the forefront of professional societies in a changing competitive landscape?</td>
<td>Please provide evidence of program evolution to meet changing member and community needs</td>
</tr>
<tr>
<td>Please provide additional comments, data, etc. that you feel are relevant to the program assessment</td>
<td></td>
</tr>
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Overview: Assessment Flowchart

**Actions guided by Scorecard Rating**

From 2019 BoD

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<thead>
<tr>
<th>Score</th>
<th>Impact band</th>
<th>Recommended Action</th>
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<tbody>
<tr>
<td>11-15</td>
<td>Significant</td>
<td>Maintain; consider additional investment as warranted</td>
</tr>
<tr>
<td>8-10</td>
<td>Moderate</td>
<td>Look to gain efficiencies/effectiveness and/or add value</td>
</tr>
<tr>
<td>5-7</td>
<td>Marginal</td>
<td>Look to sunset in x yrs.</td>
</tr>
<tr>
<td>1-4</td>
<td>Adverse</td>
<td>Discontinue</td>
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Program Summary or New Program Proposal

Preliminary HQ Review: Society Scorecard and Resources

Preliminary Score

From 4

< 4

Don’t pursue / terminate

Rating < 4
Overview: Assessment Flowchart

Assessment Protocol determined by Resource Bands

Program Summary or New Program Proposal → Preliminary HQ Review: Society Scorecard and Resources → Preliminary Score

- <4 → Don't pursue / terminate
- ≥4 → Significant Assessment Protocol

Significant → Recommendation

Resource Needs

- Moderate Assessment Protocol
- Marginal Assessment Protocol

Moderate → Recommendation

Marginal
Overview: Assessment Flowchart

Actions guided by Scorecard Rating

From 2019 BoD

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Rating < 4

Rating > 11

Rating: 5-7

Rating: 8-10

* See Appendices for Templates for Program Summary and New Program Proposal
Assessment Protocol: Significant Resource Programs

• Board Task Force Formed
  – Board Members
  – Ad Hoc MRS Volunteers
  – HQD(s) for the program area

• The Task Force will assess programs considering MRS’s criteria (strategic; “core”; effectiveness) and resource bandwidth
  – Additional input from volunteers, staff, and/or external experts may be sought as needed

• Outcomes based upon Board Assessment Rubric
Assessment Protocol: **Moderate Resource Programs**

- HQ Director in the area coordinates Assessments from
  - At least three Ad Hoc MRS Volunteers
  - HQ Directors

- Programs will be assessed using MRS’s criteria (strategic; “core”; effectiveness) and resource bandwidth
  - Additional input from volunteers, staff and/or external experts may be sought as needed

- Outcomes based upon Board Assessment Rubric
Assessment Protocol: Marginal Resource Programs

• The HQD for the area will review programs considering MRS’s criteria (strategic; “core”; effectiveness) and resource bandwidth
  – Additional input from volunteers, staff and/or external experts may be sought as needed

• Outcomes based upon Board Assessment Rubric:
Summary: Assessment Flowchart

Actions guided by Scorecard Rating

Assessment Protocol determined by Resource Bands

**Rating < 4**
- Program Summary or New Program Proposal
- Preliminary HQ Review: Society Scorecard and Resources
- Preliminary Score < 4
- Don't pursue / terminate

**Rating 4-7**
- Resource Needs: Marginal
- Marginal Assessment Protocol
- Moderate Assessment Protocol
- Moderate Resource Needs
- Moderate Assessment Protocol
- Recommendation
- Improve Program / Proposal
- Work with Program Owner to Modify
- Don't pursue / Sunset

**Rating 8-10**
- Resource Needs: Significant
- Significant Assessment Protocol
- Moderate Assessment Protocol
- Moderate Resource Needs
- Moderate Assessment Protocol
- Recommendation
- Improve Program / Proposal
- Work with Program Owner to Modify
- Don't pursue / Sunset

**Rating > 11**
- Serious Resource Needs: Significant
- Significant Assessment Protocol
- Moderate Assessment Protocol
- Moderate Resource Needs
- Moderate Assessment Protocol
- Recommendation
- Improve Program / Proposal
- Work with Program Owner to Modify
- Don't pursue / Sunset

Refine Resource Plan; Pursue Funding (Contingency, Budget, etc.) and/or Reallocation of Society Resources

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Rating: 4-7
Rating: 8-10
Rating: 4-7
Rating: 8-10